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EU4Digital Facility Activity Update

EaPeReG Plenary Meeting
(virtual), 3 December 2020



Funded under the EU4Digital
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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**

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%.



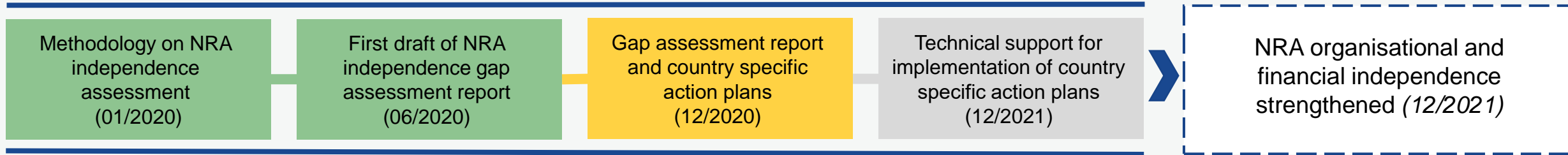
1 January 2026

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:

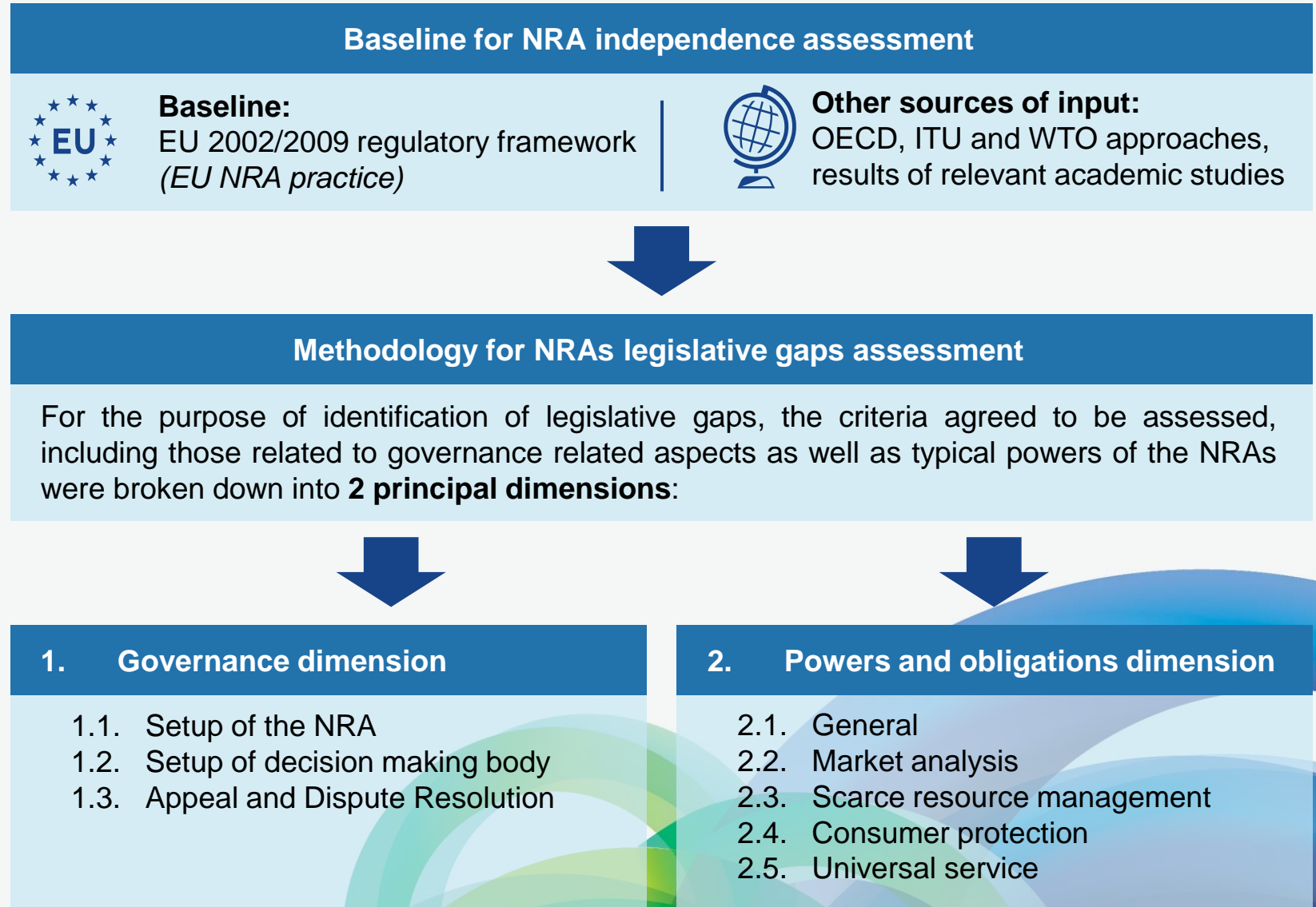


- **Gap assessment report & country specific action plans**
