

# Roam Like at Home One year on

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Incoming BEREC Chair  
2019

# Agenda

- **BEREC work on roaming**
- **Development of roaming services**
- **What's next**

# BEREC work on roaming

Retail Roaming  
Guidelines

Wholesale  
Roaming  
Guidelines

Roaming  
Benchmark Report

Report on  
Transparency and  
Comparability of  
Roaming Tariffs

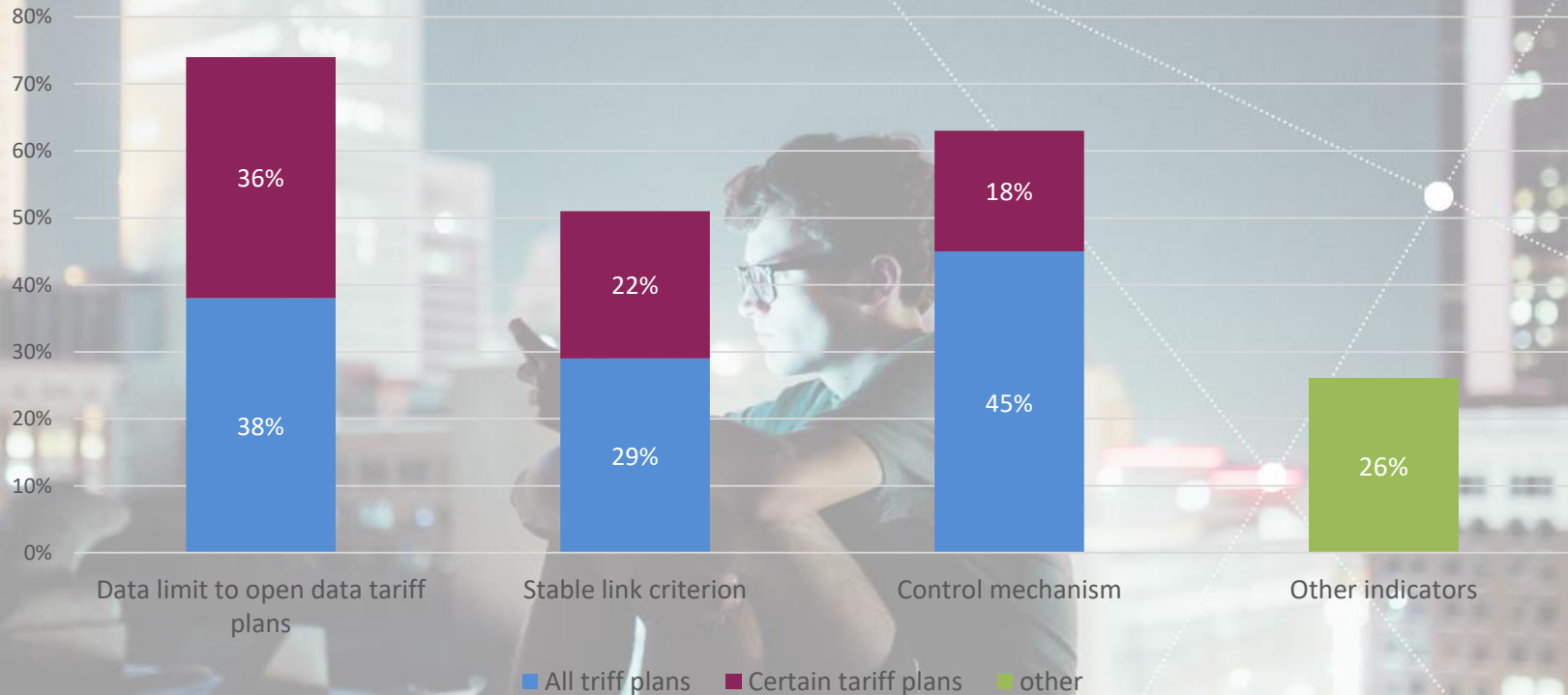
Input to EC on  
weighted average  
MTR

Inputs to the EC on  
