

2024

Annual

REPORT



Communications
Commission

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Kakha Bekauri

Chairman of the Communications
Commission

Although the 2024 Activity Report will provide a more comprehensive overview of the Communications Commission's activities, I would like to briefly discuss the results and projects that were implemented last year in order to enhance the telecommunications sector and provide a variety of communication services to our citizens.

The demand for communication services is on the rise, as evidenced by the data from the previous year. Therefore, ensuring high-quality and stable connectivity and creating a competitive environment in the telecom market is now more important than ever.

As in previous years, the number of mobile and fixed communications subscribers increased in 2024. There are now 6.14 million mobile subscribers, 4.6 million of whom are mobile internet users. There were 1.16 million fixed broadband subscribers at the end of last year, while the number of IPTV users also increased to 776,000.

The Communications Commission has conducted a wholistic study of the telecom sector to ensure that our citizens have uninterrupted access to a variety of telecommunications services, and that the business environment is competitive and free. New regulations for mobile and fixed services, which were adopted with the involvement of EU experts, will facilitate the implementation of new technologies, the development of small and medium-sized companies, and improved competition on the market, which is vital for the development of the telecom sector.

In 2025, we will complete the second phase of the study, which will examine the business subscriber segment and make the appropriate decisions in response to the identified challenges. Our objective is to fully open the telecom market and allow companies to operate without any barriers, ultimately ensuring that communication services are affordable, multinational, and of high quality.

With regards to broadcasting, our media is still pluralistic and diverse with more than 100 television broadcasters in Georgia, including 21 national broadcasting channels. Dissemination of fake news remains a challenge. The media often fails to separate facts from opinion. There are also frequent violations of the principle of impartiality. In light of these challenges, we have the obligation to protect the interests of viewers and allow them to make informed choices, while ensuring that the media adhere to journalistic standards.

The Communications Commission and the Media Academy are using a comprehensive strategy to enhance media literacy in the country. This approach aims to increase public awareness and support the professional growth of media professionals and startups. On numerous occasions last year, our projects and innovative approaches were recognised internationally as successful examples of media literacy development.

Last but not least, the Communications Commission is celebrating its 25th anniversary in 2025. The effort and professionalism of each of our employees play a major role in achieving the results. We will continue to work hard to ensure that the telecommunications sector is fair and free, and that all citizens have uninterrupted access to high-quality communication services in the modern era.

As part of the wholistic study, in 2024 the Communications Commission completed the research of the fixed and mobile services markets. The results demonstrated that the retail market of fixed and mobile services is stagnant and uncompetitive, and the relevant wholesale markets require regulatory intervention. The research also identified Magticom as an operator having significant market power on the fixed and mobile network access markets, leading to the imposition of corresponding obligations on the operator.

Several key factors contributed to the Communication Commission's decision to conduct a wholistic study of the telecom sector, one of them being that in the modern era of digital transformation, the demand for mobile and fixed services has increased significantly. Therefore, the challenge for the telecom sector is to properly adapt to the increasing market demand. The market structure established in the Georgian market in recent years has revealed factors hindering the development of the telecommunications sector, as there are two convergent operators offering both mobile and fixed services to customers.

This circumstance gives the operators a competitive advantage. Their market shares are substantial: they hold a total of 75% of the mobile market, and 78% of the fixed broadband service market. They also have infrastructure that is difficult to duplicate, and smaller operators on the market find it difficult to compete. It is therefore tremendously complicated for new players to enter and establish themselves, which ultimately affects both the quality and availability of services. These factors revealed the existence of structural and legal barriers to entry into the mobile and broadband services markets and demonstrated the need for further research into both mobile and fixed communication service segments.

The wholistic study assessed, on the one hand, the availability of communication services for the consumers, and on the other hand, the development opportunities that can be achieved in the sector by opening the market and removing entry barriers for new players while expanding the activities for the existing ones.

As part of the wholistic study, an analysis of the competitive environment in the fixed and mobile services markets was conducted, and an appropriate regulatory framework was determined to eliminate the identified problems. The competitive environment in the retail market of fixed internet and mobile services was assessed in accordance with market analysis methodological rules. The relevant wholesale markets were identified and studied in depth, revealing the existence of an operator with significant market power for whom specific and proportional obligations were determined.

Results of the study of the retail market of fixed and mobile broadband services demonstrated that competition on the market is limited and requires the identification of wholesale markets where the defining of a regulatory framework will respond to the challenges in the relevant retail market segments. The wholistic study identified and analysed the relevant wholesale markets corresponding to the retail segments of fixed and mobile broadband services, including the wholesale market for local and central access at a fixed location (the VULA and Bitstream markets), and the wholesale market for the access to mobile networks. Operators with significant market power were identified in these wholesale markets, and an appropriate regulatory framework was defined.

The regulation proposed within the framework of the wholistic study entails multiple benefits: it will provide small market players or new entrants with the opportunity to develop their activities and create alternative communication offers, while network operators will have the opportunity to utilise their network resources more effectively and generate additional revenues. The result will benefit the end user, for whom a variety of telecom services will become available, which is a prerequisite for a developed economy in the digital era.

Under the terms of the EU-Georgia Association Agreement, Georgia assumed the obligation to fully align its legislative and regulatory framework with European standards. In accordance with the recommendations of the European Council, the Communications Commission was required to identify the markets subject to mandatory regulatory examination. This initiative aims to enhance the effectiveness of competition in the retail market and improve access to wholesale network elements.



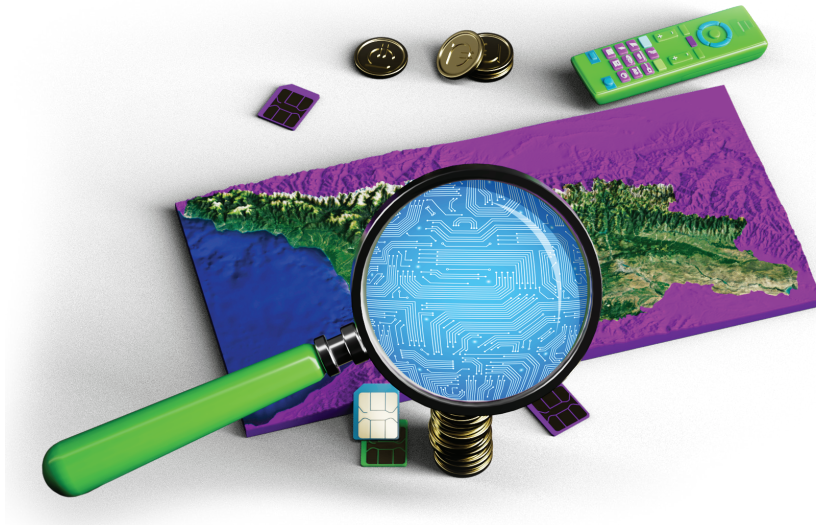
In light of the above, in 2024, the Communications Commission approved the Methodology and Procedures for Determining Market Competitiveness and Identifying Authorised Undertakings with Significant Market Power. The methodological rules are fully in line with the EU approaches to analysing the telecommunications market and are based on European best practices. In turn, these rules form the basis for the study.

Stakeholder engagement was ensured at all stages of research, both in form of public consultations held during the official proceedings, and the preliminary research results shared before the commencement of the proceedings.

The Communications Commission, in collaboration with EU experts, started working on the wholistic study of the Georgian telecom market in 2022. The EU-funded project was

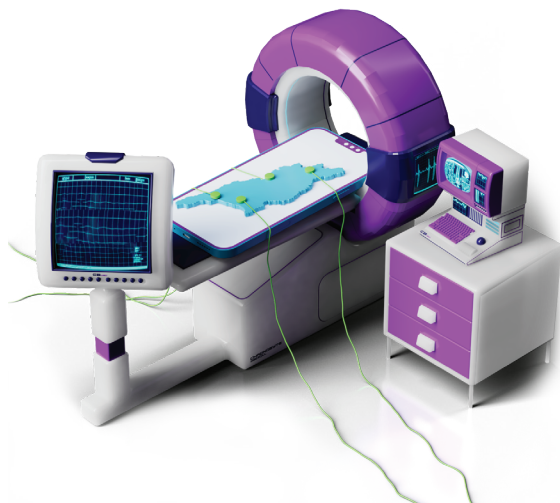
implemented within the framework of the Facility for the Implementation of the Association Agreement between the European Union and Georgia (AA Facility II). Research of this scale had not been carried out on the Georgian telecom market before. The research conducted by the EU experts was revised by the experts from TAIX (EU Technical Assistance and Information Exchange Tool).

The group of EU experts involved in the research has extensive experience in working for telecom regulators, the European Commission, BEREC, and Cullen International on research and analysis, implementation of directives, and development of regulatory frameworks. In collaboration with the Communications Commission team, they have analysed the economic, legal, and technical aspects of retail and wholesale segments within the mobile and fixed services market.



Plan for 2025

This wholistic study is a large-scale project. In addition to the markets already studied, it is necessary to analyse and assess other markets that are potentially subject to ex-ante regulation. The Communications Commission will initiate the next stage of study in early 2025 by studying markets such as the retail market for corporate offers provided to business subscribers, and the wholesale market for access to telecommunication infrastructure. Towards the end of the year, the Commission will start the analysis of the wholesale market for access to global internet resources.



The mobile services market analysis demonstrated that the mobile retail services market is stagnant and uncompetitive, and that the current environment will not improve without regulation. Based on the results of the study, the Communications Commission recognised Magticom as an operator with significant market power on the relevant wholesale market and imposed specific obligations on the company. In 2024, the Communications Commission took the decision to approve the regulatory framework for wholesale mobile network access, and to subject the wholesale mobile network access market to regulation in order to eliminate the identified competition problems.

EU experts have determined that in the absence of ex-ante regulation, the telecom market will remain stagnant for at least another three years. In accordance with the market analysis guidelines of the European Commission, the experts initially studied the retail market for mobile services. Having identified the problems with competition, they proceeded to identify the wholesale markets potentially subject to ex-ante regulation, and to conduct a three-criteria test on those markets. The experts concluded that the retail and wholesale mobile access markets in Georgia are characterised by low dynamics, a lack of innovation, and a lack of progress. They emphasised that in the absence of ex-ante regulation, this situation is unlikely to change. An additional in-depth study was conducted on the wholesale market potentially subject to regulation, as a result of which EU experts identified an operator with significant market power and determined specific obligations for that operator. According to the experts, this will improve the current uncompetitive situation on the mobile services market and create diverse choices and affordable conditions for consumers.

The analysis of the mobile services market established that the market is experiencing stagnation, which means that the market shares of mobile network operators have remained virtually unchanged over the past 5 years. The total number of subscribers increased by **13%** during the same period, while revenues grew by **58%**. According to the 2023 data, Magticom accounted for **41%** of the mobile market subscribers and **49%** of the revenues. The average revenue per user (ARPU) of Magticom was **9%** higher than the ARPU of Silknet, and **39%** higher than the ARPU of Cellfie Mobile.

The study highlights differences in pricing, supported by a comparative price analysis by the Communications Commission. According to the analysis, Georgian subscribers pay higher prices for high-speed and high-volume services compared to European subscribers, or else they must opt for lower or medium speed and volume services. Considering that the use of telecommunication services, and mobile internet in particular, has increased over the years (from 12 GB in 2022 to 14 GB in 2023), this data clearly indicates the high cost of large-volume mobile services.

The study also highlighted the fact that operators have simultaneously changed their retail tariffs in recent years. More specifically, a price change by one operator was soon followed by a similar action by another operator, with an almost identical percentage change. This also shows that the market is uncompetitive, which allows operators to act independently from customers.

According to the experts involved in the wholistic study, Magticom is an operator with significant market power. This assessment is based, among others, on the operator's substantial profit margin. In 2022, the EBITDA (earnings before interest, taxes, depreciation, and amortisation) margin of Magticom was **75%**—more than twice above the EU average of **35%**.

Based on the wholistic study, Magticom's significant market power is also evidenced by the fact that the company generated **51%** of the total mobile data traffic in the country in 2022, compared to **30%** for Silknet and **19%** for Cellfie Mobile. It is also worth noting that internet consumption increased by **592%** over the last 5 years. In 2022, Magticom carried **69%** more data traffic than Silknet, and **178%** more than Cellfie Mobile.



In 2019-2022, Magticom invested considerably more in infrastructure than its competitors. For example, Magticom accounted for 58.6% of new base stations during this period, followed by Silknet (35.4%) and Cellfie Mobile (6.1%). Magticom also spent twice more on equipment than Silknet and Cellfie, which once again points to the company's substantial market power and potential.

In light of the above, the EU experts found that Magticom enjoys considerable advantage on the market and is an operator with significant market power, as it is far ahead of its competitors both in terms of financial resources and infrastructure. Based on the recent trends, it is also unlikely that Magticom's market share will fall below the 40% threshold established by the Georgian legislation for operators with significant market power, or that one of the other operators (Silknet or Cellfie Mobile) will be able to reach said threshold.

To enhance market competitiveness and foster openness, the Communications Commission has instituted three access obligations on Magticom. These obligations require any operator with significant market power to provide network and infrastructure access to other operators under cost-based conditions.

The three access obligations imposed on Magticom are national roaming, co-location, and access for mobile virtual network operators (MVNOs).

In case of national roaming, operators who lack the appropriate infrastructure and coverage in certain parts of the country will be able to use the Magticom network to deliver high-quality service.

The co-location obligation will allow other operators to place their network infrastructure at the facilities owned by Magticom, allowing them to easily expand their network without large-scale investment.

As for the third obligation, it will allow MVNOs without their own infrastructure to enter the market and start operations by using the Magticom network.

Cost-oriented tariff obligations will significantly increase competition on the market while creating diverse choices and more favourable conditions for Georgian subscribers, in line with their European counterparts.

The Communications Commission has imposed specific obligations on Magticom under the Law of Georgia on Electronic Communications to ensure fair, transparent, and non-discriminatory conditions for companies seeking access.



Plan for 2025

Following the Communications Commission's study, Magticom is required to invite operators to apply for network access. This obligation will enable companies seeking access to receive advance information about the terms, which will ensure transparent, non-discriminatory, and fair terms. Companies seeking access will be able to apply for their preferred services, including national roaming, co-location, and wholesale MVNO access services.

The invitation to offer must present detailed technical and commercial terms, including wholesale access tariffs. The details of the invitation to offer were determined by the Communications Commission to ensure that applicants receive sufficient information and can effectively prepare and submit an application. Applicants must also be able to assess the terms of access to ensure provision of retail services on terms similar to those offered by the operator with significant market power. To this end, the Communications Commission determined that an invitation to offer from the operator with significant market power must include at least the following: description of access services; access tariffs; technical conditions for access, including network architecture and all relevant technical standards for access to the network; specifications of the equipment that the applicant must use to connect to the network of the operator with significant market power; terms of service and procedures for amending them; service quality standards and guarantees; procedure for reporting and repairing malfunctions; payment terms; and so on.

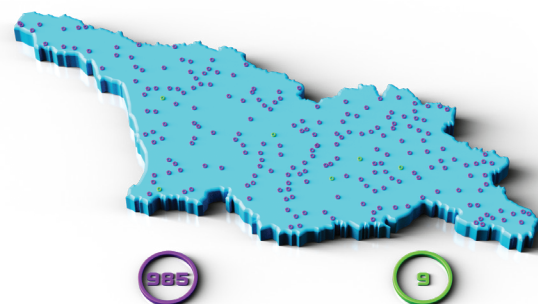
Within the framework of the wholistic study, the Communications Commission identified Magticom as an operator with significant power on the wholesale market corresponding to the fixed internet retail market and imposed specific obligations on the operator in accordance with the findings of the EU experts. In 2024, the Commission determined the regulatory framework for wholesale access to the fixed network. This decision rendered the VULA and Bitstream segments of the wholesale access market for broadband services subject to regulation.

In accordance with the methodological rules, the study commenced with the fixed internet retail market, where competition problems were evident. The group of EU experts involved in the wholistic study found the Georgian fixed internet retail market to be uncompetitive and determined that the restrictive environment will not change without ex-ante regulation, causing serious harm to consumers.

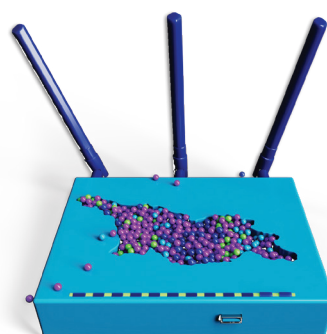
The study found that there was an uncompetitive environment in 985 out of the 994 settlements connected to the fixed broadband network in Georgia, while only 9 settlements had a competitive environment.

Furthermore, 767 out of the 994 settlements connected to the fixed broadband network only had access to the services of one operator, 182 had access to the services of two operators, while only 45 had access to the services of three or more operators.

Based on the findings, the Communications Commission and the EU experts identified the relevant wholesale markets and conducted the three-criteria test in accordance with the methodological rules. The test revealed that the wholesale markets do not tend to be competitive, and there are high barriers to entry in these markets. Furthermore, the tools specified in the Law of Georgia on Competition are not sufficient for responding to the competition-related issues established on these markets.



The study showed that the infrastructure of large operators is difficult to duplicate. Therefore, a company seeking to enter the market needs to invest significantly more in order to compete with the existing players. In addition, large operators benefit from economy of scale and scope, which also represents a barrier for operators seeking to enter the market. The operators are achieving economy of scale through the size and capacity of their network, which allows them to reduce costs. Operators that offer more than one service (for example, a combination of internet and TV) are achieving economy of scope, which reduces the average cost per unit. This is less feasible for new players, which creates an uneven playing field on the market. In addition, local financial lending markets in Georgia have higher commercial lending rates compared to the EU, which is a significant barrier for new players. Therefore, based on the results of the three-criteria test, the EU experts determined that further research was needed to assess the feasibility of introducing ex-ante regulation to address the restrictive environment of the market.





The Communications Commission conducted an in-depth study of the wholesale local and central access market at a fixed location. Based on the conclusions of the EU experts involved in the study, the Commission identified Magticom as an operator of significant market power. This determination was supported by several key factors arising from the analysis.

According to 2023 data, Magticom holds a vastly dominant position on this market in terms of subscribers, revenues, and infrastructure. Based on the results of the study, Magticom accounted for 53% of all fibre-optic internet subscribers in Georgia, followed by Silknet with 32%, Akhali Kselebi with 7% and Skytel with 2%, while the total share of other operators was 6%. The fibre-optic network of Magticom covered by far the most settlements in Georgia (602), while Silknet was only represented in 71 settlements, Skytel (which mainly operates in small settlements) in 212, and Akhali Kselebi in 14. The study also found that Magticom was the sole supplier of fibre-optic internet in 392 settlements. Skytel was the sole supplier in 104 settlements, while Silknet was the sole supplier only in 2 settlements.

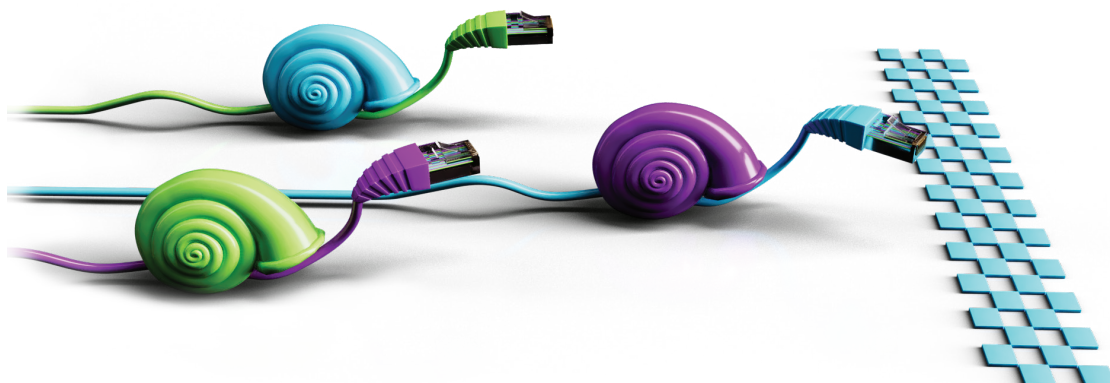
The Communications Commission undertook a wholistic study of the wholesale local and central access market at fixed locations. Drawing upon the findings of EU experts en-

gaged in the study, the Commission identified Magticom as an operator possessing significant market power. This determination was supported by several key factors arising from the analysis.

In 2023, Magticom collected the largest amount in revenues for fixed fibre-optic broadband services from residential subscribers (146 million GEL), which exceeded the revenues of Silknet by 76%, the revenues of Akhali Kselebi Group by 1055%, and the revenues of Skytel by 4092%. In terms of average revenue per user (ARPU), Magticom also held the leading position on the market with 24.54 GEL, followed by Silknet with 23.05 GEL, Skytel with 20.13 GEL, and Akhali Kselebi Group with 17.37 GEL.

It is also worth noting that out of the 994 Georgian settlements that are connected to the fixed fibre-optic internet network, Magticom holds a market share in excess of 40% in 544 settlements that account for 60% of the country's population. In comparison, the market share of Silknet only exceeds 40% in 31 settlements that cover 15% of the total population. According to the experts involved in the study, the dominant position of Magticom is also highlighted by the fact that unlike their competitors, they have a nationwide fixed network. In 2022, the network coverage of Magticom was 88.6%, compared to 57.2% for Silknet, 4.9% for Akhali Kselebi Group, and 3.5% for Skytel. With regards to combined services (TV, landline, and mobile phone services together with the internet), the market share of Magticom was 53.5%, followed by Silknet with 38.3%, Akhali Kselebi Group with 8%, and Skytel with 0.2%.

The experts concluded that in the absence of ex-ante regulation, in the next three years the market share of Magticom is unlikely to drop below the 40% threshold that determines their status as an operator with significant market power under Georgian law.



In order to improve the uncompetitive environment and open the market, the Communications Commission imposed the following specific obligations on Magticom in accordance with the Law of Georgia on Electronic Communications:

- As an operator with significant market power, Magticom shall allow other operators' access to its network against the payment of a rental fee. This will allow new players to enter the market without large-scale investment, while smaller existing operators will have the opportunity to expand their network and provide more effective competition to the large operators;

- The second obligation imposed on Magticom is the regulation of tariffs. Within the scope of this obligation, the Communications Commission has set an upper limit for the network access tariff in accordance with the internationally recognised LRIC methodology. This will prevent the operator with significant market power from imposing unfair fees on access seekers to its network;

- According to the decision of the Communications Commission, Magticom shall also comply with the obligations of transparency and non-discrimination. Within the scope of this obligation, Magticom has the obligation to publish an invitation to offer with detailed technical and commercial terms of network access. This will allow the access seekers to familiarise themselves with the terms and conditions of access in advance. The non-discrimination element compels the operator with significant market power to approach each access seeker without discrimination and offer them fair terms;

- Magticom will also be required to submit a breakdown of expenditure to the Communications Commission, which will allow Communications Commission to carry out constant monitoring and ensure that the operator does not force a competitor out of the market through cross subsidisation, which involves lowering the price of one product at the expense of other services.

