



## **Rapporteur's report**

# **Online Seminar Towards the elimination of roaming charges in Latin America and the Caribbean**

**Digitalisation**

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# **C O N T E N T S**

<b>I.</b>	<b>GENERAL INFORMATION</b>	<b>1</b>
<b>II.</b>	<b>SUMMARY OF INTERVENTIONS</b>	<b>2</b>
<b>III.</b>	<b>CONCLUSIONS</b>	<b>4</b>
<b>IV.</b>	<b>RECOMMENDATIONS</b>	<b>5</b>



## I. GENERAL INFORMATION

On 19 May this year, the Online Seminar "Towards the elimination of roaming charges in Latin America and the Caribbean" was held, organized by the Permanent Secretariat of the Latin American and Caribbean Economic System (SELA) and the Community of Latin American and Caribbean States (CELAC), whose Pro Tempore Presidency is currently held by Argentina.

Representatives of the following organizations participated in this event: Andean Community (CAN); CAF-development bank of Latin America; Economic Commission for Latin America and the Caribbean (ECLAC), whose representative moderated the Seminar; Common Market of the South (MERCOSUR); Caribbean Community (CARICOM) and the Caribbean Telecommunications Union (CTU). The Undersecretary of Telecommunications of the Ministry of Telecommunications and Information Society of Ecuador (MINTEL) also participated.

The opening speeches were delivered by Ambassador Clarems Endara, Permanent Secretary of SELA, and Ambassador Gustavo Martínez Pandiani, Deputy Secretary for Latin American and Caribbean Affairs of the Argentinean Foreign Ministry and National Coordinator of the Community of Latin American and Caribbean States (CELAC). In his speech, Ambassador Endara expressed that the gradual reduction in the costs of international roaming (IR) services is a priority among the efforts that Latin American and Caribbean (LAC) countries are making in digitalisation. He stressed that progress in this area has been very heterogeneous. He referred to the progress made to date, but also highlighted that most countries in the region require more cooperation in order to achieve this objective. In this connection, he expressed the willingness of the Permanent Secretariat of SELA to contribute to solving this situation.

For his part, Ambassador Gustavo Martínez Pandiani deplored the fact that there is a certain duplication of efforts in the regional forums in LAC, with the consequent squandering of scarce resources. On the other hand, he said that this SELA-CELAC seminar is a cooperation exercise worthy of being replicated and strengthened, since it is aimed at maximizing the few resources available for this matter. He added that such efforts require generosity and openness, and that in this case, SELA's leadership made it possible. He underscored the need for and importance of international roaming (IR) for the region and expressed his hope that the work being done will soon lead to an agreement. Referring to the pandemic, he alluded to the evils it brought about, but highlighted the opportunity that this terrible experience has meant to correct and move forward. He urged that "we move from a pandemic thinking to a post-pandemic thinking" aimed at creating jobs and trade opportunities and strengthening the social fabric, which has been seriously affected by the pandemic. Finally, he expressed his hopes for the success of the seminar and conveyed the greetings of Ambassador Santiago Cafiero, Foreign Minister of Argentina.

In line with its work agenda, the seminar: i) analysed the best practices aimed at eliminating IR charges in the region; ii) presented the progress made in LAC in this area; and iii) discussed the limited efforts to achieve this objective and the prospects for such efforts. Likewise, among the specific results expected and derived from this seminar, it is worth highlighting the following: i) a diagnosis on the importance that the elimination of IR charges has for regional integration; ii) some recommendations and policies based on best practices; and iii) the positioning of this issue in the regional agenda, with special reference to the need and convenience of an eventual regional regulation, which is expected to contribute to leveraging LAC's integration.

## 2

### II. SUMMARY OF INTERVENTIONS

Both in their presentations and in their responses to questions from the audience, the panellists made technical and policy considerations regarding the nature, current development and prospects of initiatives aimed at eliminating IR service charges in LAC. These considerations are summarised below:

- 1) Marianella Guzmán, Telecommunications and Energy Officer at the General Secretariat of the Andean Community (CAN), highlighted as a best practice associated with the gathering of knowledge and experiences related to IR in LAC the one carried out by CAN, with the support of CAF-development bank of Latin America, through the study that its technicians prepared on the status of IR and the analysis of the experiences of the European Union and the Asia-Pacific region in this area. Both actions were particularly useful in determining the best alternative aimed at reducing and eventually eliminating prices for Community end users and, more importantly, in preparing and presenting a regulatory proposal for the implementation of an integrated market for IR rates among the Community member countries (Bolivia, Colombia, Ecuador and Peru) and ensuring harmonious treatment in the subregion.

In preparing this proposal, the competent public regulatory bodies in the sector participated and inputs derived from industry consultations and observations in each Andean country were considered, as well as some of the best international experiences.