Implementing Act  
and review of the  
Regulation

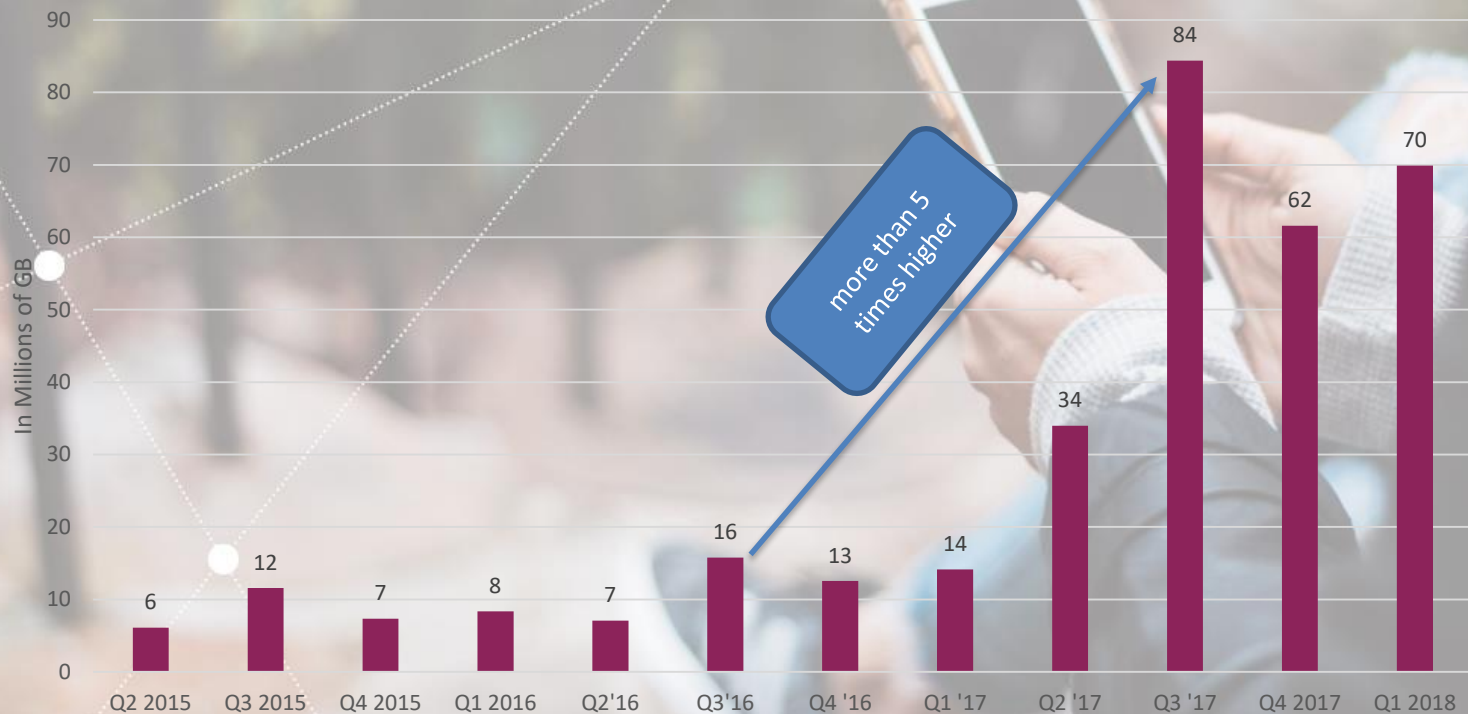
# RLAH effects

- RLAH is a big success for European consumers
- 96% EEA mobile subscribers have roaming services enabled
- >90% of roaming traffic from RLAH
- Roaming traffic volumes increase due to RLAH
- 34% of operators offer tariffs without roaming
- 17% of operators withdrew roaming from their tariff plans
- Number of derogations vary between MS
- Wholesale rates decrease and are under caps

