

# 26th EaPReg, Plenary

11 November 2025 | Riga, Latvia



# Bridging the gap in internet quality could yield wide-ranging benefits, from improved opportunities for marginalized groups to firms' outcomes



## Global evidence confirms: better broadband spurs jobs, innovation, and entrepreneurship

- Studies show that high-quality broadband: (i) Boosts employment in skilled services, (ii) Increases firm innovation and productivity, (iii) Supports entrepreneurship and startup growth. (*Wang et al., 2022; Li et al., 2024; Grimes et al., 2011*)



## Faster fixed internet leads to jobs

- In Georgia, a 10% increase in median fixed broadband speed leads to a 0.3 percentage point rise in the likelihood to be in employment. (WB study)



## High-speed internet drives labor market inclusion, especially for women

- In the U.S., high-speed internet led to a 4.1 percentage point rise in labor force participation among married women, thanks to remote work options and reduced time constraints. (Dettling, 2017)

# EU4D phase II Analytical Program - Scope

**Baseline Analysis:** WB team processed 175 million Ookla Speedtest® to map broadband infrastructure, internet speed and identify quality gaps. Policy, legal, and regulatory review from ongoing and prior TA programs

## Workstream 1

**Objective:** Identify investment projects, and mobilize capital for resilient digital infrastructure rollout

**Activities:**

1. Analysis to map broadband infrastructure, identify connectivity gaps & recommend business models to mobilize private capital to close gaps

