
International Mobile Roaming.

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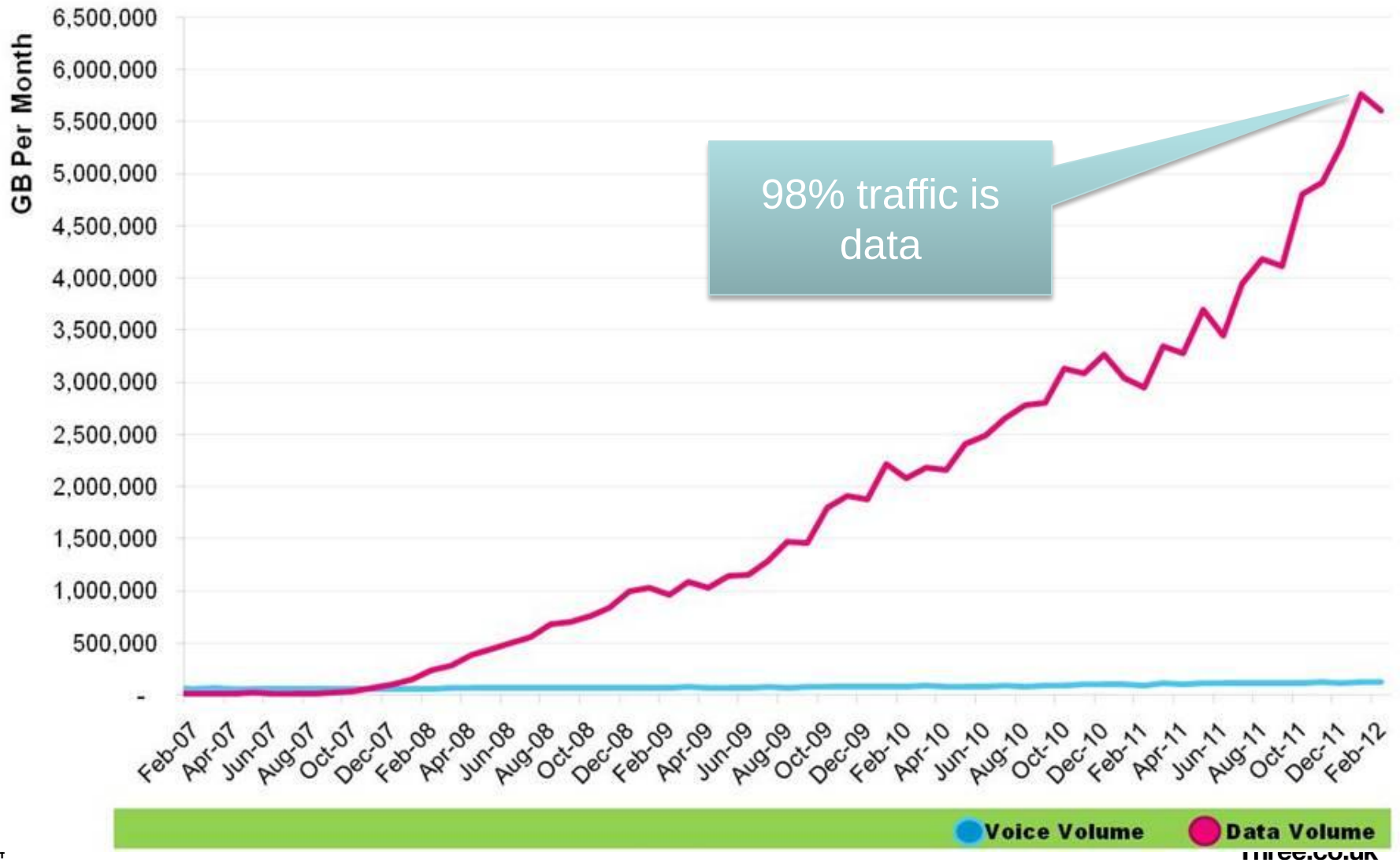
Roaming Challenge.

	Price	Control
•Voice		
•Text		
•Data		

The future is data.