 - common assessment methodology approved
 - initial findings and observations prepared for each EaP country
 - final reports with recommendations are expected to be completed by the end of October 2020
 - country specific action plans to be 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 for harmonisation of with *acquis*
 - involvement of high level stakeholders and promotion of topic is critical for proper implementation

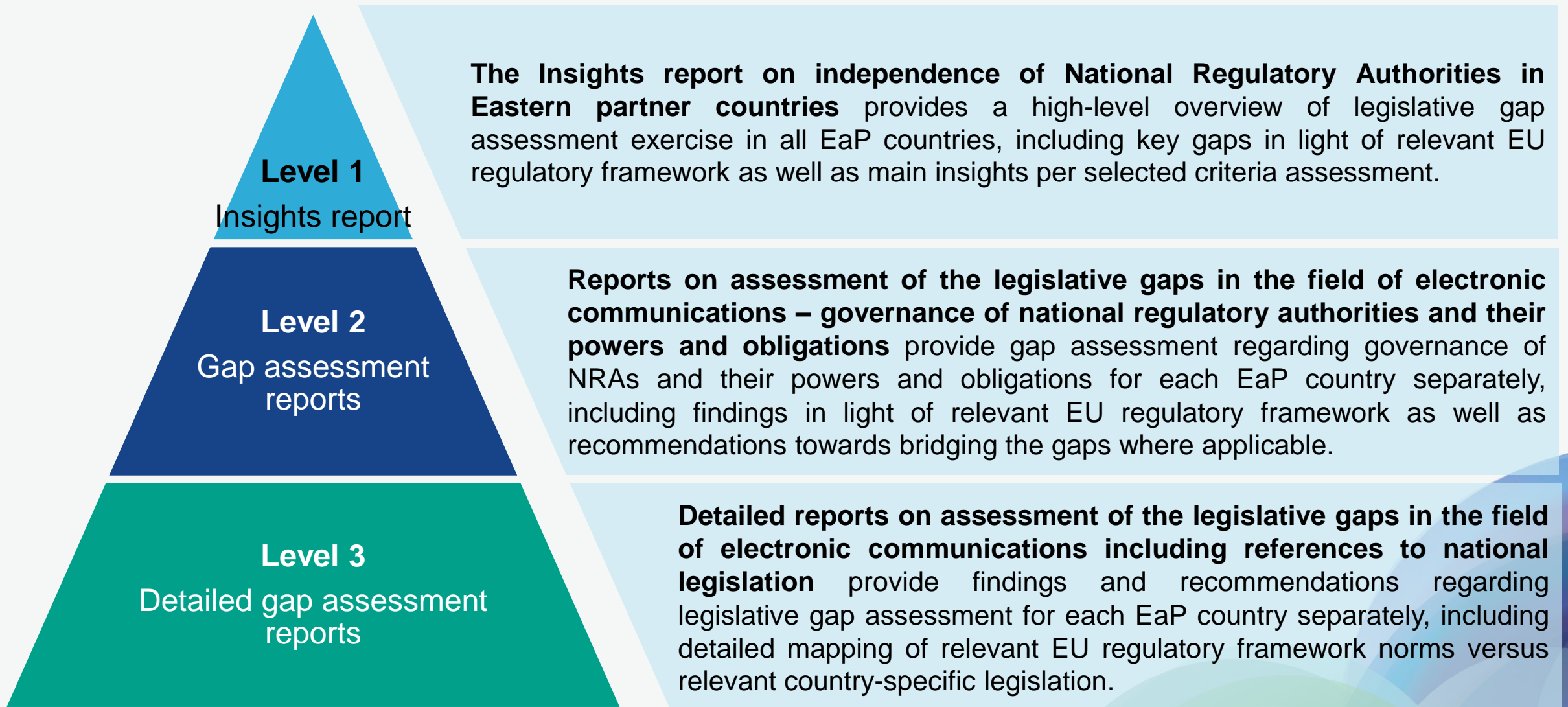
Methodology: dimensions and criteria assessed