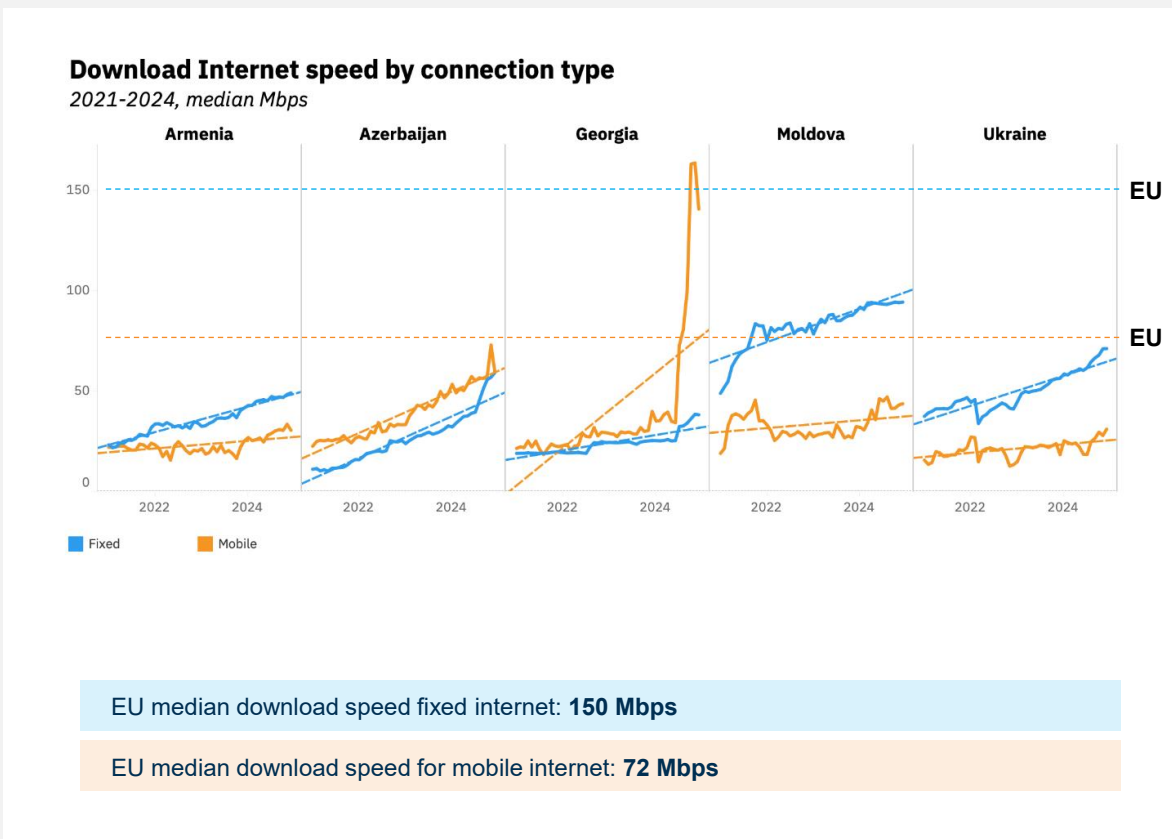
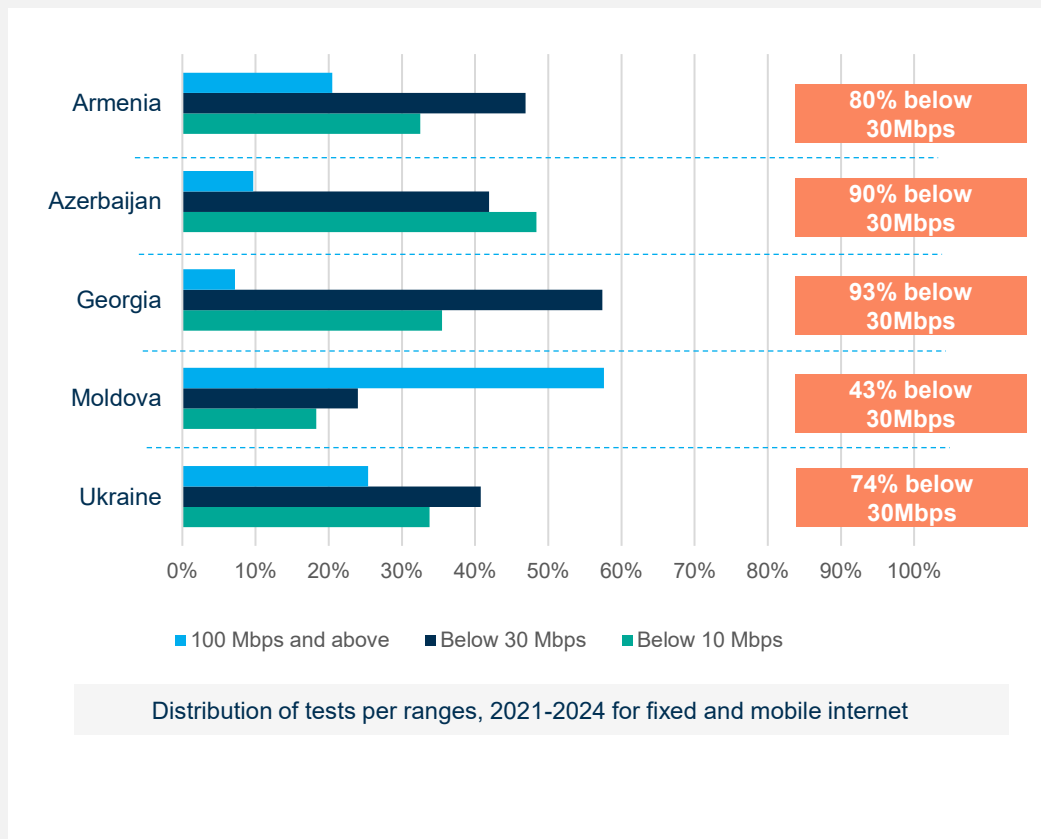
## Workstream 2