# RLAH with fair use policy

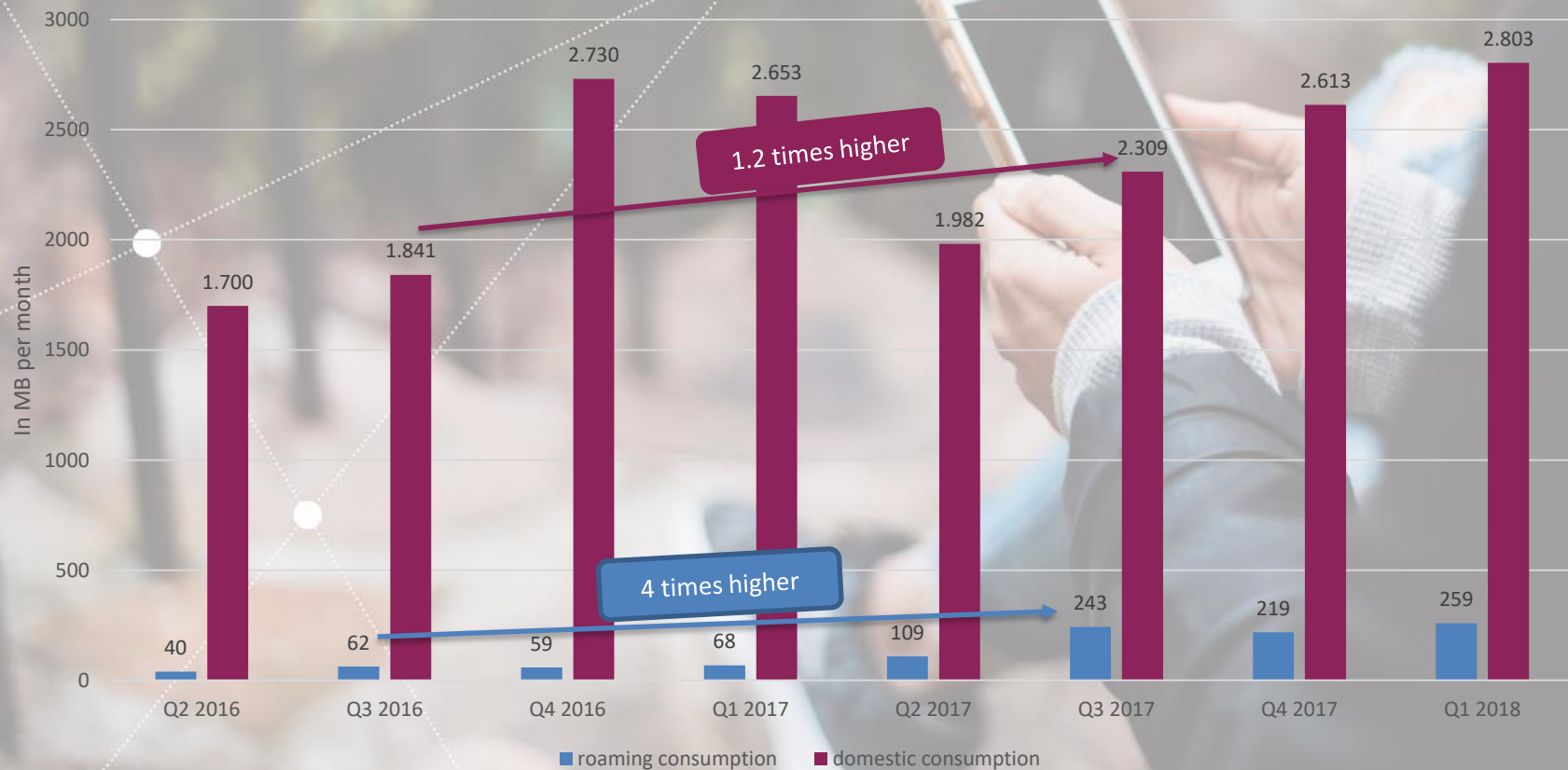


# Total roaming data consumption





# Data consumption per subscriber per month

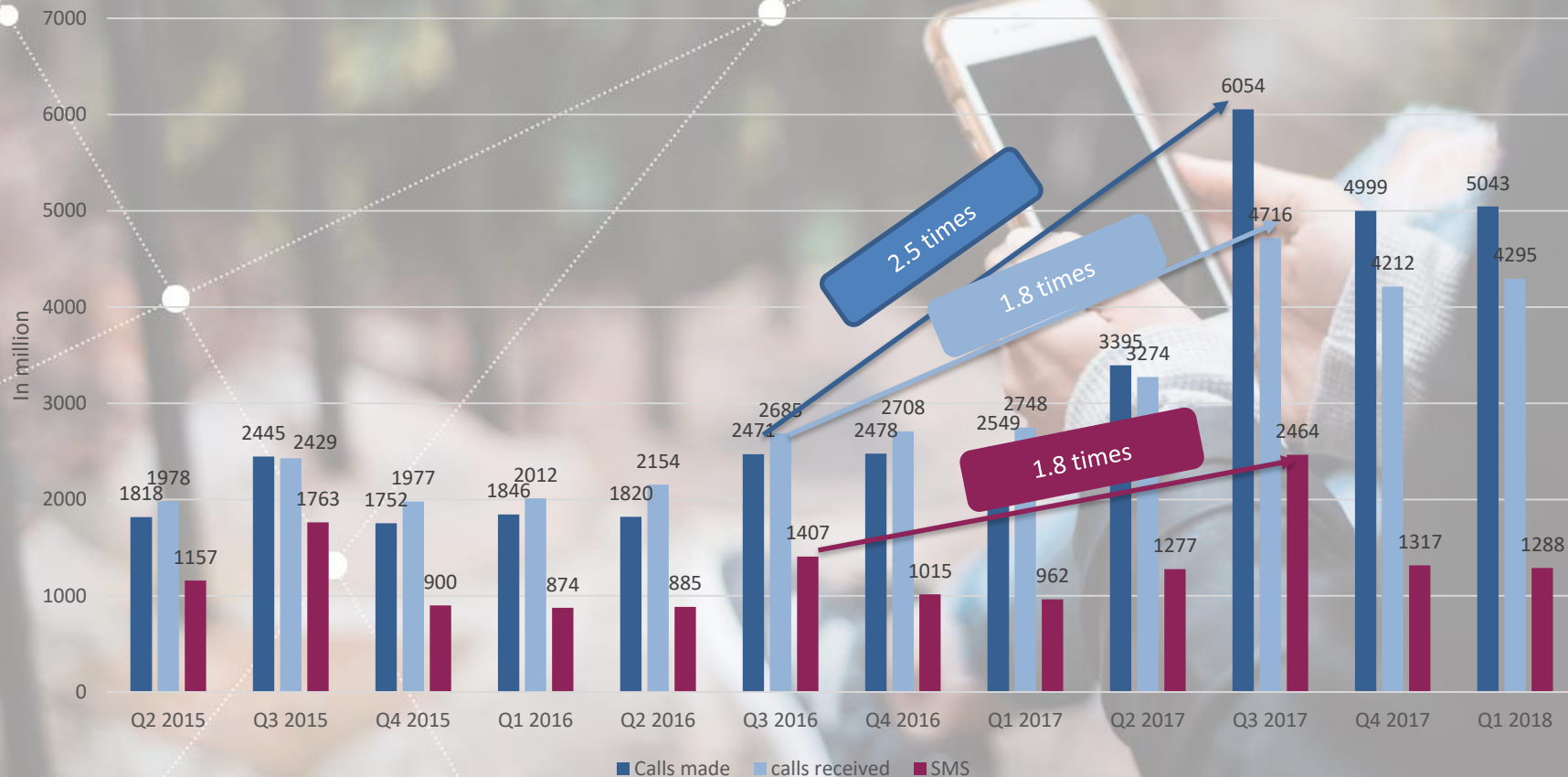


