



ERG interim report on EU-wide roaming: Summary of findings

Eurotariff

Three months later

ERG activities

- Close cooperation between NRAs and Commission on several fronts
- ERG issued guidelines to aid common interpretation of Regulatory provisions
 - draft guidelines issued August/September
 - final guidelines to be published very shortly
- Coordinated early information gathering exercise – early indicators of Eurotariff take-up
- Development of harmonised detailed data specification for future data collection

Early indicators

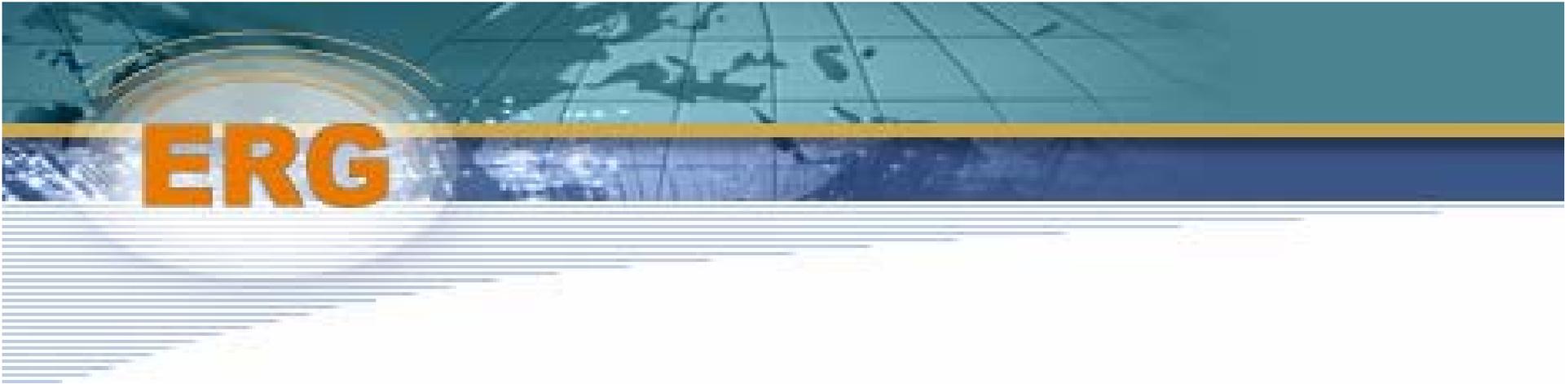
- High level of response to ERG data gathering exercise – great majority of operators responded
- Very good levels of reported compliance – advice to consumers of available tariffs, including a Eurotariff, provided on time
- Significant work being undertaken by industry to improve transparency by end of September
- ERG will continue to monitor compliance with transparency provisions

Eurotariff – initial impact

- ERG estimate that **around 200 million** mobile subscribers across Europe were able to **benefit** from **Eurotariff** rates at the **end of August**
- **Many providers** of international roaming services offer the **Eurotariff as the default** roaming tariff, but...
- ...importantly **consumers** are still **free to choose** alternative roaming tariffs where these might better suit their needs as **several providers** also offer **other roaming tariffs**

Next steps

- Continued cooperation with Commission
 - provision of expert support and analysis, particularly for Commission review
- Ongoing 6 month data collection – publication of aggregated information in ERG report
- Will provide detailed information on provider volumes and revenues for making and receiving calls, split:
 - by consumer type (contract/pre-pay and corporate)
 - for voice, SMS and data services
 - between wholesale and retail level
- All NRAs will share experiences of implementation through ERG forum



Technical annex

Overview – ERG activities

- **ERG has been working closely with the Commission towards consistent and effective implementation of the Regulation**
 - guidelines published in August and September to help consistent interpretation of provisions
 - agreed a coordinated approach to data collection for monitoring market developments
- **Individual NRAs are responsible for monitoring market trends and taking enforcement action where necessary; ERG working towards a consistent and coordinated approach**
- **Undertaking detailed data gathering exercise during October/November; but also collected early data on implementation and availability of the Eurotariff during September**

ERG ad-hoc data collection exercise

- **Ad-hoc September data collection**
 - intended to provide quick ‘snap-shot’ of ‘early stage’ implementation
 - to provide compliance check of requirement on providers to contact consumers regarding new Eurotariff
 - consistent data collection exercise across Europe
- **Good level of response to data request**
 - great majority of EU mobile network operators provided data
 - significant number of European service providers also provided information
- **Excellent levels of compliance reported**
 - all respondents confirmed that consumers had been contacted regarding the availability of the Eurotariff by the required deadline (30 July)

Eurotariff availability

- **Over 100** mobile providers across the **EU offer a Eurotariff¹** at the end of August
- **Several providers** offered the Eurotariff to consumers **before the deadline** set in the regulation
- A number even made a Eurotariff available for consumers before the deadline
- A large number of mobile providers (operators and service providers) decided to switch consumers to a Eurotariff automatically
- Early indications show that **several million** mobile subscribers across Europe **made an active choice** to switch to the Eurotariff

¹Source: Commission website
(http://ec.europa.eu/information_society/activities/roaming/implementation/benchmark/index_en.htm)

Summary

Implementation going well

- Eurotariff widely available – ERG estimate that around 200 *million* subscribers are were on *Eurotariff at the end of August*
- Mobile network operators and service providers generally *compliant* with Regulatory provisions
- Significant industry *activity to enhance* current *transparency provisions* in accordance with Regulatory requirements



ERG

Next steps

ERG detailed data gathering exercise to start in October:

- updated subscriber information
- detailed wholesale and retail revenue and volume information
- data split across consumer types and between voice and data services
- data on inadvertent roaming and the impact on consumers of traffic steering

First full ERG report expected at the end of the year

- will provide benchmark data for the previous 6 months
- reported by ERG every 6 months; split by calendar quarter