



REPORT

on

26th EaPeReg Plenary meeting

11–12 November 2025 Riga, Latvia (hybrid event)

Day 1

Opening Session and Welcoming Remarks

The 26th EaPeReg Plenary Meeting opened with welcoming remarks from **Ms. Dana Radionova**, who greeted participants attending in Riga and online. She underlined EaPeReg's long-standing cooperation and its key role in promoting regulatory development, broadband deployment, 5G, and market governance across the region. She stressed the importance of continuity, expert exchange, and collaborative progress as the network approaches its 2026 milestones.

Representing the EaPeReg Chair in 2025, **Mr. Jeyhun Huseynzade** thanked the Latvian hosts and reaffirmed Azerbaijan's commitment to contributing actively to the network's work. He highlighted the role EaPeReg plays in strengthening digital development and effective regulation across the Eastern Partnership.

Joining online from the European Commission (EC), **Mr. Thibault Charlet** emphasized that the EC is extremely happy to support the network throughout 13 years of successful and extensive cooperation. He also stressed that the EC would continue to support EaPeReg in terms of the organisational/administrative matters, as well as via the technical assistance provided by EU4Digital. This cooperation with the EaPeReg is particularly important as it's fully in line with the EC policy priorities for the region. Mr. Charlet stressed that digital connectivity is now at the core of the EU's regional agenda. He outlined the new EU Strategic Approach to the Black Sea, which identifies connectivity as one of three strategic pillars, and explained the EU's work on an ambitious cross-regional connectivity agenda connecting the EU, Eastern Partnership, and Central Asia. As part of this, preparations are underway for a Regional Digital Economy Package, which will include hard and soft connectivity investments, including backbone infrastructure, broadband networks, and secure 5G. He noted that the package is planned for presentation at a possible Eastern Partnership Digital Summit in 2026. He also encouraged progress on two long-standing regional initiatives: the Regional Spectrum Agreement (RSA) and the Regional Roaming Agreement (RRA), both areas where the EU remains ready to support.

The floor then passed to **Ms. Verena Weber**, Director of the BEREC Office, who reaffirmed the strong partnership between BEREC and EaPeReg. She noted the rapid broadband and 5G development visible in several EaP countries and stressed the shared challenge of deepening fibre deployment and progressing toward gigabit targets. Ms. Weber reflected on BEREC's close cooperation with the EC on the upcoming Digital Networks Act (DNA) and highlighted BEREC's view that simplification of regulation must not be mistaken for deregulation. She also expressed BEREC's readiness to take on

additional tasks under the future DNA and invited EaPeReg to signal areas where deeper cooperation would be beneficial.

Progress Update: EU4Digital Telecom Rules

The meeting then moved to a detailed progress update from **Mr. Andrejs Dombrovskis**, Telecom Rules Lead of EU4Digital. He presented the status of EU4Digital activities as the initiative enters its final operational period before expiring in mid-2026. These activities span roaming, spectrum, broadband monitoring, regulatory governance, 5G private networks, and bilateral support to Moldova and Ukraine. He provided a substantial update on several major deliverables:

- **Private 5G Networks** – The regional analysis and country-level roadmaps have been completed, with focus on identifying realistic use cases and the regulatory conditions needed for deployment (there is a clear role for policymakers to allocate specific spectrum bands for industrial use cases – AI, low latency networks).
- **RSA** – Work continues, with an emphasis on establishing a shared baseline across countries and achieving progress by late 2025. *Note:* While Moldova and Ukraine are moving toward the EU “Roam Like at Home” (RLAH) area, a Regional Agreement remains necessary to cover connectivity between EaP countries (e.g., Moldova-Ukraine relations outside the EU framework).
- **RRA** – Most countries are ready to sign, but finalization awaits confirmation from Ukraine.
- **Wholesale Voice Call Termination Market Analysis** – A regional analysis has been completed. Due to market structures (often one large incumbent vs. many small operators), a differentiated remedy approach was agreed upon. Full obligations are proposed for operators with >50% market share (fixed), while lighter remedies apply to smaller players. Mobile markets generally warrant full obligations for all. Next steps – launching national consultations where decisions are not yet adopted.
- **Broadband Market Analysis** – For the first time, a full regional review has been performed. Countries show diverse market structures: effective competition in Baku but not the rest of Azerbaijan, SMP findings in Georgia, fragmentation in Ukraine, and geographically concentrated SMP in Moldova. Technology: fiber presence is strong; 5G is not yet seen as a full substitute for fixed broadband but may become one.
- **Broadband Monitoring and DESI-aligned indicators** – Annual data validation has matured significantly, shifting discussions from raw figures to methodology, ensuring harmonization ahead of upcoming EU Digital Decade monitoring changes.
- **Bilateral & Legislative Support:** for Moldova – Roaming package and Electronic Communications Law adopted. Both for Ukraine and Moldova – ongoing work on transposing the Digital Services Act (DSA) and Digital Markets Act (DMA).

