



Mandatory Domestic Mobile Roaming

Policy Position

13 July 2026

Executive Summary

The Australian Communications Consumer Action Network (**ACCAN**) is calling for the implementation of mandatory domestic mobile roaming.

Introducing mandatory domestic mobile roaming would address ongoing coverage inequities and ensure more equitable access to terrestrial mobile coverage, especially in the period before the Universal Outdoor Mobile Obligation is implemented.

The benefits for consumers are clear: domestic mobile roaming would boost retail competition, particularly in regional, rural, and remote areas. It would also place downward pressure on prices and improve access to existing terrestrial mobile coverage across Australia.

Australians facing cost-of-living pressures could shop around for the plan that most suits their needs, rather than being limited by the perceived or actual coverage restrictions of certain providers. Importantly, consumers would also enjoy more reliable coverage across more networks during emergencies and natural disasters.

New findings from Wave 3 of ACCAN's Consumer Sentiment Tracker reveal overwhelming public support for domestic mobile roaming. 73% of respondents support the introduction of this service, while only 5% are opposed (n=1014). Among those with a firm opinion (excluding respondents who answered 'Neither support nor oppose' or 'Unsure'), support surges to 94%, with just 6% opposed (n=787).



ACCAN is the peak national consumer organisation advocating for trusted, accessible, inclusive, affordable and available communications and digital services.

Introduction

A mobile roaming service allows users of one network to use their phones for calls, text messages, and data on another network when outside their home network's coverage area.¹ Implementing domestic mobile roaming would make it mandatory for Mobile Network Operators (**MNOs**) to provide roaming access to consumers by sharing their terrestrial mobile network infrastructure. Two major MNOs in Australia already have a commercial network sharing agreement in place.² In practice, establishing domestic mobile roaming would engage the remaining MNO and solidify the arrangements on a mandatory and regulated basis.

Connectivity is not a luxury; it is an essential service and a critical part of everyday life. Where mobile infrastructure exists, consumers should be able to access it. No Australian should be denied coverage simply because they are signed up to a different provider, or because the only provider with infrastructure in their area offers unaffordable or unsuitable plans.

For communities living in regional, rural and remote (**RRR**) Australia, including First Nations people, older Australians, people with disability, and low-income households, the absence of domestic mobile roaming is not merely an inconvenience, it is a barrier to wellbeing and full participation in Australia's digital economy.

Mandatory domestic mobile roaming would deliver immediate, practical benefits to consumers and the broader economy. Including:

- **Expand the availability and reliability of existing access to mobile coverage** to more consumers in RRR areas, supporting equitable economic and social outcomes across communities that have long been underserved.
- **Place downward pressure on consumer prices by improving retail mobile competition**, especially in RRR areas of Australia, and by offering consumers greater access to services from MNOs and Mobile Virtual Network Operators.³
- **Encourage market entry** in the telecommunications sector by lowering the barrier to entry for new providers, further increasing downward pressure on retail mobile prices.⁴
- **Ease cost-of-living pressures** by expanding the number of services available to consumers in RRR areas, allowing providers to meet consumer needs more effectively.
- **Have a minimal effect on MNOs' incentives to expand their networks**, especially in RRR areas.
- **Simplifying camp-on during outages**, as Triple Zero calls may not need to camp-on to other mobile networks.⁵

¹ More information on the consideration of domestic mobile roaming to date can be found in **Appendix A** and information on innovations in network technology can be found in **Appendix B**.

² Optus, 'TPG Telecom and Optus Sign Network Sharing Agreement Marking New Era of Mobile Services for regional Australia' (Media Release, 2024).

³ OECD, *OECD Economic Surveys: Australia* (Report, 2026) 99–100.

⁴ Ibid.

