

Intra-region and roaming call charges within South Asia

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Making South Asia an electronically connected region

- Measures:
 - It must be cheaper/easier to communicate within SAARC than to points outside SAARC
 - Leased-line costs must be lower than extra-SAARC
 - Not covered in this presentation as research is not complete
 - Intra-SAARC fixed calling charges must be lower
 - Intra-SAARC mobile calling charges must be lower
 - If SAARC shares the single-market objectives of other regional groupings such as EU and ASEAN, roaming charges within SAARC for SAARC citizens must be lower/more transparent than when they are roaming outside
 - Affects less people, but the people affected are those who knit the region together

Colombo Declaration of 15th SAARC Summit, Para 6

“The Heads of State or Government observed that an effective and economical regional telecommunication regime is an essential factor of connectivity, encouraging the growth of people-centric partnerships. They stressed the need for the Member States to endeavour to move towards a uniformly applicable low tariff, for international direct dial calls within the region.”

Intra-SAARC fixed & mobile voice charges

International voice: Fixed line

Country		Calling from						
		Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Afghanistan	0.29	0.88	0.26	0.71	0.33	0.18	0.16
	Bangladesh		0.35	0.21	0.24	0.17	0.06	0.16
	Bhutan	0.23		0.21	0.55	0.21	0.18	0.16
	India	0.17	0.11		0.31	0.17	0.09	0.04
	Maldives	0.57	0.35	0.88		0.21	0.35	0.58
	Nepal	0.26	0.35	0.21	0.47		0.18	0.16
	Pakistan	0.17	0.35	0.21	0.31	0.17		0.16
	Sri Lanka	0.17	0.35	0.16	0.31	0.17	0.18	

Source: LIRNEasia, International Voice Benchmarks (February 2011)

- LK calling IN is USD 0.04, the **lowest** in the region
- The **highest** (USD 0.88); BT calling AF and IN calling MV
- Overall, calling **MV is expensive**
- In most cases **PK customers pay relatively less to call other SAARC countries** (USD 0.06 – 0.35)

Note: Afghanistan has not reported international voice tariffs (fixed line) for SAARC countries.

Extra-SAARC fixed voice: PK lowest (way lower than intra-SAARC in most cases)

All tariffs in USD		Calling from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Malaysia	0.11	0.09	0.88	0.21	0.28	0.42	0.02	0.11
	China	0.11	0.09	0.59	0.26	0.24	0.42	0.02	0.11
	Australia	0.11	0.11	0.35	0.26	0.31	0.42	0.02	0.06
	UK	-	0.09	0.35	0.16	0.39	0.42	0.18	0.06
	US	-	0.09	0.35	0.16	0.24	0.42	0.02	0.04
	South Africa	-	0.14	0.59	0.26	0.39	0.42	0.12	0.11
	Saudi Arabia	-	0.23	0.88	0.26	0.39	0.42	0.11	0.17
	UAE	-	0.23	0.59	0.21	0.39	0.42	0.14	0.16

Source: LIRNEasia, International Voice Benchmarks (February 2011)

BD and PK offer lower tariffs for most extra-SAARC countries

LK cheaper than intra-SAARC prices in most cases

Since 15th Summit: No one seems to make any exception for fellow SAARC countries

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Back
in
2008

July 2008		Calling from								
		Bangladesh		Bhutan	India	Maldives	Nepal		Pakistan	Sri Lanka
		Peak	Off-peak				Peak	Off-peak		
Calling to	Afghanistan	0.35	0.26	0.98	0.28	0.70	0.29	0.22	0.22	0.94
	Bangladesh			0.59	0.28	0.3	0.29	0.22	0.14	0.32
	Bhutan	0.26	0.22		0.28	0.55	0.29	0.22	0.22	0.52
	India	0.26	0.22	0.31		0.3	0.29	0.22	0.12	0.32
	Maldives	0.26	0.22	0.59	0.28		0.29	0.22	0.36	0.32
	Nepal	0.26	0.22	0.59	0.28	0.46			0.22	0.32
	Pakistan	0.26	0.22	0.59	0.28	0.3	0.29	0.22		0.32
	Sri Lanka	0.26	0.22	0.59	0.17	0.3	0.29	0.22	0.22	