# RLAH consumption per subscriber per month

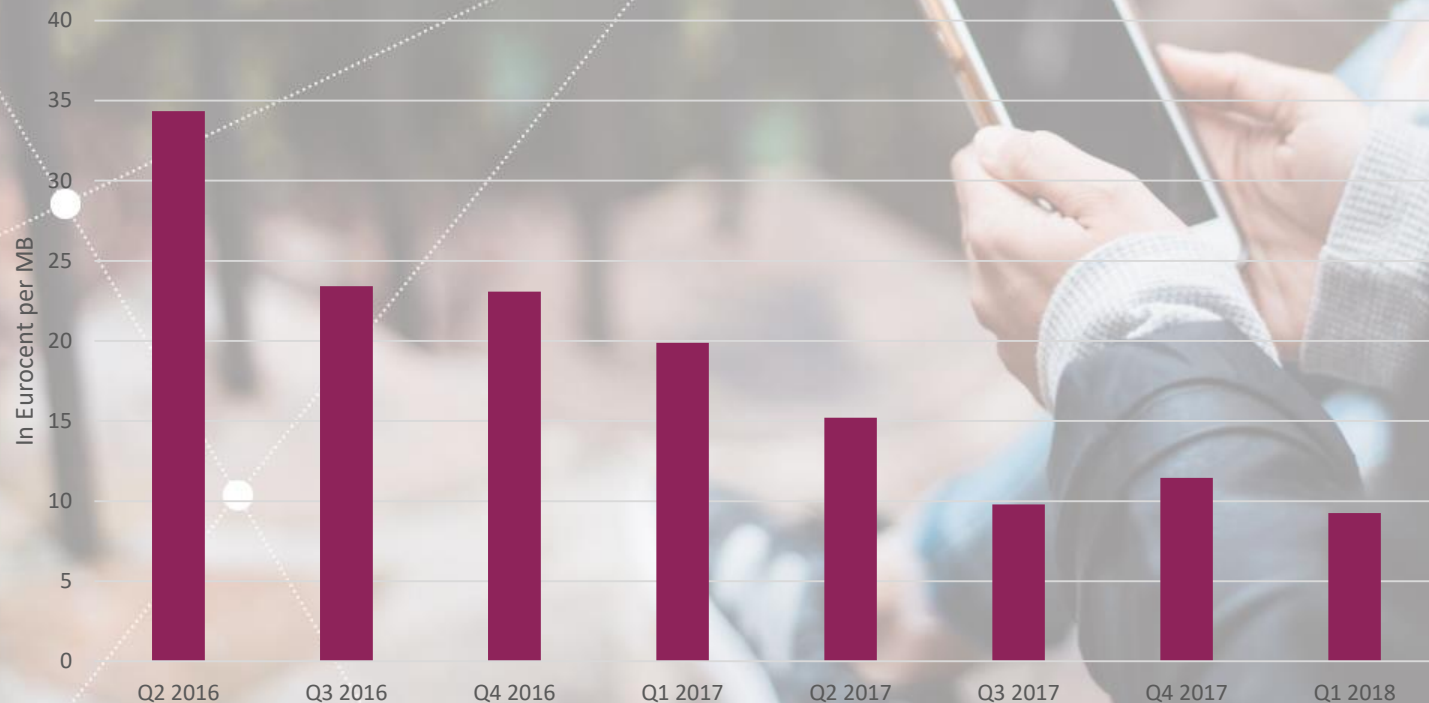




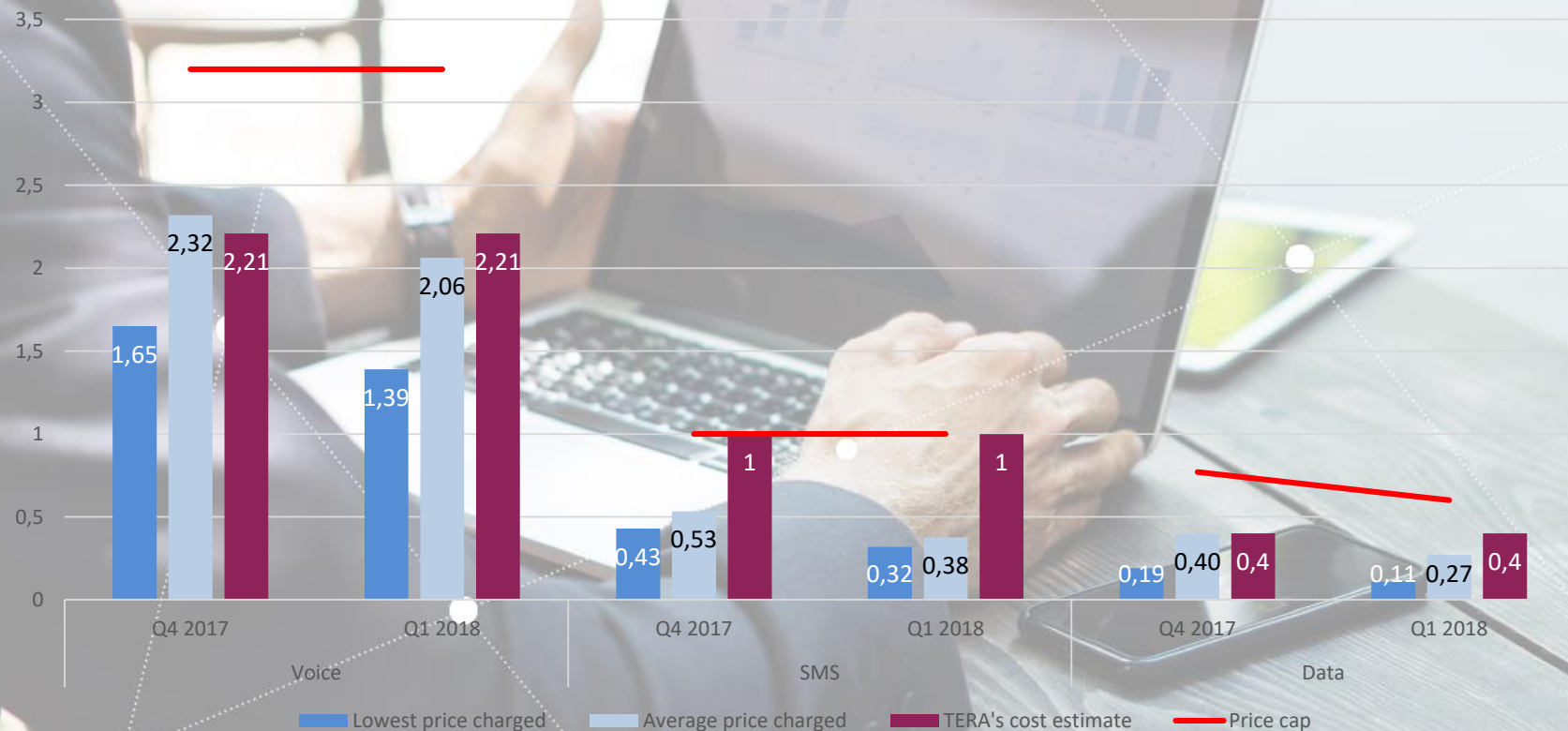
# Roaming Minutes and SMS



# Average retail prices for data roaming outside the EEA



# Wholesale roaming rates



# Average wholesale data prices per MB



# Derogations as of summer 2017

Country	applications received	Applications granted	Applications refused	Applications pending
Austria	3	2	1	0
Belgium	2	1	1	0
Czech Republic	3	0	3	0
Denmark	2	1	1	0
Finland	5	4	0	1
France	12	11	1	0
Lithuania	4	4	0	0
Poland	9	0	0	9
Portugal	1	0	1	0
Slovakia	1	0	1	0
Netherlands	1	0	1	0
Estonia	3	3	0	0
Romania	1	1	0	0
Spain	2	0	0	2
Sweden	1	0	1	0
Italy	3	3	0	0

