

INTUG World Trade and Roaming

Symposium on Mobile Roaming
Geneva, 22 March 2012 www.INTUG.org

The economic consequences
of cross border barriers
to on-line business processes

Nick White
Executive Vice President,
INTUG

INTUG Why is it so important?

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- Explosive growth in mobile data
- Negative impact on economic welfare
- Unworkable for machine to machine
- A “taxing” problem since the 1990s

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INTUG Suppose it applied to cars?

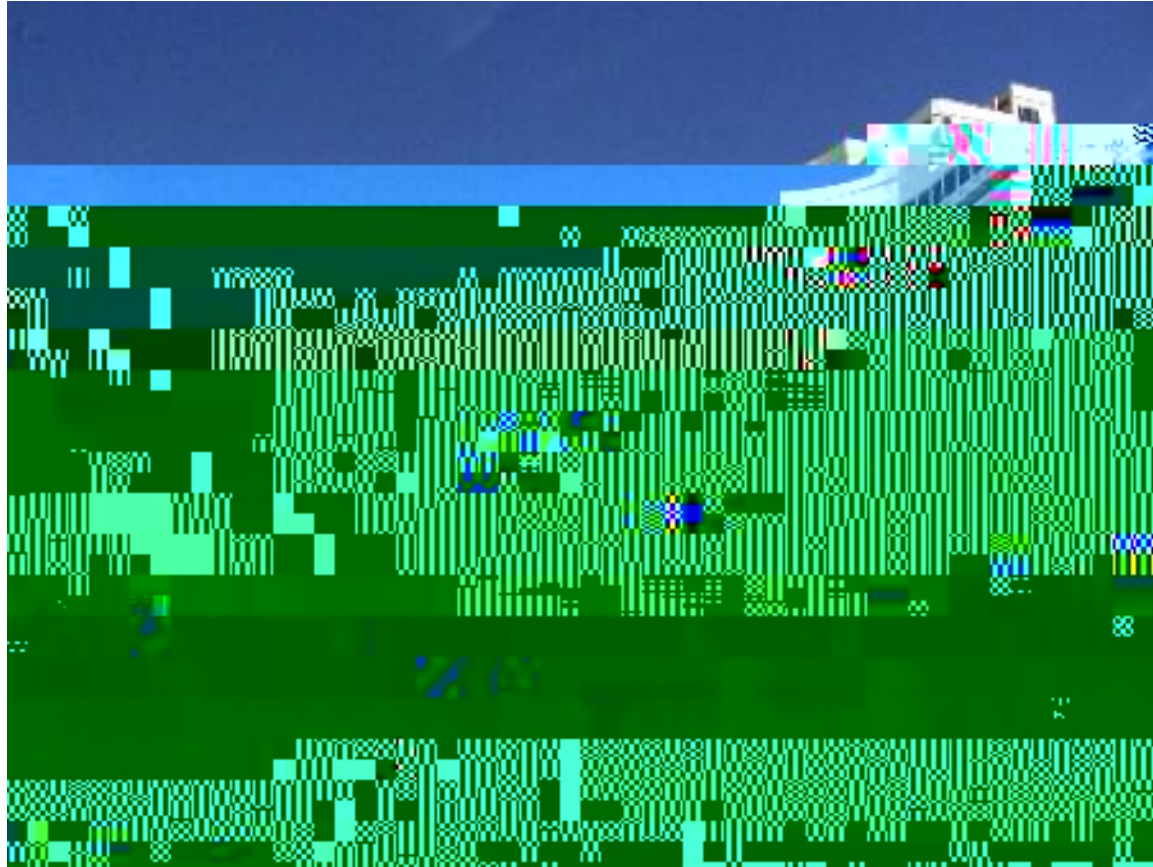
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“Driven from abroad sir? That’s a 300% petrol roaming surcharge! And an extra 3p per mile insurance, and a 100% mark up on spare parts while you’re here!”

INTUG Or it applied to hotels?

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“Hilton Honours member, sir? Oh, you live abroad!
That means a 250% surcharge, as you’re roaming!”

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INTUG Or it applied to power?

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A red L-shaped line is positioned on the page. It starts with a short horizontal segment above the letter 'I' in 'INTUG'. From the end of this segment, a vertical line descends down the left side of the page. From the top of this vertical line, a horizontal line extends across the top of the page to the right edge.