Methodology on NRAs independence assessment for Eastern partner countries

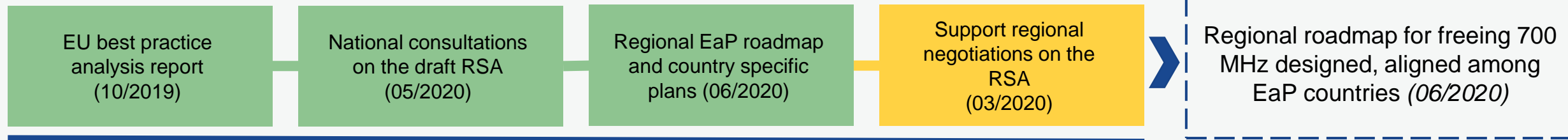


Three levels of gap assessment reports



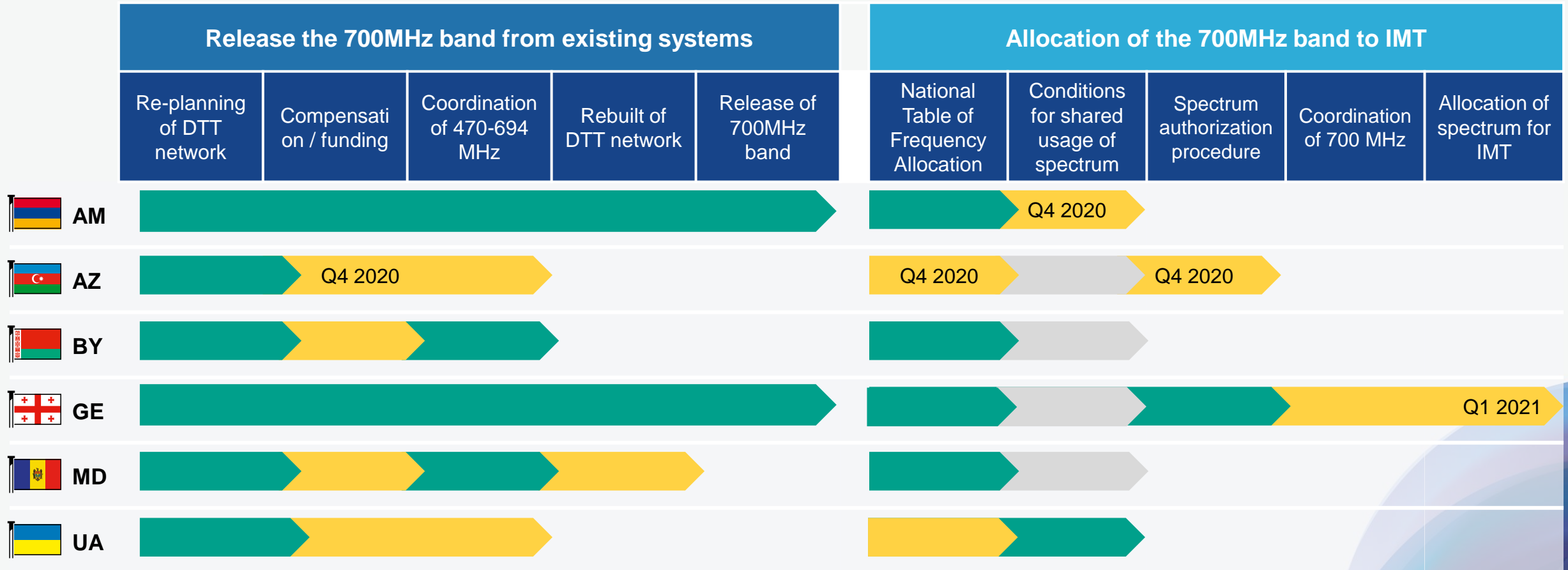
3. Freeing 700 MHz

State of play and plans:



