Supporting Broadband Development in the EaP Region

EU4Digital Initiative – Broadband Strategies
State of play and plans
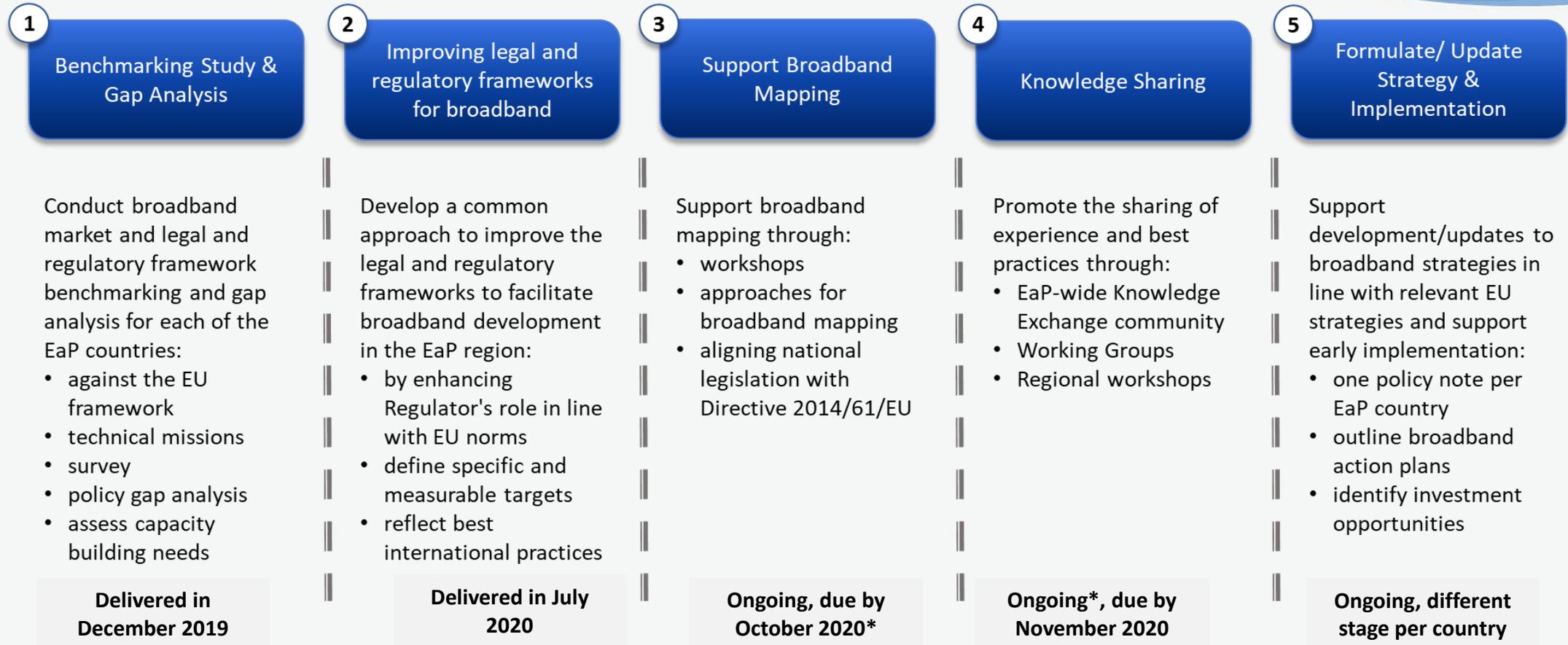
2nd Steering Committee Meeting – 7 October 2020

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Overall objective

EU4Digital Broadband Strategies - Technical Assistance

Support all EaP partner countries in their development and early implementation of national broadband strategies, in line with similar EU strategies, by providing technical assistance and capacity building support.

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EU4Digital Broadband Strategies:
Overview of activities and milestones

1

Benchmarking Study & Gap Analysis

Conduct broadband market and legal and regulatory framework benchmarking and gap analysis for each of the EaP countries:
- against the EU framework
- technical missions
- survey
- policy gap analysis
- assess capacity building needs

Delivered in December 2019

2

Improving legal and regulatory frameworks for broadband

Develop a common approach to improve the legal and regulatory frameworks to facilitate broadband development in the EaP region:
- by enhancing Regulator's role in line with EU norms
- define specific and measurable targets
- reflect best international practices

Delivered in July 2020

3

Support Broadband Mapping

Support broadband mapping through:
- workshops
- approaches for broadband mapping
- aligning national legislation with Directive 2014/61/EU

Ongoing, due by October 2020*

4

Knowledge Sharing

Promote the sharing of experience and best practices through:
- EaP-wide Knowledge Exchange community
- Working Groups
- Regional workshops

Ongoing*, due by November 2020

5

Formulate/ Update Strategy & Implementation

Support development/updates to broadband strategies in line with relevant EU strategies and support early implementation:
- one policy note per EaP country
- outline broadband action plans
- identify investment opportunities

Ongoing, different stage per country

* The team requests your assistance and input to deliver these activities on time and aligned with the country needs and priorities.

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Project Status per Component

1. **Report 1** – **delivered in December 2019**.

2. **Report 2 – delivered in July 2020** incorporating the feedback as received; informing the next stage of engagement especially on legal/regulatory reform assistance

3. **Report 3 –** the WB team engaged with UKE (Poland) colleagues to deliver this activity focused on broadband mapping. Regional and country focused virtual workshops being organized. To be delivered **by October 2020**.

