OUTCOME REPORT

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1. INTRODUCTION

The GSR-20 Regional Regulatory Roundtable Discussion for Europe and CIS: The Regulatory Wheel of Change: Regulation for Digital Transformation was held virtually on 7 July 2020 from 10:00 to 11:30 CEST.

This webinar was organized within the framework of GSR-20, and aimed at engaging representatives of the National Regulatory Authorities from Europe and CIS countries, as well as other stakeholders to advance discussions on regulation for digital transformation in the post-COVID-19 era.

Special focus was dedicated to the role of NRAs in shaping an enabling environment for the development of resilient and secure digital connectivity for all. The COVID-19 crisis has emphasised, as perhaps nothing else could have, the vital importance of connectivity and of extending affordable access to as many people as possible, as fast as we can. Discussion, amongst many other topics were touched upon collaborative regulation, spectrum management, digital safety, as well as inclusiveness.

The meeting also provided a unique opportunity for presenting the process leading towards the elaboration of the GSR Best Practice Guidelines, being an outcome document of the Global Symposium for Regulators. During the meeting, emphasis was given to some items that from the regional point of view might be reflected in the 2020 edition of the Best Practice Guidelines (see BDT/DKH/RME/DM/150).

The meeting was held in English and Russian and also benefited from captioning services. Video recording and caption from the meeting are available at the event's website. In case of any queries, please do not hesitate to contact EURregion@itu.int.

2. OPENING ADDRESSES AND SETTING THE CONTEXT

Opening Remarks

In her opening speech, Ms. Doreen Bogdan-Martin, Director of the Telecommunication Development Bureau, ITU, welcomed delegates and opened the *GSR-2020 Regional Regulatory Roundtable Discussion for Europe and CIS* by reminding that 2020 marks the 20th edition of the global symposium for regulators. In the face of the hurdles and challenges presented due to the COVID-19 pandemic, Ms. Bogdan-Martin emphasized the vital importance of providing connectivity and extending affordable access to as many people as possible and as fast as we can. She stressed that in "a world where digital increasingly lies at the heart of all we do, collaborative cross-sector regulation is the best and quickest way to leverage digital transformation and deliver meaningful connectivity and inclusive digital markets."

Her speech also pointed to the paramount role of digital as the new foundational means to build social and economic resilience, as well as the critical role that regulators and policymakers play in accelerating digital transformation and supporting the economic sectors. Ms. Bogdan-Martin mentioned that the recently published U.N. Secretary-General Roadmap for Digital Cooperation "leaves us in no doubt that digital technologies are the vital key to accelerating towards the 17 Sustainable Development Goals." Based on the ITU's New Regulatory Outlook 2020 benchmark regulation across 193 countries, she reiterated Europe's role in leading other regions in regulatory development. Following this, she also explained that ITU's findings show that an increase in 10% in

fixed broadband penetration could boost per capita GDP by 0.63% in CIS countries, while in Europe, a rise of 10% in mobile broadband penetration could yield a GDP per capita increase of more than 2%. Finally, Ms. Bogdan-Martin emphasized that it is really in reaching to "marginalized communities that the transformational role that is played by regulators becomes absolutely critical."

Message of the Chair of GSR-2020

Mr. Dan Sjöblom, Director General of the Swedish Post and Telecom Authority (PTS) and Chair of BEREC, started his remarks by saying that the GSR-2020 represents an opportunity to learning from the lessons that the COVID-19 pandemic has presented us with, and apply to a post-pandemic scenario. He also expressed that GSR has "played a key role in bringing together regulators on important issues covering almost everything we do from infrastructure sharing strategies to network investment issues to consumer trust issues and, more recently and very importantly to date, the digital inclusion and connectivity."

In his message, he reminded audiences that more collaboration between regulatory bodies and all stakeholders around the world is needed. Mr. Sjöblom also emphasized that one of GSR's biggest challenges lies in trying to assist in the management of the COVID-19 situation. From lockdown to social distancing or from remote education to business and health, "collaboration and cooperation among the ICT ecosystem are more relevant and important than ever." He finished his remarks by emphasizing the need of uniting forces and synergies "to find new regulatory approaches to get the support from the policymakers to accelerate inclusive growth of ICTs and to ensure that we make the best of the concerns that usually underpins the GSR best practice guidelines that we will have as an output of this year's GSR."

3. EXECUTIVE HIGHLIGHTS OF GSR-2020 AND BEST PRACTICE GUIDELINES

Ms. Sofie Maddens, Head of Regulatory and Market Environment, ITU, started by emphasizing that GSR-2020 is the most important GSR of our times due to the impact of the COVID-19 pandemic. Beyond addressing the need for more pervasive connectivity and more effective digital skills, questions of taxation, data sharing, privacy are also highly important issues. She reminded participants of the importance in providing their views, ideas, experiences on demonstrating regulatory leadership for digital transformation while considering the best policy approaches capable of enabling the digital economy to grow sustainable and meet social goals.