**Objective:** Review and develop policies and regulations for a pro-competition, pro-investment enabling environment

**Activities:**

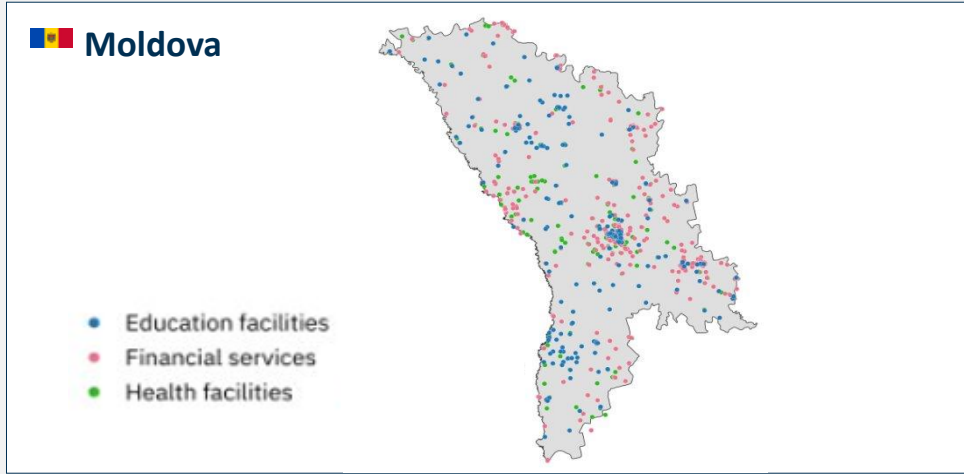
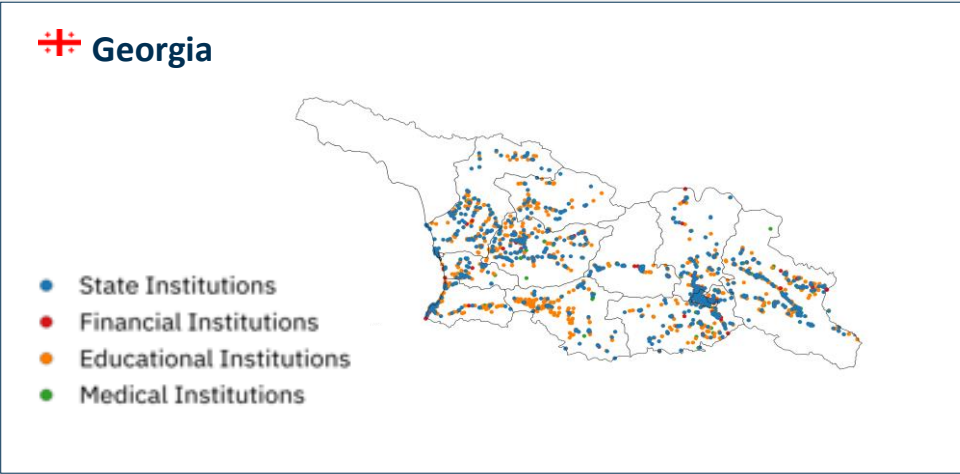
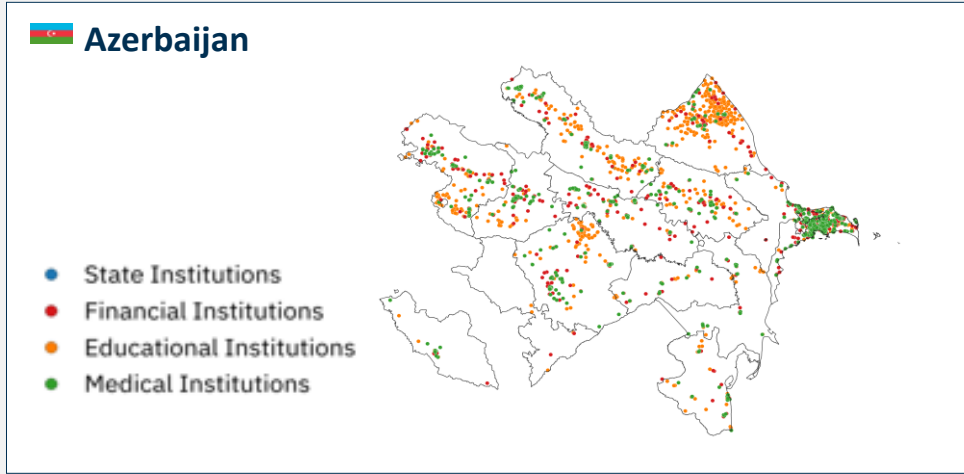
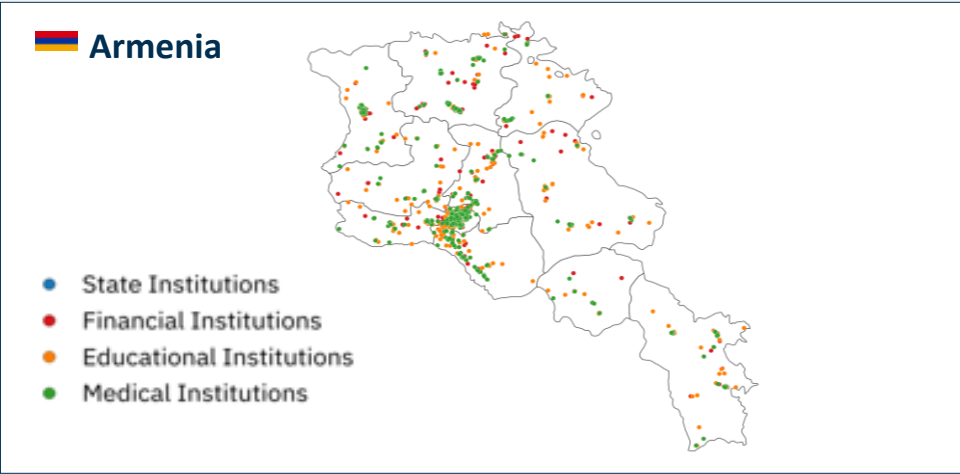
1. Legal & regulatory advisory to improve enabling environment
2. Targeted assistance to Azerbaijan to develop regulatory strategy
3. Support to improve NRA Data collection and analysis