Following the presentation, **Mr. Juris Rencis (Latvia)** expressed strong hope for the continuation of EU4Digital cooperation beyond the mid-2026 expiration date, citing its critical value for the Spectrum Expert Working Group (SEWG). **Mr. Sergiu Gaibu (Moldova)** supported the call for continued support. He shared Moldova’s experience, noting that voluntary roaming implementation with the EU served as an excellent preparation exercise. He emphasized that regulatory harmonization is essential to support the infrastructure investments planned under the new EU Regional Economic Package.

Expert Working Group (EWG) Reports

Roaming Expert Working Group (REWG)

Ms. Zaruhi Stepanyan, Chair of REWG, presented the group's 2025 achievements. She reported progress on the RRA, the finalisation of the wholesale voice call termination market analysis, and discussions about integrating data collection tools into the group's future work with potential coordination with World Bank initiatives. She reiterated that RRA remains the top priority, especially with Moldova and Ukraine's transition towards RLAH conditions with the EU.

In the subsequent discussion, Moldova shared its experience of pre-accession roaming alignment, emphasising the political and social benefits of improved connectivity and encouraging swift finalisation of the regional agreement.

Independent Regulators & Broadband EWG (IRB EWG)

Ms. Zaruhi Stepanyan then delivered a second report as Acting Chair of the IRB EWG. She outlined the group's activities, including a workshop in Chisinau on open internet, quality of service, and complaint-handling systems; the annual broadband data validation cycle; and the preparation of the regional broadband market analysis. She also noted progress in monitoring NRA independence and underlined the importance of maintaining this assessment to support EU-approximation efforts. She also expressed her hopes for the continuation of the EU4Digital initiative for further implementation of not only effective analysis (which is done by the NRAs) but as well as importance of usability and usefulness of further recommendations and conclusions proposed for the EaP NRAs.

A short exchange followed on the relevance of continuing NRA-independence evaluations. **Mr. Huseynzade** (Azerbaijan) queried the necessity of the NRA independence assessment given the existence of the ITU Regulatory Tracker.

Mr. Dombrovskis clarified that the EU4Digital assessment measures against the specific baseline of the EU *acquis* and institutional requirements (financial viability, dismissal procedures), which differs from the ITU self-assessment model.

Spectrum Expert Working Group (SEWG)

The final presentation of the morning came from **Mr. Juris Rencis**, Co-Chair of the SEWG, who summarised the group's recent technical meeting. He reported broad participation across the region and contributions from ITU, RSPG, BEREC, CEPT and several EU regulators. Key topics included the upper 6 GHz band, developments in 26 GHz and sub-700 MHz, satellite-to-device licensing, and national approaches to spectrum renewal and future 5G/6G planning. He outlined the group's priorities for 2025–2026: advancing the RSA, aligning national auctioning strategies, supporting WRC-27 preparation, and issuing a questionnaire to refine the workplan.

Following closing remarks, the morning session concluded with acknowledgement of the progress made across all expert groups and the importance of sustained collaboration and EU support.

Session on International Cooperation

The afternoon session of the Plenary focused on international cooperation, highlighting how EaPeReg's partnerships with global and regional organisations strengthen collective regulatory capacity and support the region's digital transformation. The session opened with **Ms. Nataliia Lado**, who emphasized that cooperation with multilateral partners remains essential for addressing current challenges and identifying new opportunities in digital regulation.

