



Data Roaming

Mobile Broadband without Borders

Market Report

This report presents the trends of the emerging market of international roaming for data services on GSM / 3G mobile networks, the services and tariffs offered by European operators and their evolution. It also analyses the technology involved to provide data roaming services and the relations between the different players: mobile network operators, international transit carriers and clearing houses.

Key questions

- What is data roaming? How is it implemented?
- How does 3GSM roaming compare with WI-FI roaming?
- What are the main categories of usage of data roaming?
- Which services can drive the development of the market?
- What are the challenges for optimizing data roaming operation?
- What solutions do international transit carriers and clearing houses offer?
- What is the strategy of the players?





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1 - Description of International Roaming

1.1 Definition

1.2 International Roaming features

1.3 Technical elements of International Roaming

- GSM / UMTS networks
- Devices
- International Roaming mechanisms
- Inter-operator interconnection

1.4 Commercial elements of roaming

- Roaming subscriptions parameters
- Roaming agreements
- Inter-Operator Tariffs and Transferred Account Protocol
- Retail roaming tariffs
- Inter-operator billing and Data clearing
- Inter-operator financial settlement and clearing

1.5 Data services availability when roaming

1.6 Other forms of international roaming

- Inter-standard roaming
- Satellite Mobile Networks
- Wi-Fi roaming
- SIM swapping

2 - Strategy and key issues for mobile operators

2.1 Technical and operational issues

- Manage growing complexity of roaming agreements
- Ensure end-to-end interoperability and QoS

2.2 Marketing and commercial issues

- Improve service / tariff perception
- Generate usage with new services

2.3 European regulatory issues

2.4 Evolution of data roaming tariffs and service bundles

3 - Data roaming market

3.1 Market context: networks, devices and subscriptions

3.2 Usage of International Roaming

3.3 Usage of data roaming

3.4 Market estimates and forecasts

3.5 Economical and commercial importance of data roaming

4 - Case studies: Mobile Network Operators

4.1 Orange Group

4.2 Orange France - Business Customers

4.3 SFR (France)

4.4 O2 (United Kingdom)

4.5 Vodafone Italy

4.6 Hutchison 3G – United-Kingdom

4.7 Base – Belgium (KPN Group)

4.8 Wind – Italy

4.9 Bouygues telecom – France

4.10 Tele2Tango – Luxemburg

5 - Case studies: Transit carriers / Clearing Houses

5.1 Belgacom International Carrier Services

5.2 Syniverse

5.3 France Telecom International Wholesale Services

6 - Annexes

6.1 General architecture of GSM / UMTS networks

6.2 Protocols used in GSM / UMTS networks

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