To ensure that the obligations for the operator with significant market power were proportionate and fair, the EU experts grouped Georgian settlements according to competitiveness and determined different obligations for Magticom for each group. The study found that 981 of the 994 settlements connected to the fixed fibre-optic broadband network had a highly uncompetitive environment. Therefore, the experts deemed all five obligations listed above to be necessary for these settlements. Four settlements were assessed as locations with susceptible to effective competition, and the experts recommended introducing relatively light obligations for these areas by setting an upper threshold for the access fee only in the central part of the network. For the 9 settlements that were deemed to have a competitive environment, the experts recommended minimal regulation (only the obligation to provide access).

The practice of regulating access to fixed networks is employed by many European countries, including Belgium, Germany, Croatia, Italy, Spain, Norway, and Denmark.

Regulation allows access seekers to use the infrastructure of an operator with significant market power extending from the central or local access point of the network to the subscriber's home. This gives smaller operators an opportunity to enter the market and expand, introduce alternative offers on the

fixed broadband market, and thereby increase the volume of services in the economy. On their part, consumers will get a broader choice of services, which will ultimately make the services more diverse and affordable. Subscribers will be able to receive the services of alternative operators through the existing network infrastructure, while the network owners will generate additional wholesale revenues by renting out their network resources.

Plan for 2025

Magticom will publish a reference offer for operators requesting network access. Interested parties may apply for wholesale local and central Bitstream access services at fixed locations in accordance with the reference offer.

As with mobile network access, Magticom shall present detailed technical and commercial terms for fixed network access in the reference offer.



European Telecom Market Analysis Methodology

The wholistic study of the mobile and fixed services markets is based on the new market research methodology and rules adopted by the Communications Commission in line with European approaches to telecom market analysis and European best practices. The study is conducted in accordance with the EU standards and the Methodology and Procedures for Determining Market Competitiveness and Identifying Authorised Undertakings with Significant Market Power.

The document establishes transparent procedures and standards for the ex-ante regulation of the telecom market, identifying the relevant segments of the service market, studying competition in these segments, as well as identifying the entities with significant market power and imposing specific obligations on them. According to the methodology, the relevant segment of the markets susceptible to ex-ante regulation is determined through the three-criteria test, which forms the main basis for regulation of the European Union's telecom sector and ensures market analysis that takes into account all the essential circumstances and the full mechanism of the sector's operation.

The Communications Commission initiated the preparation of draft amendments to the market analysis methodological rules in 2018 as part of the EU Twinning programme. An updated version of the draft was developed in 2019 as part of the project of the European Bank for Reconstruction and Development. The document was revised once again under the Twinning Review Mission. In 2022, European experts presented additional recommendations regarding the draft rules within the framework of the Technical Assistance and Information Exchange Tool of the European Commission (TAIEX). Finally, the document was revised in 2023 by the experts of the Facility for the Implementation of the EU-Georgia Association Agreement – II (AA Facility II). The Communications Commission then gave the stakeholders the opportunity to familiarise themselves with the draft, present their opinions and discuss them during public and informal consultations.

The Communications Commission will conduct annual research¹ to compare the prices of telecom services in Georgia with similar figures in European countries. In 2023, the Commission carried out a comparative price analysis to determine how favourable the prices of mobile voice and internet services, as well as fixed internet services, are, both separately and in combination with other telecom services.

The analysis determined that the prices of low-speed/low-volume and medium-speed/medium-volume services on the Georgian mobile and fixed markets are similar or lower than the average prices in the countries that were included in the research, while high-volume and high-speed services are considerably more expensive.



Plan for 2025

The Communications Commission has commissioned the German firm Empirica to conduct the price survey with the latest figures for 2024, using the price survey methodology developed by the European Commission. Empirica has been conducting similar studies for EU countries on behalf of the European Commission for many years. The company's clients include global players in the communication sector and other fields from Europe, United States, and the Middle East, including private companies, government agencies and EU institutions.

¹The report of 2023 Benchmarking has been published on the website of the Communications Commission.

In 2024, the Communications Commission held an auction for the implementation of 5G mobile internet in Georgia for the second time. As it is vitally important for the Commission to facilitate the implementation of new technologies, it took the request of operators into consideration and gave them the opportunity to participate in the second auction to implement 5G technology and provide customers with high-quality services.

The Commission announced an auction for 17 lots for the implementation of 5G technology. The lots in question were for the 700 MHz, 3410-3710 MHz, and 2600 MHz frequency bands. In addition, 4 auctions were announced for licenses for the 800 MHz and 2100 MHz frequency bands.

Magticom was the only participant in the 2024 auctions for the implementation of 5G internet. The company won 7 auctions at a total cost of 149,025,808.00 GEL. With the necessary licenses, the operator committed to expanding 5G coverage across major populated and tourist areas, ports, airports, railways, and highways in Georgia within seven years. Magticom must develop the 5G network in accordance with the technical norms set by the European Union, which will ensure the quality and security of the network.

The second auction for the implementation of 5G technology did not require operators to provide infrastructure access to mobile virtual network operators (MVNOs). Operators who purchased a license that included this obligation would receive a 20% discount on the starting price. Magticom acquired licenses that did not include the obligation to allow MVNOs access.

In 2023, the Communications Commission held the first auction for the implementation of 5G, in which only Cellfie Mobile took part. The company obtained the license to implement 5G with the obligation to allow MVNOs access to its infrastructure.

The Communications Commission started actively working on the introduction of 5G technology in 2020 and determined the parameters and conditions necessary for the implementation 5G, taking into account the decisions of the European Commission and the experience of fellow European regulators. The Commission determined the price of the frequency resource with the involvement of experts from one of the Big Four accounting firms, EY. For the 2024 auction, the Commission once again worked with EY to calculate reserve prices for the auction.

5G is a new generation of wireless internet technology that will significantly increase mobile internet speed compared to the previous mobile technologies, reduce delays and take key sectors such as communications, healthcare, education, business, agriculture and infrastructure to a new level, which will in turn strengthen the country's economy.





The Communications Commission, together with the Ministry of Economy and Sustainable Development, continues to actively work on the issue of Georgia's accession to the common roaming area of the EU, which is regulated by the Roam Like at Home (RLAH) policy. The initiative aims to create a common roaming space between Georgia and the European Union, which will allow Georgian consumers traveling in the EU to use voice services, text messaging, and internet roaming at prices similar to those paid to mobile operators for local mobile connections in Georgia.

In order to join RLAH, Georgia's legal framework and regulatory norms related to roaming must be fully compliant with the legislation, regulations and guidelines of the European Union and the Body of European Regulators for Electronic Communications (BEREC). To this end, the Communications Commission and the Ministry of Economy and Sustainable Development of Georgia, together with the experts from the EU initiative EU4Digital, developed draft legal documents, including the relevant law and by-laws.

The EU experts and specialists from the Communications Commission and the Ministry of Economy and Sustainable Development of Georgia studied the needs for legal approximation between the European Union and Georgia and proceeded to prepare primary and secondary draft laws to ensure the harmonisation of Georgian legislation with the European standards.

Once the Parliament of Georgia adopts the draft law, the Communications Commission will be given a deadline for adopting the secondary legislation.

In 2023, the Communications Commission, in collaboration with the Ministry of Economy and Sustainable Development of Georgia and with the participation of European experts, conducted an analysis of the legal framework related to RLAH accession. This effort resulted in the development of foundational documents, which served as the basis for the draft legal framework prepared under the EU4Digital initiative in 2024.

An economic assessment of Georgia's accession to RLAH was also carried out in 2023. The study found that by joining the common roaming space, the costs incurred by Georgian subscribers for mobile services will be significantly reduced, even under the conditions of increased consumption. In addition, both large businesses and SMEs will have the opportunity to expand the scope of their digital products. Joining RLAH will also contribute to the development of Georgia's digital market, harmonisation with the EU Digital Single Market, and the European integration process. Georgia will become more attractive for tourists and foreign investors.

The establishment of a common European roaming space allows subscribers from the EU member states to use their mobile services in these countries without paying additional roaming fees, or to benefit from significantly reduced rates. RLAH was initiated by the European Commission in 2013 and approved by the European Parliament in 2014. After a gradual process of tariff reduction, RLAH was fully implemented in the European Union and Eastern Partner countries in June 2017, and the benefits of establishing a common European roaming space became available to consumers.

The working group of the Council of the European Union held a meeting in 2024. The event took place at the initiative of the host country Hungary, which held the presidency of the Council of the European Union, and was attended by representatives of the European Commission, EU member states, and EU candidate countries. Representatives of the Communications Commission and the Ministry of Economy and Sustainable Development of Georgia took part in the meeting of the working group of the Council of the European Union. The event addressed the status of the roaming agreement between the European Commission and participating countries, reviewed possible legal solutions, and discussed the pros and cons of joining the EU's common roaming area.

During the event, Georgian representatives informed the participants about the steps taken by Georgia towards integration into the EU's common roaming area, and the projects implemented to this end with the involvement of the Communications Commission. They highlighted the results of the analysis of the legislative changes and regulatory norms, as well as the economic impact assessment of joining RLAH.

In addition, the meeting discussed the effectiveness of the proposed legal solution which involves the approximation of the legal framework of candidate countries to the EU legislation and which, if successfully implemented, will ensure the country's full integration into the common roaming area of the EU.



The Communications Commission has approved rules for telecommunication access to electronic and physical infrastructure, methods for resolving access fee disputes, and guidelines for managing the unified information platform. The Commission was tasked with adopting the normative acts by the Law of Georgia on Sharing Telecommunication Infrastructure and Physical Infrastructure Applicable for Telecommunication Purposes, which was adopted by the Parliament of Georgia in 2023. The Resolutions adopted by the Communications Commission aim to fulfil the legal obligation that will facilitate the development of high-speed broadband infrastructure on the territory of Georgia.

The Resolution of the Communications Commission on Approval of the Rules and Terms for Access of an Authorised Undertaking to Electronic Communication Infrastructure and Physical Infrastructure Applicable for Telecommunication Purposes includes the legal and technical rules and terms for access to physical infrastructure, forms for requesting and refusing access, grounds for refusal, the access agreement form and mandatory requisites, the procedure and deadline for filing a complaint with the Communications Commission, the procedure for resolving disputes, and other important issues related to accessing the physical infrastructure.

The Resolution of the Communications Commission on Approval of the Methodology for Calculating Access Fees to Physical Infrastructure Owned by the Infrastructure Operator in the Event of a Dispute between the Infrastructure Operator and the Authorised Undertaking adopts the long-run incremental costs plus (LRIC+) pricing model for individual elements of physical infrastructure recognised by EU legal acts and recommendations. It also details the methods and geographic assumptions for estimating or calculating the operational and capital costs associated with the service. In the event of a dispute between the parties, the Communications Commission will calculate a reasonable fee for access to the infrastructure using this methodology.

The implementation of the Law of Georgia on Sharing Telecommunication Infrastructure and Physical Infrastructure Applicable for Telecommunication Purposes helps telecom operators to effectively develop their networks by using infrastructure used for the following purposes: natural gas, electricity distribution, outdoor lighting, heat supply, transport, as well as infrastructure used for any other purposes specified by the law.

The pricing methodology ensures transparency in calculating access fees for natural gas, electricity, outdoor lighting, heat supply, water, transport, and other infrastructure, which will increase the possibility of using this infrastructure.

This tool is critically important for the development of the telecom sector. The expansion of network infrastructure, increased access to communication services, and the development of digital services will ultimately have a positive effect on the development of the sector and the interests of the consumers.

To fulfil the obligations imposed on the Communications Commission under the Georgian law and introduce EU best practices, the international consulting firm PWC developed the methodology and corresponding fee calculation model with funding from the World Bank. In addition, the working process was conducted with the involvement of all stakeholders, including the Georgian National Energy and Water Regulatory Commission, other relevant state agencies, telecom operators, as well as owners of gas, electricity, and water supply infrastructure.

The Communications Commission also approved the Rules for the Administration of the Unified Information Platform, which defines the rules for submitting information on physical infrastructure and public construction works to the platform and posting such information. This resolution will simplify the acquisition of information about telecom infrastructure, physical infrastructure and public construction works.

The unified information platform, <https://sip.comcom.ge/>, was established by the Commission in 2024 to facilitate dissemination of information about telecom infrastructure and infrastructure used for telecommunication purposes, as well as public construction works. The platform contains information on the rules and procedures related to obtaining construction permits/consent.

Apart from establishing the administrative framework for the unified information platform, the Rules for the Administration of the Unified Information Platform determine the procedures for submitting information on physical infrastructure and public construction works to the platform and posting this information, as well as the rules for registration on the platform.

The Commission also approved the Instructions for Platform Users that outline the detailed rules for using the platform and its functions, including submitting, posting, and accessing information.

Under the Law of Georgia on Sharing Telecommunication Infrastructure and Physical Infrastructure Applicable for Telecommunication Purposes, infrastructure operators will receive additional income in exchange for allowing access to authorised undertakings in the communications sector, while the authorised undertakings themselves will save the financial resources required for network construction and will be able to enter the market and provide telecom services to subscribers at lower cost. This will improve competition on the telecom market and create a more favourable environment for consumers.



In order to protect consumer interests, in 2024 the Communications Commission improved the internet quality control mechanism [Sheamotsme.ge](https://sheamotsme.ge). The platform allows consumers to measure the speed and quality of fixed internet, and to check whether the quality of the internet complies with the terms and conditions stipulated in their contract with the provider. The internet quality control mechanism allows both consumers and the Communications Commission to constantly monitor how well the companies are fulfilling their obligations towards their subscribers. In case of violations, the Commission shall take legal measures against internet service providers to ensure the provision of quality internet service.

In 2024, the internet quality testing service became simpler and more efficient, allowing for the measurement of service parameters, including download and upload speeds, ping, jitter, and packet loss.

As a result of the platform upgrade:

- It has become possible to test internet service parameters while using a Wi-Fi connection. This change has made it easier to use the system, as it was previously necessary to connect to a network cable while conducting the tests, which was inconvenient for users. Unlike the other popular internet speed testing programmes, this service also measures the signal level of the radio network and, in case of a weak signal, prompts the user to move the test computer closer to the router.



- The number of stages required for testing has been reduced, making the service easier to use. The testing of internet quality begins immediately after the service is launched. After completing the test, the user can send a complaint to the Public Defender of Consumer Interests by filling out a simple form, as well as saving the test results in different formats based on their needs.
- The system testing algorithm has been improved, reducing testing time to 2-3.5 minutes.
- The user interface and several other features have been improved, making the system more user-friendly.

Since the launch of the internet quality testing platform, the website has had a total of **806,200** visitors.

To improve the current situation on the fixed internet market and ensure that the quality and speed of the internet are adequate for the price paid by the customer, one of the priorities for the Communications Commission is to actively use the platform and respond to violations in accordance with the law.

In 2024, the Communications Commission reviewed numerous consumer complaints and found cases where the quality of the internet service provided by the companies did not match the terms of the agreement concluded with the subscribers. The Communications Commission sanctioned the companies in question for providing poor-quality internet and ordered them to bring the service in line with the terms of the agreement.

As part of the 2020-2025 National Internetisation Strategy, the Communications Commission continued to actively implement the Log-In Georgia project, which has been underway since 2020 with the financial support of the World Bank and the European Investment Bank. In 2024, the company Open Net, with the support of the Communications Commission, extended the fibre-optic network 500 km, providing more than 30,000 people with internet access. The new sections of the network include Abasha-Senaki and Tskaltubo-Vartsikhe-Khoni.

In addition, construction works continued in the Zugdidi-Khobi, Chiatura-Sachkhere, and Zestaponi-Kharagauli sections of the network, which collectively cover 800 km of infrastructure and 79,500 people.

Apart from the completed and ongoing construction, planning works were initiated in 2024 for the 160 km Jvari-Mestia section, the 240 km Shida Kartli section, and the 130 km Keda-Shuakhevi section of the infrastructure network.

In total, the volume of works completed and ongoing in 2024 covers approximately 1,900 km, while the works completed and ongoing since the beginning of the project in 2020 cover 2,700 km of fibre-optic infrastructure.

The list of infrastructure projects completed within the framework of the Universal Internetisation Programme, ongoing construction works, and technical network data can be viewed on the Open Net digital map: <https://maps.opennet.ge>.

The Digital Support Programme, which has been implemented by the Communications Commission from 2022 as part of the Log-in Georgia project, actively continued in 2024. The aim of the programme is to raise digital awareness among the rural population in selected municipalities, teaching them how to use the internet effectively and facilitating their involvement in the digital economy.

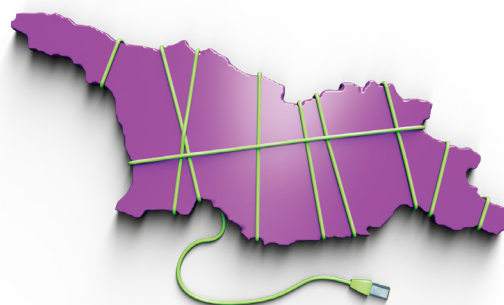
The Digital Support Programme was developed on the basis of a study of the population's internet needs. It includes seminars on digital literacy and safe internet use, which serve to raise the awareness of programme beneficiaries on issues such as searching for information, using e-mail and other communication apps, using Google Maps and Google Translator, protecting private data, learning about artificial intelligence, detecting fake news, and developing other digital skills. In addition to thematic seminars, the programme includes informational meetings on the use of state electronic services such as e-auctions, and the rights of internet users.

In 2024, the Digital Support Programme covered 65 target settlements in the municipalities of Tsageri, Lentekhi, Zugdidi, Abasha, and Senaki. More than 200 free seminars were held for a total of 2700 beneficiaries.

Since 2022, the Digital Support Programme has been successfully implemented in the target municipalities of Ozurgeti, Chokhatauri, Samtredia, Khelvachauri, Kobuleti, Ambrolauri, Oni, Tsageri, Lentekhi, Zugdidi, and Abasha. Around 500 seminars have been held in 200 settlements, with up to 6,200 locals acquiring the skills necessary for safe navigation on the internet. Beneficiaries include schoolteachers, high school students, people with disabilities, local women entrepreneurs, homemakers, and temporarily unemployed citizens.

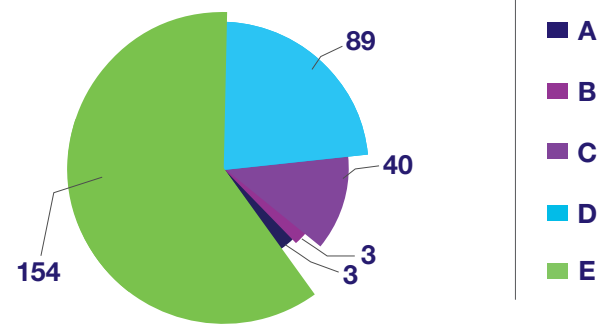
Plan for 2025

The Log-in Georgia project aims to provide around 500,000 people in rural settlements in Georgia with access to affordable high-quality internet services, as well as to help develop digital skills and facilitate the use of digital services. In 2025, the Communications Commission will implement the programme in the municipalities of Chkhorotsku, Senaki, Tsalenjikha, Tskaltubo, Khoni, and Sachkhere.

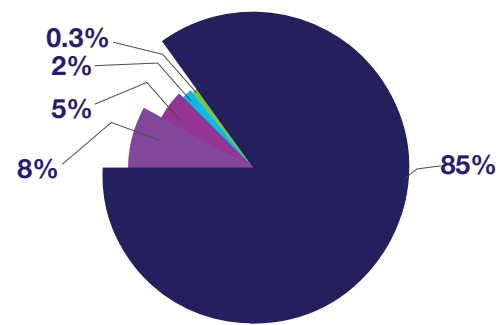


There were 289 active undertakings² registered in the field of electronic communications in 2024. Only 3 companies (Magticom, Silknet, and Cellfie Mobile) generated revenues of more than 100 million GEL and were recognised as Category A companies³. These companies generated up to 85% of the total revenues. In 2024, 154 Category E authorised undertakings with revenues under 100,000 GEL accounted for 0.3% of total revenues.

Number of undertakings active in electronic communications by category

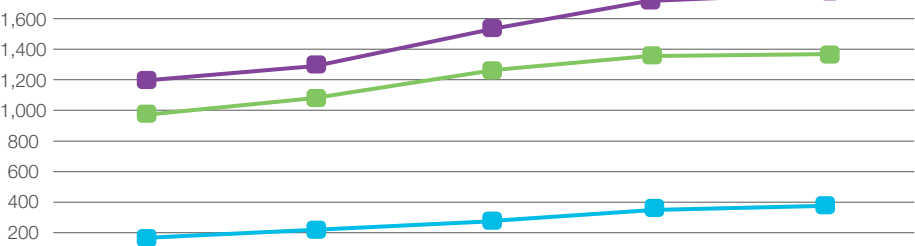


Revenue distribution of undertakings active in electronic communications by category



In 2024, the revenues generated by authorised undertakings from electronic communication services increased by 128 million GEL over the previous year and amounted to 1.787 million GEL, including 1.461 million GEL in retail revenues. The compound annual growth rate (CAGR)⁴ of retail revenues over the last 5 years was 12%.

Revenues Generated from Electronic Communications by Authorised Undertakings (millions GEL)



	2020	2021	2022	2023	2024
Retail revenues	961	1 058	1 202	1 353	1 461
Other communication and non-communication	192	211	267	306	325
Total	1 153	1 269	1 469	1 659	1 787

²Undertakings that have generated any form of revenue in the field of electronic communications during the year.