⁵ The camp-on process can take longer to connect than a normal call. ACCAN research found that when experiencing disruptions to mobile services, 51% of consumers reported that they wait less than a minute before hanging up and trying to call again. Accordingly, reductions in

Crucially, domestic mobile roaming would deliver these benefits where they are needed most. By enabling network access across providers, it would enhance social engagement and community welfare and expand access to vital services like telehealth and education. Domestic mobile roaming would remove structural barriers to staying connected, helping ensure people in RRR Australia enjoy the same opportunities as those in metropolitan areas.

Domestic mobile roaming strengthens retail market competition

The lack of meaningful competition in Australia's mobile market is an economic and social equity issue. Recent evidence has called into question the currency of the Australian Competition and Consumer Commission (ACCC)'s 2016 findings that domestic mobile roaming would not enable new market entrants.⁶ The Organisation for Economic Co-operation and Development's (OECD) 2026 Economic Survey of Australia 2026 identified Australia's high retail mobile prices and relative service stagnation as a direct consequence of limited competition among the three MNOs.⁷ The OECD further found that *'Barriers to entry are particularly high in regional areas, where coverage is often limited to a single provider's network infrastructure.'*⁸

This suggests it is timely to revisit the 2016 ACCC decision in light of a rapidly changing market, to maintain modern, reliable, and safe communications for all Australians. International experience further reinforces this point. The OECD's analysis of infrastructure sharing in Canada, France, and Japan demonstrates the benefits of such policies:

- Infrastructure-sharing obligations and pro-competitive spectrum allocation are essential to lowering entry barriers in mobile markets.
- Mandatory roaming and tower-sharing obligations in Canada have facilitated the survival of smaller regional operators, boosting coverage and lowering consumer prices.
- A credible fourth entrant, supported by contestable spectrum and access to essential inputs (e.g., roaming), exerts strong, persistent price discipline.⁹

In addition, New Zealand's regulated national mobile roaming arrangements have facilitated the development of competition in the mobile market by enabling new network operators to access established networks for a period of time, supporting new operators to quickly expand coverage beyond their own initial physical networks.¹⁰

camp on time could reduce delays to accessing emergency services. ACCAN, *Experiences and Barriers in Contacting Triple Zero: Full Report* (Report, July 2026) 20.

⁶ Australian Competition and Consumer Commission, 'Final Report' (Report, 23 October 2017) 58 <<https://www.accc.gov.au/by-industry/telecommunications-and-internet/mobile-services-regulation/domestic-mobile-roaming-declaration-inquiry-2016/final-report>>.

⁷ OECD, *OECD Economic Surveys: Australia* (Report, 2026) 99–100.

⁸ Ibid.

⁹ Ibid.

¹⁰ New Zealand Commerce Commission, 'Commission Says Mobile Roaming Regulation Still Important to Competition', *Commerce Commission* (Media release, August 2023) <<https://www.comcom.govt.nz/news-and-media/news-and-events/2023/commission-says-mobile-roaming-regulation-still-important-to-competition/>>.

New Zealand also benefits from its Rural Connectivity Group, a cellular network that New Zealand's three mobile network operators share, providing voice, data, text and wireless broadband across rural Aotearoa, delivering modern digital services to New Zealand's most isolated communities.¹¹

New market entrants are essential to increasing competition and promoting equity, particularly in RRR areas. Without domestic mobile roaming, RRR consumers are effectively locked into the sole provider with local infrastructure, a situation that would be unacceptable in metropolitan Australia. Mandating roaming expands the pool of consumers accessible to new providers, increasing choice and driving competition so that all Australians can select from a range of services, not just those in cities.

Competition is vital to affordability during a cost-of-living crisis

The affordability of mobile services, especially in RRR Australia, is a persistent and growing challenge, and one that falls disproportionately on those least able to bear it.¹² In 2025, a Salvation Army survey found that 55% of respondents were unable to pay their electricity, gas or phone bill on time,¹³ and a report by the Telecommunications Industry Ombudsman found that many Australians are choosing to pay for internet and mobile services over other essentials like rent or food.¹⁴ As Australians increasingly struggle to pay for essentials, the cost of mobile connectivity continues to rise.¹⁵

This is not just about affordability; it is also an equity issue. RRR Australians effectively face a location premium through higher prices, fewer plan options, and limited ability to switch to a better deal.¹⁶ This compounds existing disadvantages, especially for First Nations peoples, older Australians, people with disability, and low-income households in RRR areas.