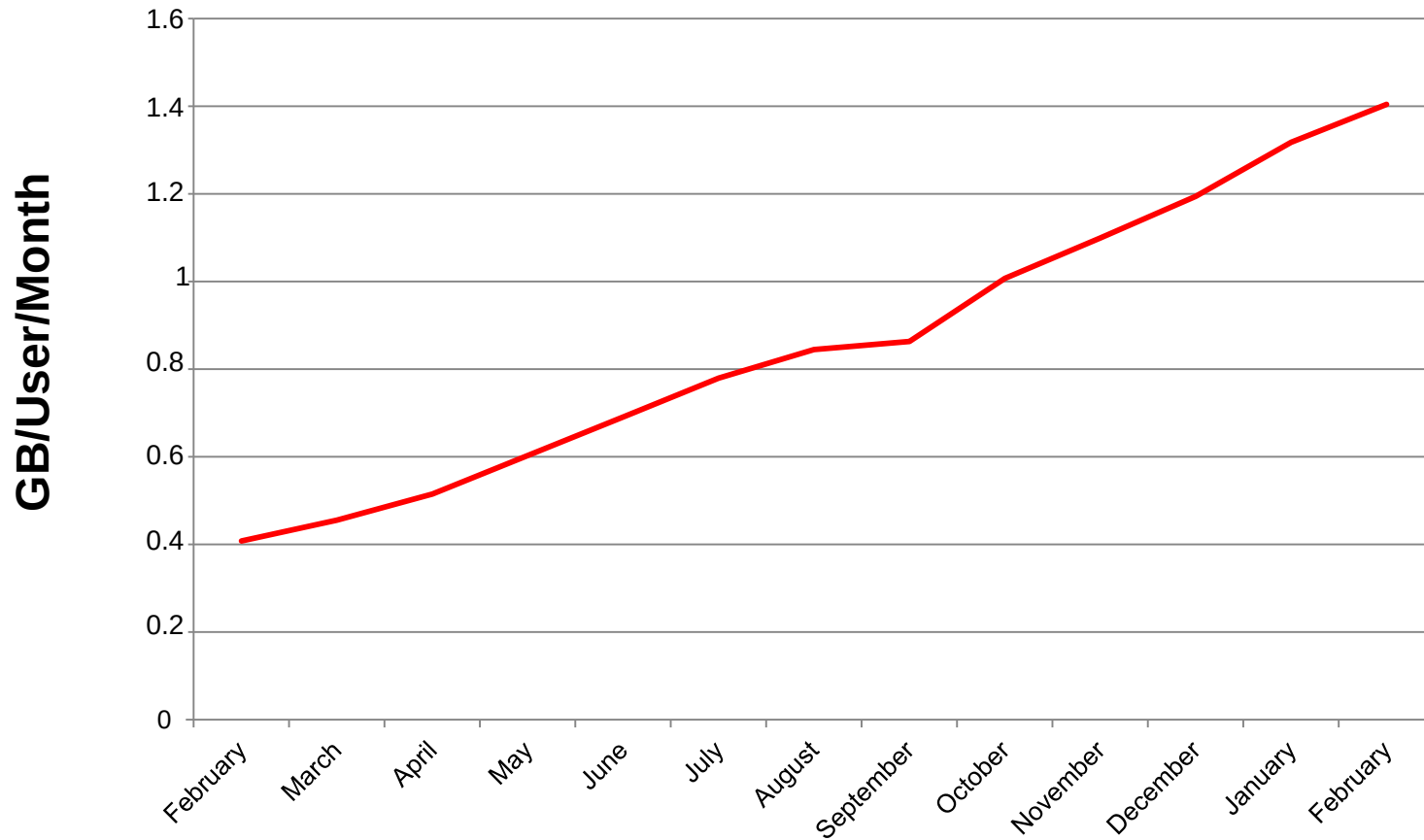


Mobile data growth.