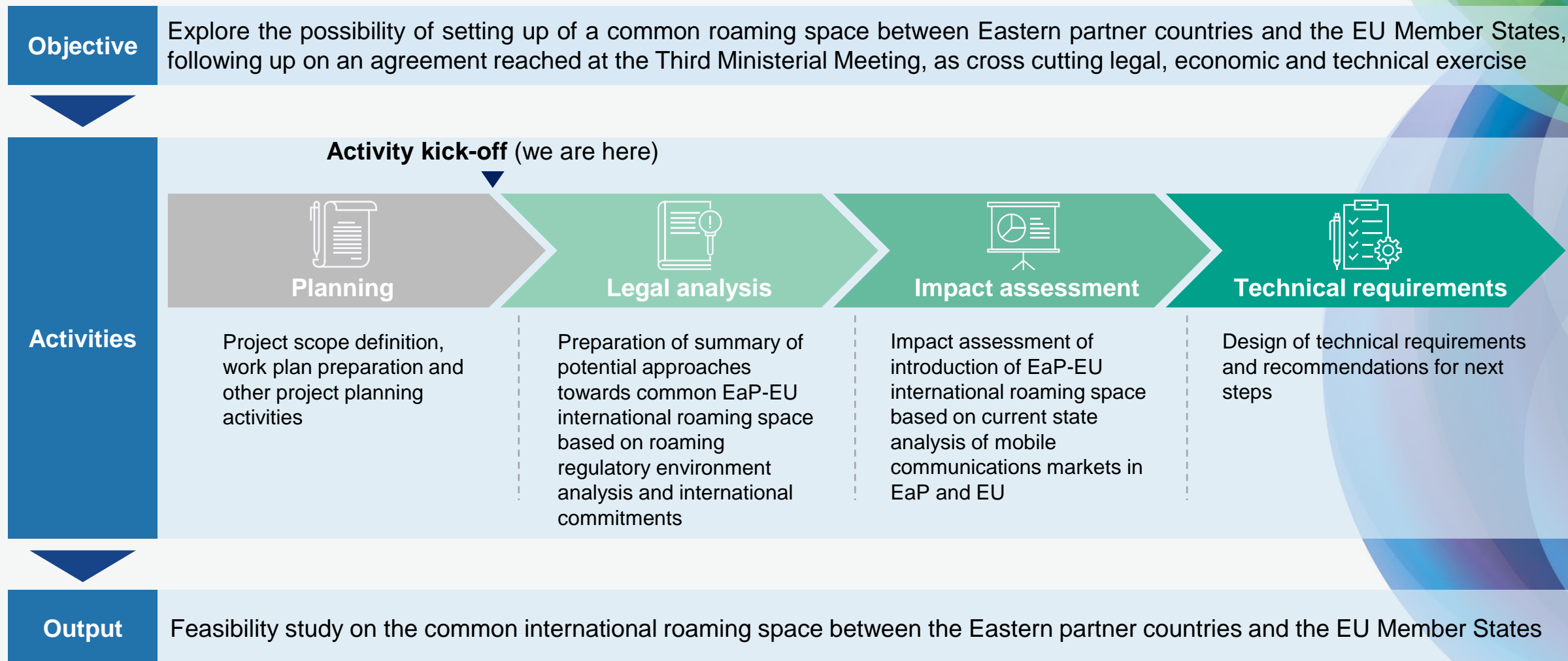
- **Implementation of the Regional EaP roadmap:**
 - handed over to Country representatives for implementation
 - current phase – ongoing technical support and on-demand consultations
 - it is recommended to accelerate roadmap implementation by introducing monitoring mechanism, enabled through SEWG and 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