# Snapshot of quality of internet based on baseline analysis



**A large proportion of users remain constrained to speeds below 30 Mbps—insufficient to support essential digital services such as video conferencing, online education, and telehealth.**

# Social institutions are widely dispersed: broadband must reach where services are delivered



# Investment gaps identification: Current status

## Workstream 1

Objective: Identify investment projects, and mobilize capital for resilient digital infrastructure rollout

### Key focus areas:

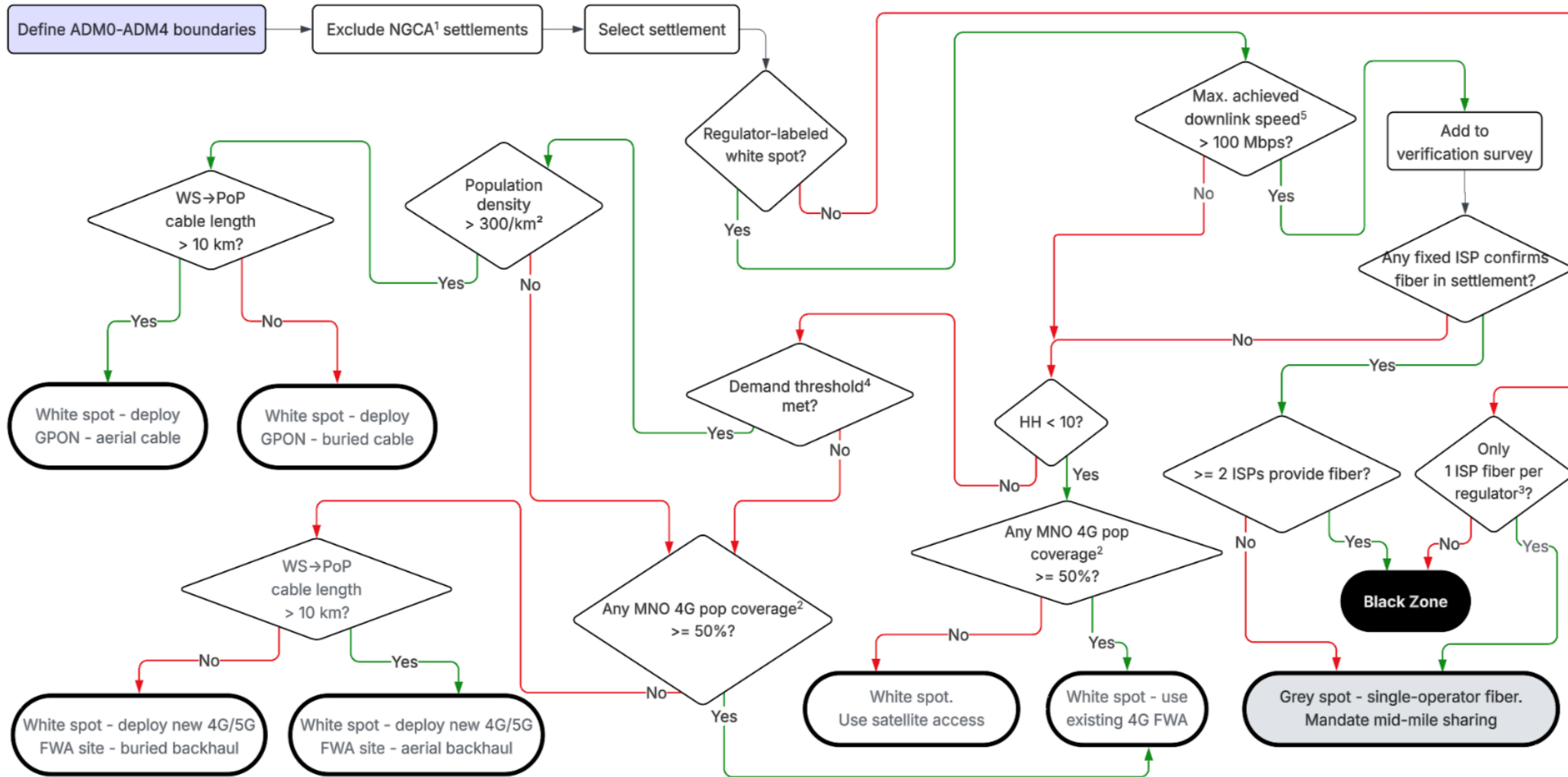
Infrastructure → Gaps → Resilience → Business Models & Financing → Socio-Economic Impact Assessment → Policy