The proposal was presented to the Andean Committee of Telecommunications Authorities (CAATEL) and approved by the Commission of the Andean Community (composed of the Ministers of Trade, the Andean Council of Foreign Ministers, and telecommunications specialists) through Decision No. 854 of 19 February 2020. From 19 July 2020 to 31 December 2021, the gradual reduction of IR rates for post-paid mobile data, telephony (voice) and messaging services began. On 1 January 2022, IR operators in a member country started to apply the same rates or rate plans in the other EU countries for post-paid service.

The progress made by CAN in terms of IR is essentially due to the supranational nature of its decisions and resolutions, which are above the national laws of the member countries of the Community and their application is straightforward. They do not require confirmation by national parliaments and are effective from the moment of their publication in the official gazette of the Community.

- 2) Another best practice is that of the Caribbean Community (CARICOM), about which Jennifer Britton, Deputy Director of ICT for Development Programmes at CARICOM, explained the efforts the Community is making towards the formation of the CARICOM Single ICT Space, approved by the Heads of Government in 2017, which includes actions aimed at eliminating IR service charges among the member countries. She added that the most significant step to date towards the full achievement of that objective was the signing, on 25 February 2022, of the Declaration of St. George's towards the Reduction of Intra CARICOM Roaming Charges to facilitate the CARICOM Single ICT Space and the CARICOM Single Market and Economy.

Finally, she noted that the following actions contribute to shaping a regional vision on the elimination of IR charges among CARICOM member countries: i) the sustained work towards the formation of the Single ICT Space; ii) a growing awareness of its necessity and importance among stakeholders and the general public; iii) the formation of a multi-

stakeholder working group from the public and private sectors; and iv) the reduction of licensing fees for service providers.

- 3) Selby Wilson, Director of Finance and Administration of the Caribbean Telecommunications Union (CTU), then presented and discussed the highlights of the process leading to the signing of the St. George's Declaration, from its inception in 2014, through the writing of the first draft on 13 December 2021, to its signing by the Prime Minister of Grenada, the Community's Heads of Government and representatives of the Government Affairs Digicel Group and South Caribbean Cable and Wireless Communications (CWC), the largest telecommunications providers in the region. Both companies participated in the efforts that resulted in the signing of the St. George's Declaration, an effective collaborative work between the public and private sectors, and committed themselves to include the new IR service model in their proposals.

Digicel Group proposed the Roaming Passport, which is a package purchased prior to travel and provides the purchaser with options for 1, 3, 4, and 7 days or for a 30-day period. For its part, Wireless Communications (CWC) committed to propose to its roaming partners to renegotiate rates in order to complement an existing suite that includes free incoming calls, free roaming minutes and data on selected post-paid plans, and a roam like home feature, where the charge for the RI service is taken out of the customer's local data package, at no additional charge.

In addition, the two companies committed to: i) support the initiatives of the Community Heads of Government to establish the Single ICT Space; ii) work towards the elimination of RI charges in all Member States for mobile data, telephony (voice) and messaging services; and iii) support the Community Heads of State in the effort to agree on initiatives that support CARICOM's policy on connectivity in particular and on digital development in general.

- 4) For his part, Mauricio Agudelo, Specialist in Technology, Media, and Telecommunications at CAF—development bank of Latin America, made some clarifications regarding the region's digital ecosystem, within the framework of which the elimination of charges for IR is being pursued. In this regard, he highlighted that there has been a significant increase in the adoption of mobile technologies in the last ten years in LAC, that 78% of the population has smartphones, and that around 60% are recurrent internet users. He added that there has been an explosion in per capita spending on applications and that consumption of social networks is similar to digital consumption in countries with medium or high digital development.

He then pointed out that the intra-regional trade dynamics have a challenge in the variation of import and export scales, with growth posing a major challenge in understanding how to converge towards a reduction in IR costs in order to strengthen regional integration processes. He expressed that the elimination of charges for IR services would contribute to boosting digital trade, regional integration, and economic development. He pointed out that this service involves multiple and varied interests associated with different actors such as authorities, operators, industrialists, manufacturers, and users, among others, and that this situation, as in other regions of the world, has delayed the efforts aimed at eliminating charges for this service in LAC.

He explained that, given the number of asymmetries on "all fronts of the digital ecosystem" and the significant differences in digital development among LAC countries, harmonisation

## 4

and coordination in spectrum management are required to make progress in reducing the costs of the IR service.

Finally, he said that LAC is a regional digital market of approximately six hundred million consumers that requires free movement of digital goods and services, rules compatible with free competition, without arbitrary barriers, with expeditious access and adequate consumer and personal data protection, regardless of nationality or place of residence.