A lack of choice and competition in the retail mobile market, particularly in RRR areas, forces many Australians to pay high, often unaffordable prices just to stay connected. In RRR areas, this limited competition leads to regional monopolies, fewer service options, higher prices, and significant service gaps.¹⁷ The 2024 Regional Telecommunications Review (**RTR**) found that '*competition for mobile services in much of regional Australia appears to be poor to non-existent*'.¹⁸

¹¹ New Zealand Government 'The Rural Connectivity Group' (Webpage, n.d) <<https://www.thercg.co.nz/>>.

¹² Regional Telecommunications Independent Review Committee, *2024 Regional Telecommunications Review* (Report, 13 December 2024) 4 <<https://www.rtrc.gov.au/>>.

¹³ The Salvation Army Australia, 'Cost of Living Report 2025 | The Salvation Army Australia' (Webpage, 2026) <<https://www.salvationarmy.org.au/the-red-shield-report-2025/cost-of-living/>>.

¹⁴ Telecommunications Industry Ombudsman, 'Keeping Connected – Experiences of Telco Consumers in Financial Hardship' (Report, August 2025) 3 <<https://www.tio.com.au/reports/keeping-connected-experiences-telco-consumers-financial-hardship>>.

¹⁵ Australian Competition and Consumer Commission, 'ACCC Communications Market Report 2024-25' (Report, 17 December 2025) 9-10 <<https://www.accc.gov.au/about-us/publications/serial-publications/accc-communications-market-reports/accc-communications-market-report-2024-25>>.

¹⁶ Centre for International Economics, *Telstra's Price Premium – The Premium Paid by Consumers for Fixed and Mobile Services* (25 November 2016) 1 <https://www.accc.gov.au/system/files/VHA%20submission%20Annex%203%20of%205_0.PDF>.

¹⁷ Regional Telecommunications Independent Review Committee, *2024 Regional Telecommunications Review* (Report, 13 December 2024) 23 <<https://www.rtrc.gov.au/>>.

¹⁸ Ibid.

Furthermore, consumer sentiment strongly supports the need for change. ACCAN's Consumer Sentiment Tracker (Wave 3) found 46% of respondents surveyed rank price as the most important factor in choosing a mobile plan, ahead of reliability (26%) and speed (14%).¹⁹ In the same research, 73% expressed support for domestic mobile roaming, with just 6% opposed (n=1,014). Among those with a firm view, 94% of consumers support domestic mobile roaming, with just 6% opposed (n=787).²⁰

Mobile roaming reflects infrastructure investment realities

Mobile network infrastructure in RRR Australia faces declining investment. This infrastructure requires substantial investment per site, creating an incentive for MNOs to focus on high-density (primarily metropolitan) areas.²¹ MNOs have decreased investment in terrestrial mobile telecommunications infrastructure in recent years, particularly in harder-to-serve areas such as RRR areas of Australia.²² This entrenches a two-tier system, with the quality and availability of an essential service determined by postcode.

ACCAN observes a clear and growing dependence on public investment to support the growth of mobile infrastructure for outer regional, remote and very remote areas of Australia. For example, ACCAN has calculated that the percentage of new co-funded sites relative to total sites in outer regional areas has risen from 50.5% to 58.9% between 2021 and 2025, and 30.6% to 59.6% in very remote areas.²³ The ACCC did not declare a mobile roaming service in 2017, in part due to the perceived impacts on mobile infrastructure investment.²⁴ With this investment largely underpinned by co-funding and likely to decrease in RRR areas in the future, it is unlikely that domestic mobile roaming will distort infrastructure investment incentives, especially in RRR areas.