Cooperation with International Communication Union (ITU)

The first speaker, **Mr. Jaroslav Ponder**, Head of the ITU Office for Europe, delivered an extensive overview of ITU's collaboration with EaPeReg. He recalled that this cooperation began with the signing of the Memorandum of Understanding and has since deepened, including through a joint declaration with Euro-Mediterranean Regulators Group (EMERG) which created a platform for coordinated activities. Over the past year, ITU and EaPeReg have collaborated on several regional studies, organised joint sessions on broadband mapping and emergency telecommunications at European regulatory conferences (in North Macedonia regarding broadband mapping; in Montenegro regarding emergency telecommunications), and marked ITU's 160th anniversary together with EaPeReg and other platforms.

Mr. Ponder described various capacity-building initiatives that benefited EaPeReg members, including the October training in Cyprus on quality of service (QoS) and mobile network resilience, as well as EaPeReg participation in workshops on meaningful connectivity, infrastructure protection, and cybersecurity. He also noted ongoing technical assistance to Ukraine and Moldova, alongside a special conference on cybersecurity held in Krakow, and highlighted emerging topics such as digital accessibility for persons with disabilities – inviting EaPeReg members to attend ITU's first European event on this topic in Brussels (December 2025). He further announced the upcoming Regional Radiocommunication Seminar to be held in Athens in February 2026, Regional Development Forum (14 March 2026), underlining the importance of EaPeReg participation. Also, as it was noted by Mr. Ponder, the upcoming World Telecommunication Development Conference (WTDC) in Baku is to define the ITU mandate and regulator expectations. Concluding his intervention, Mr. Ponder stressed that cooperation works because activities are designed to meet the real needs of regulators, avoid duplication, and deliver concrete results.

Updates from EMERG

The next intervention was delivered by **Mr. Petros Galides**, Chair of EMERG and Deputy Commissioner of Office of Electronic Communications & Postal Regulation, Cyprus (OCECPR). He welcomed the strong partnership between EMERG and EaPeReg and outlined the group's recent developments. EMERG has secured new funding from the European Commission under DG MENA, allowing it to pursue a more ambitious work programme. He described EMERG's active participation in global events, including WSIS+20, GSR, and the regional regulatory forum in Budva (Montenegro). A cybersecurity workshop initially postponed due to regional tensions was successfully held later in the year in Jordan, demonstrating EMERG's resilience and commitment to capacity building. Mr. Galides reflected on the rapidly evolving nature of regulatory challenges, particularly in relation to digital security and artificial intelligence, noting that these can only be addressed through intensified international cooperation and cross-sector collaboration. He also outlined EMERG's strategic priorities: regulatory approximation across a diverse membership, capacity building, regional connectivity, institutional sustainability, and environmental sustainability. Ongoing initiatives include broadband mapping, joint analytical work with ITU and EaPeReg, the development of a regulatory "sandbox" for testing policy impacts, and the creation of a Digital Knowledge Hub to make regulatory data publicly accessible.

A short interactive discussion followed. **Ms. Lado** asked both ITU and EMERG representatives what makes regional cooperation effective and sustainable. **Mr. Ponder** emphasised open dialogue, clearly defined needs, and avoiding overlap between organisations. **Mr. Galides** added that cooperation depends above all on people – their professionalism, openness, and willingness to "break down silos". Representatives from Moldova and other countries thanked ITU and EMERG for their support, noting how valuable these partnerships are for a young regional platform like EaPeReg.

Global Informal Regulatory Anti-Fraud Forum (GIRAFF)

The session then moved to a presentation by **Mr. Johannes Myhre Vallesverd** of the Norwegian Communications Authority, representing the GIRAF. He introduced GIRAF as a fast-growing global group with 40 participating regulators from five continents, working collaboratively on operational solutions to combat telecom fraud. He explained that telecom fraud now accounts for substantial traffic volumes worldwide, with some operators reporting up to 30% fraudulent traffic, causing severe financial and emotional harm to consumers (global surveys indicate that 70-80% of the population has been approached by fraudsters in the last 12 months). GIRAF focuses on practical measures, particularly stopping spoofing, improving know-your-traffic practices, and sharing best practices. Mr. Vallesverd emphasised that spoofing can be significantly reduced through coordinated technical measures, as demonstrated by Finland and Norway. He encouraged EaPeReg members to join GIRAF, noting that the group has produced draft communiqué “Carry with Care” encouraging carriers/service providers to step up in the fight against fraudulent traffic and aims to adopt its first formal deliverable shortly. He acknowledged that GIRAF’s continuation beyond mid-2026 depends on whether more regulators take on leadership roles to sustain the initiative.