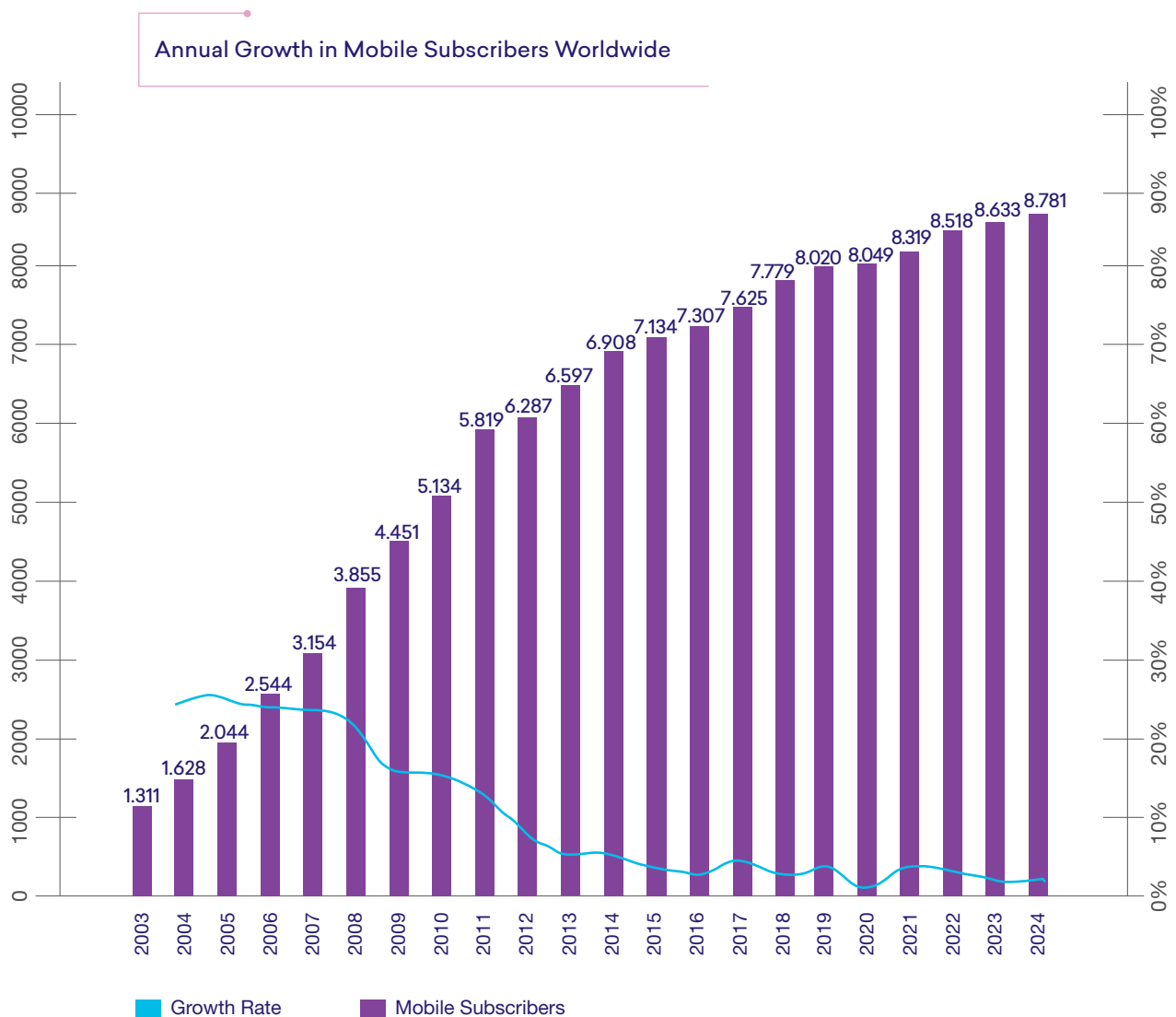
³The following categories are considered:

⁴CAGR – Compound Annual Growth Rate.

Category	Revenues generated during the year
A	GEL 100 million or more
B	Between GEL 10 million and GEL 100 million
C	Between GEL 1 million and GEL 10 million
D	Between GEL 100 000 and GEL 1 million
E	Less than GEL 100 000

The global telecommunications market revenue was valued at 1.885 billion USD in 2024 and is expected to reach 2.875 billion USD by 2030. This forecast is mainly based on investment in fibre-optic and 5G technologies, the development of digital services, the increase in demand for the internet of things (IoT), as well as the creation and distribution of new devices and the resulting increase in demand for high-speed internet.

The number of mobile users worldwide continues to grow. In 2024, mobile subscribers totalled 9 billion, a 1.2% increase from the previous year⁵. The number of unique mobile users worldwide was 5.8 billion⁶.

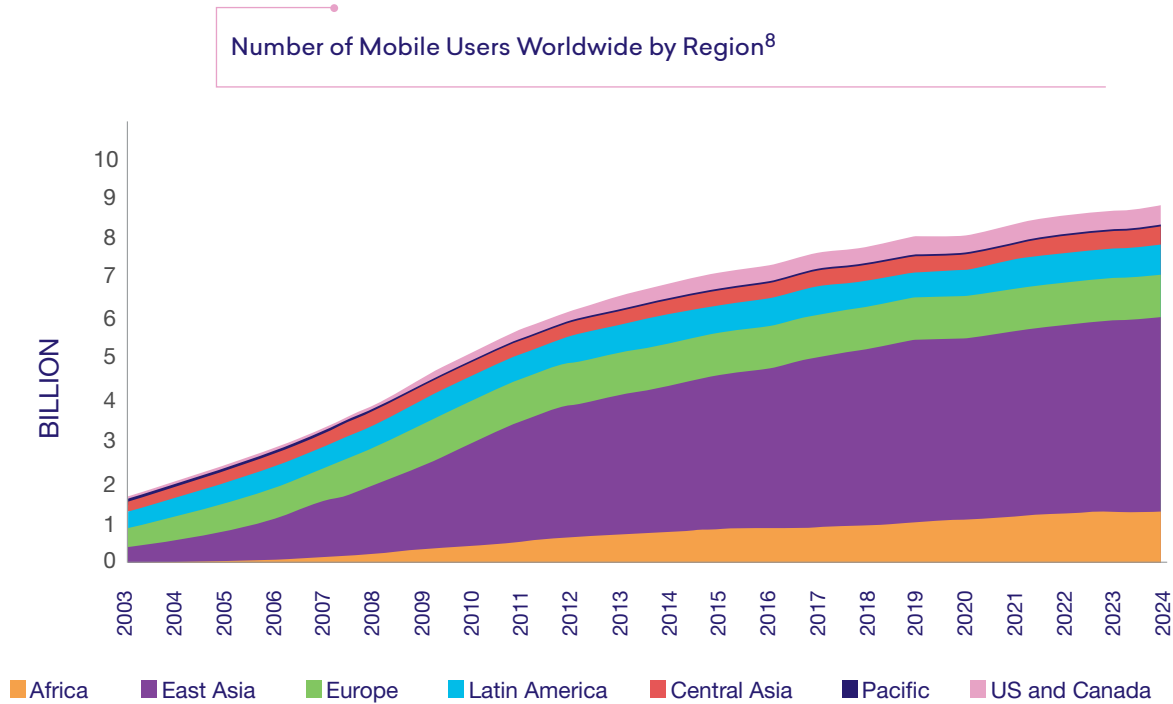


⁵TeleGeography, GlobalComms Mobile Statistics, 2024.

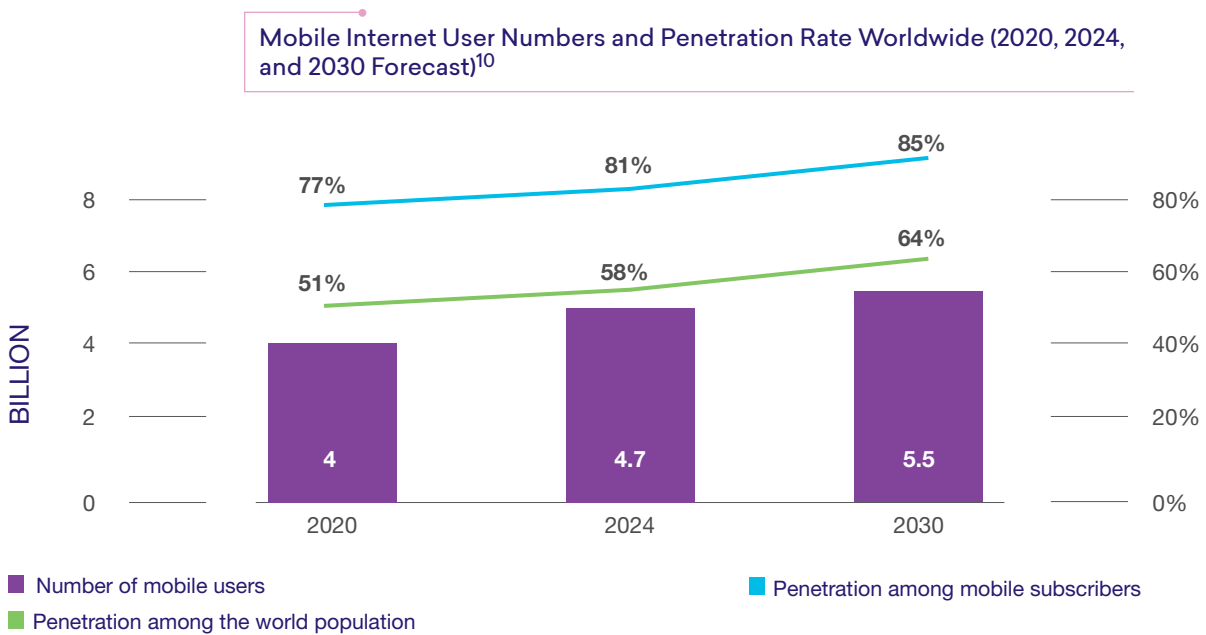
⁶[The Mobile Economy 2025, GSMA.](#)

This data does not include the numbers for the machine-to-machine (M2M) technology and the internet of things (IoT). If we take the full picture into account, the total number of devices connected to the mobile network exceeds 12 billion. This number increased by 5.98% year-over-year, while the number of unique mobile subscribers increased by 2.03%⁷.

East Asia accounts for the largest number of mobile subscribers, which is due to the large population and the high-tech development of several leading countries in the region. However, other regions (Europe, North America, Central Asia, and Latin America) are ahead in terms of mobile service penetration.



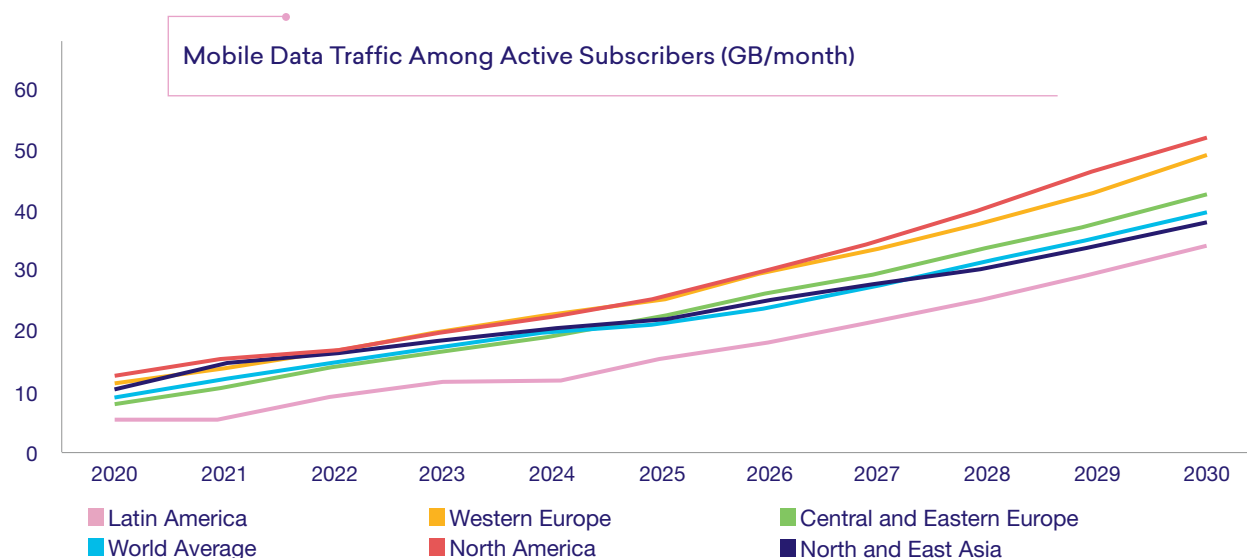
58% of the world's population uses mobile internet, equating to 4.7 billion people. Furthermore, 58% of subscribers are connected to 4G mobile internet, while 5G services are available to 25% of subscribers worldwide⁹.



⁷Extensive Datasets with a Global Reach, GSMA Intelligence.
⁸TeleGeography, GlobalComms Mobile Statistics, 2024.

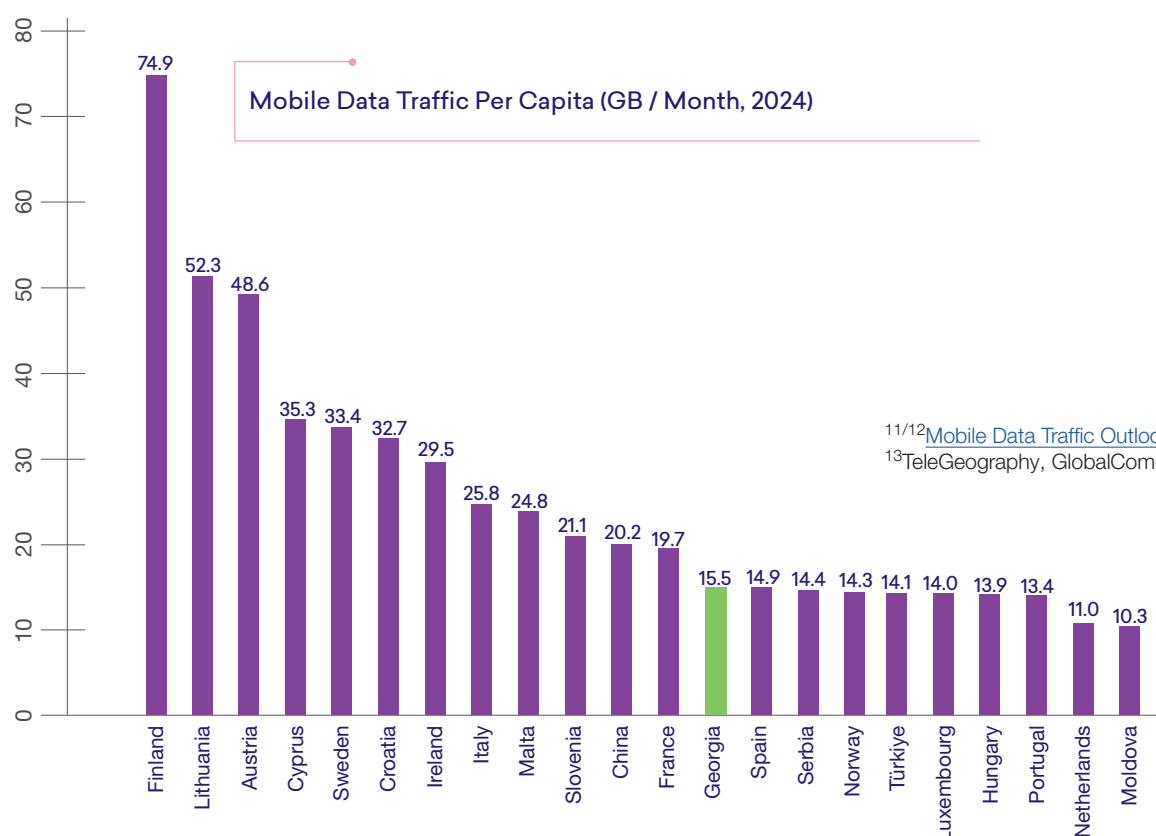
⁹The Mobile Economy 2025, GSMA.
¹⁰The Mobile Economy 2025, GSMA.

The average monthly mobile internet usage (traffic) per subscriber varies by country, but the total volume of mobile internet generated is increasing everywhere. This trend is driven by technological developments and increased coverage, as well as the volume of content and the economic accessibility of mobile internet. The average monthly volume of mobile internet per active mobile subscriber worldwide exceeds 19 GB. In the regions shown in the diagram, the figure mostly exceeds 20 GB¹¹.



With the development of 5G technology, the average data traffic per active subscriber worldwide is expected to reach 40 GB per month by 2030¹².

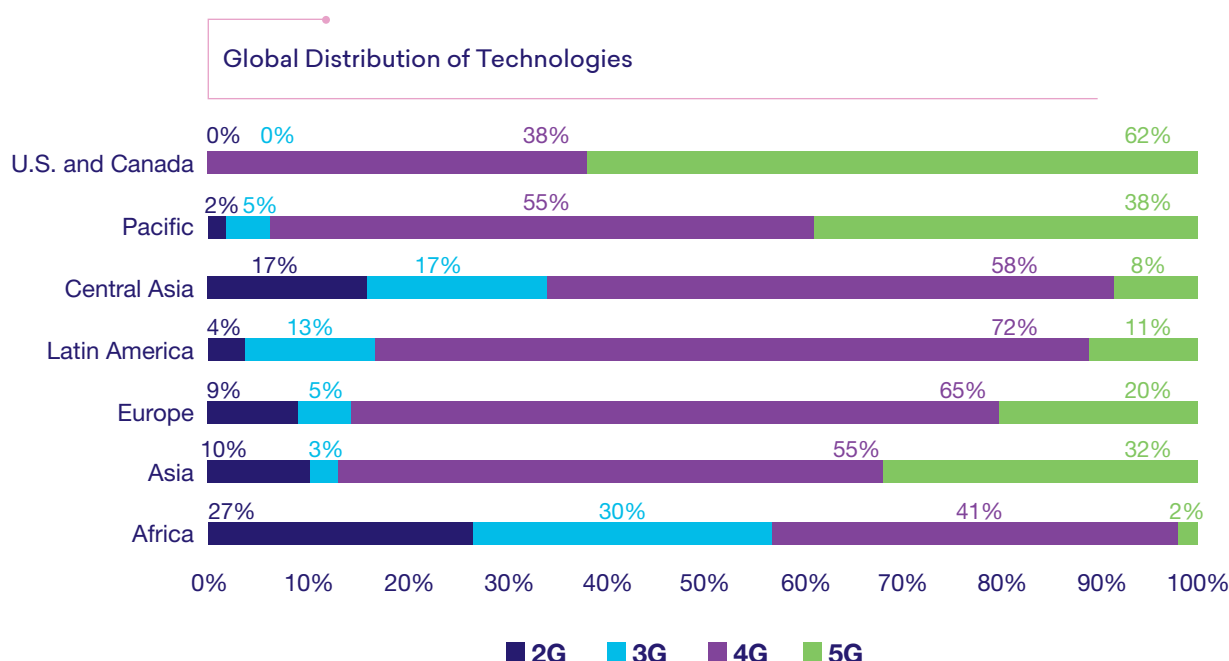
Among the European countries, Finland leads the way with an average monthly mobile data traffic per capita of 75 GB, followed by Lithuania (52 GB) and Austria (49 GB). In Georgia, the average monthly mobile data traffic per capita increased from 12.9 GB in December 2023 to 15.5 GB by the end of 2024. The average monthly mobile data traffic per capita is calculated by dividing the average traffic by the country's population¹³.



^{11/12} [Mobile Data Traffic Outlook, Ericsson.](#)

¹³ TeleGeography, GlobalComms Mobile Statistics, 2023.

The mobile data traffic growth is partly driven by the development of data transmission technologies around the world. Notably, the United States and Canada have almost completely replaced 2G and 3G mobile technologies with next-generation mobile technologies.



Other regions are also actively replacing older technologies with modern LTE and 5G¹⁴. Operators are also expected to gradually replace the 4G radio systems, which are still widely used today, with next-generation technologies. According to the forecast figures, the share of LTE technology in European countries is expected to drop from the current 63% to 18% by 2030, while 5G technology will be available to 80% of the subscribers¹⁵. On a global level, 4G market penetration is expected to decrease from 58% to 35% by 2030, while that of 5G will increase from 25% to 57%¹⁶.

5G was launched in Georgia in late 2023. At the end of 2024, 5G subscriber penetration in Georgia was 5.5%¹⁷. TeleGeography expects the penetration rate to increase to 81% by 2030¹⁸. In December 2024, 5G accounted for 11% of the total mobile data traffic and 4G accounted for 86% while 3G accounted for approximately 3%.

Technology	Total Volume (GB) ¹⁹	Share
2G	6 327	0.0%
3G	1 762 760	2.8%
4G	53 536 432	85.7%
5G	7 171 905	11.5%

¹⁴TeleGeography, GlobalComms Mobile Statistics, 2024.

¹⁵[The Mobile Economy Europe 2025, GSMA.](#)

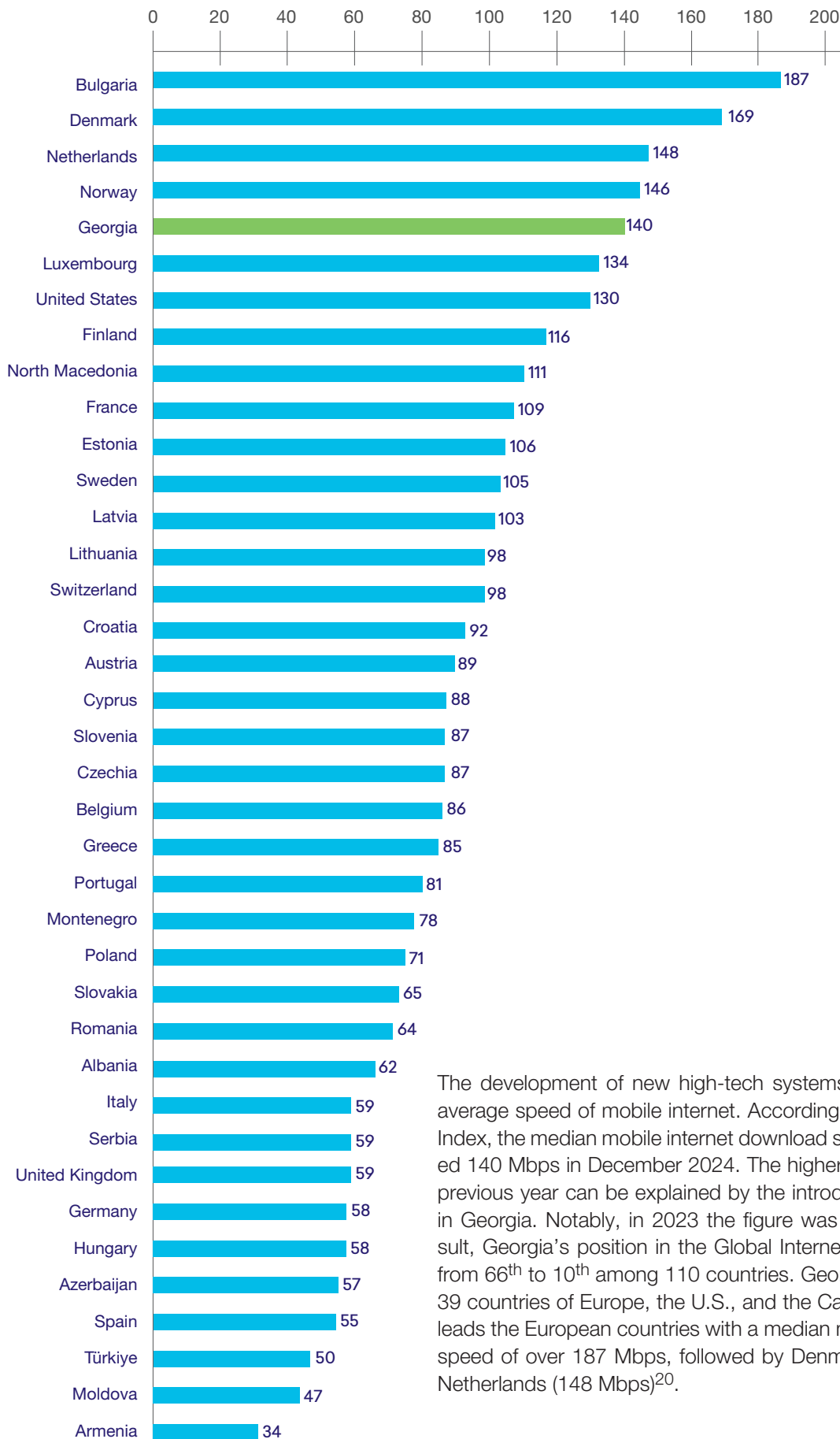
¹⁶[The Mobile Economy 2025, GSMA.](#)

¹⁷TeleGeography, GlobalComms Mobile Statistics, 2024.