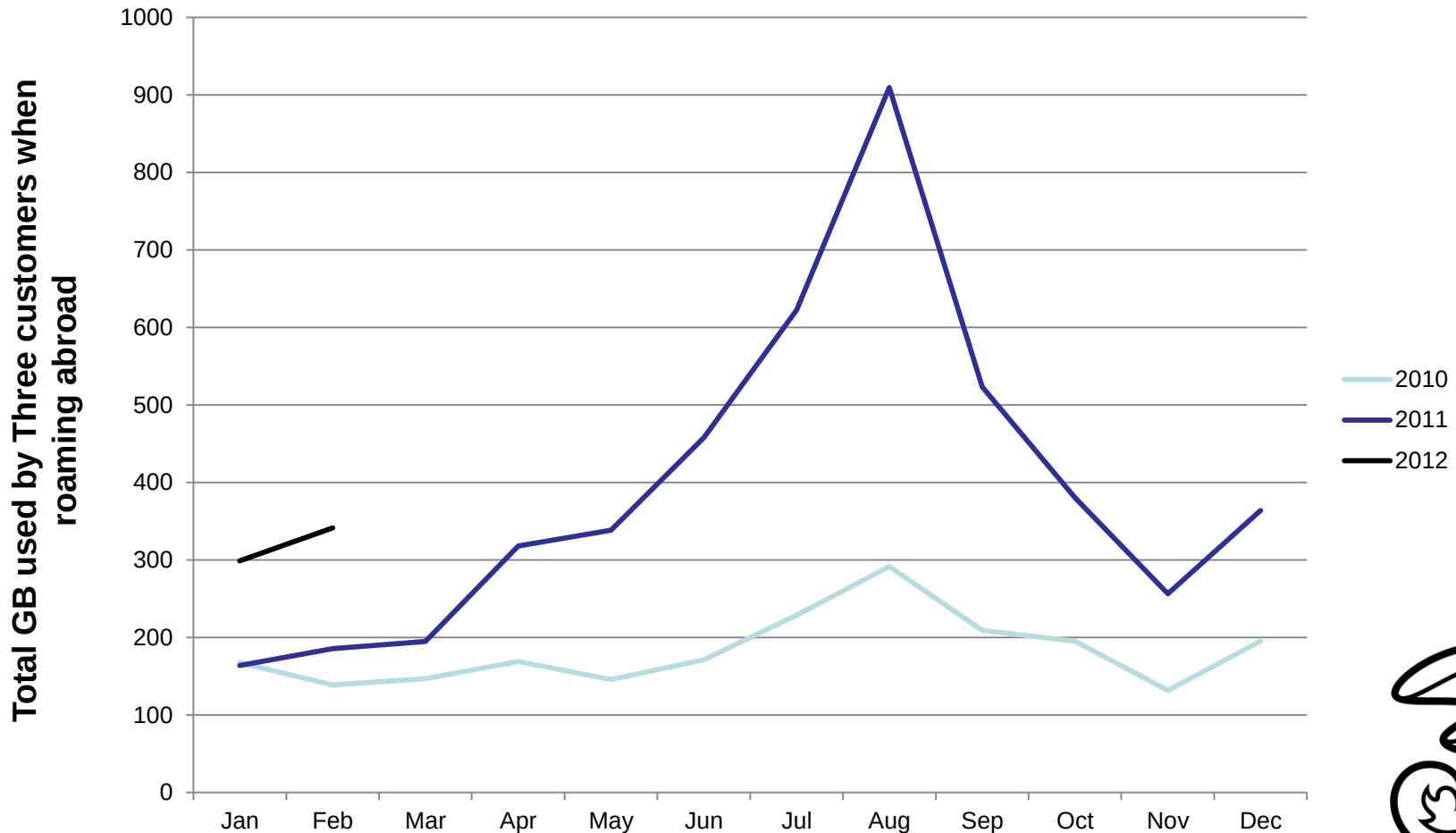


Smartphone data growth on Three.

Smartphone data 2011-2012



Growth of international roaming on Three.



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“Unexpectedly high mobile bills are most commonly caused by consumers downloading data, primarily while roaming outside the EU, but also while using their phones in the UK.”

Ofcom Bill Shock Results March 2012



EU roaming price today:

£1,250 per GB /

€1,490 per GB



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Current Situation.



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Same Product, Same Place



€1,000

€5



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Why?

- High wholesale caps
- Bi-lateral agreements
- Lack of competition
- Dominant operators

Customers just don't get best deals.
Nowhere near = / same as home market



The Golden Rule Applies

Pricing advantage comes from:

- Coverage
- Buying power

But can this benefit consumers?



Effective Wholesale Caps?

Current EU proposals still 100s times retail prices, but they set a clear direction.

	Jul 2011	Jul 2012	Jul 2013	Jul 2014
Current/ proposed wholesale cap	€0.5/MB = £440/GB	€0.3/MB = £264/GB	€0.2/MB = £176/GB	€0.1/MB = £88/GB
3 Group proposed wholesale cap		€0.05/MB = £50/GB	€0.04/MB = £40/GB	€0.03/MB = £30/GB
Three UK retail offer		£1.13/GB		
T-Mobile UK retail offer		£4.00/GB		
Vodafone UK retail offer		£3.75/GB		



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Thank you.



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