

Wir stehen für **Wettbewerb** und **Medienvielfalt**.

RTR

Update Roaming

Regulierungsdialog

27.06.2016



Conclusion of the Wholesale Review – Wholesale roaming market is not functioning properly

Further regulation necessary

- Further regulation of the wholesale roaming market in the EU is necessary in order to enable RLAH in 2017
- Policy objectives
 - enable citizens to access mobile services at domestic prices for periodically travelling
 - ensure cost recovery at wholesale level, preserving incentives to invest in visited networks and avoiding distortion of domestic competition in the visited markets
 - enable a sustainable abolition of retail roaming surcharges for all, or virtually all, operators in the EU, avoiding distortions on the home markets
- → What is the appropriate level of the cap to
 - enable RLAH in 2017,
 - ensure recovery of costs (including joint and common costs) at wholesale level.
- FUP
 - is not meant to be used by the home operator to limit its exposure to RLAH
 - is a possibility given to the home operator to prevent the abusive use of RLAH



Development of roaming prices at the wholesale level – aligned with successive caps

- Prices are appreciably above costs, as seen from:
 - Prices for balanced traffic > unbalanced traffic
 - Cost estimates provided by the cost model (including joint and common costs and seasonality)
 - Domestic retail prices
 - Domestic wholesale prices
 - Intra-group prices much < prices to non-group operators
- Smaller operators and MVNOs do not get prices below the regulated caps
- Further regulation of the wholesale roaming market in the EU is necessary in order to enable RLAH in 2017.



Commission proposes to lower wholesale caps to...

- Voice: 4 €/min
- SMS: 1 €c
- Data: 0.85 €c/MB

- These caps
 - ensure the recovery of costs (including joint and common costs) of providing wholesale roaming services by visited operators;
 - leave space for competition below the cap;
 - keep investment incentives in the visited markets;
 - may act as a safeguard against unwanted permanent roaming or anomalous or abusive use of wholesale roaming access and the potentially resulting national market distortions.

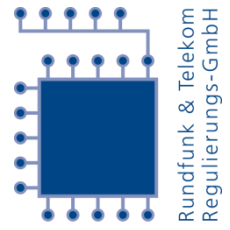
- Opt-pout possibility in favor of eg. capacity based pricing etc.



Caps at the retail level allow a sustainable provision of RLAH

Percentage of operators with a positive sustainability, a sustainability percentage up to 1%

	Sustainability %				
	Positive Sustainability	<1%	1-3%	3-5%	>5%
Single EU wide- cap	88%	5%	2%	5%	2%
Current caps	66%	6%	5%	5%	19%



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