¹⁸TeleGeography, GlobalComms Forecasts, 2024.

¹⁹December 2024 data, Communications Commission.

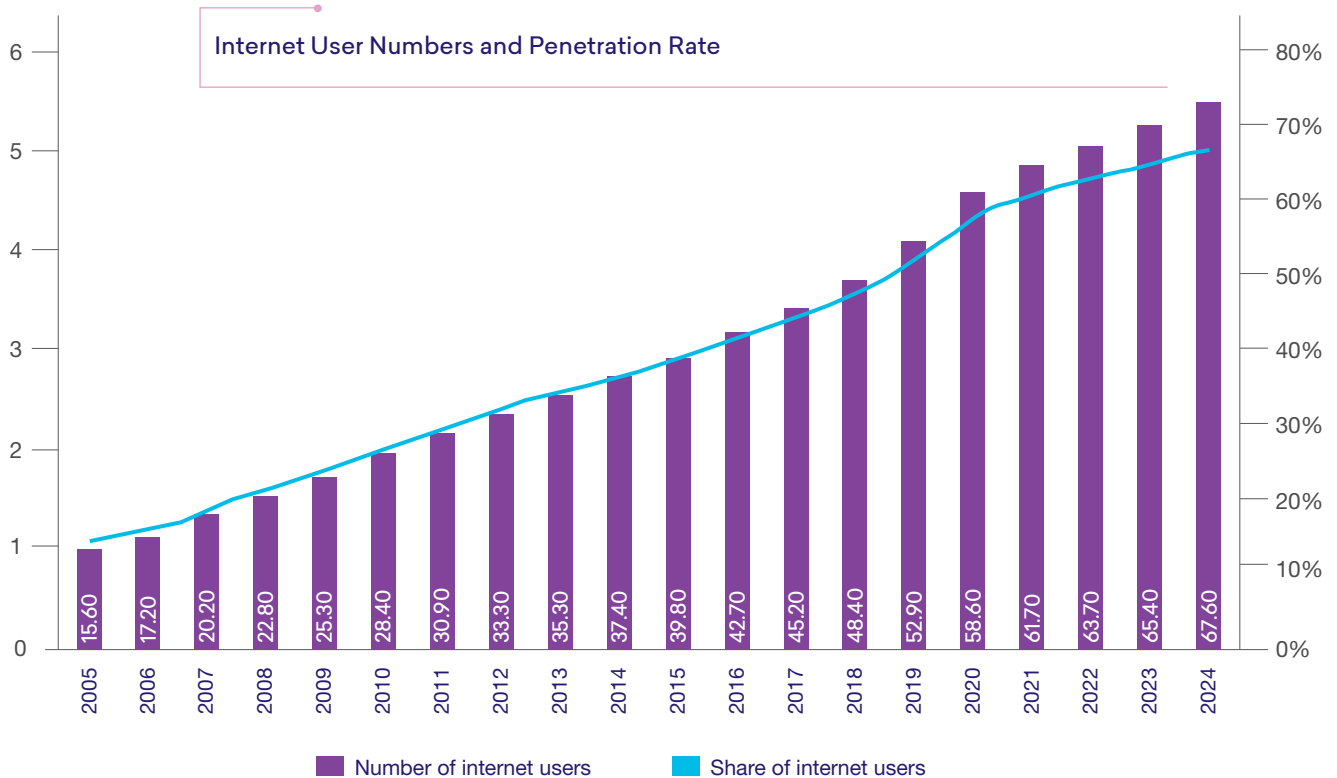
Median Mobile Download Speed (Mbps)



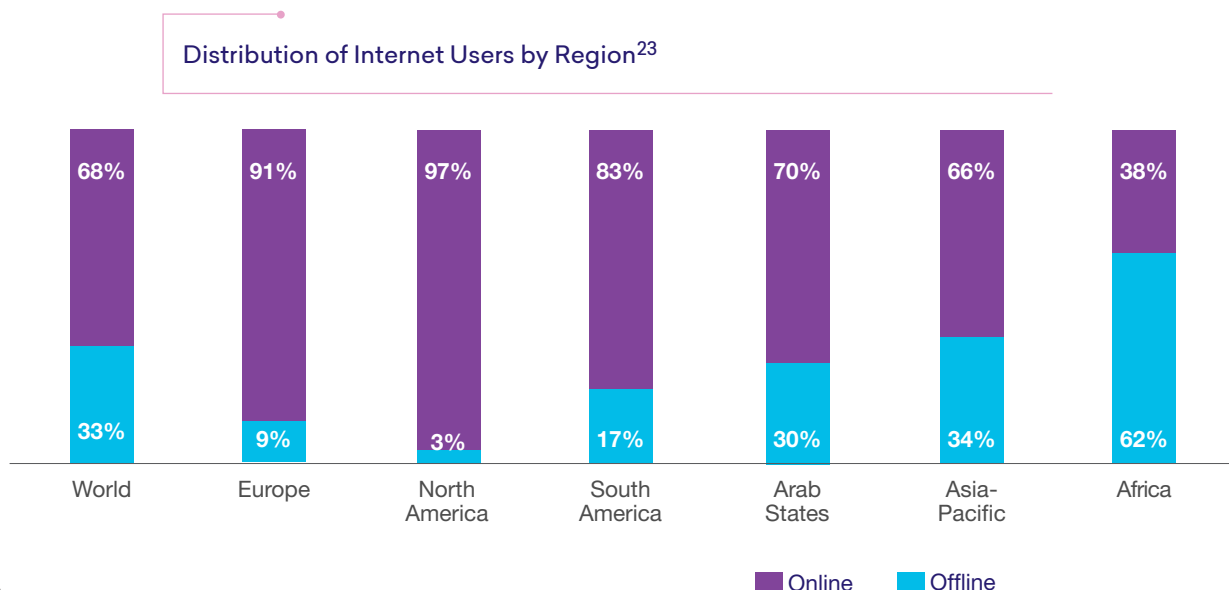
The development of new high-tech systems is also reflected in the average speed of mobile internet. According to the Speedtest Global Index, the median mobile internet download speed in Georgia exceeded 140 Mbps in December 2024. The higher speed compared to the previous year can be explained by the introduction of 5G technology in Georgia. Notably, in 2023 the figure was only 38 Mbps. As a result, Georgia's position in the Global Internet Speed Index improved from 66th to 10th among 110 countries. Georgia ranks 5th among the 39 countries of Europe, the U.S., and the Caucasus Region. Bulgaria leads the European countries with a median mobile internet download speed of over 187 Mbps, followed by Denmark (169 Mbps) and the Netherlands (148 Mbps)²⁰.

²⁰[Speedtest.net Global Index by Ookla.](#)

5.5 billion people (68% of the world's population) had access to mobile and fixed internet in 2024. The number of internet users increased by 3.4% compared to the previous year. Nevertheless, 2.6 billion people across the world remain offline. The number of fixed broadband users worldwide is 1.6 billion, which is 6% more than in 2023²¹.



The highest rate of internet users is in North America (97%), followed by Europe (91%) and South America (83%)²².



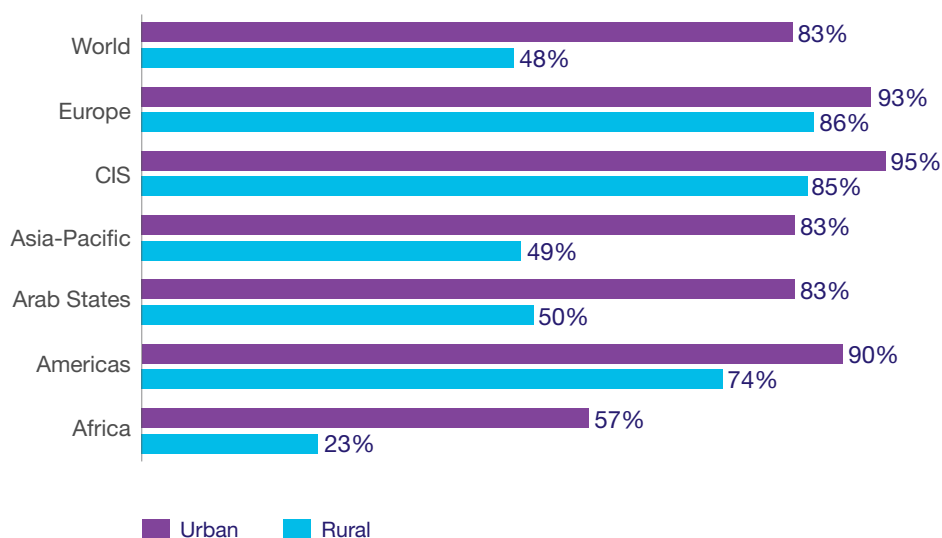
²¹Facts and Figures 2024, ITU.

²²Global Internet Penetration Rate, Statista.com.

²³Sources: Facts and Figures 2024, ITU; 2023 Global Internet Penetration Rate, Statista.com.

Access to the internet varies between cities and rural areas. 83% of urban residents worldwide are online, compared to just 48% in rural areas. The smallest gap in internet access between urban and rural areas is in Europe, where 93% of the urban population and 86% of the rural population are online.

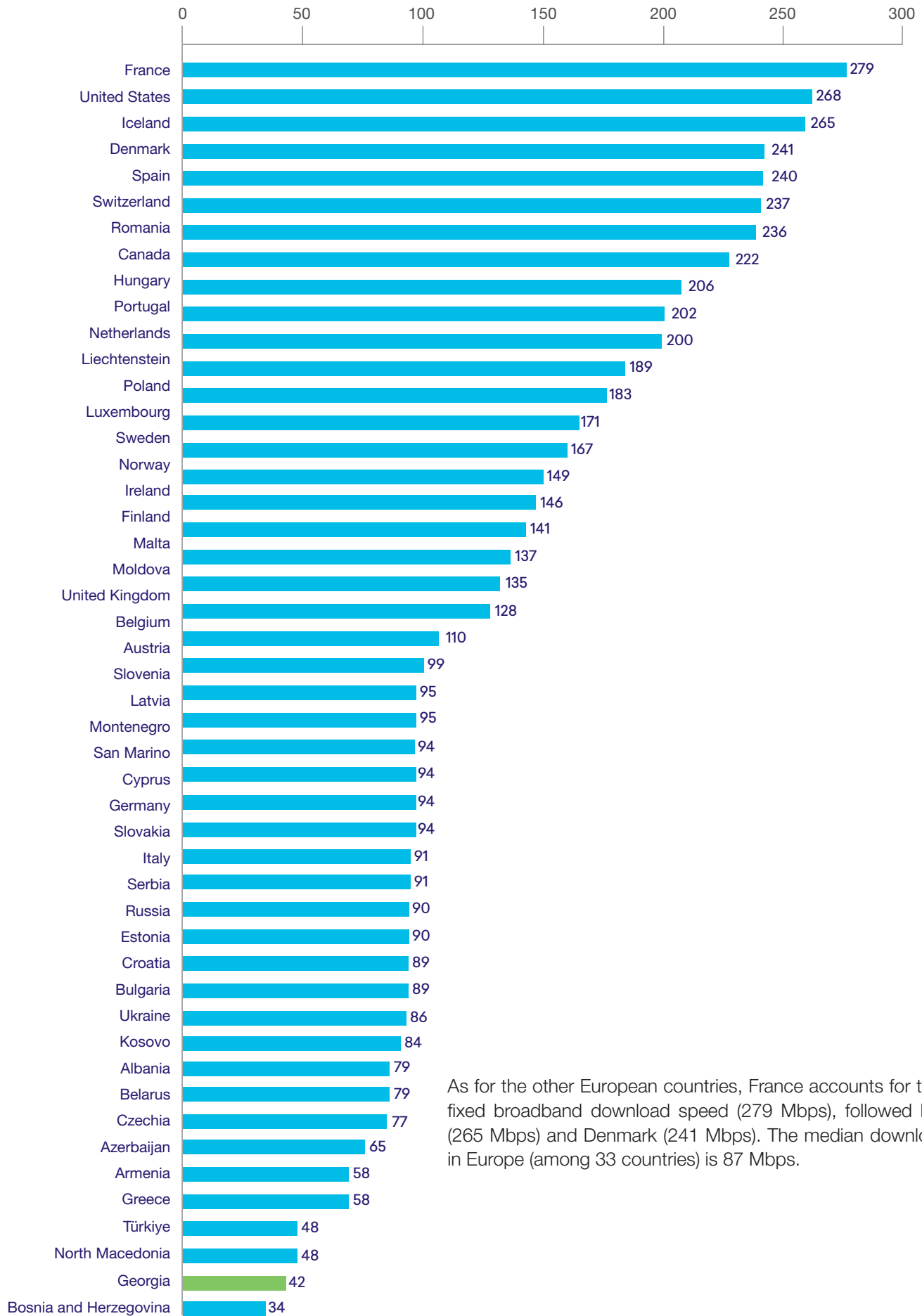
Percentage of Individuals Using the Internet by Settlement Type



Fixed broadband service

Unlike the mobile internet speed, the average fixed broadband speed in Georgia is considerably lower. According to the Speedtest Global Index, the average fixed broadband speed in Georgia in 2024 was 41 Mbps. It is worth noting that in 2024, the largest fibre-optic broadband service providers in Georgia offered increased speeds to the existing and new subscribers without changing the rates. Consequently, the average fixed broadband speed in Georgia increased by almost 60% year-over-year (from 26.6 Mbps to 41 Mbps).

Fixed Broadband Download Speed (Mbps)

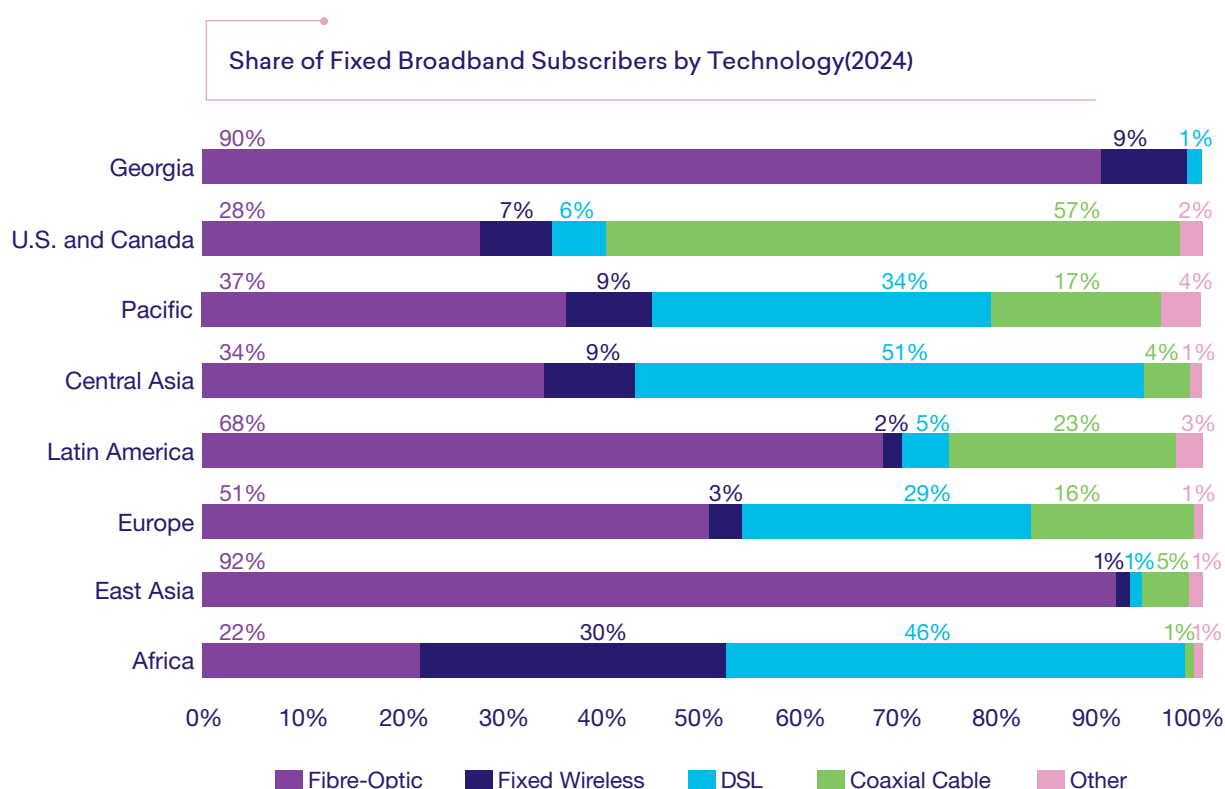


As for the other European countries, France accounts for the highest fixed broadband download speed (279 Mbps), followed by Iceland (265 Mbps) and Denmark (241 Mbps). The median download speed in Europe (among 33 countries) is 87 Mbps.

Average monthly fixed broadband traffic per subscriber in Georgia is 85 GB, which is 6.5 times greater than mobile network usage. The higher volume of traffic generated in the fixed network can be explained by several factors, including the unlimited data transfer in a fixed network, several devices usually being connected to one fixed network subscriber point, and data for multimedia tools such as Netflix, YouTube, Apple TV and other OTT²⁴ platforms being mainly transmitted through a fixed network.

Interestingly, there has also been progress in the provision of fixed broadband services around the world. Over the past 5 years, the share of fibre-optic broadband service users has increased significantly. 51% of European households with fixed internet access receive this service through fibre-optic technology, and their share has increased by 20% in the last 5 years. Copper infrastructure still plays a significant role in European countries. In Georgia, companies have almost stopped using copper infrastructure, and its share has decreased to a mere 1.12%.

The growth in the share of fibre-optic broadband users is driven by the transition from outdated digital subscriber lines (DSL) and coaxial cable services to high-speed fibre internet.



Fibre-optic broadband was implemented in Georgia on a large scale from the very beginning. As early as in 2019, 82% of fixed internet subscribers had access to this service, compared to only 31% in Europe and 16% in North America. It is worth noting that the development of fibre broadband was not considered a priority in Europe and North America, since it was possible to provide high-speed internet services through a well-developed infrastructure of copper and coaxial cables in these regions. This is reflected in the current figures, which show that 90% of fixed broadband subscribers in Georgia have access to the internet through fibre-optic technology, compared to 51% in Europe and 28% in North America.

Although the development of Georgia's fibre-optic broadband network began early and now holds one of the most advanced positions, it still lags behind many countries in terms of the download speed and the share of subscribers using this technology. Georgia ranks second from the bottom in this parameter among the countries of Europe and the Caucasus region, ahead of only Bosnia and Herzegovina.

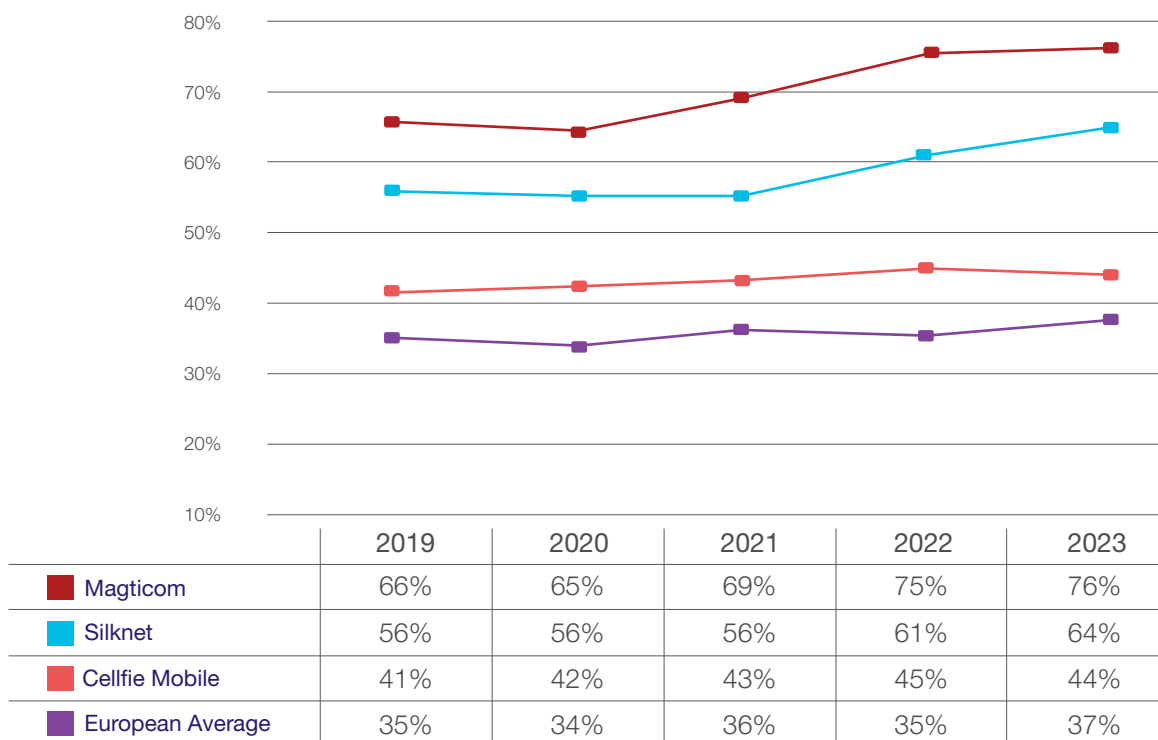
²⁴Over The Top - Provision of multimedia services via Internet Protocol (IP).