## Status of deliverables

- ✓ Inception reports (all countries)
- ✓ Initial geospatial broadband mapping (all countries)
- ✓ Country engagement with regulators initiated (methodology workshops)
- ✓ Private sector stakeholder dialogue (E.g MNO's)
- ✓ Policy and regulatory gap assessment
- ✓ Preliminary root cause analysis: In progress
- ✓ Business models & financing options: In progress (Moldova (Done))
- ❑ Impact calculations: In progress
- ❑ Consolidated reports: Not started
- ❑ Validation workshops with regulators

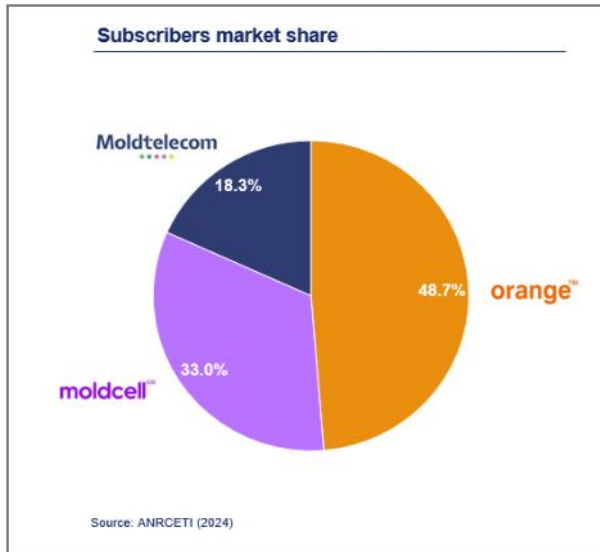
To be completed by Jun. 2026