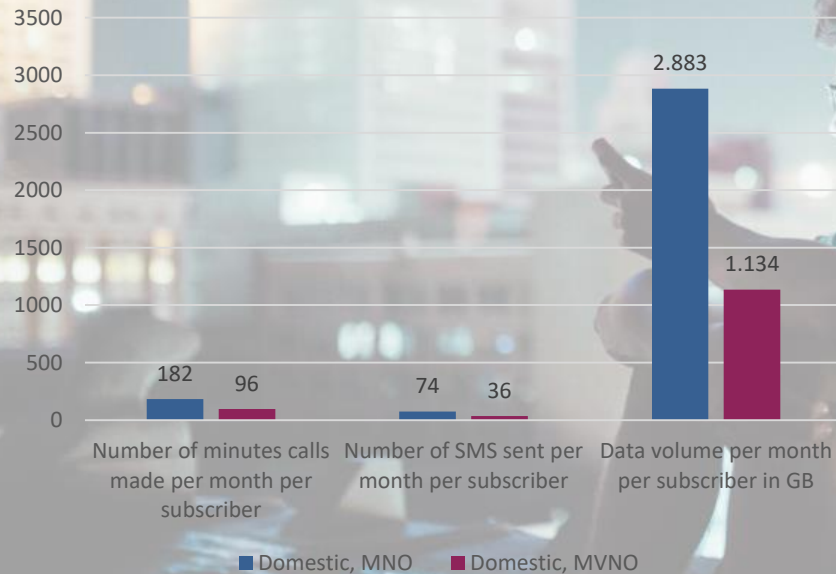
## Granted Applications:

36% MNOs  
36% MVNOs  
28% Resellers



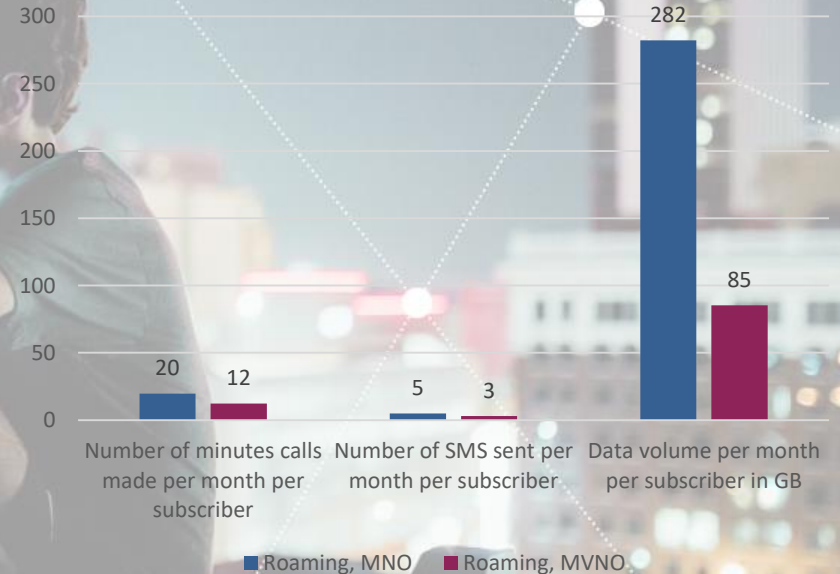
# MNOs vs MVNOs

## Domestic



ARPU/month  
MNO: 11.4 Euros  
MVNO: 6.9 Euros

## Roaming





# What's next

- **BEREC continues monitoring activities and will start analysing data separately for MNOs and MVNOs**
- **BEREC is closely working with the EC on developing the cost model**
- **BEREC is providing input to the Review of the European Commission by Mid June 2019**



# Thank You!

Body of European Regulators  
for Electronic Communications

**BEREC**