Assessment of the telecommunications market should also consider the EBITDA margin (earnings before interest, taxes, depreciation, and amortisation) of telecom operators. It is particularly interesting to compare this data between the European and Georgian operators.

In 2023, the EBITDA margin of large operators in European countries ranged between 28.9% and 55.5%, while the average EBITDA margin of operators in 20 European countries was 37.1%²⁵.

For comparison, the EBITDA margins of the major Georgian operators Magticom and Silknet during the same period were 76% and 64%, respectively, while the EBITDA margin of the third-largest operator by market share, Cellfie Mobile, was 44%. It is worth noting that Cellfie Mobile only holds 23% of the Georgian market in terms of subscribers.

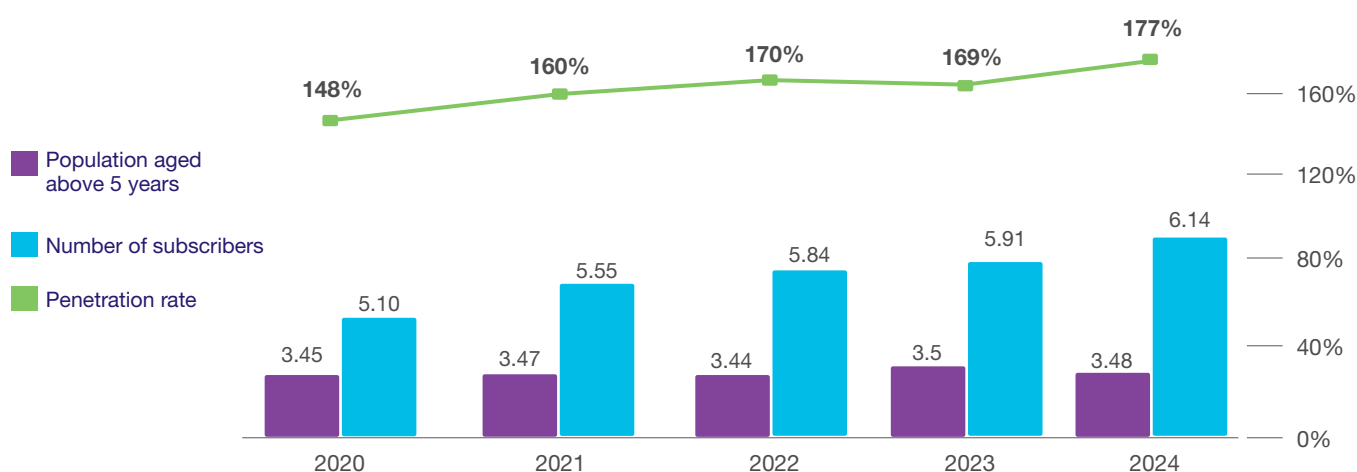
EBITDA Margins of the Three Largest Operators on the Georgian Telecom Market Relative to the Average EBITDA Margin of European Telecom Operators



²⁵38 operators in the following countries: Austria, Belgium, United Kingdom, Germany, Spain, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Romania, Greece, France, Serbia, Slovenia, Hungary, Finland, Sweden, Switzerland.

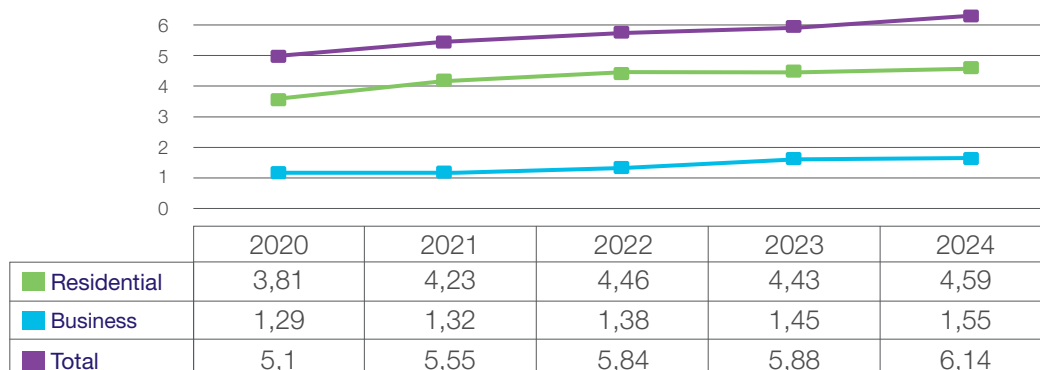
The number of mobile subscribers²⁷ in Georgia reached 6.14 million by the end of 2024, while the penetration rate among the Georgian population was 177%²⁸. This suggests that subscribers have multiple mobile phone numbers, and that they use the services of more than one operator to obtain favourable terms in accordance with their needs. Furthermore, the introduction of eSIM²⁹ and dual SIM technologies has made it easier for individuals to use more than one mobile number.

Mobile Subscriber Numbers (mln.) and Penetration Rate among the Population Aged Above 5 Years



The increase in the number of subscribers is driven by an increase in the number of residential and business subscribers. The share of business subscribers in the total number of subscribers was 25.4% in the final quarter of 2024.

Subscriber Numbers by Type (mln.)



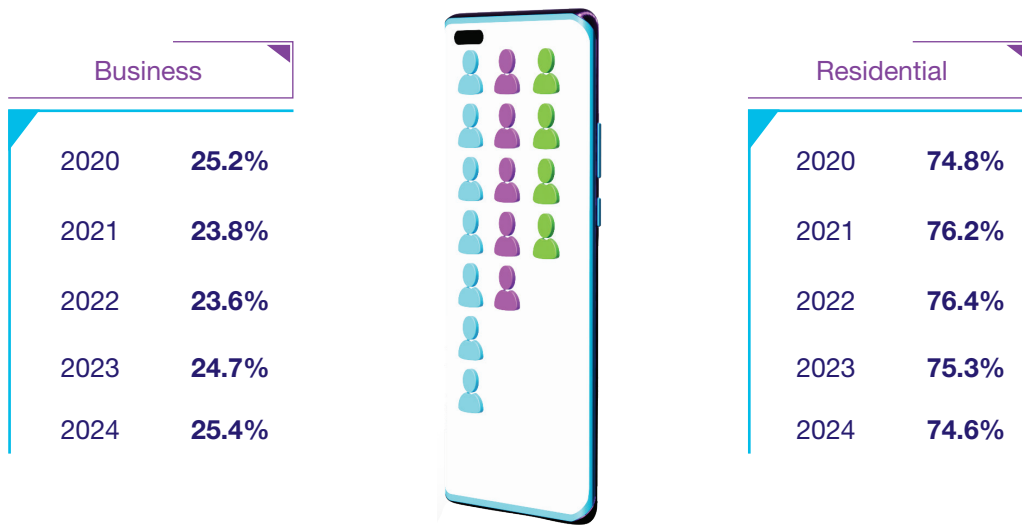
²⁶As of 10 February 2024.

²⁷A subscriber is a SIM card that has been used at least once during a three-month period to make a voice call, render a service or pay a subscription fee (including company employees, but not including test cards).

²⁸The Georgian population includes persons aged 5 years and above.

²⁹eSIM is a technology embedded on a mobile device that allows connection to a mobile network without a physical SIM card.

Distribution of Subscribers



In 2024, the market shares of mobile operators by the number of subscribers remained unchanged year-on-year, with Magticom accounting for 41%, Silknet for 35%, and Cellfie Mobile for 23%. At the end of 2022, the mobile virtual network operator Eclectic began operating under the brand name Hallo. In the fourth quarter of 2024, they had 30,000 subscribers and a market share of 0.5%.

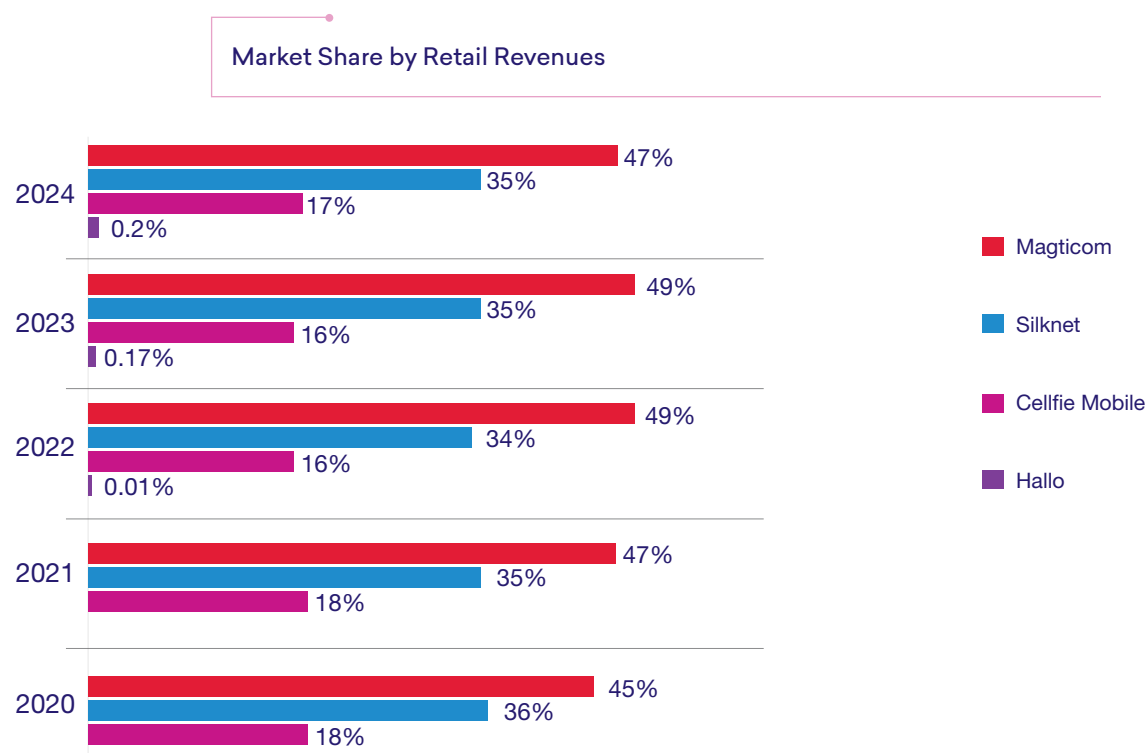
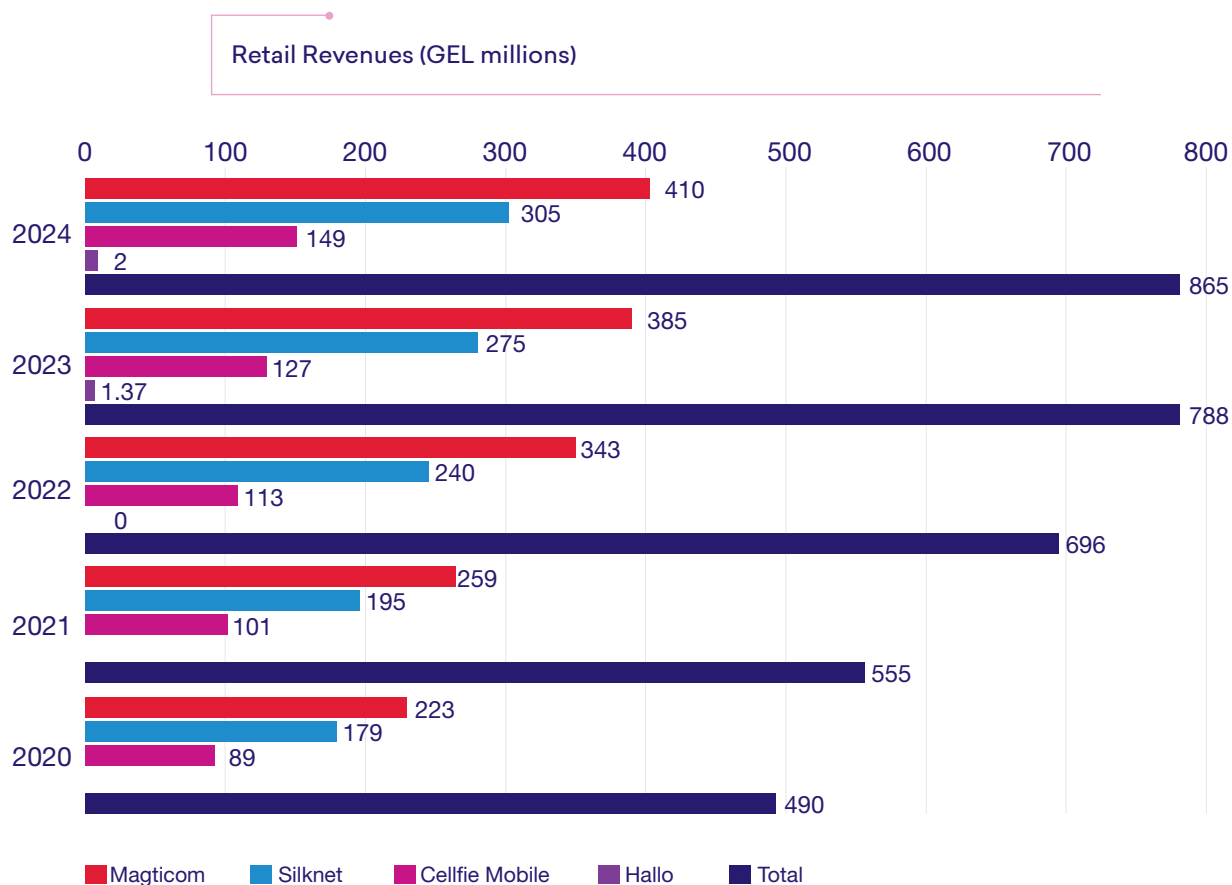
Subscriber Numbers and Market Share by Subscriber Numbers (millions)

	2020	2021	2022	2023	2024
	2.07 41%	2.31 42%	2.44 42%	2.45 41%	2.52 41%
	1.7 33%	1.85 33%	1.96 33%	2.02 34%	2.17 35%
	1.33 26%	1.4 25%	1.45 25%	1.41 24%	1.42 23%
			0.004 0.1%	0.03 0.5%	0.03 0.5%

Number of Residential and Business Subscribers by Companies (millions)

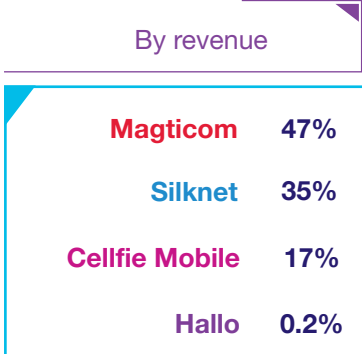
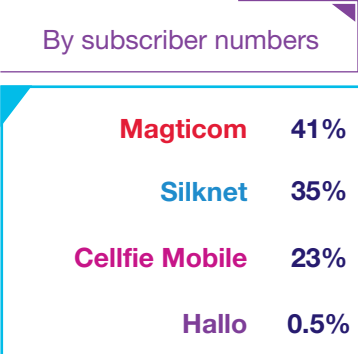
	Magticom	Silknet	Cellfie Mobile	Hallo	Total
Residential	1.84	1.60	1.12	0.03	4.59
Business	0.68	0.57	0.3	0	1.55

In 2024, the retail revenues of mobile operators totalled 865 million GEL. Magticom had the largest market share in retail revenues (47%), followed by Silknet (35%) and Cellfie Mobile (17%).



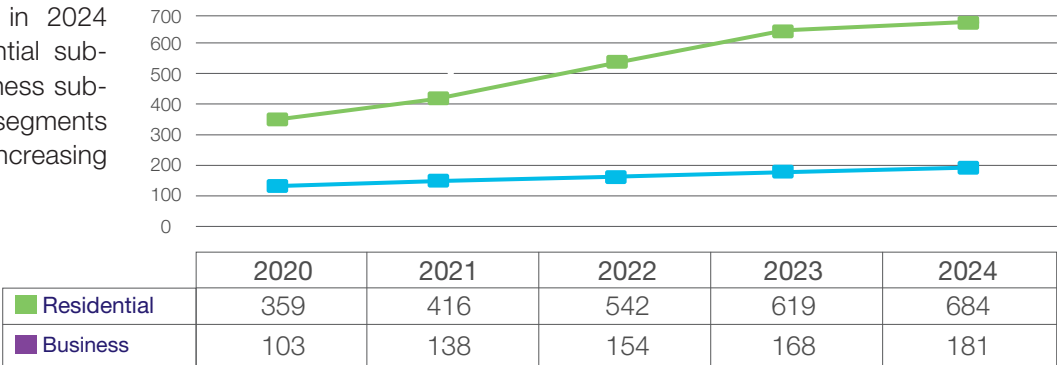
The varying distribution of market shares among the companies based on revenues and subscriber numbers indicates that on average, Magticom subscribers pay more for mobile services than Cellfie Mobile users. In the case of Silknet, subscriber and revenue shares are almost equal, which means that Silknet subscribers pay more than Cellfie Mobile subscribers, but less than Magticom subscribers.

Distribution of Operators by Revenue and Subscriber Numbers



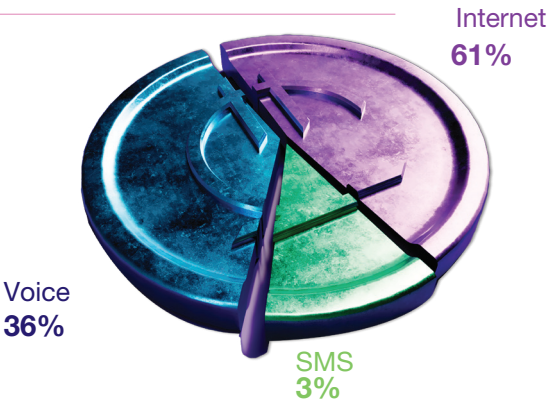
Revenues by Subscriber Type (GEL millions)

79% of mobile revenues in 2024 were generated by residential subscribers, and 21% by business subscribers. Revenues in both segments are characterised by an increasing trend.



Revenues by Service (GEL millions)

In terms of services, the largest share of total revenues comes from mobile internet (61%), followed by voice services (37%) and SMS services (3%).



The distribution by residential and business subscribers shows that the ratio is more or less similar for each company, although Cellfie Mobile appears to be more popular with residential subscribers:

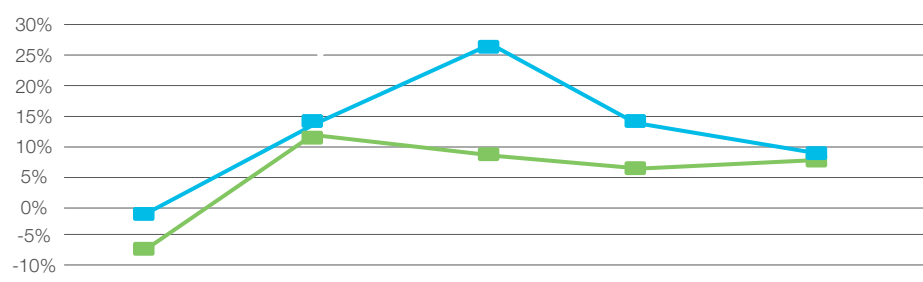
	Magticom	Silknet	Cellfie Mobile	Hallo
Residential	40%	35%	24%	1%
Business	44%	36%	20%	0%



Mobile service revenues relative to the country's economic figures

In 2024, the growth rate of mobile service revenues in Georgia decreased, while the country's economic growth rate (GDP growth) increased. Thus, the GDP growth rate slightly exceeded the growth in mobile revenues, although the figures are closer than last year.

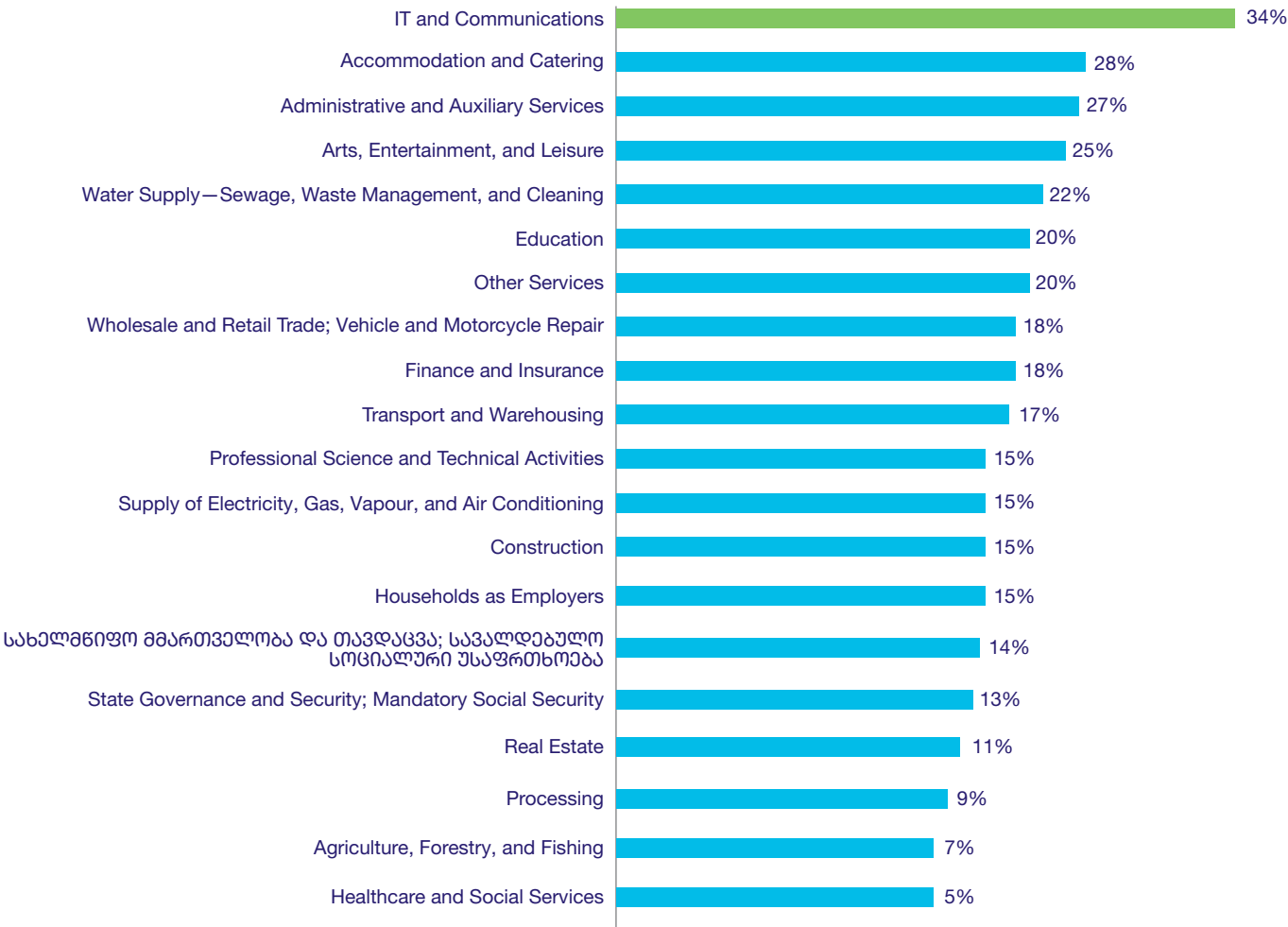
Growth in Mobile Revenues Relative to GDP Growth



	2020	2021	2022	2023	2024
GDP growth	-7%	11%	10%	7.50%	9.4%
Mobile revenue growth	-1.9%	13.20%	25.50%	13.20%	9.80%

Below is the average growth rate of Georgia’s largest industries³⁰ (as a share of GDP) over the past 5 years. The IT and communications sector continues to lead the way.