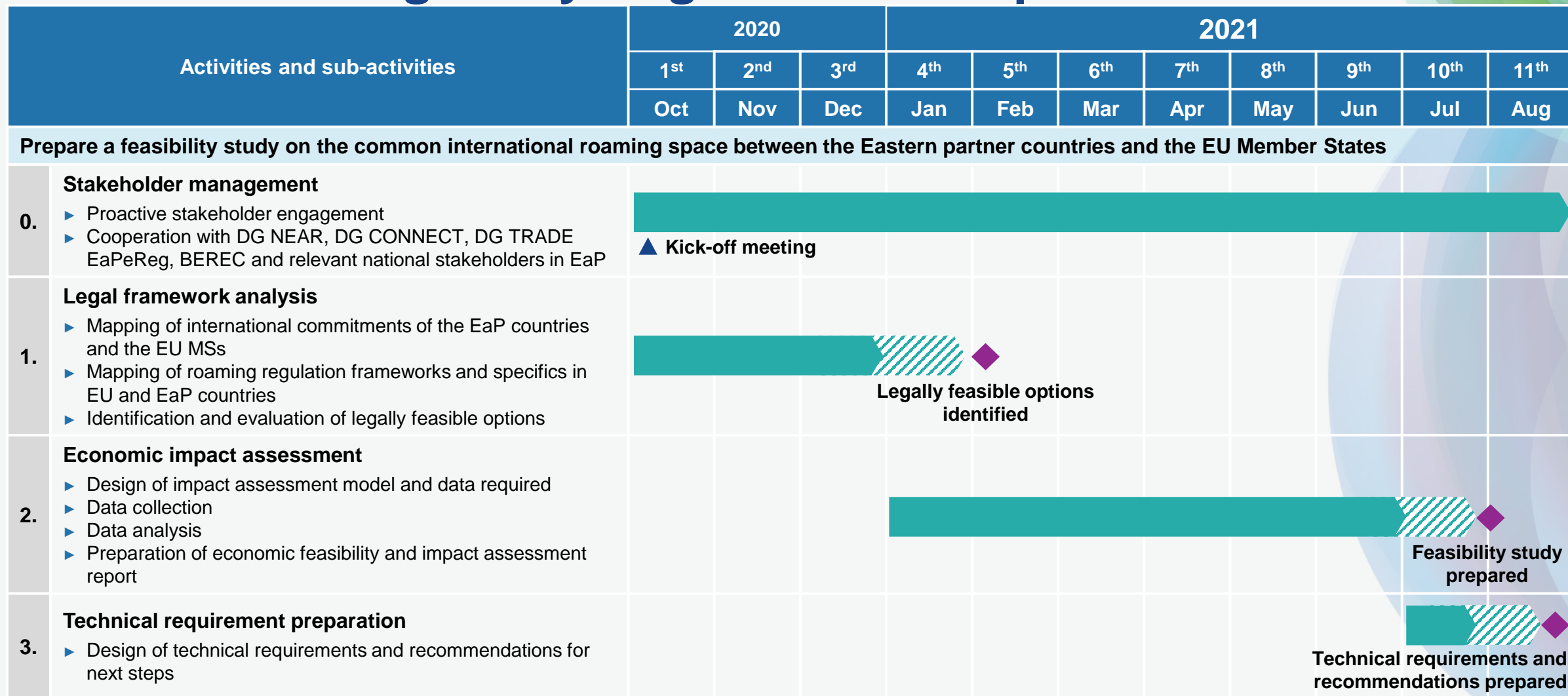


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4. EaP-EU Roaming study: scope and expected deliverables



EaP-EU Roaming study: high level work plan



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Legend:



Activity implementation



Alignment with relevant stakeholders



Results



Kick-off meeting

Stakeholder engagement approach

EaPeReg	<ul style="list-style-type: none">▪ Close collaboration with EaPeReg and its' Roaming expert working group (REWG) from the early beginning▪ All deliverables / decisions aligned with EaPeReg and its' REWG before communicating to the relevant national stakeholders in EaP countries
European Commission	<ul style="list-style-type: none">▪ All deliverables / decisions to be aligned with DG NEAR and DG CONNECT▪ Deliverables / decisions related to international commitments/legal feasibility to be also aligned with the DG TRADE
BEREC	<ul style="list-style-type: none">▪ All deliverables / decisions to be aligned with BEREC
National stakeholders of EaP countries (relevant ministries and NRAs)	<ul style="list-style-type: none">▪ All deliverables / decisions need to be aligned with NRAs and relevant ministries▪ Communication via REWG country representatives – they are expected to represent position of respective NRA / Ministry
National mobile network operators	<ul style="list-style-type: none">▪ To be engaged during the work products presentation and alignment with wider stakeholders▪ Communication via REWG country representatives



Key considerations for success



EaP and EU MSs cooperation and provision of data is essential

It is crucial that countries concerned would cooperate (both Eastern Partner and EU MSs), including commitment to provide mobile communications markets data, participation in the relevant stakeholder meetings and verification of the findings



Signing of RRA among EaP countries is one of underlying assumptions for further assessing feasibility of common EaP-EU roaming space

Regional Roaming Agreement (RRA) signing, which is expected to take place late 2020 or early 2021 shall bring Eastern partner countries' roaming regulation closer to the harmonization with EU international roaming regulatory framework and is a pre-requisite for common EaP-EU roaming area



Involvement of EaPeReg, BEREC, relevant European Commission services and national stakeholders in EaP countries is required

The work shall be carried out by the EU4Digital team with potential involvement of the experts of the REWG, representatives of the BEREC. It is also essential, that DG NEAR and DG CONNECT would be involved, when aligning the work products. For work to progress the involvement of relevant national stakeholders (NRAs and respective Ministries) is essential.



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