Now
After the
15th
summit
declaration
and 16th
summit
resolution

February 2011		Calling from						
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Calling to	Afghanistan	0.29	0.88	0.26	0.71	0.33	0.18	0.16
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	Bhutan	0.23		0.21	0.55	0.21	0.18	0.16
	India	0.17	0.11		0.31	0.17	0.09	0.04
	Maldives	0.57	0.35	0.88		0.21	0.35	0.58
	Nepal	0.26	0.35	0.21	0.47		0.18	0.16
	Pakistan	0.17	0.35	0.21	0.31	0.17		0.16
	Sri Lanka	0.17	0.35	0.16	0.31	0.17	0.18	

Source: LIRNEasia, International Voice Benchmarks (July 2008 & February 2011)

- In 2010, Sri Lanka had uniform pricing across the region

Intra-SAARC fixed voice: Percentage reductions since 15th Summit

Reduction in prices in February 2011 relative to July 2008		Calling from						
		Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Afghanistan	19%	11%	6%	-2%	-15%	19%	83%
	Bangladesh		41%	25%	21%	43%	58%	49%
	Bhutan	12%		25%	-1%	28%	19%	69%
	India	34%	65%		-3%	43%	21%	89%
	Maldives	-119%	41%	-214%		28%	2%	-81%
	Nepal	1%	41%	25%	-2%		19%	49%
	Pakistan	34%	41%	25%	-3%	43%		49%
	Sri Lanka	34%	41%	7%	-3%	43%	19%	

Calling MV from BD, IN and LK has become more costly

Intra-SAARC mobile voice: **AF treats SAARC countries equally**

Country		Calling from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Afghanistan		0.31	0.99	0.33	0.71	0.28	0.24	0.72
	Bangladesh	0.50		0.39	0.22	0.24	0.08	0.09	0.20
	Bhutan	0.50	0.23		0.22	0.55	0.21	0.24	0.54
	India	0.50	0.17	0.11		0.31	0.07	0.09	0.05
	Maldives	0.50	0.57	0.39	0.33		0.21	0.24	0.59
	Nepal	0.50	0.26	0.39	0.22	0.47		0.24	0.32
	Pakistan	0.50	0.20	0.39	0.22	0.31	0.11		0.20
	Sri Lanka	0.50	0.17	0.39	0.22	0.31	0.17	0.24	

Source: LIRNEasia, International Voice Benchmarks (February 2011)

- LK calling IN is USD 0.05, the **lowest** in the region
- The **highest** USD 0.99; **BT calling AF**, but at least they can call now
- Overall, calling **India is cheaper** and calling **AF is expensive**
- In most cases **NP callers pay relatively less** (USD 0.07 – 0.28); a major change from when international calls were most expensive from Nepal

Extra-SAARC mobile voice

All tariffs in USD		Calling from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Singapore	0.50	0.09	0.39	0.14	0.24	0.07	0.03	0.10
	Hong Kong	0.50	0.09	0.39	0.14	0.28	0.07	0.03	0.10
	UK	0.55	0.23	0.39	0.14	0.39	0.21	0.03	0.20
	US	0.55	0.09	0.39	0.14	0.24	0.06	0.03	0.10
	South Africa	0.66	0.23	0.66	0.22	0.39	0.65	0.09	0.23
	Saudi Arabia	0.50	0.23	0.99	0.20	0.39	0.08	0.13	0.27

Source: LIRNEasia, International Voice Benchmarks (February 2011)

Cheapest intra-SAARC call from PK is 3 times that of call to Singapore/US.
LK has lowest price to IN. But cheaper to call US than other SAARC countries.