Average GDP Growth in the Last 5 Years by Type of Economic Activity
(4th Quarter Forecast)



Average Revenue Per User (ARPU)³¹



ARPU (GEL)	
2020	8.6
2021	9.7
2022	11.8
2023	12.8
2024	13.2

According to the 2024 data, the average revenue per user increased by 3% to GEL 13.2 (excluding VAT³²)

³⁰Source: National Statistics Office of Georgia.
³¹ARPU – Average Revenue per User.
³²As of December 2024.

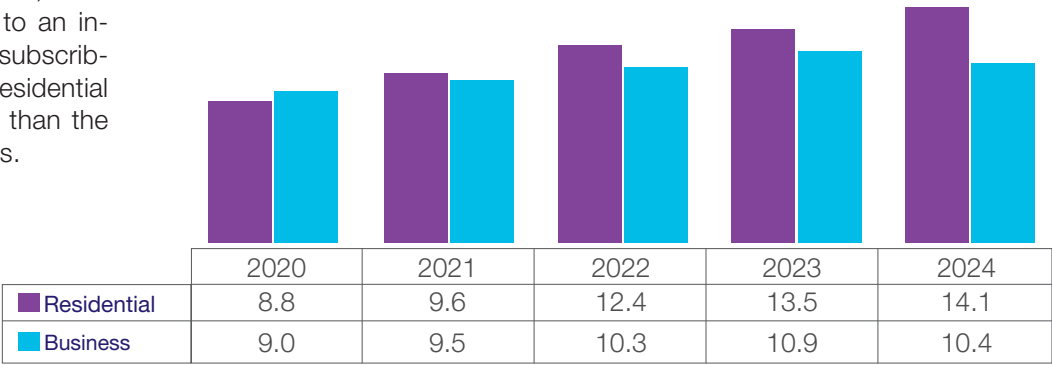
In December 2024, Magticom had the highest ARPU among the operators, followed by Silknet. Cellfie Mobile and Eclectic (Hallo) subscribers spent the least amount on mobile connection. Furthermore, the figures for all three major operators increased year-over-year, with only Eclectic’s ARPU decreasing.

ARPU by Companies

	Magticom	Silknet	Cellfie Mobile	Hallo
2020	9.9	9.3	6.1	0
2021	10.9	10.1	6.8	0
2022	14.1	12.1	7.7	7
2023	14.6	13.3	8.9	8.5
2024	15	13.4	9.8	8

In previous years, business subscribers generated more revenue than residential subscribers. However, this trend changed in 2022 due to an increase in rates for residential subscribers. In 2024, the ARPU of residential subscribers was 29% higher than the ARPU of business subscribers.

ARPU by Subscriber Type



Voice traffic and MOU³³



Voice Traffic
(billions minutes)

2020	10.18
2021	10.23
2022	9.17
2023	8.41
2024	8.02

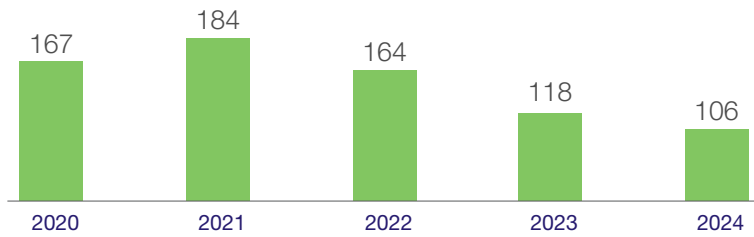
The decline in voice traffic delivered by traditional technologies is a clear trend worldwide. This is due to the increase in internet usage, which allows subscribers to make voice calls without any additional charges through various social networks or OTT apps such as WhatsApp, Viber, Zoom, Teams, etc. This trend is also evident in Georgia.

In 2024, the total outgoing voice traffic decreased by 5% year-over-year and amounted to 8.02 billion minutes. The average minutes of use (MOU) also decreased to 106 minutes³⁴. This trend began in 2022 and is likely to be irreversible.

³³Minutes of Use – average talking time in a month (outgoing calls only).

³⁴Average of the fourth quarter of 2024.

Average MOU



According to the data for the fourth quarter of 2024, Cellfie Mobile subscribers account for the highest average minutes of use per month, which is due to the relatively low rates offered by the company. They are followed by Silknet and Magticom, while Eclectic subscribers only used an average of 6.9 minutes per month.

Average Monthly MOU by Companies (billion minutes)

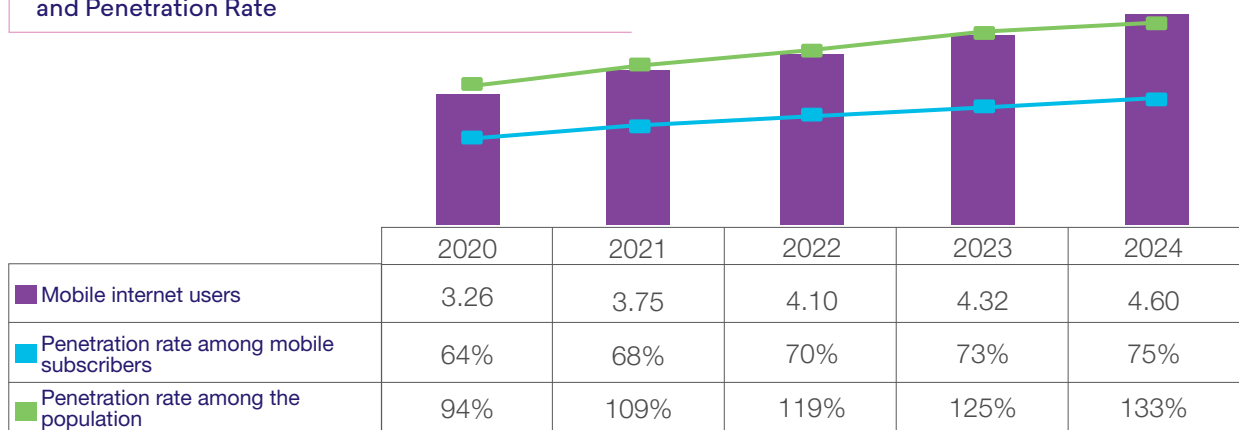


Mobile Internet

The importance of mobile internet in the modern world is growing due to an ever-increasing demand for online services and digital platforms. Therefore, there is also an increased dependence on a constant and stable connection. The population's skills in using modern technologies are gradually improving, and the number of mobile internet users is growing rapidly. From 2020 to the end of 2024, the compound annual growth rate (CAGR) of the number of mobile internet users was 7.7%³⁵. By the end of 2024, 4.6 million mobile subscribers were using internet services.

At the end of 2024, the mobile internet user penetration rate was 133% among the population of Georgia³⁶, and 75% among the mobile service subscribers.

Mobile Internet User Number (mln.) and Penetration Rate



³⁵CAGR – Compound Annual Growth Rate.

³⁶The population of Georgia includes persons aged 5 years and above.

By the end of 2024, Silknet had the largest number of mobile internet users with 1.70 million, followed by Magticom with 1.63 million and Cellfie Mobile with 1.25 million subscribers.





The share of mobile internet users in the total number of subscribers varies by operator. Cellfie Mobile leads the market in this regard, with 88% of the company's subscribers using mobile internet. This is due to the relatively low rates offered by the company, and the segment of users. Silknet comes second with 78%, while Magticom holds third place with 65%.

Mobile Internet Users (mln.)

	2020	2021	2022	2023	2024
 სილქნეტი SILKNET	1.17	1.35	1.45	1.57	1.70
 მაგთი MAGTI	1.08	1.34	1.45	1.52	1.63
 cellfie	1.00	1.06	1.17	1.21	1.25
 Halo	-	-	0	0.02	0.02

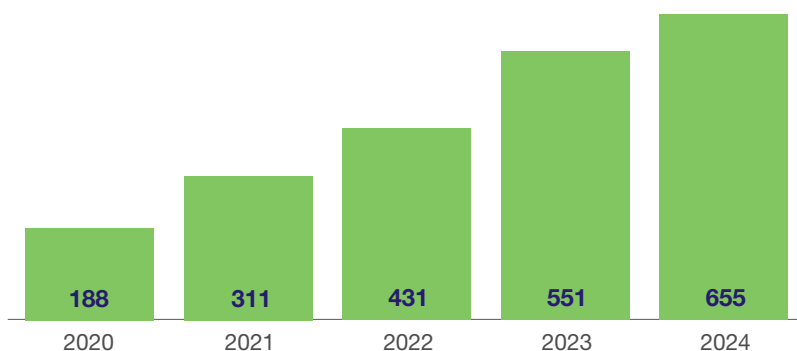


Mobile Internet User Penetration Rate by Companies

	88%
 სილქნეტი SILKNET	78%
 მაგთი MAGTI	65%
 Halo	58%





In 2024, the volume of traffic generated by mobile internet users increased by 19% year-over-year to 655 petabytes. This is due to the introduction of 5G technology, increased demand for internet access, an increase in the number of mobile internet users, and an increase in the number of smartphones on the market.

Mobile Data Traffic (petabytes)

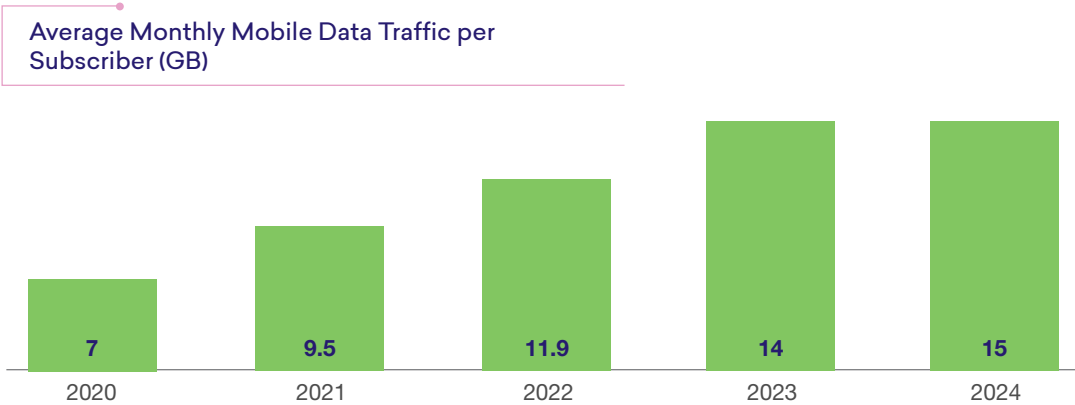


Magticom subscribers generated 47% of the total mobile data traffic in 2024, while Silknet and Cellfie Mobile subscribers generated 34% and 18%, respectively.

The Share of Operators in the Mobile Data Traffic

 მაგთი MAGTI	47%
 სილქნეტი SILKNET	34%
 cellfie	18%
 Halo	0.4%

The increase in the total volume of mobile data traffic and the number of mobile internet users is driven by an increase in the average mobile internet usage per subscriber. This figure has increased by 18% year-over-year.



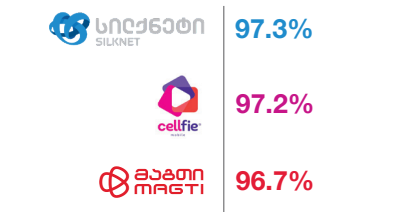
Magticom once again leads the market in terms of the average monthly data traffic per subscriber with 22 GB, which exceeds the traffic generated by Silknet subscribers by 57%, and the traffic generated by Cellfie Mobile subscribers by 144%. The average monthly data traffic of Eclectic subscribers in 2024 was 21 GB, slightly behind Magticom.

Average Monthly Mobile Data Traffic per Subscriber (GB)



With the introduction of 5G and the growth of 4G, the volume of data traffic generated by 2G and 3G technologies is decreasing. In 2024, 4G accounted for 97% of all mobile data traffic.

The Share of 4G in Total Mobile Data Traffic



In 2024, the Communications Commission held an auction to offer mobile operators harmonised frequency resources for 5G technology. As a result of the auction, Magticom acquired the frequency resources and immediately started offering 5G to its customers. Cellfie Mobile had already acquired the license for 5G frequencies as a result of the auction held by the Communications Commission in 2023, and the company is in the process of gradually developing its network. It is therefore expected that 5G technology will account for a significant share of mobile data traffic in Georgia by 2025.

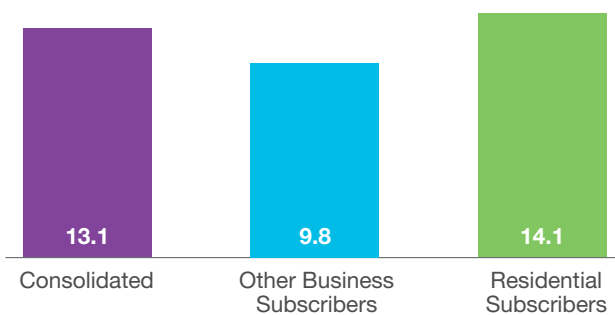
In the irreversible process of digital transformation, the potential and substantial capabilities of 5G technology are already clearly evident in many markets around the world, offering advantageous opportunities to residential and business subscribers alike. It is therefore important to make 5G technology and its advantages widely available to the Georgian market.

At the end of 2024, there were 307,000 active subscribers included in the consolidated state tender, which is 26% of the total number of business subscribers.

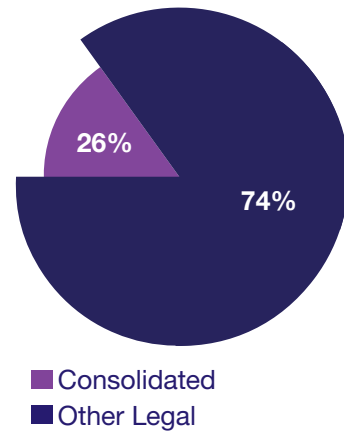
Business subscribers generated a total revenue of 181 million GEL in 2024, with 77 million GEL being generated by consolidated tender subscribers.

The monthly ARPU of subscribers included in the consolidated tender exceeds the ARPU of other business subscribers by an average of 3.3 GEL³⁷.

ARPU (GEL)

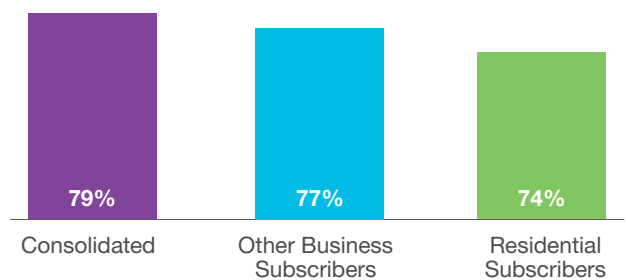


Distribution of Business Subscribers

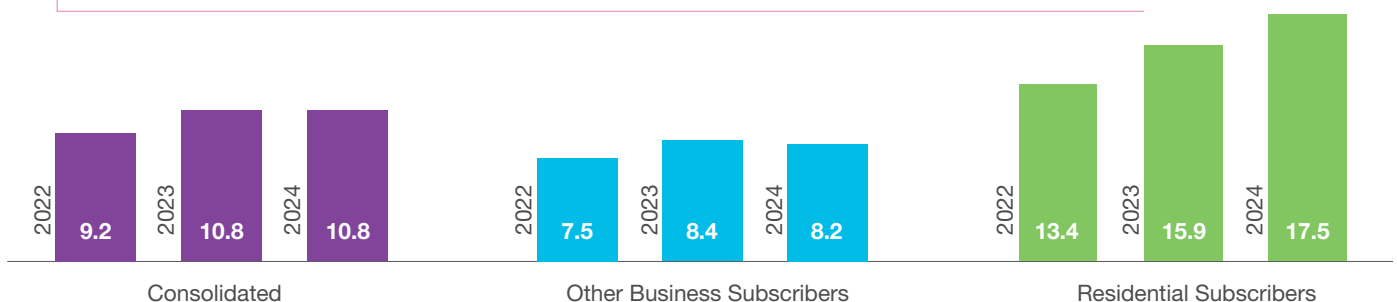


At the end of 2024, the penetration rate of mobile internet users among the consolidated tender subscribers was 79%, while the figure for other business subscribers was 77%. The penetration rate of mobile internet users among the residential subscribers was 74%.

Penetration Rate of Mobile Internet Users

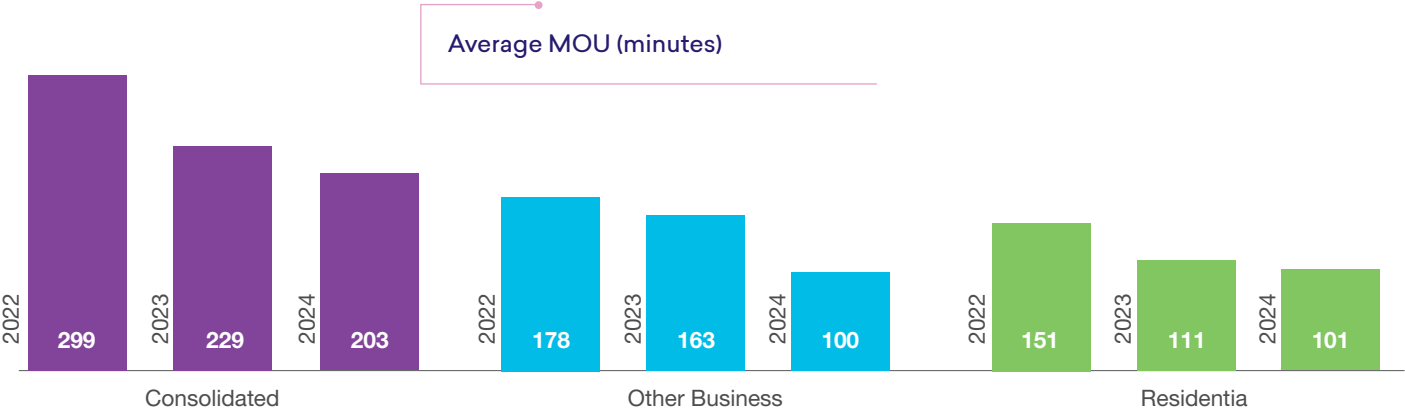


Average Monthly Mobile Data Traffic per Subscriber (GB)



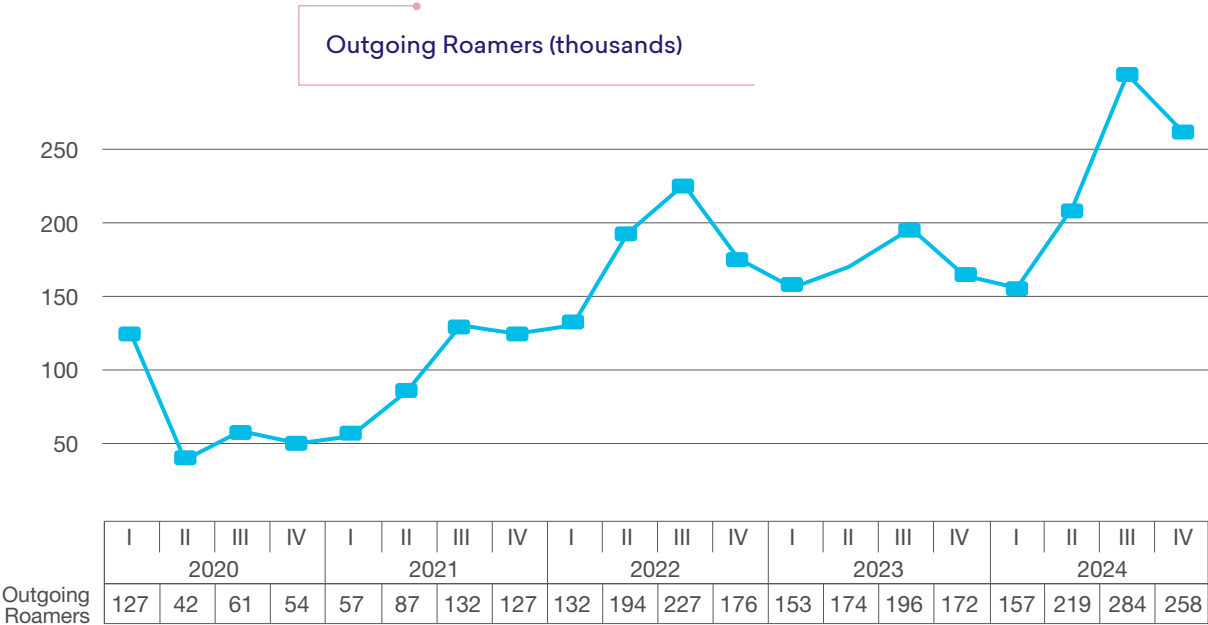
³⁷ARPU for December 2024.

In 2024, consolidated tender subscribers had the most minutes of use, spending an average of 203 minutes³⁸ per month talking on their mobile phones—approximately twice as much as other business subscribers and residential subscribers. The average MOU per subscriber is decreasing for all three segments.