Should MNOs continue to reduce their mobile infrastructure investment in RRR areas, consumers may face years of poor coverage before the full maturation of direct-to-device technologies facilitated by the Universal Outdoor Mobile Obligation (**UOMO**). Uncertainty regarding the default start date of the UOMO and the capabilities of UOMO technologies risks further perpetuating poor mobile coverage outcomes for consumers.

¹⁹ ACCAN, 'Consumer Sentiment Tracker Wave 3 - Reliability' (Report, March 2026) <<https://www.accan.org.au/consumer-sentiment-tracker/consumer-sentiment-tracker-wave-3-reliability>>.

²⁰ ACCAN, 'Consumer Sentiment Tracker Wave 3' (Survey Data). Participants were asked "How strongly do you support or oppose the introduction of a domestic mobile roaming service?". All participants (n=1,014) could answer in a range of 'strongly/somewhat' and 'support/oppose', with the option for 'Neither support nor oppose' and 'Unsure'. Rebased modelling defined 'participants with a firm view' as those who did not answer 'Neither support nor oppose' or 'Unsure' (n=787).

²¹ Costs can vary from roughly \$500,000 to \$1.2 million per tower, with higher costs usually in remote areas rather than urban areas. Australian Competition and Consumer Commission, *Regional Mobile Infrastructure Inquiry: Final Report* (Report, July 2023) 36–37.

²² Australian Competition and Consumer Commission, *Mobile Infrastructure Report 2025 - Output Tables* (Report, 2025), table 18.

²³ Australian Competition and Consumer Commission, 'Mobile Infrastructure Report 2025 - Output Tables' (Report, 2025) Tables 34 and 38.

²⁴ Australian Competition and Consumer Commission, 'Final Report' (Report, 23 October 2017) 58 <<https://www.accc.gov.au/by-industry/telecommunications-and-internet/mobile-services-regulation/domestic-mobile-roaming-declaration-inquiry-2016/final-report>>.

The 2026-27 Budget contained a reduction over the forward estimates in terrestrial mobile infrastructure co-funding programs.²⁵ Co-funding programs currently underpin a significant portion of mobile infrastructure building in RRR areas, without which investment in many of these areas would be uneconomical and commercially unviable for providers. Without co-funding, ongoing mobile infrastructure investment in RRR areas is likely to decrease significantly.

It is inequitable to ask RRR communities to wait for future technologies while metropolitan consumers already enjoy competitive services. Domestic mobile roaming delivers immediate improvements by leveraging existing infrastructure, rather than deferring equitable access to an uncertain technological future. This is especially important given the current uncertainty around the timing of the UOMO's implementation.

Conclusion

ACCAN calls for the urgent implementation of domestic mobile roaming. Consumers in RRR areas face higher prices and fewer service options than those in cities, an inequity that falls hardest on those who rely most on connectivity.

Domestic mobile roaming would boost retail competition, expand access to existing coverage for many more Australians, lower entry barriers, and rebuild trust in the sector. Careful management of new network technologies and capacity will help maximise the benefits of domestic mobile roaming.

Above all, domestic mobile roaming is the best available tool for delivering equitable access to mobile coverage, regardless of carrier. With possible delays in UOMO technology, this policy will address current inequities, support public wellbeing and safety, and help drive down costs for consumers.

²⁵ Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts, Portfolio Budget Statements 2026-27 (Budget Paper, 2026) 64 <<https://www.infrastructure.gov.au/about-us/corporate-reporting/budgets/budget-2026-27/portfolio-budget-statements-2026-27>>.