# Decision tree for identifying investment gaps and technology options



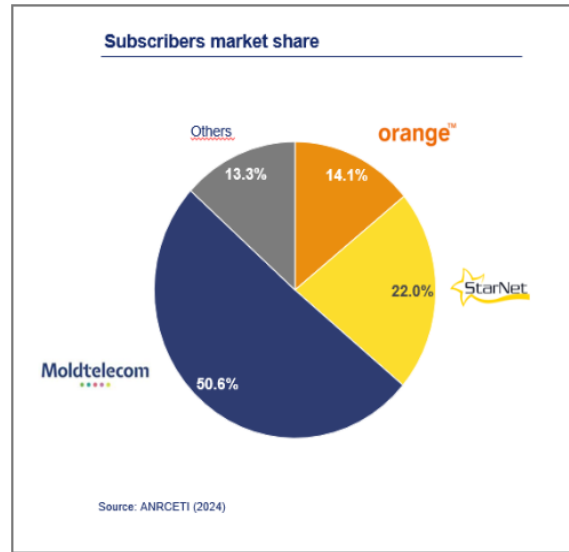
# Moldova Analysis: Market Outcomes

## Mobile



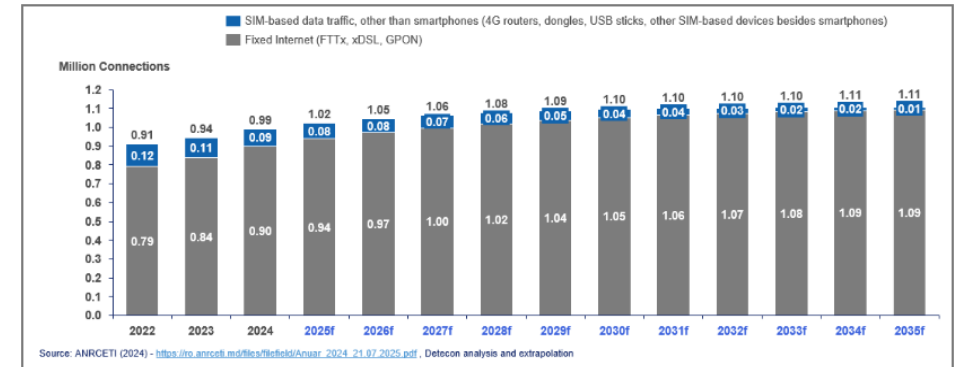
**Top 2 providers: 85% market share**

## Fixed

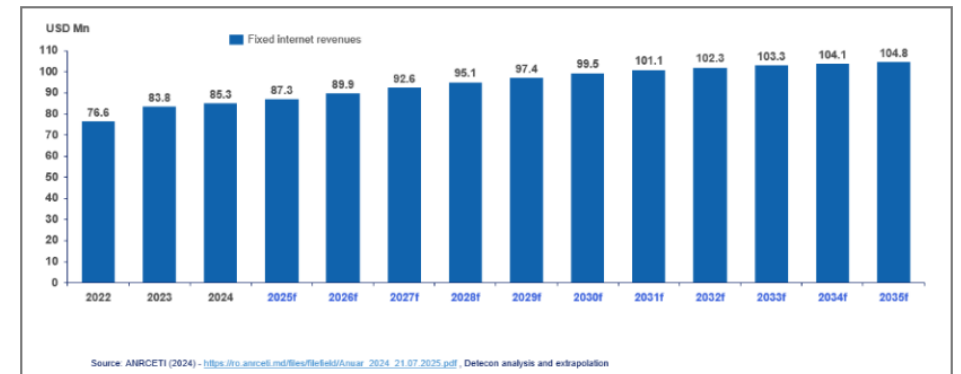


**Top 3 providers: 80% market share**

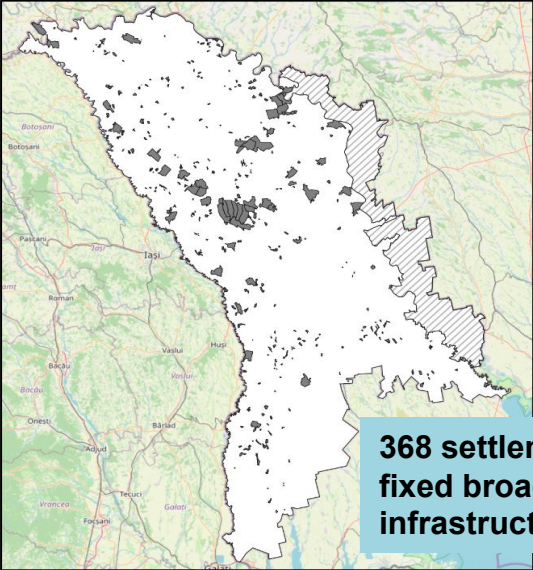
**Sim Based traffic (excl. smartphones) to drop while fixed internet penetration forecasted to grow (2035 projection)**



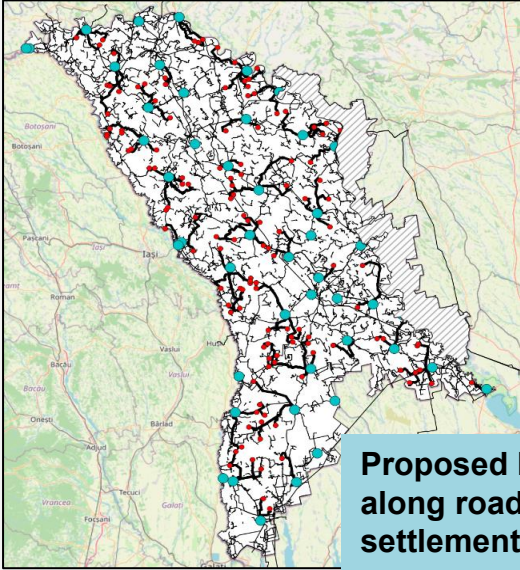
**Fixed internet revenues expected to increase before plateauing as competition increases (2030 projection)**