Several participants of the Plenary asked about participation structures and the role of different regulators. Mr. Vallesverd clarified that GIRAF is primarily composed of telecom regulators but also cooperates with bodies such as Interpol, UNODC, and major digital service providers. He invited EaPeReg members to join the upcoming meetings and contribute in particular to areas such as countering fraud on social media, especially considering that the current mandate expires in June 2026. Continuation requires active contribution and leadership from participating regulators.

Integration of Moldova and Ukraine into the EU Roaming Area

The final speaker in this session was **Mr. Stefan Tabareanu** from the European Commission’s DG CONNECT, who presented a comprehensive overview of the process through which Ukraine and Moldova were integrated into the EU’s RLAH area, effective from 1 January 2026. He explained that this integration is linked to both countries’ EU candidate status and follows provisions in their Association Agreements, which allow early access to sectors of the EU internal market. The Commission carried out a detailed assessment of both transposition of the EU roaming acquis and national implementation capacity. After both countries rapidly addressed remaining gaps and demonstrated sufficient readiness, the Council endorsed the Commission’s proposal in mid-2025, and the Joint Association Bodies formally adopted the decisions shortly after. Mr. Tabareanu emphasised that once integrated, Ukraine and Moldova are treated fully as part of the RLAH internal market in their relations with EU Member States, though this does not extend to relations between Ukraine and Moldova themselves nor to EFTA countries. Participants welcomed this development, with representatives from Armenia and Moldova emphasizing its practical benefits and expressing their wish to continue regional negotiations so all EaP countries can eventually experience such roaming conditions.

The session closed with remarks from **Ms. Lado**, who highlighted the strong interest in expanding cooperation with international partners, the growing relevance of anti-fraud collaboration, and the substantial progress in aligning regional roaming frameworks.

Session on National Initiatives, Developments and Projects

The afternoon session opened with **Ms. Nataliia Lado**, who introduced the segment dedicated to national updates and the exchange of good practices. The session was based on the information shared during the roundtable discussion on the NRAs’ Insights on Plans, Ongoing Projects and Priorities that took part during the previous plenary meeting (was introduced as an activity in 2024) highlighted how

NRAs across the region are expanding their mandates and directly engaging with citizens to strengthen digital inclusion, consumer protection and digital awareness.

Office of Electronic Communications (UKE), POLAND: New Competencies and Digital Awareness

The first presentation was delivered by **Ms. Anna Rogozinska** from UKE, who outlined the extensive new competences assigned to regulator in 2025. These include responsibilities under the DSA, where the President of UKE serves as Poland's Interim Digital Services Coordinator, engaging in EU-level enforcement, cross-border cooperation, and participation in eight dedicated working groups on issues such as content moderation, data access, consumer protection, child safety and online marketplaces. She detailed UKE's preparations for national implementation: amendments to Polish legislation, creation of a new Digital Services Department, operational procedures, complaint-handling mechanisms, and public awareness campaigns.

Then **Ms. Rogozinska** presented UKE's new tasks under the European Accessibility Act, explaining the new accessibility requirements for products and services such as ATMs, e-commerce, electronic banking, telephony and passenger transport. For this role UKE established a new Department of Market Surveillance, which – in 2025 alone – conducted hundreds of inspections, product tests and customs interventions. The final part of her presentation focused on UKE's extensive digital awareness and consumer protection campaigns, including the flagship programme “*Virtual World for All*”, which trains people with intellectual disabilities, seniors and young people on online safety, accessibility and assistive technologies and “*I Click Sensibly*”, an online safety campaign reaching over 170,000 students.

Communications Regulatory Authority of Lithuania (RRT): “No One is Left Behind”

The next speaker, **Ms. Gintarė Ribinskienė** from RRT, presented an award-winning national programme “No One is Left Behind”, aimed at improving digital literacy among older citizens aged 55-74. She explained that Lithuania – one of the fastest ageing societies in Europe – faces extremely low digital skills among seniors. In response, the regulator created a large-scale training network involving 3,000 partners, including municipalities, libraries, private companies, and NGOs. The initiative offers weekly online sessions and in-person trainings across cities, villages and remote regions, with a wide range of topics from accessing e-health services to using mobile apps, online shopping, cybersecurity and AI awareness. In two years, the programme has trained nearly 20,000 seniors and over 2,000 children, while also launching a new “digital ambassadors” model in libraries when library employees are trained to act as local educators. The project aims to train 176,000 people by 2028 and has gained national recognition, as well as being selected as a finalist in the European Digital Skills Awards.

