

# Global Mobile Roaming: Operator Strategies and Market Trends – 3rd edition

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2013

NOW INCLUDES GLOBAL FORECASTS FOR VOICE, SMS AND NON-MESSAGING DATA

“The availability of mobile roaming is coming to be viewed as an essential enabler in international business and relations. Roaming used to be a premium service that ran quietly in the background for those segments which could afford it; however, the indisputable value of mobile telecoms to national economies has turned political and economic powers onto the potential developmental benefits of roaming for wider regional growth. Operators can expect pressure in the next few years to offer basic roaming services at lower prices; however, the market has the chance to become more dynamic as a result.”

Angela Stainthorpe, Research Analyst

**Global Mobile Roaming: Operator Strategies and Market Trends to 2013 – 3rd edition** provides a comprehensive analysis of the key business models, strategic approaches and tariff initiatives driving the global market today.



**A truly global analysis of the roaming market**

## Brand new data and analysis in this report includes:

- ✓ Detailed analysis of the regulatory impact on revenues and prices in both the EU and non-EU regions
- ✓ Examination of the business cases for and implementation levels of roaming hubbing and NRTRDE initiatives
- ✓ Comprehensive forecasts for outbound voice, SMS and non-messaging data users, traffic and revenue
- ✓ Major global roaming pricing study covering 27 countries worldwide (based on a survey of 9,500 price points)
- ✓ Exclusive industry survey results highlighting industry opinion on topics as diverse as revenue growth, IOT discounting and CAMEL implementation

See inside for more details on this report



# Global Mobile Roaming: Operator Strategies



“Although international roaming may be a profitable business for some, on a global scale the potential of the market is as yet largely untapped. On a retail level, there are issues to be addressed regarding the strategic priority of mass market roaming and threats from alternative roaming solutions; in wholesale, more sophisticated pricing models are necessary to capture the nascent data market; and on a technical level, there are myriad questions concerning quality of service, fraud and the impact of next generation networks.”

Angela Stainthorpe, Research Analyst

## WHO SHOULD READ THIS REPORT?

### Operators

- Evaluate the future size of the roaming market by subscribers, revenues and traffic in your region and globally
- Benchmark your approach to wholesale and retail roaming against leaders and innovators in the field
- Discover the benefits and challenges of alliance membership
- Learn from the European experience of roaming regulation and prepare for the effects of future regulation on the global market
- Find out how other operators view multiple aspects of the roaming market, from IOT levels to prepaid roaming

### Roaming enablers, software and hardware vendors

- Identify new opportunities within the roaming value chain
- Assess the challenges operators face with integrating new services into roaming
- Locate the gaps between operators' roaming objectives and currently available technologies

### Consultants, analysts and venture capitalists

- Provides unbiased, reasoned hard facts free from industry hype
- Provide clients with clear business intelligence to support recommendations and investment

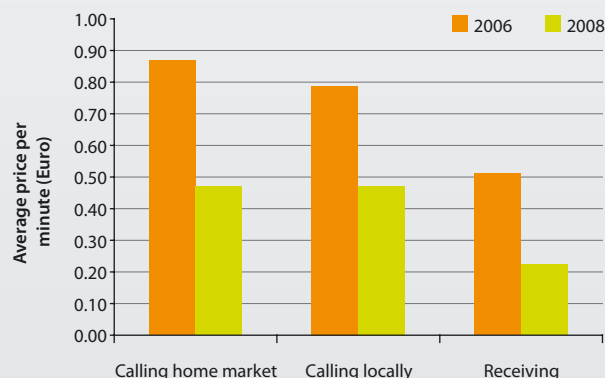
## THIS REPORT ADDRESSES THE KEY ISSUES IN THE GLOBAL ROAMING MARKET:

**The number of people using their mobile phone whilst abroad will grow over 50% between 2008 and 2013**, voice roaming traffic will double over the period and data roaming traffic will increase to many times its 2008 level. These figures represent a great opportunity to build mobile telecommunications into a truly global service, and to reap the rewards in subscriber reach and revenue generation.

