



EU4Digital

# Thematic session: Telecom Rules

## DAY 3

Online | 7 October 2020

# EU4Digital Steering Committee Meeting Week

## DAY 1



- EaP – Current policy agenda and results
- Second phase of EaPConnect 2 – Kick-off meeting

## DAY 2



- Future of EaP – policy beyond 2020
- Digital transformation in EaP

## DAY 3



- Telecom Rules thematic session
- eHealth thematic session

## DAY 4



- Digital Skills thematic session
- ICT innovation thematic session

## DAY 5



- eTrade thematic session
- Trust and Security thematic session



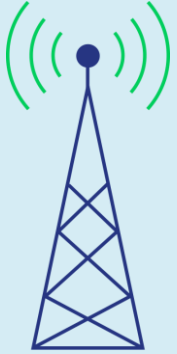
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# DAY 3: Telecom Rules session – Agenda

Time	Item	Duration
09:00 - 09:25	Telecom Rules thematic area state of play & plans	25 minutes
09:25 - 09:30	Feedback from Telecom Network (EaPeReg)	5 minutes
09:30 - 09:55	Q/A and Common discussion	25 minutes
09:55 - 10:05	Short break	10 minutes
10:05 - 10:30	Broadband strategies project state of play & plans	25 minutes
10:30 - 10:35	Feedback from Telecom Network (EaPeReg)	5 minutes
10:35 - 11:00	Q/A and Common discussion	25 minutes



# EU4Digital Facility in Telecom Rules area

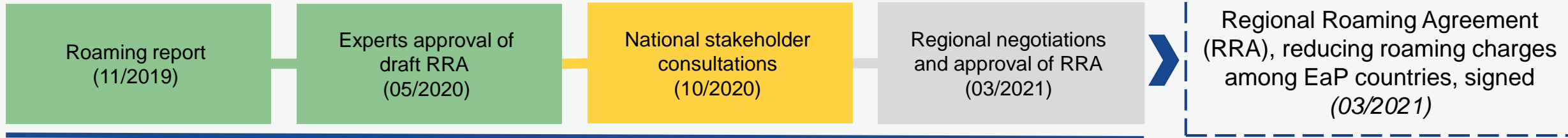


- Support development and implementation of a **common approach to roaming pricing** in the EaP region
- Support strengthening of the organizational and financial **independence of National Regulatory Authorities** for electronic communications
- Support a coordinated **approach for freeing 700 MHz** in the six partner countries
- **NEW activity:** Explore the possibility of a common international roaming space between the EaP countries and the EU MSs – **EaP-EU roaming study**



# 1. Roaming

## State of play and plans:



- **Draft Regional Roaming Agreement (RRA) and consultations with relevant stakeholders**
  - RRA is drafted in a form of Mutual Recognition Agreement (WTO compliant)
  - expected 87% roaming prices reduction with positive impact of € 4.6m
  - national consultations expected to be closed during common workshop in mid-October
  - next step – regional negotiations and validation during HDM Panel expected on 13 November 2020
- **The signing ceremony of the RRA is expected to take place late 2020 / early 2021**
  - WTO shall be notified by one of its' members before signing RRA
  - RRA enters into force on 1 January 2022 - price regulation starts
- **New activity planned – EaP-EU roaming study**

*Afternoon event regarding launch of EaP-EU roaming study planned today at 16:00 – 17:00 (CET)*

# Regional Roaming Agreement - timeline

- 
- Late 2020 or early 2021**  
Eastern partner countries Ministers plan to sign a Regional Roaming Agreement.
  - Throughout 2021**  
Adoption of any amendments to the laws or/and by-laws, necessary to achieve the objectives and implementation of Regional Roaming Agreement.
  - 1 January 2022**  
Regional Roaming Agreement enters into force, people in Eastern partner countries will pay less for mobile communications services while roaming within the six Eastern Partnership countries.
  - 2023 - 2025**  
Roaming prices will be still falling in line with proposed glidepath. It is expected, that by the end of this period in 2026 the roaming charges for customers will be reduced by 87%.
  - 1 January 2026**  
Roaming charges for customers expected to be further reduced as a result of mirroring new EU rates for wholesale prices and setting retail charges by adding calculated effective domestic prices.