Appendix A: Consideration of domestic mobile roaming to date

To enable mobile roaming service, the service must be 'declared' by the ACCC under existing provisions of the *Competition and Consumer Act 2010* (Cth), following a review of specified criteria. The ACCC has previously considered declaring mobile roaming in 1998 and 2005, and most recently in its 2016 inquiry. The 2016 inquiry focused on whether declaring a mobile roaming service would benefit the long-term interests of end-users (LTIE).²⁶ In this case, two primary criteria define the LTIE:

- Would declaration of a mobile roaming service promote competition in the relevant markets?
- Would declaration of a mobile roaming service encourage the economically efficient use of and investment in infrastructure?²⁷

At the time, the ACCC found that declaration could promote competition by lowering the barrier to market entry but could also disincentivise investment in regional infrastructure, ultimately deciding that it was not in the LTIE.²⁸ However, market conditions and investment in terrestrial mobile network infrastructure in Australia have changed drastically since the ACCC's previous decision.

For example, since 2016, there has been a demonstrated increase in co-funded terrestrial infrastructure, especially in RRR areas, an increase in infrastructure sharing arrangements, and adoption of emerging technologies that have worked together to disincentivise traditional infrastructure investments in RRR areas.

Further, the 2024 RTR report and the ACCC's submission to the RTR consultation noted that, with respect to mobile roaming, the emergence of Low Earth Orbit Satellite technology has likely impacted competitive dynamics in the mobile market.²⁹

²⁶ The long-term interests of end-users (LTIE) serves as the principal evaluative criterion in ACCC declaration inquiries. The ACCC is required to determine whether a declaration would advance LTIE as defined in section 152AB of the *Competition and Consumer Act 2010* (Cth).

²⁷ Australian Competition and Consumer Commission, 'Final Report' (Report, 23 October 2017) 2 <<https://www.accc.gov.au/by-industry/telecommunications-and-internet/mobile-services-regulation/domestic-mobile-roaming-declaration-inquiry-2016/final-report>>.

²⁸ Ibid 2.

²⁹ Regional Telecommunications Independent Review Committee, *2024 Regional Telecommunications Review* (Report, 13 December 2024) <<https://www.rtrc.gov.au/>> 59-62; Australian Competition and Consumer Commission, *2024 Regional Telecommunications Review* (Submission, July 2024) 18-21.

Appendix B: Innovations in network technology

It is important to note that network stability – particularly in relation to emergency calls – should naturally be prioritised in the context of roaming. ACCAN recognises that there may be discrete scenarios and situations in which networks should not or cannot be shared for technical or public safety reasons.

Additionally, innovations in network technology will be crucial to minimise the risk of congestion and realise the full benefits of domestic mobile roaming. For example, the expansion of 5G networks and 5G network slicing allows MNOs to create multiple virtual networks of different performance levels and characteristics using the same physical infrastructure. This technology enables MNOs to effectively isolate and protect critical traffic, allowing them to prioritise their own customers or emergency services, as needed, to mitigate potential congestion.³⁰ This technology has been shown to enhance network performance and reliability, with direct applications in domestic mobile roaming that would vastly improve access across the country.

The Australian Communications Consumer Action Network (ACCAN) is Australia's peak communication consumer organisation. The operation of ACCAN is made possible by funding provided by the Commonwealth of Australia under section 593 of the Telecommunications Act 1997. This funding is recovered from charges on telecommunications carriers. ACCAN is committed to reconciliation that acknowledges Australia's past and values the unique culture and heritage of Aboriginal and Torres Strait Islander peoples.

³⁰ '5GS Roaming Architecture – Smooth Interworking with EPS', *ericsson.com* <<https://www.ericsson.com/en/reports-and-papers/ericsson-technology-review/articles/roaming-in-the-5g-system>>; Telstra, 'Telstra Announces World First <https://telstra.com.au/content/tcom/aboutus/media/media-releases/telstra-5g-slicing-world-first>tomers' (26 February 2024); University of Technology Sydney, 'Advancing 5G Innovation' (31 March 2025) <<https://www.uts.edu.au/news/2025/03/advancing-5g-innovation>>.

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