Since 15th Summit: some price reductions

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July 2008		Calling from								
		Afghanistan	Bangladesh		Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
			Peak	Off-peak						
Calling to	Afghanistan		0.38	0.29	-	0.22	0.70	0.36	0.29	0.74
	Bangladesh	0.49			0.59	0.22	0.30	0.36	0.12	0.32
	Bhutan	0.49	0.29	0.25		0.22	0.55	0.36	0.29	0.56
	India	0.49	0.29	0.25	0.31		0.30	0.29	0.16	0.14
	Maldives	0.49	0.29	0.25	0.59	0.22		0.36	0.29	0.23
	Nepal	0.49	0.29	0.25	0.59	0.22	0.46		0.29	0.32
	Pakistan	0.49	0.29	0.25	0.59	0.22	0.30	0.36		0.32
	Sri Lanka	0.49	0.29	0.25	0.59	0.22	0.30	0.36	0.29	

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February 2011		Calling from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Afghanistan		0.31	0.99	0.33	0.71	0.28	0.24	0.72
	Bangladesh	0.50		0.39	0.22	0.24	0.08	0.09	0.20
	Bhutan	0.50	0.23		0.22	0.55	0.21	0.24	0.54
	India	0.50	0.17	0.11		0.31	0.07	0.09	0.05
	Maldives	0.50	0.57	0.39	0.33		0.21	0.24	0.59
	Nepal	0.50	0.26	0.39	0.22	0.47		0.24	0.32
	Pakistan	0.50	0.20	0.39	0.22	0.31	0.11		0.20
	Sri Lanka	0.50	0.17	0.39	0.22	0.31	0.17	0.24	

Source: LIRNEasia, International Voice Benchmarks (July 2008 & February 2011)

- Afghanistan continues to offer uniform pricing across the region

Intra-SAARC mobile voice: Percentage reduction/increases since 15th Summit

Reduction in prices by February 2011 relative to July 2008		Calling from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Calling to	Afghanistan		17%	-	-50%	-2%	23%	19%	2%
	Bangladesh	-2%		33%	0%	21%	77%	21%	38%
	Bhutan	-2%	21%		0%	-1%	42%	19%	3%
	India	-2%	41%	65%		-3%	76%	41%	61%
	Maldives	-2%	-97%	33%	-50%		42%	19%	-155%
	Nepal	-2%	11%	33%	0%	-2%		19%	1%
	Pakistan	-2%	31%	33%	0%	-3%	69%		38%
	Sri Lanka	-2%	41%	33%	0%	-3%	54%	19%	

Calling MV from BD, IN and LK has become more costly

Skype and Google Talk; does it make any difference?

Highlighted in red are lowest for each country

Fixed lines

Country		Calling from							Skype	Google Talk
		Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka		
Calling to	Afghanistan	0.29	0.88	0.26	0.71	0.33	0.18	0.16	0.37	0.27
	Bangladesh		0.35	0.21	0.24	0.17	0.06	0.16	0.14	0.10
	Bhutan	0.23		0.21	0.55	0.21	0.18	0.16	0.24	0.18
	India	0.17	0.11		0.31	0.17	0.09	0.04	0.09	0.06
	Maldives	0.57	0.35	0.88		0.21	0.35	0.58	0.68	0.70
	Nepal	0.26	0.35	0.21	0.47		0.18	0.16	0.68	0.19
	Pakistan	0.17	0.35	0.21	0.31	0.17		0.16	0.15	0.11
	Sri Lanka	0.17	0.35	0.16	0.31	0.17	0.18		0.15	0.12

Source: LIRNEasia, International Voice Benchmarks (February 2011)

Mobile

Highlighted in red are lowest for each country

Country		Calling from									
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka	Skype	Google Talk
Calling to	Afghanistan		0.31	0.99	0.33	0.71	0.28	0.24	0.72	0.37	0.27
	Bangladesh	0.50		0.39	0.22	0.24	0.08	0.09	0.20	0.14	0.10
	Bhutan	0.50	0.23		0.22	0.55	0.21	0.24	0.54	0.24	0.18
	India	0.50	0.17	0.11		0.31	0.07	0.09	0.05	0.09	0.06
	Maldives	0.50	0.57	0.39	0.33		0.21	0.24	0.59	0.68	0.70
	Nepal	0.50	0.26	0.39	0.22	0.47		0.24	0.32	0.68	0.19
	Pakistan	0.50	0.20	0.39	0.22	0.31	0.11		0.20	0.15	0.11
	Sri Lanka	0.50	0.17	0.39	0.22	0.31	0.17	0.24		0.15	0.12

Source: LIRNEasia, International Voice Benchmarks (February 2011)