## 2. Regulators' independence

### State of play and plans:



- **Gap assessment report & country specific action plans**
  - common assessment methodology approved
  - initial findings and observations prepared for each EaP country
  - final reports with recommendations are expected to be completed by the end of October 2020
  - country specific action plans to be prepared by the end of 2020
- **National consultations and regional events to promote benefits of regulatory independence and support country actions towards strengthening NRA organisational and financial independence**
  - regulatory independence is prerequisite towards EU Association Agreements for DCFTA countries
  - involvement of high level stakeholders and promotion of topic is critical for proper implementation

*Afternoon event on regulatory independence planned today 13:30 – 15:30 (CET)*

# Regulators' independence assessment

## Detailed list of criteria per Governance dimension

1. GOVERNANCE			
<b>1.1.</b>	<b>SETUP OF THE NRA</b>		
1.1.1.	Status of NRA – legally distinct and functionally independent	1.1.7.	Recruitment of personnel and experts
1.1.2.	Decision making powers, prohibition to seek or take instructions	1.1.8.	Ability to set remuneration for Board members and employees
1.1.3.	Powers to develop NRA's own strategy	1.1.9.	Legislative initiative powers of NRA
1.1.4.	Formation of NRA's budget	1.1.10.	Bodies and process for challenging NRA's decisions
1.1.5.	Sources of NRA's financing	1.1.11.	Consultation and transparency requirements
1.1.6.	Possibilities to execute (spend) NRA's budget	1.1.12.	Cooperation setup with other competent authorities
<b>1.2.</b>	<b>SETUP OF DECISION MAKING BODY</b>		
1.2.1.	Procedure and conditions set for recruitment of head or collegiate body performing that function	1.2.3.	Dismissal of the head or collegiate body performing that function, criteria for dismissal
1.2.2.	Appointment of the head or collegiate body performing that function	1.2.4.	Terms in Office as head or collegiate body performing that function
<b>1.3.</b>	<b>APPEAL AND DISPUTE RESOLUTION</b>		
1.3.1.	Appeal procedures	1.3.2.	Powers of resolve disputes between undertakings



# Regulators' independence assessment

## Detailed list of criteria per Powers and obligations dimension

### 2. POWERS AND OBLIGATIONS

<b>2.1.</b>	<b>GENERAL</b>		
2.1.1.	Powers of enforcement of regulation	2.1.7.	Powers to supervise EU Broadband Cost Reduction Directive implementation from 2014
2.1.2.	Powers to collect information	2.1.8.	Powers to organise public hearings
2.1.3.	Powers to regulate market entry	2.1.9.	Powers to organise associated councils or consulting bodies
2.1.4.	Powers to regulate national and/or international roaming	2.1.10.	Powers for international cooperation
2.1.5.	Powers to regulate net neutrality	2.1.11.	Powers to be represented in international regulatory bodies
2.1.6.	Powers to control quality of service requirements		
<b>2.2.</b>	<b>MARKET ANALYSIS</b>		
2.2.1.	Powers to define and analyse relevant markets	2.2.5	Powers to regulate termination and/or origination and/or transit tariffs
2.2.2.	Powers to implement <i>ex-ante</i> obligations	2.2.6.	Powers to set tariffs and/or prices
2.2.3.	Powers to regulate interconnection and access	2.2.7.	Powers to apply cost accounting and allocation methodologies
2.2.4.	Powers to regulate access to ducts and/or other network infrastructure	2.2.8.	Powers to set Weighted Average Cost of Capital
<b>2.3.</b>	<b>SCARCE RESOURCE MANAGEMENT</b>		
2.3.1.	Powers to grant scarce resources	2.3.3.	Powers to manage numbering plans
2.3.2.	Powers to manage radio frequencies		
<b>2.4.</b>	<b>CONSUMER PROTECTION</b>		
2.4.1.	Powers to set requirements for contracts	2.4.2.	Powers to solve customer complaints
<b>2.5.</b>	<b>UNIVERSAL SERVICE</b>		
2.5.1.	Powers to set universal service obligations	2.5.2.	Powers to define universal service's baskets