In the discussion that followed, participants emphasised the value of such people-centred initiatives. **Ms. Lado** asked both presenters about the impact of these activities on the public perception of NRAs and on regulatory policymaking and their overall visibility. Both speakers underlined that direct engagement with citizens is invaluable: it raises awareness of consumer rights, strengthens trust in the regulator, and provides early insight into market problems that can inform future decisions. Delegates also explored practical aspects of implementation, cooperation with partners, content development and local outreach. Lithuania noted that partners join because they gain visibility and directly support local communities; Poland emphasised the importance of using feedback from citizens to develop new campaigns and guidelines.

Several regulators, among them the Czech Telecommunication Office, shared that they run similar initiatives and confirmed the strong demand for consumer-facing education. The World Bank representative also highlighted that addressing digital usage gaps is essential to inclusive digital transformation.

World Bank Update: Phase II of EU4Digital Support

The session continued with a detailed presentation by **Mr. Himat Singh Sandhu** of the World Bank, who outlined the Bank's work under EU4Digital Phase II. He described global evidence showing the strong links between broadband, economic growth, employment, inclusion and resilience. He summarised the Bank's two major workstreams:

1. **Identifying infrastructure investment gaps** and building business models to achieve universal high-speed broadband across the Eastern Partnership;
2. **Supporting legal and regulatory reforms**, including infrastructure sharing, spectrum management, 5G, mapping, and data collection frameworks. He also presented early analytical findings based on 175 million speed tests, demonstrating infrastructure gaps and quality disparities across EaP countries, and provided examples of ongoing country missions and consultations:
 - **Armenia:** Support on infrastructure sharing implementation and 5G spectrum management.
 - **Azerbaijan:** Operationalizing new electronic communications laws and developing a 3-year action plan for ICTA.
 - **Data Collection:** A new project launching to improve data collection methodologies across the region (aligned with EU standards).
 - **Cross-Sectoral Sharing:** Exploring "Just-in-Time" advisory on using energy transmission and railway fiber for telecom backhaul (referencing the Baltic Optical Highway model).
3. He noted the growing emphasis on data-driven regulation and on enhancing network resilience, including through diversification of backbone routes.

Participants welcomed the analysis and expressed appreciation for the Bank's continued support. Moldova highlighted the practical value of sharing project experiences, while the World Bank reaffirmed its commitment to the region.

EaPeReg Leadership Report

Next, **Ms. Dana Radionova** presented the EaPeReg Leadership report for 2025. She noted progress in updating the EaPeReg website, creating a calendar of events, and conducting a full review of the Protocol of Cooperation, which had not been revised for seven years. She proposed postponing approval until remaining articles are finalised with incoming leadership, after properly discussing and agreeing upon current proposals and comments received. She also highlighted EaPeReg's international engagement at the GSR, ITU workshops, and the Regional Regulatory Forum. A significant part of her report addressed the situation regarding the European Commission's indication that Georgian representatives (ComCom) could only join EaPeReg meetings virtually and without speaking rights. **Ms. Radionova** termed this unacceptable, noting that EaPeReg is a technical, non-political platform where ComCom is a founding and highly active member and invited the Plenary participants to express their opinion.

Multiple regulators – including representatives from Armenia, Czech Republic, Latvia, Moldova – voiced strong support for Georgia's continued full participation:

Armenia: Stressed that no mandate exists to exclude a member country and called for a common position to resolve the issue.

Czech Republic: Reaffirmed support for Georgia, stating that at the expert level, there should be no restrictions. They believe this stems from a misinterpretation of rules at the working level.

Latvia: Highlighted that the Spectrum group is chaired by a Georgian representative; excluding them would jeopardize the group's functionality.

Moldova: Emphasized the need for a technical solution to maintain cooperation.

The Plenary expressed strong solidarity with ComCom and mandated the leadership to seek an urgent resolution with the European Commission to restore full participation rights for Georgian experts, as maintaining Georgia's active role is essential for the network.