- 5) A third best practice, commented by Nicolás Evers, Planning and Development Manager of the National Telecommunications Commission of Paraguay, and Daniel Carletti, from the National Directorate for International Affairs of the National Telecommunications Agency of Argentina and both members of Working Subgroup 1 "Mercosur Communications," is reflected in the agreement among the countries of the common market (Argentina, Chile, Paraguay and Uruguay), approved in 2019, non-binding, and pending parliamentary approval.

Evers explained that, for this initiative, a free trade agreement signed in 2017 by Chile and Argentina was taken as a reference, whose article 10.24 refers to IR. MERCOSUR agreement provides for activation among the countries that have already approved it. For his part, Daniel Carletti pointed out that in Paraguay this agreement is considered a strategy to: i) raise the effective market of IR and strengthen the integration of the Member States by allowing greater communication among their inhabitants; ii) reduce uncertainty around the price of services in the member countries of the common market; iii) increase trade by allowing users to carry out cross-border commercial activities using mobile services more intensively in IR; and iv) raise the value of telecommunications with the expansion of real coverage, thus contributing to greater use and increased coverage, without increasing prices.

- 6) Finally, Sheldon López, Undersecretary of Telecommunications of the Ministry of Telecommunications (MINTEL) and the Information Society of Ecuador, highlighted that between the borders of Ecuador, Peru and Bolivia, on some occasions, the charge for the IR service rises to over a thousand dollars for "inadvertent international roaming use", which represents a hindrance to the well-being of the population, as well as to the digital development and, consequently, the economic performance of the countries in the region.

### III. CONCLUSIONS

The following were the conclusions drawn from the interventions of the panellists and the moderators in their various presentations.

- 1) A key step towards the elimination of IR charges in Latin America and the Caribbean would be the assessment of the telecommunications sector with a view to strengthening and harmonising the relevant regulatory and institutional frameworks and the convergence of national laws and public policies that serve as a basis for the adoption of regional policies and regulatory instruments. This would facilitate the configuration of an integrated regional digital market and the optimisation of the regional digital ecosystem, which in turn would significantly increase the population's access to digital goods and services and, consequently, to a better standard of living.
- 2) Among the main expected advantages from the elimination of IR charges in the region, the following stand out: i) access to the service with the same charging conditions of the



country of origin for voice, data and SMS services, which would benefit the 244 million people living in LAC; ii) the drastic reduction or progressive closing of the digital divide, coupled with the strengthening of the population's rights to timely access to information through basic telecommunications and ICT services, which in turn will facilitate access to online education and e-health services, as well as to other goods and services offered by public platforms and institutions, thus contributing to a reduction and progressive closing of social gaps in general; and iii) a step forward towards regional integration through the creation of a regional digital market.

- 3) IR is a service that opens an opportunity for tourism. The intra-regional trade dynamics face a challenge in the variation of internal import and export scales, with a significant growth that poses a major challenge to understand how to converge towards a reduction in the costs of this service, which would contribute to strengthening regional integration processes.
- 4) The implementation of public policies aimed at favouring connectivity as an element that ensures greater equity in accessing the opportunities of the digital world, accessibility, security, users' rights to quality ICTs at reasonable prices and free competition by the operators of such services, would facilitate efforts towards the elimination of the IR charges.
- 5) Some benefits arising from IR for citizens include: i) scope for innovation and connectivity; ii) elimination of high bills; iii) possibility of savings; iv) lower costs for using mobile services; v) reduction of financial stress when communicating with family, friends and associates, free access to the Internet; and vi) absence of unfair rates. In addition, service providers would also benefit from reduced licensing and universal service rates.
- 6) An efficient IR market would facilitate the implementation of economic, social, and commercial initiatives by enabling users to maintain communications with relevant information at affordable prices, regardless of the country where the service operator is based.

#### **IV. RECOMMENDATIONS**

Following are the recommendations derived from the concepts and ideas expressed by the panellists and the moderators:

- 1) Promote technical working groups to define strategies for regional cooperation in the field of IR.
- 2) Foster synergic action among the different authorities, national telecommunications entities, and representatives of the private sector to promote the elimination of IR service costs and guarantee harmonised treatment in the region.
- 3) Take advantage of bilateral negotiations and agreements on IR, such as the case of Argentina and Chile, to build a platform that facilitates the achievement of consensus on this issue that can be extended to the rest of the region.
- 4) Promote the design of public policies aimed at strengthening national efforts and initiatives to eliminate IR service charges in Latin America and the Caribbean.

**6**

- 5) Evaluate the regulatory and institutional frameworks relevant to IR with a view to updating, strengthening, and harmonising them towards a better management of the service.
- 6) Promote the convergence of national laws and public policies that serve as a basis for the adoption of regional policies and regulatory instruments on IR.
- 7) Continue monitoring the evolution of the experiences being developed in the EU, the Andean Community, CARICOM, and MERCOSUR regarding the management of the IR service, with a view to identifying new elements that could be adopted in LAC.