



vodafone

ACCC Mobile Services Review

National and International Roaming

Vodafone Australia

Brian McDonnell

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Agenda

- **Part 1: National Roaming**
- **Part 2: International Roaming**

PART 1: National Roaming

- **ACCC 1997 Inquiry:**
 - “Roaming likely to be commercially provided without the need for regulatory intervention”
 - Watching-brief on anti-competitive conduct.
- **Service dynamics:**
 - Commercially negotiated and agreed NR a feature of Australian mobile services market since 1999.
 - Vodafone experience: access seeker and access provider:
 - Vodafone roaming agreement with Telstra
 - Vodafone roaming agreement with Hutchison
 - Mobile Phones on Highways

PART 1: National Roaming

- Other services agreements:
 - Hutchison agreement with Telstra
 - One-Tel agreement with Telstra
- **Market failure or success?**
 - Economies of scale
 - Extended mobile coverage
 - Pricing

PART 1: National Roaming

- **If the market is performing, then why do CSP's have different coverage areas?**
 - Parties may not choose to seek NR – clunky, technical issue
 - Supply side alternatives
 - Demand side alternatives
- **Should National Roaming be regulated?**
 - Durable market failure
 - Impact of regulation:
 - Investment decisions
 - ACCC Inquiry 1997 “declaring roaming may have an adverse impact on investment incentives”.
 - Impact on commercial negotiations

PART 1: National Roaming

- **Conclusions:**
 - No market failure
 - ACCC conclusions in 1997 Inquiry: no basis to intervene
 - Market has delivered commercial outcomes: reinforces this position

PART 2: International Roaming

- **What is International Roaming?**
 - Wholesale and Retail component
 - GSMA role in the development of International Roaming

- **Service dynamics:**
 - Relatively new service
 - Developing services
 - IOT regime

PART 2: International Roaming

- **Competitive Pressures: Current**
 - Wholesale component:
 - Domestic competition
 - Substitutes
 - Retail component:
 - Network selection
 - Movement away from IOT regime
- **Transparency**
 - Alleged lack of transparency in IR pricing
 - Techniques to limit spend

PART 2: International Roaming - Transparency

The screenshot shows the Vodafone Australia website's 'Roaming Charges' page. The page features a red header with the Vodafone logo and navigation links. Below the header is a banner with the text 'Go There' and a 'vodafone live!' logo. A search bar and login fields are visible. The main content area is titled 'Roaming Charges' and includes a table of approximate peak rates for various countries.

Roaming Charges

Approximate peak rate call charges per minute in the relevant countries local currency.

Country	Network	Currency (local)	Incoming additional to Ausn IDD rates	National	Australia	SMS - 0	Fax / Data
Albania	Vodafone	LEKE		77.63	457.72	37.80	service s/a
Austria	PTA Mobilkom	EUR		0.95	1.90	0.41	Same as voice
	T-Mobile (prev. Max Mobil)	EUR		0.94	1.24	0.39	Same as Voice
	Comcast	EUR		0.99	1.22	0.41	Same as voice
	Telia.Ting	EUR		0.75	1.85	0.34	Same as voice
Bahrain	Babelco	BHD		0.98	0.87	0.05	Same as voice
Bangladesh	GreenPhone	TAKA	41.45	41.45	139.20	15.53	No data
Belgium	Proximus Belgium Mobile	EUR		0.95	2.15	0.29	Same as voice
	Mobile1	EUR		0.97	2.15	0.17	Same as voice
	Base NVSA (prev. KPN Orange)	EUR		0.94	2.01	0.17	Same as voice
Bosnia & Herzegovina	PTT	DEM		0.81	5.84	0.19	Same as voice

PART 2: International Roaming

- **Emerging competitive pressures**
 - Emerging 'focus' of network providers
 - Technological determinism
 - New products and services
 - Customer segmentation
- **Should international roaming markets be regulated?**
 - Jurisdiction?
 - Market failure?
 - Impact of past regulation

PART 2: International Roaming

- **Conclusions:**
 - Emerging competitive pressures on IR will result in changes in price and transparency
 - No market failure
 - No basis to regulate



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