Elections of 2026 EaPeReg Leadership

The session concluded with the election of EaPeReg leadership for 2026. With no objections, **Armenia** (PSRC) was confirmed as Chair and **Czech Republic** (CTU) as Vice-Chair for 2026. **Mr. Armen Hunanyan** (Armenia) and **Ms. Zuzana Zifaldova** (Czech Republic) accepted the results of the elections, acknowledging the challenging geopolitical times but committing to the continued development of the network. Both expressed gratitude and commitment to supporting the network through a challenging but important year.

BEREC Work Plan for 2026

Representing BEREC, **Ms. Katja Kmet Vrčko** joined remotely to present the draft BEREC Work Plan 2026, namely its strategic priorities:

- Full Connectivity & Digital Single Market – Opinions on relevant markets recommendation, state aid access conditions, and Gigabit Infrastructure Act guidance.
- Open Digital Ecosystems: Implementation of the Data Act and DMA, and analysis of AI's impact on competition.
- Empowering End Users – Accessibility Act implementation and switching/contract termination rules.
- Sustainable & Secure Infrastructure – Sustainability indicators, network resilience (NIS2 cooperation), and anti-fraud best practices.
- BEREC Capabilities: Input to the legislative review of the DNA.

EaPeReg 2026 Work Plan & Closing Remarks

Ms. Zaruhi Stepanyan presented the preliminary schedule of core activities for 2026:

- Spring 2026: EWG meetings in Hungary (IRB/Roaming) and potentially a physical Spectrum meeting (location TBD pending resolution of the Georgia issue).
- Spring Plenary (27th): To be hosted by PSRC in Yerevan, Armenia (May/June).
- Autumn 2026: EWG meetings in Croatia; Autumn Plenary (28th) hosted by CTU in Prague, Czech Republic.

Ms. Dana Radionova officially concluded Day 1 of the Plenary thanking all of the participants (online and on-site) for their valuable input and extensive and fruitful discussions. Participants were invited to a Workshop on EU Digital Decade and Digital Infrastructure Regulation commencing the following morning.

Day 2

WORKSHOP on EU Digital Decade and Digital Infrastructures Regulation in the EU and the Eastern partner countries

The second day opened with welcoming remarks from **Ms. Dana Radionova**, who thanked the EU4Digital team and expressed confidence in the workshop's value.

Mr. Paulius Zostautas outlined the workshop's purpose. For four years, EU4Digital has supported Eastern Partnership countries in collecting broadband data aligned with the EU's DESI methodology. As the EU moves to the Digital Decade framework, the group has been considering whether to update the EaP methodology. Earlier IRB EWG meetings and last year's EaPeReg Plenary agreed that any changes would apply from the 2025 cycle. He presented the agenda: an overview of the EU's monitoring approach, updates on the Digital Decade, upcoming regulatory changes, and a discussion on the future of EaP broadband monitoring.

EU approach on the collection of digital infrastructure indicators for the purposes of Digital Decade monitoring exercise

The first presentation was delivered by **Mr. Andrejs Dombrovskis**, who set out the current status of broadband data collected from EaP countries and explained differences between EU and EaP data collection approaches. He emphasised that while the joint DESI-aligned exercise has improved significantly since 2021, the evolution of EaP markets raises questions about whether indicators should now be updated. He outlined how the current methodology draws on the EU DESI framework but also incorporates national specificities where needed – for example, an additional indicator introduced for Georgia due to the local market structure, where data-only mobile offers are sold as add-ons rather than separate SIM subscriptions.

Mr. Dombrovskis presented country-specific observations:

- **Azerbaijan:** Strong fibre expansion driven by copper switch-off policies. High-speed broadband rising. Market restructuring and the Online Azerbaijan project remain key trends.
- **Georgia:** High mobile data usage. A national practice - mobile data add-ons - raises penetration levels. Work continues on broadband strategy, 5G preparation, and remote connectivity via Starlink.
- **Moldova:** Steady progress, including growth in very high-speed broadband. Further improvements depend on full 5G harmonisation. Recent advances include RLAH integration, a new EU-aligned telecom law, and spectrum alignment.

A regional analysis followed, showing that EaP countries collectively meet the target of 80% household broadband coverage, though speed availability varies. The region is relatively advanced in fibre deployment compared to parts of the EU, largely because newer deployments favour fibre over copper. Mobile broadband take-up varies significantly, with Georgia representing a special case due to the structure of mobile offers. Mr. Dombrovskis then explained the EU's Digital Decade targets – universal gigabit connectivity and full 5G coverage by 2030 – and described how national and EU trajectories are monitored annually. He encouraged participants to reflect on whether aligning with EU monitoring methods would add value given the current stage of market development in EaP countries.