Roaming

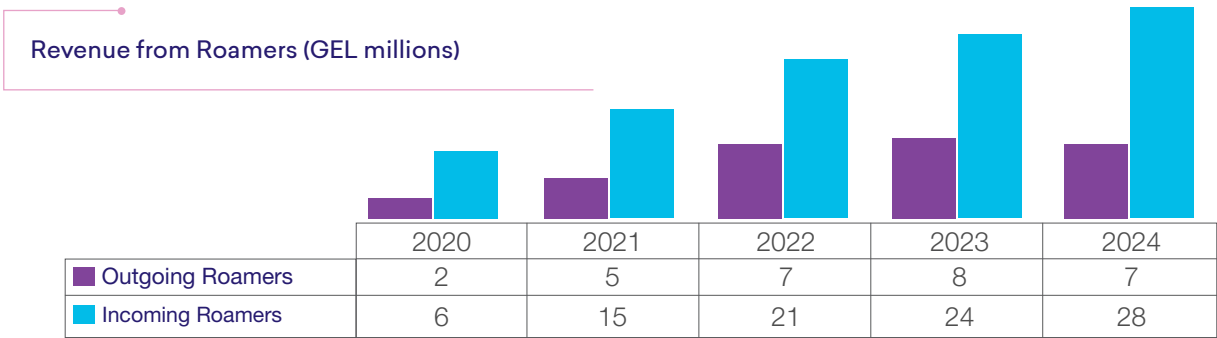
The dynamics of the number of outgoing roamers by year and by quarter is as follows:



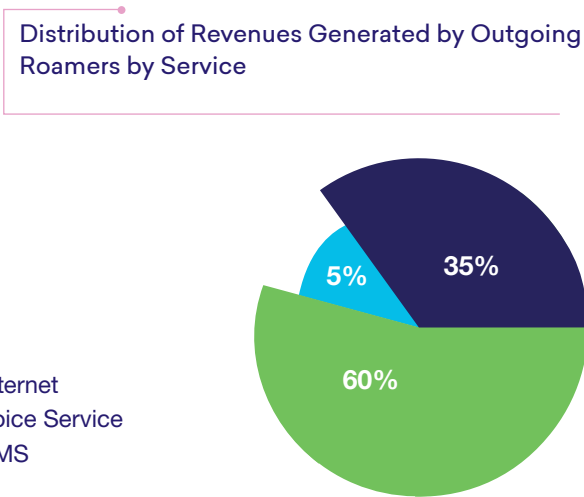
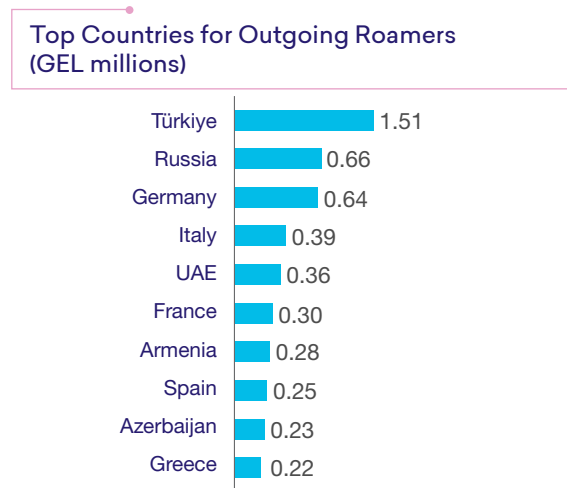
³⁸Average for the fourth quarter

In recent years, there has been an increase in the number of outgoing roaming subscribers, which is due to both the post-pandemic circumstances and increased usage driven by improved roaming packages. In 2024, Silknet, Magticom, and Cellfie Mobile began offering updated roaming packages that could be used on the networks of operators in certain European countries and Türkiye, with more favourable terms on offer than in the previous packages. It is also worth noting that the Georgian national football team participated in the 2024 European Championship, which led to a large outflow of population to Europe and, consequently, an increase in the number of roamers.

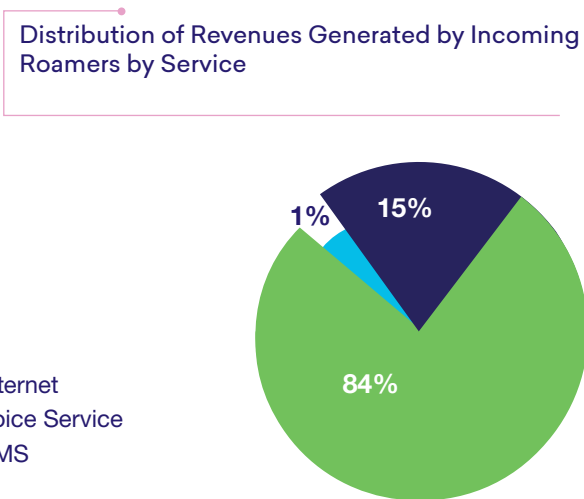
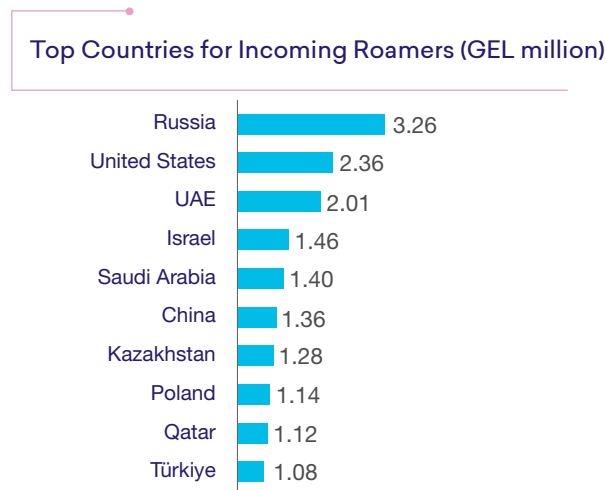
The total revenue from roaming services in 2024 amounted to 35.1 million GEL.



In 2024, outgoing roamers from Georgia spent the most amount of money (1.51 million GEL) on roaming services in Türkiye, which was facilitated by their use of Türkiye as a transit country to reach their final destination.



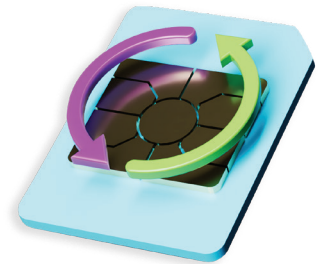
The highest amounts on mobile services during their stay in Georgia were spent by roamers from the Russian Federation. This trend has not changed compared to 2023. Russia is followed by the United States, United Arab Emirates, and Israel.



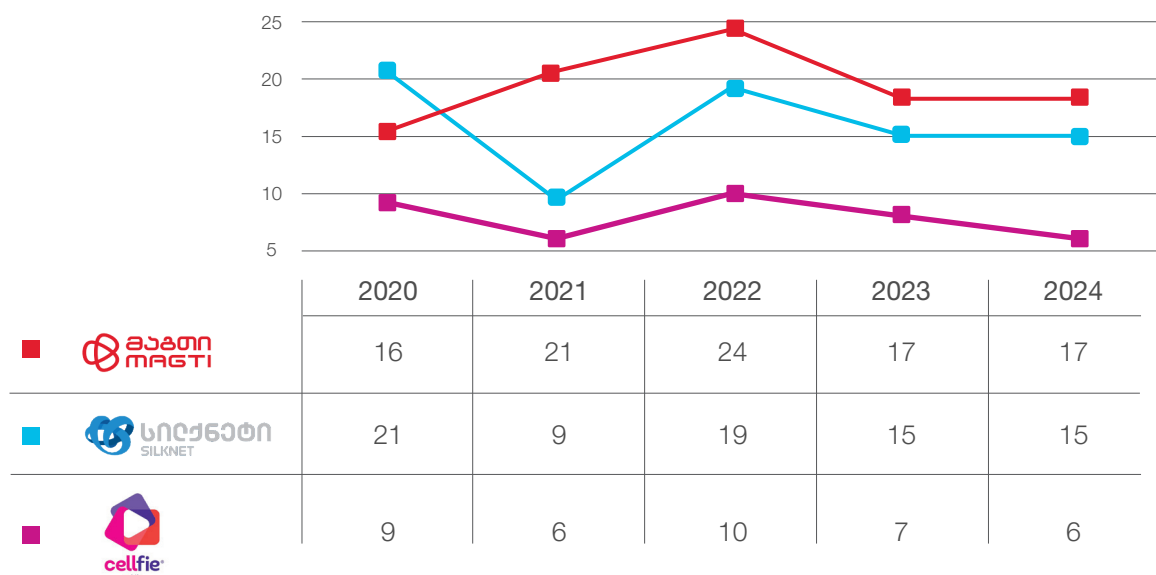
In 2024, 38,000 numbers were ported to the networks of mobile operators, which is 1,000 less than in 2023.

Number of Ported Numbers (thousands)

2020	46
2021	37
2022	52
2023	39
2024	38

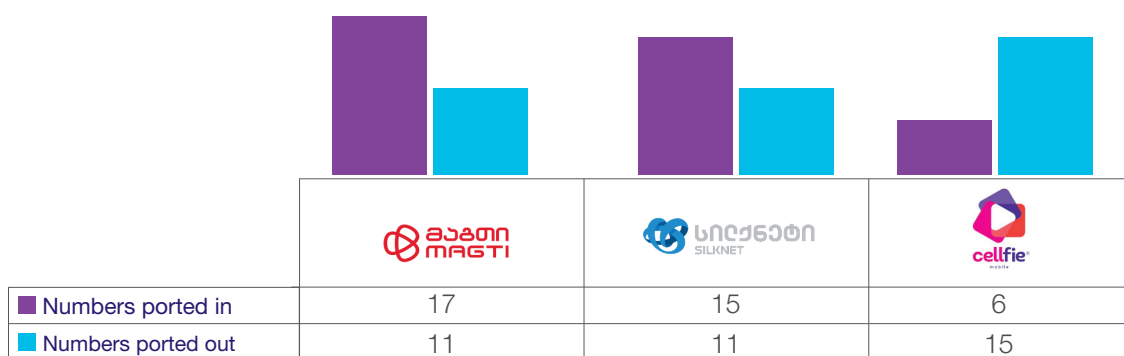


Number of Ported Subscribers (thousands)



The Magticom network received the largest number of ported subscribers, while the Cellfie Mobile network experienced the largest loss of ported subscribers.

Ported Subscribers by Companies (thousands)



Distribution of mobile devices by manufacturer

Samsung phones are the most popular mobile devices in Georgia in terms of quantity, while Apple phones are the second most popular. Notably, Samsung’s market share in Georgia has decreased compared to the previous year, while Apple’s share has increased.

Company	2023	2024	
Samsung	37.3%	35.5%	
Apple	19.8%	22.0%	
Others	16.1%	22.2%	
Xiaom	14.7%	13.8%	
Microsoft ☞ Nokia	6.6%	2.2%	
Huawei	4.1%	3.3%	
Lenovo	0.5%	0.5%	
LG	0.3%	0.2%	
Sony/Ericsson	0.2%	0.1%	
ZTE	0.2%	0.1%	
TCT	0.1%	0.1%	
HTC	0.1%	0.03%	



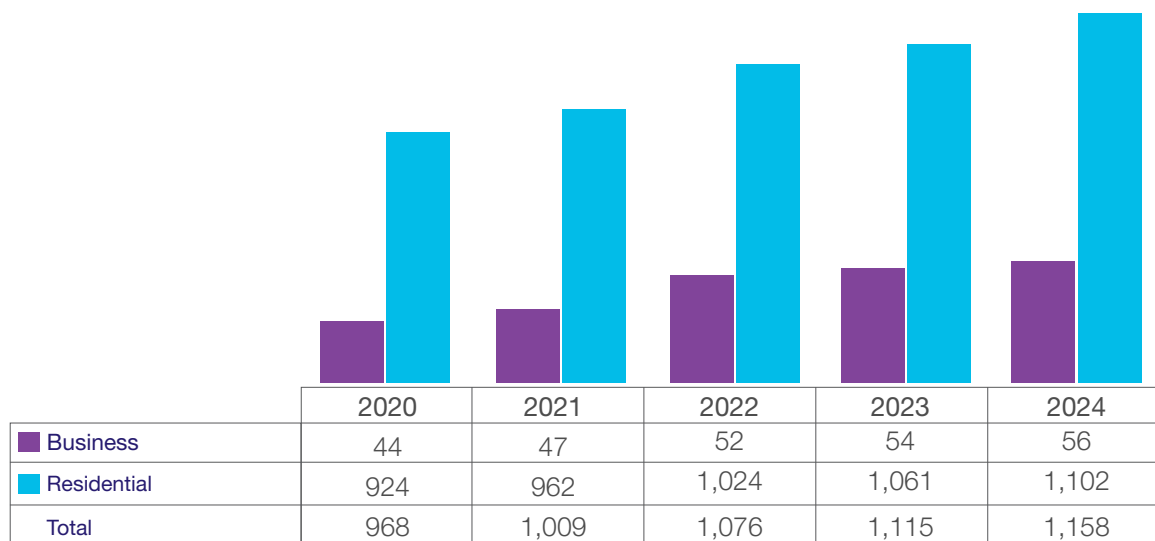
The growth of the fixed broadband market in Georgia is linked with the rapid development of fibre-optic technology. Recent trends show that the number of fibre-optic broadband users is steadily increasing, while the number of people using out-dated technologies such as xDSL, fixed wireless, and fixed LTE is decreasing. This is due to the advantages of fibre-optic technology, which include high data transfer rates, high bandwidth, and low latency, which gives it a competitive edge over other technologies.

The Communications Commission completed a wholistic study of the fixed broadband market in 2024, which identified Magticom as an operator with significant market power and imposed specific obligations on the company. During the course of the study in 2024, two major fixed broadband service providers, Silknet and Magticom, increased the speed of their fibre-optic internet packages without changing the subscription fees, enabling access to faster fibre-optic internet for their subscribers. Following this move by the major operators, other companies such as Akhali Kselebi Group⁴⁰ and Skytel also increased the speeds for their internet packages without changing the rates.

As of the fourth quarter 2024, there were 1.16 million fixed broadband subscribers. The number of subscribers increased by 43,700 (3.9%) year-over-year. The number of residential subscribers increased by 3.9%, and the number of business subscribers by 4.2%. Over the past five years, the average annual growth in the number of subscribers was 4.5% for residential subscribers and 5.9% for business subscribers.

Residential subscribers accounted for 95.2% of the total subscriber base.

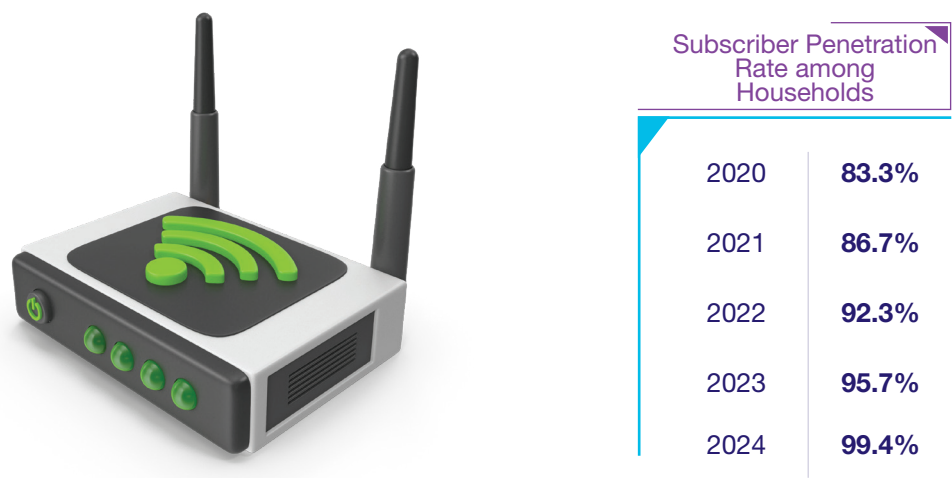
Number of Subscribers by Contract Type (thousands)



³⁹Based on the ITU definition, this is a technology that allows data transmission at speeds of 256 kbps or higher. Source: Manual for measuring ICT Access and Use by Households and Individuals by ITU, 2014 Edition.

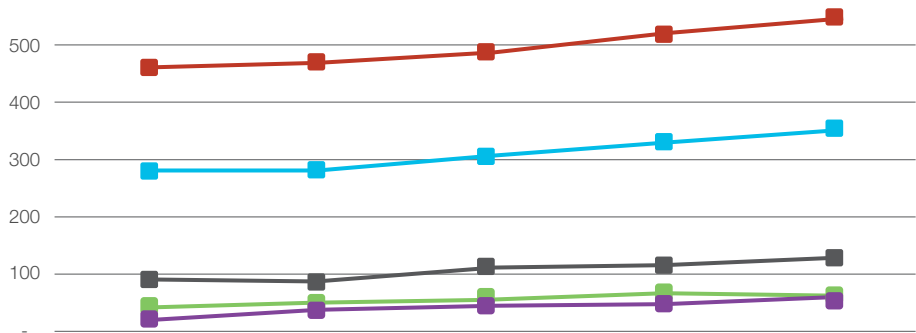
⁴⁰The Akhali Kselebi Group includes the subscribers of Akhali Kselebi and the Georgian Central Communications Corporation. They are interdependent entities.

There were 1.1 million residential subscribers in 2024, which is 41,400 more than in the previous year. Consequently, the penetration rate of fixed broadband subscribers in households increased to 99.4%⁴¹.



Silknet accounted for the largest year-over-year increase in the number of residential subscribers in 2024 with 19,100, followed by Magticom with 10,400.

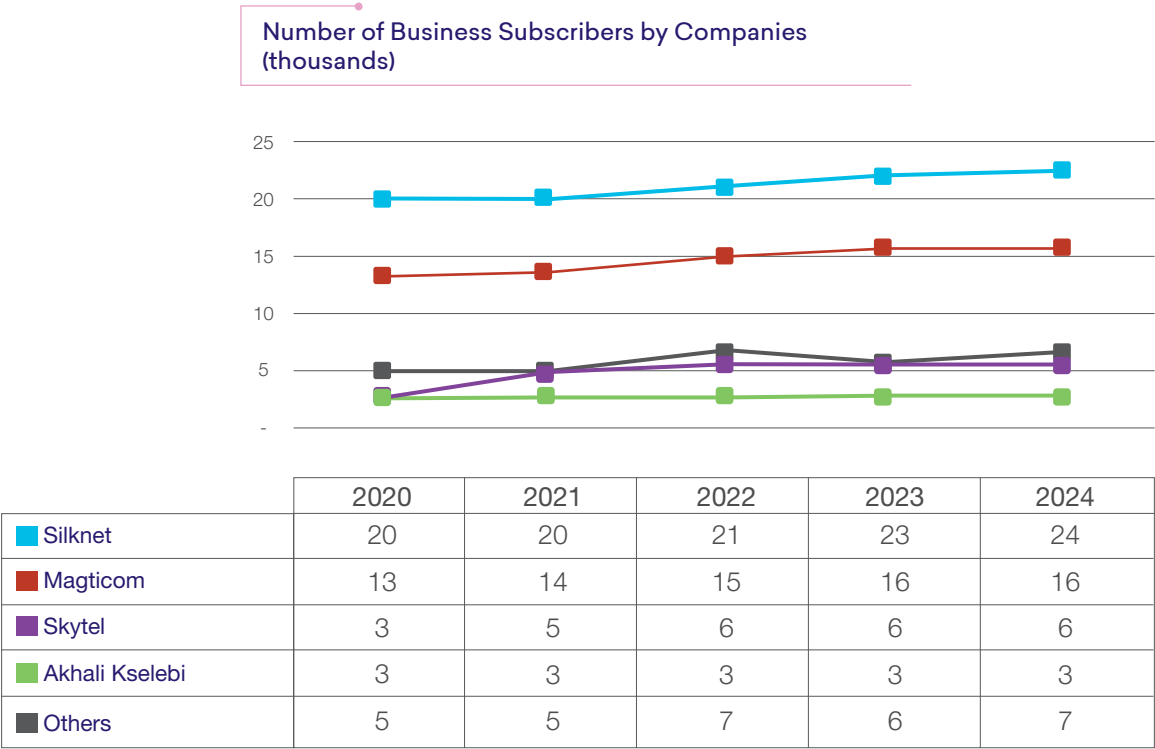
Number of Residential Subscribers by Companies (thousands)



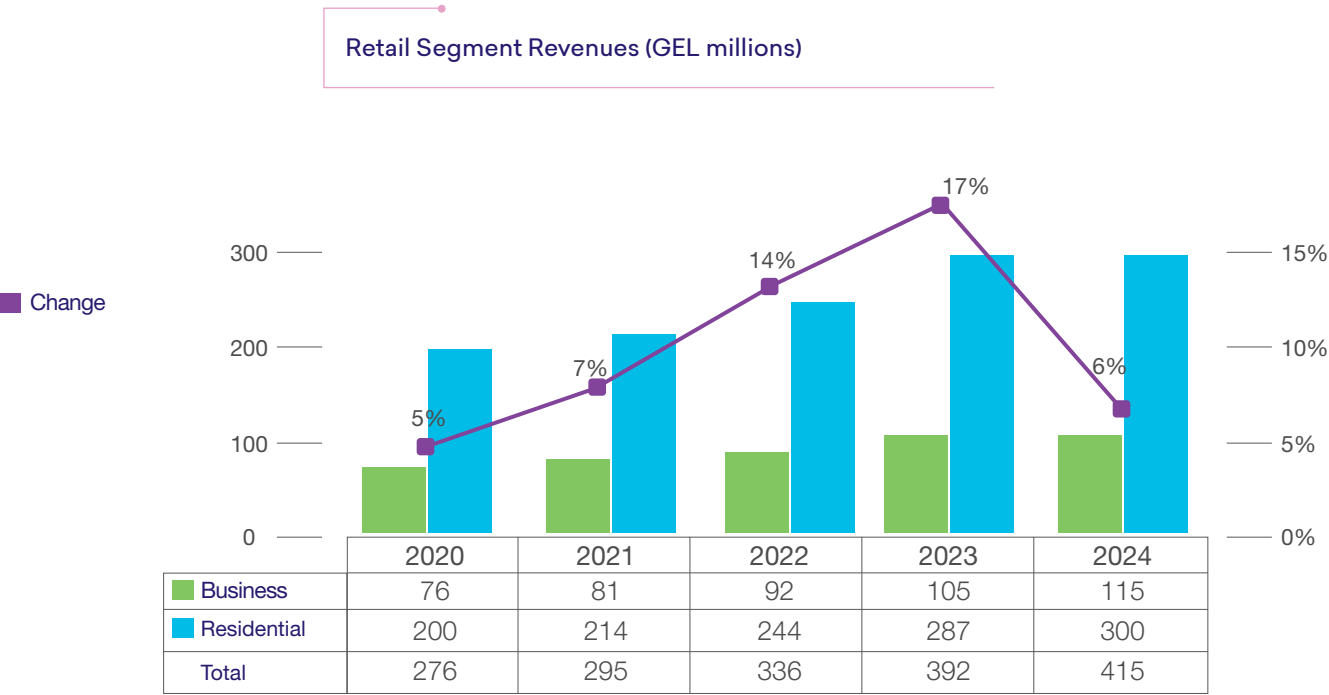
	2020	2021	2022	2023	2024
Magticom	458	474	497	508	518
Silknet	285	285	308	322	341
Akhali Kselebi Group	57	59	60	64	64
Skytel	25	50	55	58	64
Others	99	94	104	109	115

⁴¹The penetration rate is calculated with the number of households in the latest household census (2014) published by the National Statistics Office of Georgia.