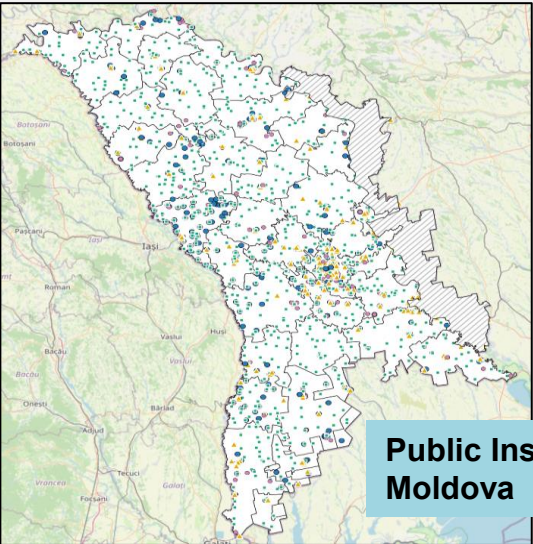
# Moldova Analysis – Settlements without fixed broadband infrastructure identified



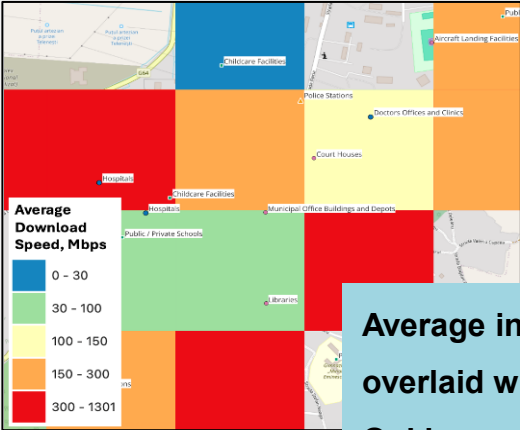
**368 settlements without fixed broadband infrastructure**



**Proposed Middle-mile fiber connectivity along roads and power lines to connect settlements and public institutions**



**Public Institutions in Moldova**



**Average internet download speed (Mbps) overlaid with public institutions. Source: Ookla**

# Legal and regulatory support: Current status

**Objective:** Review and develop policies and regulations for a pro-competition, pro-investment enabling environment

**Activities:**

- 1. Legal & regulatory advisory to improve enabling environment**
2. Targeted assistance to Azerbaijan to develop regulatory strategy
3. Support to improve NRA Data collection and analysis

## Key Thematic Areas

- Infrastructure sharing & rollout efficiency (AM & AZ)
- Permitting & information point rules (AM & AZ)
- Fair access & interconnection rules
- Universal service frameworks
- Quality of service (QoS)
- Spectrum & 5G management
- Market development (e.g., MVNOs)
- Capacity building & harmonization

## Deliverables for Azerbaijan, Armenia, Georgia, Moldova & Ukraine

- ✓ Inception report: Delivered
- ✓ Current State Reports
- ✓ Gap analysis: In progress
- Implementation guidance: Not started
- Validation workshops
- Final reports: Not started
- Action plans: Not started
- Dissemination & Capacity-Building Workshops
- Missions

**To be completed by Jun. 2026**

# World bank support to Azerbaijan: ICTA strategic roadmap

**Objective:** Review and develop policies and regulations for a pro-competition, pro-investment enabling environment

**Activities:**

1. Legal & regulatory advisory to improve enabling environment
2. Targeted assistance to Azerbaijan to develop regulatory strategy
3. Support to improve NRA Data collection and analysis

The WB team worked closely with ICTA develop a strategic workplan and roadmap to guide its regulatory landscape over the next three years

~250 action items were structured and prioritized with a clear timeline for ICTA's units

**ICTA Mission Statement – Background and Approach**

**Background**

The Information and Communication Technologies Authority (ICTA) of Azerbaijan was established to serve as the national regulator for telecommunications and postal services. In a period marked by rapid digital transformation, ICTA's role has expanded from merely overseeing compliance to actively shaping the digital ecosystem, ensuring that regulatory measures enable in consumer protection.