Ms. Maddens also reminded the audience of the following questions to be submitted as inputs of best practices by July 15th: what have we learned from the COVID crisis? What are the key ingredients for effective future proof policy and regulatory leadership? What do you think of the vectors of regulatory action? How can we better collaborate across the sectors, cooperate across borders, cooperate across regions? Finally, she emphasized that some of the contributions as of now point to the fact that "that a modern, effective approach to regulation must address the technical innovation as well as consumers." She concluded by reminding delegates of upcoming GSR-20-related events in the forthcoming months.

4. KEY REGIONAL TRENDS BY REGIONAL ORGANIZATIONS

Moderator: Mr. Jaroslaw Ponder, Head of the ITU Office for Europe, ITU

Speakers: Mr. Jeremy Godrey, Vice Chair, BEREC; H.E. Elmir Velizadeh, Deputy Minister, Ministry of Transport, Communications, and High Technologies of the Republic of Azerbaijan and Vice Chair, EaPeReg; and Ms. Naama Henig, Chair of the International Roaming EWG, EMERG.

Key points

- BEREC helped coordinate three precautionary measures in Europe: 1) Requesting streaming services to make adaptations to reduce traffic to stream by default in standard rather than in high-def nation; 2) Reinforcing with operators the fact that net neutrality regulation did not stop from putting in place traffic management measures to maintain the stability of networks; and 3) Asking all of the National Regulatory Agencies (NRAs) to report to BEREC and provide information on the performance of the networks in their countries, so BEREC could, in return, distribute biweekly reports.
- In most European countries, operators increased mobile data packages. In Ireland, for instance, operates that did not offer unlimited packages managed to introduce them, allowing consumers the ability to swap to those packages without penalty with the same operator.
- The longstanding decline in voice traffic was reversed during the COVID-19 pandemic, meaning that the telecom industry increased its level of interconnectivity, which led to technical issues that needed to be addressed by operators.
- BEREC highlights that regulators cannot focus entirely on the telecom industry. Connectivity has helped save lives during the pandemic across several sectors of society (e.g. education, health, job market, etc.), which points to the fact that Connectivity is a means to an end now, not an end in itself.
- Telecom is a corner of a much broader digital ecosystem that include not only providers and regulators, but also users that benefit from them and help shape the way that competition unfolds in the sector. Making the trade-off between how to protect end-users and how to allow innovation to happen in such an ecosystem will be a fundamental issue facing us over the next few years.
- EaPeReg Working Groups have established effective relationships in the implementation of projects by experts from World Bank and Ernst & Young supported by the European Commission. This project covers the development infrastructure in eastern partnership countries. It also deals with questions of frequency.
- EaPeReg's Vice-Chairman expects to sign two agreements on the reduction for international mobile roaming services and to harmonize technical foundation for frequencies by the end of 2020 within thin the eastern partnership countries.
- In the region covered by EaPeReg, broadband access connections in the first quarter of 2020 increased by 16%.
- Upon EMERG's evaluation, the main aspects related to the crisis management included: establishing the control center dedicated to monitoring the efforts of the pandemic; providing additional spectrum to support increased broadband usage; extending 5G deadlines; and

sharing information and best practices with the member countries to improve the crisis management.
- Other actions were taken to support underserved populations such as the launching of a webinar with delegates from other countries. EMERG reinforced position about protecting the end-users as well as the need for bridging the digital divide for eLearning, etc.

5. NATIONAL REGULATORY APPROACHES TO FOSTERING POST COVID-19 DIGITAL TRANSFORMATION

Moderator: Ms. Natalia Mochu, Regional Director, ITU Regional Office for CIS

Speakers: H.E. Elmir Velizadeh, Deputy Minister of Transport, Communications and High Technologies of the Republic of Azerbaijan, Chairman of RCC High-level Working group on Information Society Development; Mr. Aleksandar Mastilovic, Director of Telecommunications at Communications Regulatory Agency of Bosnia-Herzegovina (RAK); Mr. Azamat Dyikanbaev, Director, State Communications Agency of the Kyrgyz Republic; Mr. João António Cadete de Matos, Chair of the Board of Directors, Autoridade Nacional de Comunicações (ANACOM), Portugal; and Mr. Vladica Tintor, Director, Regulatory Agency for Electronic Communications and Postal Services (RATEL), Serbia.