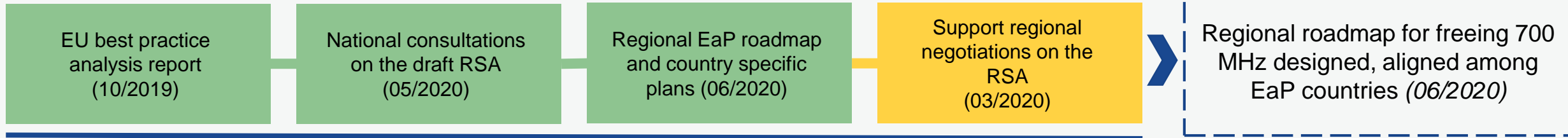
# 3. Freeing 700 MHz

Completed

In progress

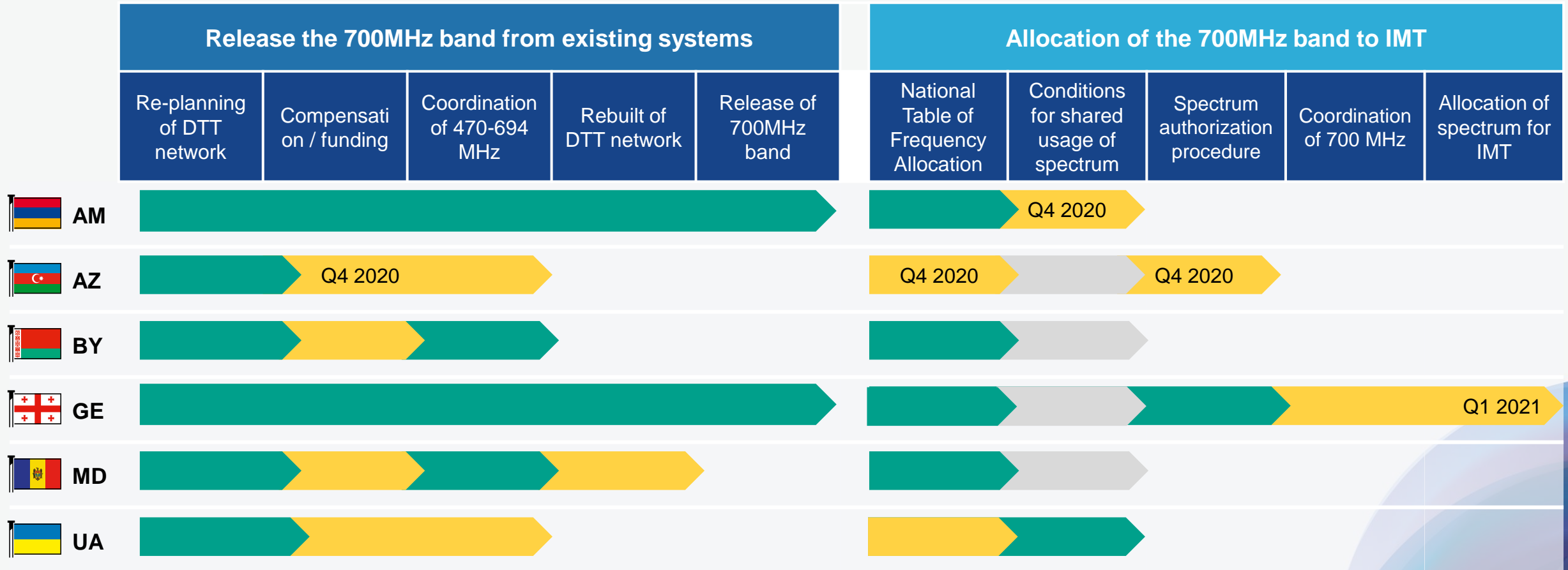
Planned for the upcoming 6 months

## State of play and plans:



- **Implementation of the Regional EaP roadmap:**
  - handed over to Country representatives for implementation
  - current phase – ongoing technical support and on-demand consultations
  - it is recommended to accelerate roadmap implementation by introducing monitoring mechanism, enabled through SEWG and HDM Panel levels at least on a bi-annual basis
- **Signing of Regional Spectrum Agreement (RSA):**
  - RSA is in the final stages of alignment, pending agreement on reflection of national specificities
  - the signing ceremony of the RSA is expected to take place late 2020 or early 2021

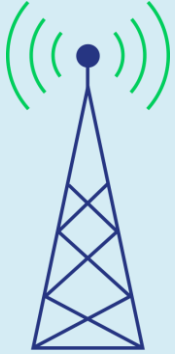
# Progress of EaP countries freeing 700 MHz



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# Telecom Rules area beyond 2021

## Considerations for the future



- **Reduction of roaming prices** among the **EU Member States and EaP countries**
- Establishment of mechanism and tools to comprehensively **monitor internet service quality and reach**
- Design of roadmap / action plan to **promote access to competitive broadband internet services**
- Design roadmap / action plan for the **release and allocation of potential frequency bands (other than 700 MHz) for 5G mobile networks**
- Launch of **5G strategies and 5G pilot projects** in EaP countries
- Empower **National regulatory authorities to promote effective competition** in the EaP countries' electronic communications markets





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# Feedback from Telecom Network (EaPeReg)



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**Q/A**  
**Common discussion**



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**Thank You**

**EU4Digital Facility | Telecom Rules**

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