

The consumer perspective for roaming services

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X/018/2010

Regulatory workshop
on roaming services

Brussels

24th March 2010



BEUC ? BERRK ? BEUIK ?

- Established in 1962 by 6 consumer organisations
- 43 member organisations in 31 European countries (26 EU Member States)
- Current presentation is based on information from DK, SI, UK, BE, ES, AT, PT



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Transparency and protection

- ✓ Regulation increased transparency considerably
- ✓ Challenges remain
 - Users of mobile PC internet do not always get the information sent
 - Some media reported general protection tariff on data roaming
- ✓ Too early to assess cut-off limits. Our Spanish member mentions not compliance



Complaints

- ✓ Complaints have not disappeared ... unfortunately...
- ✓ Bill-shock and lack of understanding are mostly mentioned
- ✓ DK:
 - Involuntary roaming (updates, automatic processes, ...)
 - Price per MB, but what do I get for a MB?
 - Data roaming prices seem to have increased outside EU
 - Companies let fall roaming bills on an individual basis



Complaints (cont')

- ✓ High stable retail prices
 - BE: Still prices of 16.5 Euro/MB
 - SI: High prices and billing interval at 100kB
 - Dynamics in AT for data roaming
 - July '08: 8.09 Euro/MB
 - July '09: 7.52 Euro/MB
 - July '10: ?
- ✓ New type of complaints: National prices are higher than roaming prices

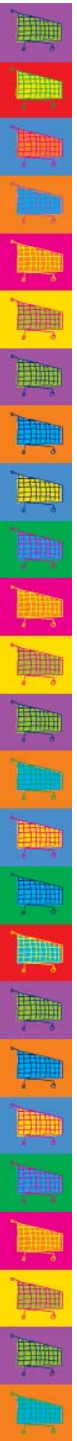
- BE:

TARIFS DE GSM À GSM (APPEL ÉMIS)

	National (1)	Vers l'étranger (2)	Roaming
Appel	0,18 à 0,23 €	0,65 à 1,20 €	0,45 à 0,52 €
SMS	0,10 à 0,15 €	0,37 à 0,50 €	0,13 €

(1) Tarifs standards entrée de gamme

(2) Belgique vers Italie à titre d'exemple



Future?

- ✓ DK: “Less price regulation is the long term solution, but this is currently not realistic. The wholesale markets must be reviewed so that foreign companies can buy wholesale roaming at national prices (LRAIC-determined).”
- ✓ Currently, most consumer organizations oppose abolishing the regulation
- ✓ Is roaming a special case of a non-functioning market (as in “relevant market”) or can we find the long term solution in increasing the competition in the telecom market in general?
 - BE-case



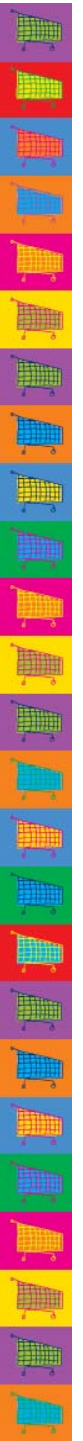
COMPARAISON EUROPÉENNE DU PROFIL MOYEN

Pays	Opérateur et formule	Type	Total mensuel (€)	Indice
Pays-Bas	VODAFONE Scherp 150 + Scherp SMS 100	Postpaid	7,2	100
Pays-Bas	SIMPEL (KPN) Vooral bellen 5€ + extra 25 SMS bundel	Postpaid	8,75	122
Pays-Bas	KPN Sim-Only 17,50	Postpaid	9,95	138
RU	O2 Sim-Only Simplicity 150	Postpaid	11,25	156
RU	3 Sim only £10	Postpaid	11,49	160
RU	TESCO MOBILE (O2) Pay monthly 10€	Postpaid	11,49	160
Allemagne	SOLOMO (E-PLUS) Solomo 085	Prepaid	13,79	192
Italie	WIND Super Senza Scatto con Noi Tutti e Pieno Wind New	Prepaid	13,79	192
Belgique	TOLEDO MOBILE (BASE) Toledo 10	Postpaid	14,2	197
Pays-Bas	T-MOBILE Relax 150 Sim Only + Relax SMS 50	Postpaid	14,25	198

France	ORANGE forfait bloqué Zap 1H30	Postpaid	26	361
Italie	COOPVOCE (TIM) Veloce	Prepaid	26,1	363
France	SFR Les forfaits SFR sur-mesure 2H	Postpaid	27	375
Italie	TIM Premia 10 Senza Scatto	Prepaid	27,23	378
France	BOUYGUES Forfait 2 fois plus 1H+1H + option 50 SMS	Postpaid	27,4	381
Espagne	MOVISTAR Contrato Simple	Postpaid	29,11	404
Belgique	PROXIMUS Smile Together 20	Postpaid	29,63	412
Italie	VODAFONE Più Carica Easy	Prepaid	30,85	428
Espagne	ORANGE Nuevo Contrato Único	Postpaid	41,69	579
Espagne	VODAFONE Plan Relax 25	Postpaid	42,03	584

Conclusions

- ✓ Roaming II less successful than roaming I, although we do not have the full picture yet
 - Retail data roaming prices have not followed decreased at wholesale level
 - Bill-shock remain (Early in the process)
- ✓ Transparency has increased, although the information does not always reach the consumer
- ✓ Roaming regulation has shown the limited competition in some countries



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[EC transparency register](#): identification number 9505781573-45