Key points
- The pandemic has created conditions for citizens to adapt to a new way of life that riles on teaching and studying remotely, on developing services and changing workflows, on coordinating and using frequency more correctly and efficiently, as well as on developing ideal telecommunication infrastructure and information security.
- From education to business and from agriculture to government, communication regulators gain more responsibility and thus need to open to consumers and flexible in making decisions.
- RCC's Executive Committee provided a few insights regarding potential actions that it claims to be appropriate to the sustainable conditions for several sectors in society as a response to a post-COVID scenario: 1) to increase access to broadband services in Azerbaijan for low-income groups and those with Special Needs; 2) to create equal market participants to deploy services both in terms of access and price; 3) to foster collaboration of the cost reduction methods taken into account the specifics of each country; 4) to encourage small and medium-sized businesses for innovative solutions for efforts to be used by ICT opportunities and important interaction; and 5) to promote the sharing of experiences between regulators as well as representatives from other sectors among RCC countries.
- RAK took the pandemic as an opportunity to launch project initiatives related to digital transformation that been in the pipeline for years, establishing, among other things, accessibility services and also planning upcoming projects.
- The pandemic circumstances, therefore, became an accelerator of new initiatives, projects, and work which would not have been done so quickly otherwise.
- RAK appealed to its telecom and service providers to optimize the resources as well as to report about the current situation of the networks, so potential issues do not directly affect critical areas that rely on telecom services—businesses, educational practices, and so on.

- There have been shifts in societal values due to COVID-19 in the Kyrgyz Republic, which makes individuals reevaluate what before did not get enough importance; thus, shaping the kinds of demands for ICT services that are currently offered and regulated.
- Telecom operators are now able to see how vital their work is for all segments of society. To survive and maintain their positions in commercial markets, telecom operators must accelerate their activities, supply chains, coverage, and cycles of innovation.
- In the Kyrgyz Republic, the government could not provide radio monitoring. There was an issue of guidance and 5G consequently suffered, given that supply chains were broken during quarantine, which directly affected the testing of 5G, which slowed down in the country. Despite that, operators managed to provide its population with certain benefits, such as free Internet services basically for the hospital, clinics, schools, and so on.
- Amid the increased usage of telecommunication services during the lockdown, RATEL has been updating the status of networks in Serbia, including issues such as network usage and load, congestion, and the demand for additional capacity.
- Alternative network providers in Serbia have increased their hiring capacity due to an increase in data traffic. Payment deadlines were extended to users to make sure that they were not without service during the country's state of emergency. As of now, there is no need for additional frequency for MNOs in the country.
- RATEL addressed numerous comments, false information and social media posts connecting the causes of the COVID-19 pandemic with the 5G network deployment in Serbia. RATEL responded promptly by providing a detailed analysis of proof, opinions, guidelines of the relevant international organizations, institutions to demonstrate to the general public that there is no connection between 5G and coronavirus.

Before closing the session, Ms. Sofie Maddens, Head of Regulatory and Market Environment, an executive overview of the ITU platform called #REG4COVID that as of today welcomed over 400 submissions from regulators, policy makers, industry, civil society and others. All submissions served as a basis for a special discussion paper on Pandemic in the Internet Age. It provides an analysis of the policy and regulatory responses, good practices and guidelines to prepare for recovery to ensure connectivity, business continuity and service delivery while responding to the communications and the data trafficking increase.

5. CONCLUSION AND WAY FORWARD

Mr. Jaroslaw Ponder, Head of Regional Office for Europe, ITU, thanked all participants and speakers for participating in the *GSR-2020 Regional Regulatory Roundtable Discussion for Europe and CIS: The Regulatory Wheel of Change*. He also encouraged the speakers to follow the journey of the GSR which did not end with this roundtable discussion. Mr. Ponder proceeded to invite participants to engage with the following GSR-related meetings, as well as the event taking place

- On 30 July 2020: GSR-20 Regulatory Roundtable Discussion: Digital Transformation for Digital Economies @COVID-19 South-Asia
- On 20 August 2020: GSR-20 Regulatory Roundtable Discussion: Competition Policy and Analysis in a Digital Apps Environment for the Arab and Africa Regions

- On 31 August 2020: The Regional Regulatory Associations meeting and the Industry Advisory Group for Development Issues and Private Sector Chief Regulatory Officer's meeting (IAGDI-CRO).
- On 1 September 2020: The Heads of Regulators Executive Roundtable (upon invitation only), just before the main sessions of GSR.
- The core sessions of GSR will be held from 1 to 3 September 2020 in short sessions over 3 hours each day.

Furthermore, he reminded participants to participate and share more about the country approaches and regional trends using REG4COVD and GSR platforms, so new strategies can be taken toward accelerating digital transformation. He reiterated call for inputs to the 2020 GSR Best Practice Guidelines (See BDT/DKH/RME/DM/150). Finally, Mr. Ponder invited participants to access and refer to the reports that are input documents to this particular webinar, but also to the GSR, in particular the following:

- Pandemic in the Internet Age: Communications industry responses
- 2020 Global ICT Regulatory Outlook (GIRO) and ICT Regulatory Tracker
- Economic Contribution of broadband, digitization and ICT regulation: Econometric modelling for the ITU Europe region
- Economic contribution of broadband, digitization and ICT regulation: Econometric modelling for the ITU Commonwealth of Independent States region