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INTUG Short term approaches

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- Regulation – price caps, transparency and awareness, bill shock safeguards
- Commercial – contracts, tariffs, bundles

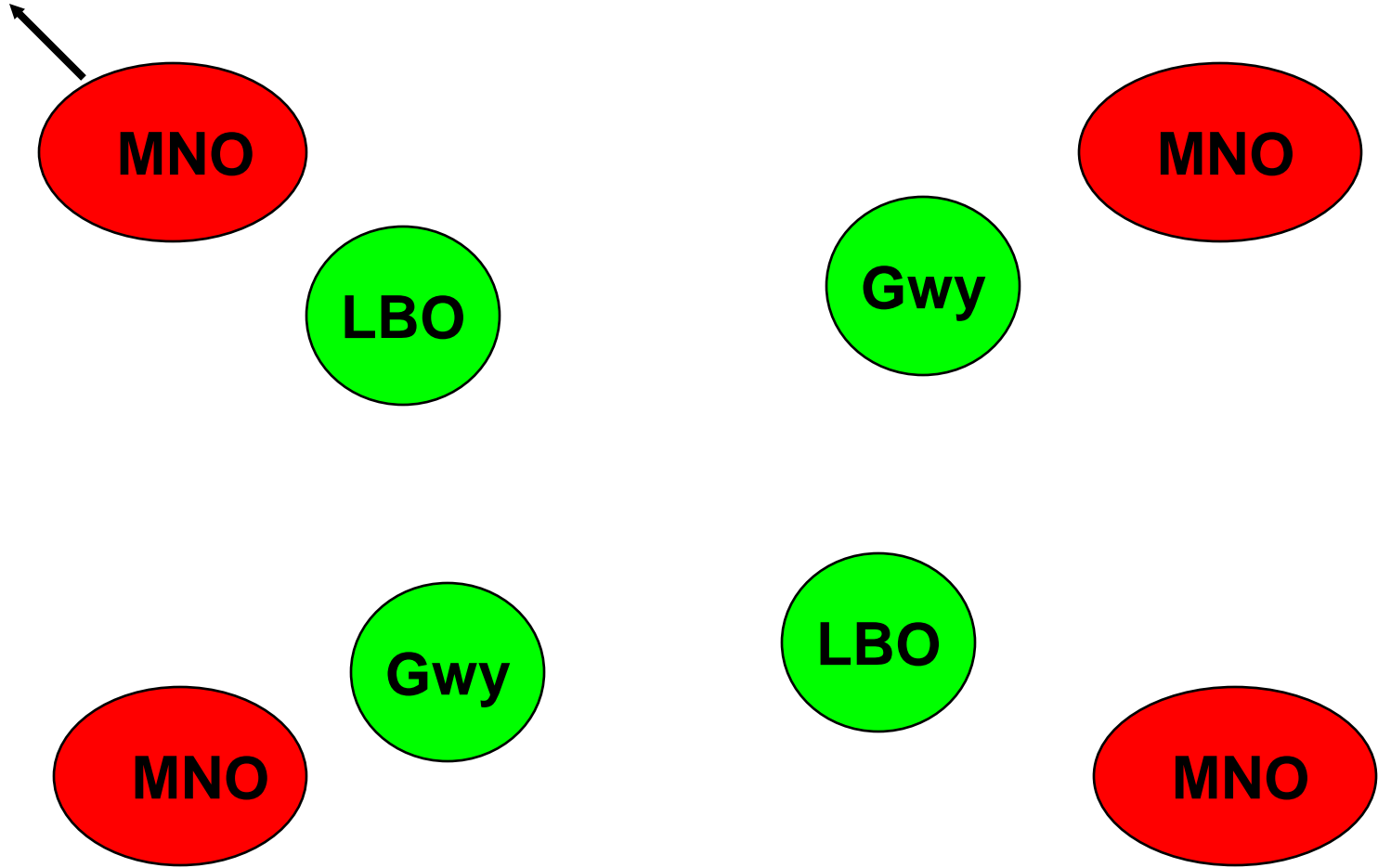
INTUG Short term approaches

- Regulation – price caps, transparency and awareness, bill shock safeguards
- Tariffs – flat rates, bundles
- Avoidance – multiple SIMs, multiple contracts, call back, gateways

INTUG Short term approaches

- Regulation –

INTUG Local Breakout/Gateways



INTUG Short term approaches

- Regulation – price caps, transparency and awareness, bill shock safeguards
- Tariffs – flat rates, bundles
- Avoidance – multiple SIMs, multiple contracts, call back, gateways
- Structure – separation, local break out, international operators, MVNOs

Just stop gaps - undesirable, costly, inconvenient, complex not a solution

INTUG On-Line Business Future

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- International public and private clouds
- Ubiquitous mobile broadband access

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INTUG The Spectrum Challenge

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- Spectrum availability pressures

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INTUG The Spectrum Challenge

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- Spectrum availability pressures
- Growing global acceptance of problem
- Sharing will be come essential

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- Spectrum availability pressures
- Growing global acceptance of problem
- Multiple duplicated infrastructures unaffordable and unjustifiable
 - Sharing will be come essential

INTUG Long Term Approach

- Steep glide path to zero for “roaming”

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- Adopt Internet style traffic exchange

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- Steep glide path to zero to eliminate
- Adopt Internet style traffic exchange
- Spectrum licence condition to allow open access to strongest signal
- Multinational MVNOs, gateways, LBO

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Let's make it an opportunity
to make progress, not a problem

Thank You

Nick White
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