4. **Report 4 –** being finalized as summary of knowledge sharing activities delivered, including virtual workshops delivered throughout 2019 and 2020. **To be delivered by November 2020.** We are organizing a webinar for NRAs and NPs on the digital response to the COVID-19 pandemic, through the relief, recovery, and resilience phases, to feed into broadband strategy recommendations. The event will be held virtually at the **end of October (~28 October)**.

5. **Report 5** – on recommendations for national broadband strategies, work at various stages (more details in subsequent slides). **To be delivered by November 2020** for all six countries.

An update: In light of delays due in part to COVID-19, the World Bank activities in the context of the EU4Digital initiative have been extended by the EC until December 2020 with the plan of submitting all deliverables by November 2020.

A request: We request your inputs and cooperation to define the scope of knowledge exchange activities until November 2020, and your engagement to ensure a timely delivery of all the remaining outputs.

Initial findings re. Broadband Mapping

Overall suggestion: Multi-country TAIEX with EU MS on broadband mapping - legal and technical framework development for EaP countries. Main actors that should be involved are all the relevant organizations in mapping (but mainly NRAs).

More-specific list of topics to consider, noting that the needs vary by country:

Legal framework: ▪ Further development of the legal framework for broadband mapping, including in the context of embedding BCRD approaches ▪ Definition of secondary legal instruments (typically, regulations) to implement mapping (e.g., data collection, including across infrastructure owners of telecom-ready infrastructure) ▪ Creation of appropriate enforcement approaches for data collection and related topics (e.g. dispute resolution)	**Institutional framework:** ▪ Support to define the roles of different organizations involved in mapping, ensuring collaboration and data exchange as needed including across infrastructure sectors and regulators ▪ Capacity building for the staff of the NRAs (or where relevant, other agencies) to implement broadband mapping ▪ Budgeting and HR requirements, operating model
Technical matters: ▪ Definition of mechanisms to collect data especially providers from different sectors, including standard forms and definitions ▪ Defining and protecting critical infrastructure, including cybersecurity aspects for the system	**Other topics:** ▪ Understanding the choice of implementation arrangements, i.e. in-house vs. outsourced implementation ▪ Development of Single Information Point (SIP)

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Project Status per Country

AM	• Recommendations on a national BB strategy (on track, draft recommendations shared with NP, final version by October following feedback from the NP) • Providing TA on rural broadband program design (draft shared) • TA on updates of Electronic Comms law (ongoing, consultant being mobilized)
AZ	• Preparing policy note on rural broadband, • Workshop on upgrading of broadband infrastructure • Recommendations to develop BB strategy being prepared to share with NP in October 2020
BY	• Provided early inputs to draft smart cities strategy • BB strategy recommendations and roadmap on 5G deployment (ongoing and planned by October 2020)
GE	• BB strategy recommendations (adopted by Govt in Jan 2020) • Policy dialogue on regulatory reforms (completed) • Legal reforms on infra sharing (draft law submitted to Parliament) • Financing of rural broadband connectivity program being prepared (expected start date January 2021)
MD	• Inputs provided on broadband strategy (done) • Ongoing TA on implementation on EU Directive 61 • Ongoing TA on implementation of uninterrupted power supply to mobile broadband networks
UA	• Inputs provided to Electronic Communications Law (adopted 30/09/2020) • Inputs to BB vision (done) • BB strategy recommendations (submitted to the GoU) • Rural broadband plan options (planned by October 2020)

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Example of impact: Georgia

EU4Digital supported development of National Broadband Development Strategy (adopted Jan. 2020)	Targets aligned with the EU Gigabit Society targets for 2025, with indicative action plan to: • Increase Competitive Pressure • Attract Investment • Build Digital Skills and Demand
EU4Digital assisted in early implementation of high priority legal and regulatory actions (2019-2020)	Technical assistance to the NP and NRA on: • Development of infrastructure legal framework, under Parliamentary consideration, aligned with the EU BCRD framework • Advisory support on ex ante competition regulation for wholesale markets
EU4Digital influenced the mobilization of financing to support broadband market development (2019+)	Financial assistance to Georgia to: • Implement the "Open Net" program, modeled on Lithuania's RAIN Project, and to support wider adoption of broadband-enabled services • Support adoption of legal framework for alignment of Georgia's legal framework on cost reduction

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Next steps and planned activities

Continue work on broadband mapping

- Bilateral discussions with NRAs and NPs
- Drafting of recommendations underway, focusing on identifying key steps to implementation of mapping
- 2nd Regional Workshop on BB mapping in cooperation with ANACOM (November 2020)

Continue knowledge sharing activities

- Webinar on the digital response the the COVID-19 pandemic (October 2020)
- Organizing additional virtual workshops to deliver demand-based knowledge sharing
- Identify topics for potential downstream support by EU, e.g. through TAIEX

Continue country-specific work on broadband strategies

- Armenia: Finalize strategy recommendations
- Azerbaijan: Support strategy recommendations and workshop on infrastructure sharing
- Belarus: Focus on a roadmap on 5G deployment
- Georgia: Support strategy implementation (legal reforms, financing of rural broadband)
- Moldova: Support strategy implementation (especially BCRD)
- Ukraine: Continue work on strategy recommendations

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THANK YOU!

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