Intra-SAARC roaming

Not in 15th SAARC Summit
Declaration, but of stated interest to
South Asian Telecom Regulators
Council (SATRC)

Roaming is complex

- Includes many functionalities, including
 - Making a local call in roamed-in country
 - Making a call back home from roamed-in country
 - Receiving a call while roaming
 - Sending an SMS in roamed in country

Making a local call whilst roaming: **Expensive** and **opaque**

Local outgoing call (SAARC countries)		Home Country								
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka	Iran
Visiting country	Afghanistan		0.60	-	0.59	0.76	0.93	0.90	0.69	-
	Bangladesh	1.50		-	0.64	0.63	1.14	0.90	0.73	-
	Bhutan	-	1.29		1.32	1.94	2.07	-	1.52	-
	India	2.50	1.07	1.39		1.65	1.69	-	1.37	2.01
	Maldives	1.50	0.17	-	0.31		1.26	0.90	0.34	-
	Nepal	2.50	0.41	-	0.51	0.77		0.90	0.61	-
	Pakistan	1.50	0.41	-	-	0.60	0.86		0.52	0.63
	Sri Lanka	3.00	0.32	-	0.33	0.44	1.04	1.49		0.43

Source: LIRNEasia, International Roaming Benchmarks (February 2011)

- Indian operators rip off roamers the most; followed closely by Bhutan
- Afghan roamers treated the worst by all SAARC countries
- Opaque except for AF and PK where the customers have a fighting chance of understanding the roaming charges they will experience

Lessons on simplicity from European Union, a real regional grouping

All tariffs in USD: Making a Local roaming call (European countries)		Roaming from															
		Belgium	Bulgaria	Cyprus	Czech Republic	Estonia	Finland	Germany	Greece	Ireland	Lithuania	Luxembourg	The Netherlands	Romania	Spain	Sweden	UK
Roaming in	Belgium		0.59	0.56	0.64	0.60	0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Cyprus	0.49	0.59		0.64	0.60	0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Estonia	0.49	0.59	0.56	0.64		0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Germany	0.49	0.59	0.56	0.64	0.60	0.60		0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Hungary	0.49	0.59	0.56	0.64	0.60	0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Latvia	0.49	0.59	0.56	0.64	0.60	0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58
	Portugal	0.49	0.59	0.56	0.64	0.60	0.60	0.58	0.48	0.59	0.60	0.55	0.58	0.49	0.49	0.63	0.58

Source: International Roaming Benchmarks (July 2010)

No matter where a telco customer in an EU country roams within Europe, same price is paid

Sample of the multiple that a roamer pays to make a local call (AF roamer pays local call x 133 in LK)

Roaming vs. Domestic ratios		Roaming from							
		Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Roaming In	Afghanistan		6	-	6	8	9	9	7
	Bangladesh	81		-	34	34	61	49	39
	Bhutan	-	84		86	126	135	-	99
	India	95	41	53		63	64	-	52
	Maldives	21	2	-	4		18	13	5
	Nepal	71	12	-	14	22		26	17
	Pakistan	93	26	-	-	37	54		32
	Sri Lanka	133	14	-	15	19	46	66	

Source: LIRNEasia, International Roaming Benchmarks (February 2011)

What LIRNEasia is doing to assist

- We will continue to collect and publish information on international call prices and roaming prices (making a local call in roaming country, calling home from roaming country, receiving a call, sending an SMS) at <http://lirneasia.net/projects/ict-indicators/> using a standard methodology
 - Domestic voice and SMS prices collected since 2007, but will not be collected from 2010 onward
 - Roaming data collection started at request of TRAI Chair/SATRC Chair in 2008; would be happy to hand over to any organization once the methodology is stable

16th SAARC Summit resolved to implement resolutions; what recourse if this too is not implemented?

5. The Leaders agreed that the scope and substance of cooperation had expanded However, a number of these had not translated into meaningful and tangible benefits to the people. . . . They resolved that the Silver Jubilee Year should be commemorated by making SAARC truly action oriented **by fulfilling commitments, implementing declarations and decisions and operationalizing instruments** and living up to the hopes and aspirations of one-fifth of humanity.