A short discussion followed. Participant from Azerbaijan asked whether the indicators could be harmonised with ITU methodologies, noting the risk of confusion when different organisations use different definitions. The speakers clarified that the EaP framework mirrors the EU's regulatory structure, which is linked not only to data collection but also to the wider EU legislative system. Participant from Armenia added that countries follow EU indicators because of national commitments

linked to EU alignment processes. Participants also highlighted the importance of maintaining continuity in methodology to keep indicators comparable over time.

Representative from the EU side emphasised that even within the EU, defining KPIs is challenging. It was noted that the focus has shifted from comparing Member States with each other toward observing a country's progress over time, and that some EU targets, such as the VHCN KPI, do not fully reflect national realities. It was advised EaP countries to prioritise indicators that are practical and meaningful for their own markets, while maintaining complementarity with EU processes.

State of Play: EU Digital Decade Policy – monitoring and relevance for EaP countries

The session then continued with presentations on EU approaches to infrastructure monitoring. **Ms. Begoña Garcia-Mariñoso** from CNMC and as BEREC representative provided an in-depth overview of the Digital Decade monitoring system and the regulatory and technical considerations behind broadband mapping. She explained the evolution of EU targets, the introduction of legally binding Digital Decade KPIs in 2022, and the role of DESI as the formal monitoring tool. She described BEREC's work on harmonising broadband mapping across Member States, including the move towards building-level data and common definitions for coverage, VHCN classification, and mobile broadband measurement. She highlighted the complexity of achieving comparability across countries and explained ongoing challenges such as inconsistent definitions of households or rural areas. Nonetheless, she emphasised that the EU has made major progress in improving data reliability and granularity, which now informs both policy decisions and EU funding mechanisms.

This was followed by a member state perspective from **Ms. Aoife Moloney** from ComReg, who explained how Ireland has built a comprehensive data collection and validation system over the past several years. She described the country's use of a unique national address code (Eircode) to collect data at a highly granular level, enabling detailed broadband mapping, accurate overlap identification, and precise take-up calculations. She outlined ComReg's custom-built portal for automated data submission and validation, their internal and external reporting tools, and the integration of Article 22 guidelines into the national system. Ms. Moloney highlighted practical challenges, particularly around educating policymakers to avoid cross-country comparisons, and shared how the granular dataset has supported market analysis, switching analysis, and detailed public broadband checkers.

Follow-up Discussion

Participants asked about the time and effort required to build such a system. The Ireland experience showed that development requires sustained engagement with operators, significant technical coordination, and continuous iteration, but the long-term benefits in regulatory capacity and data reliability are substantial.

BEREC Perspective on the DNA and Regulatory Framework

Dr. Annegret Groebel from BNetzA presented BEREC's input to the European Commission's call for evidence on the Digital Networks Act. She began by emphasising that the Commission's recent analysis of EU connectivity markets is overly pessimistic. According to BEREC, Europe performs well in both fixed VHCN and mobile 5G coverage when compared internationally, and its competitive markets have contributed to significantly lower consumer prices than in other developed regions. From BEREC's perspective, this strong performance demonstrates that the current pro-competitive regulatory framework is functioning effectively, and therefore no radical restructuring is necessary.

On the topic of simplifying legislation, Dr. Groebel stressed the need to distinguish genuine simplification from deregulation. While unnecessary administrative burden should be removed, *ex-ante*

regulation is still required in most Member States to preserve competitive retail markets. She also addressed spectrum policy, noting that spectrum remains a matter of national sovereignty, and that centralising control at EU level would not contribute to more efficient or competitive outcomes. BEREC also does not support extending licence durations beyond current norms.

A key theme of her presentation was the need for the new DNA to broaden its scope to account for modern digital infrastructures, including cloud-based and virtualised network elements. She also addressed long-standing debates around IP interconnection and reiterated BEREC's view that this market continues to operate efficiently without regulatory intervention, though close monitoring remains important.

Dr. Groebel reviewed BEREC's position on access regulation, noting that SMP-based *ex-ante* regulation remains essential, even in fibre-based markets. Symmetric measures can complement SMP regulation but cannot replace it. She also cautioned against premature deregulation, especially during migration from copper to fibre.