**Approach to Shaping the Mission**

The mission statement was crafted through:

- Alignment with the national digital transformation agenda and the Development and Transport.
- Internal consultation across ICTA's departments to reflect operat ambitions.
- Benchmarking against international best practices for telecom a ICTA's mission resonates with both national and global expectati
- Commitment to collaboration, engaging stakeholders from the p society to co-create a regulatory environment that balances inni rights.

**STRATEGIC GOAL 1: FORMATION OF REGULATORY FRAMEWORK**  
1.1. IMPROVEMENT OF THE NORMATIVE LEGAL FRAMEWORK (3/6)

#	Title	#	Activity	Type	Priority	Lead Department	St. at	Time line
21	Draft Law of the Republic of Azerbaijan "On placement of electronic communication networks in infrastructure facilities"	4.1	4.1. Definition and implementation of technical regulations and guidelines	P	High	Electronic communication	LP	25
22	Preparation of a new Postal law	1.4	1.4. Preparation and adoption of the new Postal Services Law and associated regulations and procedures	P	Medium	Postal services	LP	25
23	Preparation of new regulations, harmonization measures after the approval of the law on Postal	1.4	1.4. Preparation and adoption of the new Postal Services Law and associated regulations and procedures	P	High	Postal services	NL	26
24	Coordination of the draft "REQUIREMENTS for the organization of express mail service and the operation of postal business points" with relevant institutions and taking measures for registration in the Ministry of Justice	/	/	O	/	/	E	/
25	Adaptation of the rules for connecting to a public network - requirements for vendors	4.1	4.1. Definition and implementation of technical regulations and guidelines	P	High	Electronic communication	NL	26
26	Preparation of guidelines for the design and construction of fiber optic lines	4.1	4.1. Definition and implementation of technical regulations and guidelines	P	High	Technical regulation	LP	25
27	Preparation of changes to the rules related to the authorization process of items with restricted out circulation	4.2	4.2. Improvements to equipment type approval and procedures	P	High	Technical regulation	NL	25
28	Drafting of a normative legal act on network stability	4.1	4.1. Definition and implementation of technical regulations and guidelines	P	High	Technical regulation	NL	26
29	Draft amendment to the rule on mobile number portability	4.1	4.1. Definition and implementation of technical regulations and guidelines	P	High	Technical regulation	LP	25
31	Improvement of rule No. 22 - Rules for the allocation, registration, use and determination of fees for radio frequencies.	1.2	1.2. Definition and implementation of the public telecommunication services regulation, authorization and/or licensing frameworks	P	High	Spectrum management	NL	25

Legend: Type (P: Project, O: Operation), Priority (Low, Medium, High), Status (NLS: not started, E: Executed, LP: in progress, /: to be completed)

A user's guide has been created to help the units navigate in the key goals, actions, and priorities

# Support NRA Data Collection and Analysis: Current status

**Objective:** Review and develop policies and regulations for a pro-competition, pro-investment enabling environment

**Activities:**

1. Legal & regulatory advisory to improve enabling environment
2. Targeted assistance to Azerbaijan to develop regulatory strategy
3. **Support to improve NRA Data collection and analysis**

**Objective**

- Strengthen regulatory functions and decision-making through **improved data practices**
- **Institutionalize data** as a strategic asset within telecom sector regulators
- **Support organizational capacity building**
- Align local regulatory practices with international and EU best practices

**Status:** Contracting underway

# Potential areas of just-in time advisory and support in 2026

## **Armenia:**

- Assessment of government network topology to identify efficient solutions
- Evaluation of connectivity quality and coverage along major highways to support trade and logistics

## **Azerbaijan:**

- Advisory on Internet Exchange Point (IXP) implementation

## **Armenia, Azerbaijan, Georgia:**

- Advisory on broadband mapping implementation

## **Moldova & Ukraine:**

- Moldova: New or targeted analyses (to be defined)
- Ukraine: Amendments made to be included in Workstream 2

## **Regional (South Caucasus):**

- Identification of good practices and commercialization options for leveraging electricity transmission operators' fiber optic infrastructure to develop geo-redundant middle-mile networks

# Thank You