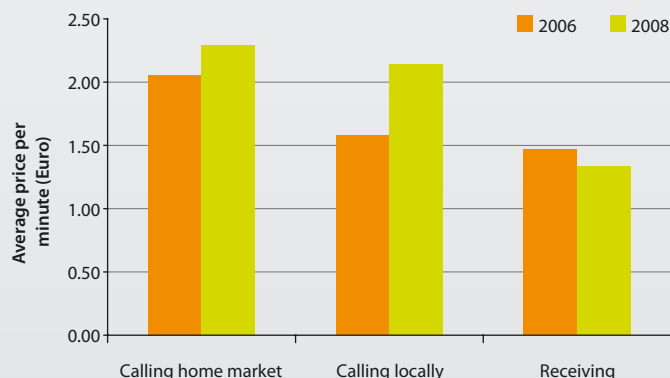
*This report analyses current and future operator business models across the most crucial elements in international roaming, evaluates the potential of industry-wide developments and thoroughly considers the effect of external regulatory forces on the market.*

## RETAIL PRICE CHANGES SINCE EU ROAMING REGULATION:

EU SUBSCRIBERS ROAMING WITHIN THE EU, 2006 AND 2008: VOICE



EU SUBSCRIBERS ROAMING OUTSIDE THE EU, 2006 AND 2008: VOICE



NB: includes selected EU countries only

Source: Informa Telecoms & Media

## KEY FORECASTS IN THIS REPORT 2008-2013

### Global

Global outbound roamers: by region  
 Global outbound roamers: by user segment  
 Global outbound roamers: by user segment, by region  
 Global outbound roaming voice traffic: by region  
 Global outbound roaming SMS traffic: by region  
 Global outbound roaming non-messaging data traffic: by region  
 Global outbound roaming revenues: by region  
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North America outbound roamers: by user segment  
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 North America outbound roaming voice revenues: intra- and inter-regional  
 North America outbound roaming SMS and non-messaging data revenues

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Latin America outbound roamers: by user segment  
 Latin America outbound roamers: by destination region  
 Latin America outbound roamers: by user segment, by destination region

Latin America outbound roaming voice traffic: intra- and inter-regional  
 Latin America outbound roaming SMS and non-messaging data traffic  
 Latin America outbound roaming revenues: intra- and inter-regional  
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 Latin America outbound roaming SMS and non-messaging data revenues

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“The global roaming market is growing at a very fast pace, leading to a dramatic increase of the number and volume of transactions between roaming partners. For Syniverse, current business intelligence and thoughtful insight into industry trends is critical if we are to successfully compete in this market and continue to develop compelling new roaming solutions and services for the world’s mobile operators.”

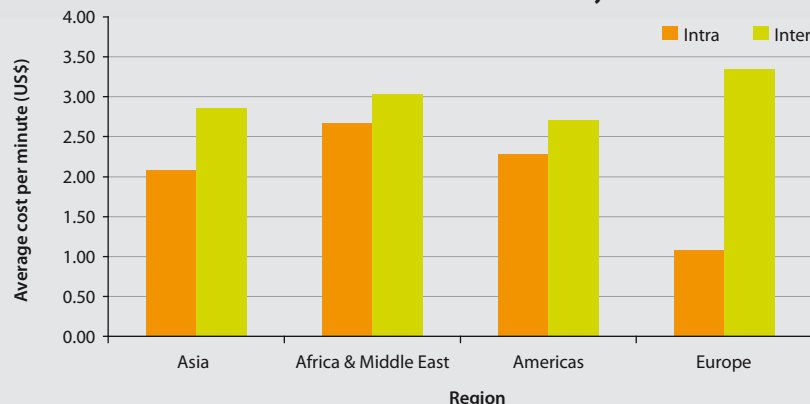
Syniverse

### HOT TOPICS THIS REPORT ADDRESSES:



- ✓ Voice and data roaming regulations
- ✓ Retail and wholesale pricing
- ✓ Roaming hubbing and NRTRDE
- ✓ Value of roaming alliances

### AVERAGE PRICE PER MINUTE TO CALL HOME WHILST ROAMING INTRA- AND INTER-REGIONALLY, 2008



NB: Europe figures include non-EU countries

Source: Informa Telecoms & Media

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\*Contents correct at time of printing

Informa Telecoms & Media is leading provider of market intelligence to the global telecoms and entertainment industries. Our clients receive business-critical strategic information, advice and forecasting on all aspects of converging mobile, entertainment and fixed telecoms market.

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