European Commission Perspective on the DNA

Mr. Andreas Roever from European Commission presented the EC's view on the development of the Digital Networks Act, which is currently being prepared and expected to be published in early 2026. He noted that the policy context has changed significantly since the EECC was adopted in 2018, especially given new geopolitical challenges, the need for a competitive European industry, and growing calls for simplification of regulatory processes.

His overview of stakeholder feedback indicated a high degree of diversity in views, but several key themes emerged. Stakeholders across the EU support reducing administrative burden, but regulators underline the need to retain sufficient data and tools for market assessment. Consumers favour simplification but insist that high levels of end-user protection must remain intact.

In the area of spectrum, operators favour more harmonisation and predictability, including easier renewals and longer licence durations. Member States, however, remain cautious and stress the need to respect national circumstances. There is growing interest in satellite-based connectivity and potential EU-wide approaches to satellite authorisation.

When discussing access regulation, Mr. Roever confirmed that the debate remains divided between infrastructure owners and access seekers. Support for fibre deployment is universal, though views differ on the pace and conditions of copper switch-off. He also raised the need to consider networks more broadly as ecosystems that include cloud, software, and private backbones, noting that the Commission sees a need to strengthen cooperation mechanisms across the connectivity value chain.

He concluded by emphasising that the DNA will be a regulation, directly applicable in EU Member States, and that its development should be closely followed by Eastern Partnership regulators, even though implementation for them will be gradual and aligned with national agendas.

Follow-up Discussion

Discussion focused on the purpose of the Digital Networks Act (DNA) and its implications for smaller markets and Eastern Partnership countries.

A first question asked whether the DNA aims to review the regulatory framework to strengthen both EU-wide competition and the EU's global competitiveness. The response clarified that the DNA is primarily an internal market initiative. Its focus is ensuring that European industry can compete effectively within the EU, where global players already operate. Any global benefits are secondary to this core objective.

A follow-up question addressed the impact of strong pan-European or global operators on smaller economies and rural areas. The reply stressed that rural connectivity and inclusiveness remain key policy

goals. Infrastructure rollout, digital decade targets, end-user protection, and the shift to fibre and advanced mobile networks all remain priorities. The speaker also acknowledged the significant progress made by Eastern Partnership countries and encouraged continued alignment with EU best practices.

The exchange closed with agreement to maintain dialogue once the DNA proposals are released. The workshop then shifted back to its main task: reviewing existing indicators and considering potential updates for the next Eastern Partnership broadband monitoring cycle.

Initial discussion on broadband access monitoring data collection questionnaire for 2025 and summary of the workshop

Mr. Andrejs Dombrovskis closed the workshop by summarising the main discussions and outlining next steps for broadband monitoring in the Eastern Partnership. He recalled that the workshop reviewed EU policy developments, the Digital Decade monitoring system, and the interaction between national regulators, BEREC, and the European Commission. The aim was to assess whether the current EaP framework remains effective and whether any adjustments are needed.

He compared the existing EaP indicators with the EU's Digital Decade metrics, noting that most relevant indicators are already included, while others - such as those related to edge computing - are not yet applicable in the region. He stressed that data should be collected only when it reflects real market conditions.

Fixed broadband indicators align well with EU practice. Mobile indicators differ because 4G still dominates in most EaP countries and early 5G deployment may create double-counting issues. EU metrics will continue to evolve but only changes relevant to the regional context should be adopted.

He emphasised that the current monitoring system functions well, providing four years of comparable data and capturing local market realities. There is no immediate need for changes unless countries identify clear benefits. One open question is whether to shift from annual to biannual data collection, as done in the EU.

Mr. Dombrovskis outlined two possible approaches:

1. Full alignment with EU methodology (not advised for now), or
2. Continuing a tailored EaP approach, updating indicators only when justified.

The second option remains preferred, supported by regular updates on EU developments.

Follow-up Discussion

Participants debated whether subscription-based indicators adequately show progress when coverage is already high. Some proposed giving stronger weight to coverage metrics. Others stressed the need for consistency across all EaP countries. Several supported gradually adding DESI-aligned indicators while keeping those that best reflect local market conditions.

It was noted that coverage and subscription measure different realities – network availability versus uptake – which may require complementary policies. The group agreed to continue discussions in expert groups and revisit potential adjustments in future cycles.