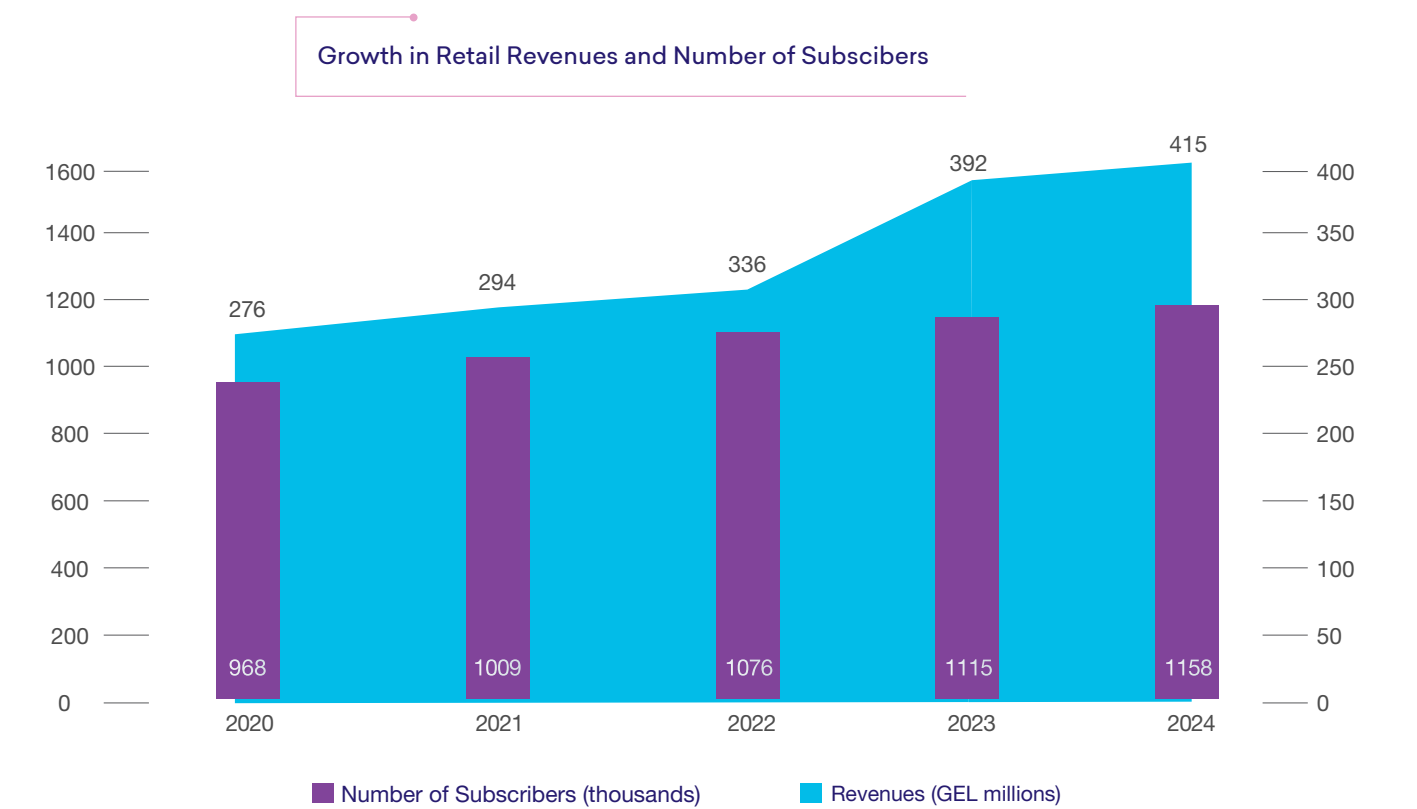
As of Q4 2024, Silknet had the largest number of business subscribers, followed by Magticom and Skytel.



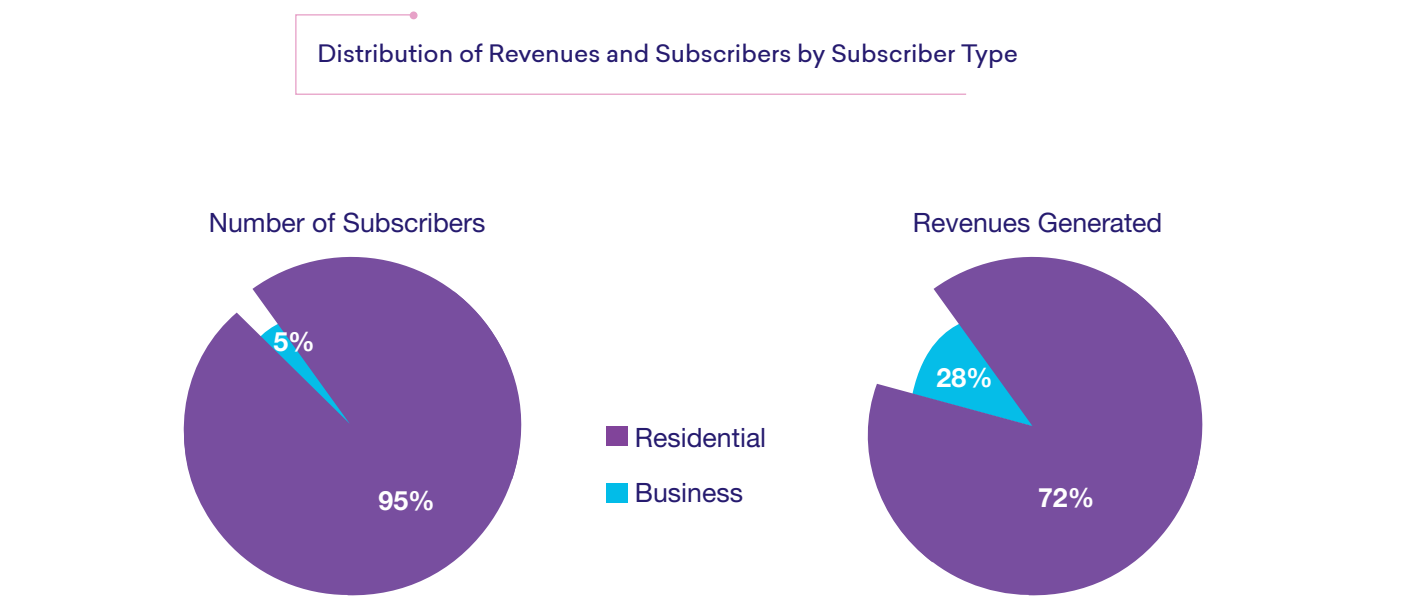
In 2024, retail revenues from fixed broadband services increased by 6% year-over-year to 415 million GEL.



The average growth rates of revenues and subscriber numbers differ from each other. Over the past five years, average revenue growth has been 10.7%, while subscriber numbers increased by an average of 4.6%. This suggests that the average price paid by subscribers for internet services has risen annually.

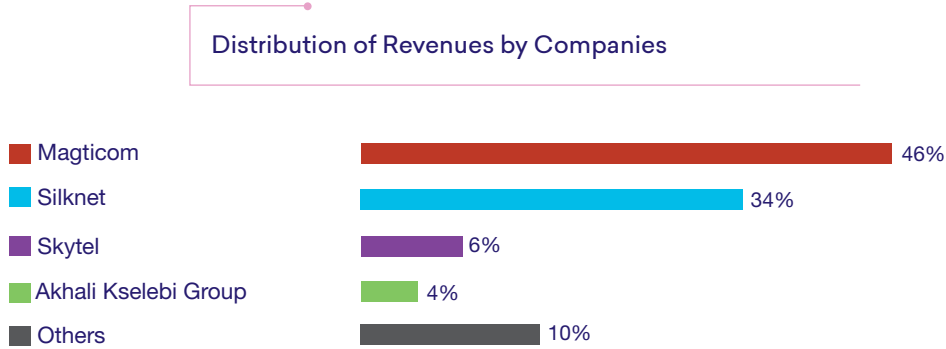


Business subscribers account for 28% of the total revenue, even though they only account for 5% of the total number of subscribers. This indicates that the service fees for business subscribers significantly exceed the subscription fees paid by residential subscribers.

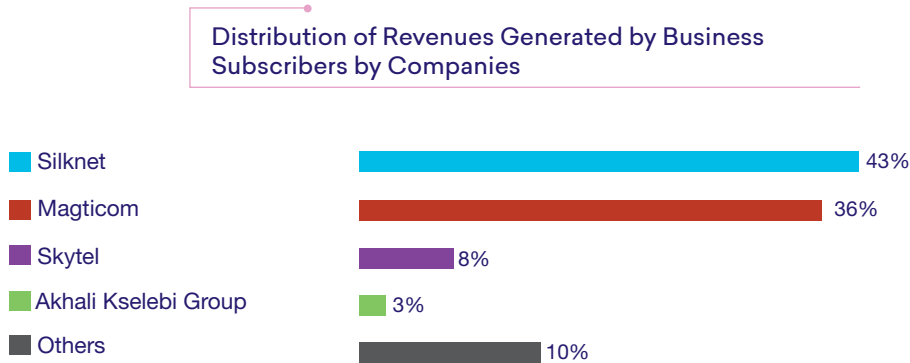
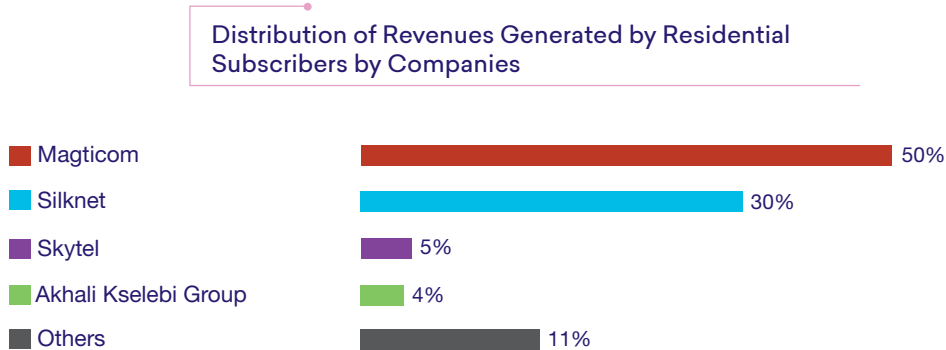


The Communications Commission has initiated the second phase of the wholistic study of the Georgian telecom market, which includes an in-depth study of corporate offers for business companies on the fixed retail market.

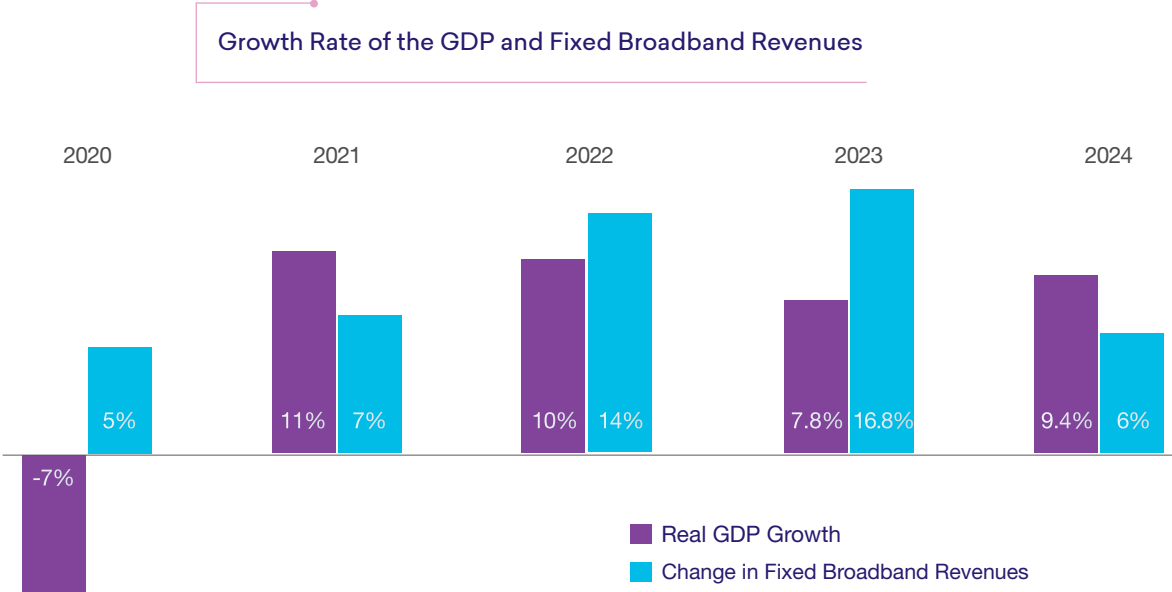
In 2024, 89.9% of the revenues were generated by the four largest players on the market, while the remaining 10.1% were distributed among 150 smaller companies. In terms of revenue, Magticom had a 46% share of the market, followed by Silknet with 34%, Skytel with 6%, and Akhali Kselebi Group with 3.9%.



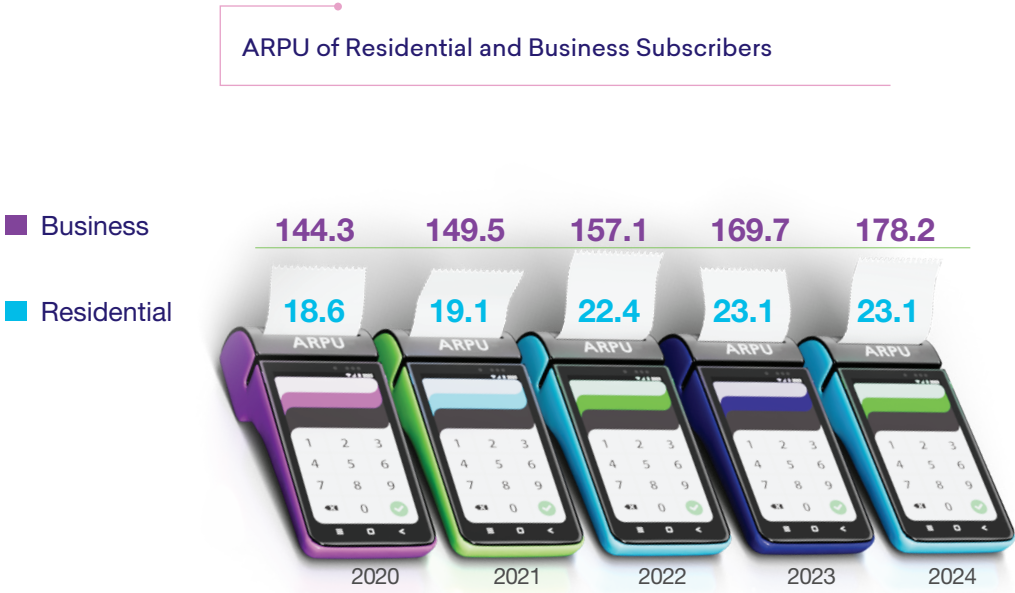
If we compare the residential and business subscriber segments by generated revenues, Magticom has the largest share of revenues among residential subscribers, while Silknet has the largest share among business subscribers.



The percentage change figures for fixed broadband revenues and the GDP in 2024 are positive and closer to each other than in the previous year. The GDP growth rate increased from 7.8% to 9.4%⁴², while fixed broadband revenue growth fell from 16.8% to 6%.



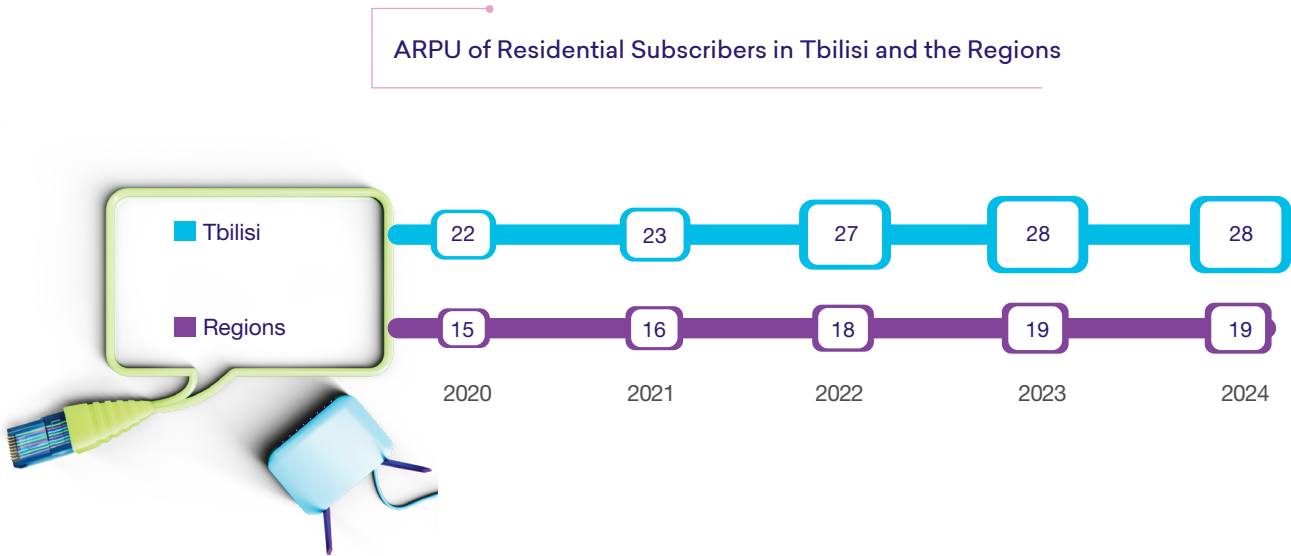
The average revenue per user (ARPU)⁴³ of residential subscribers in 2024 was 23.1 GEL, while the ARPU of business subscribers was 178.2 GEL. The ARPU of business subscribers increased by 5% year-over-year, while the ARPU of residential subscribers remained unchanged.



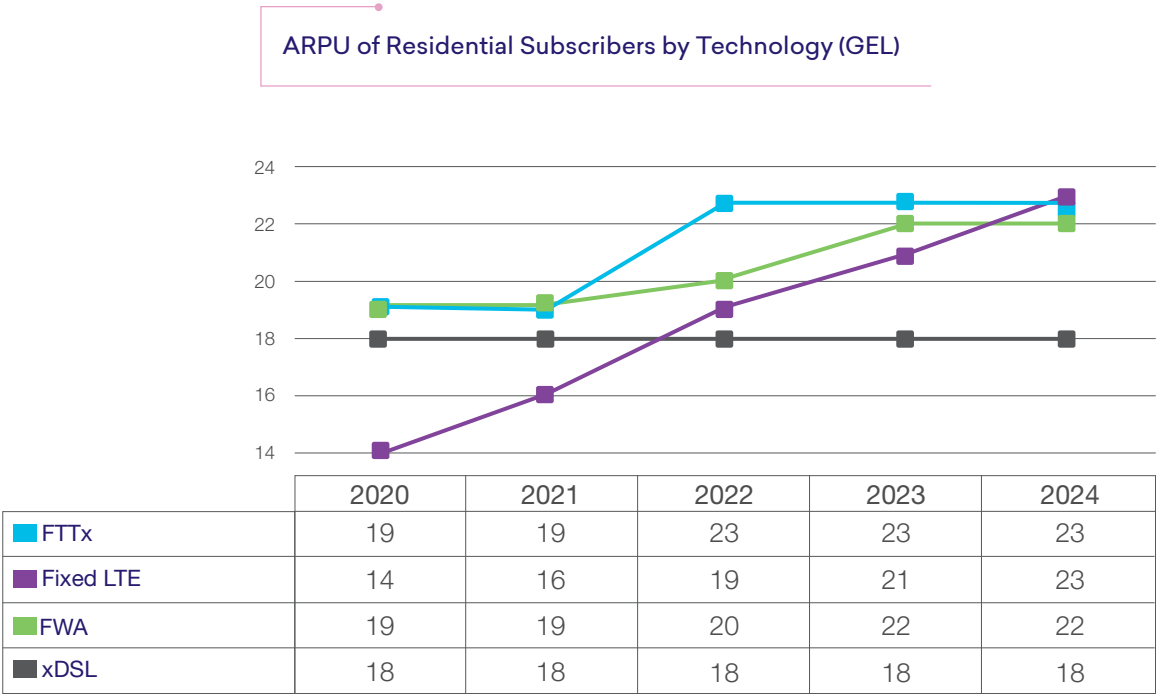
⁴²2024 figures published by the National Statistics Office of Georgia.

⁴³ARPU – Average Revenue per User.

According to the data of the fourth quarter of 2024, the ARPU of residential subscribers in Tbilisi exceeded the ARPU of subscribers in the regions by 50%. The ARPU figures in the capital and in the regions remained virtually unchanged compared to the previous year.



Fibre-optic technology accounts for the highest ARPU among residential subscribers with 23.3 GEL. Among the technologies listed below, DSL has a significantly lower data transfer speed.

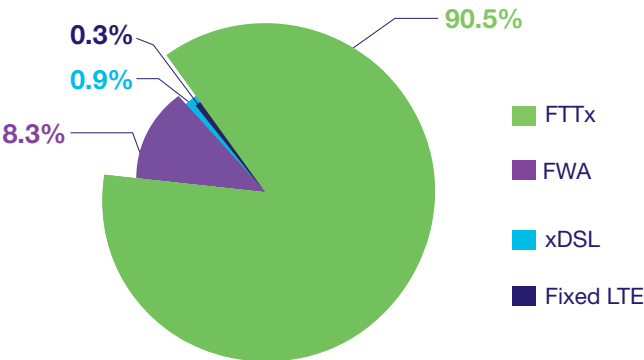


In 2024, fibre-optic technology reached 89.7% of Georgian households, up 3.9% from the previous year.

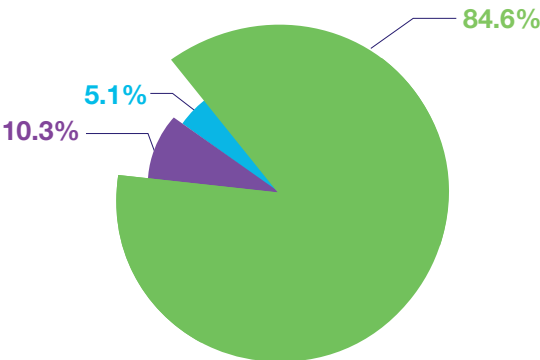
The majority of residential subscribers (90.5%) use fibre-optic broadband services. Fixed wireless access (FWA) is the only other technology that accounts for a significant share (8.3%).

The distribution of business subscribers by technology is somewhat different. In this case, FWA⁴⁴ and xDSL technologies hold a larger share of the market than in the residential subscriber segment.

Distribution of Residential Subscribers by Technology



Distribution of Business Subscribers by Technology

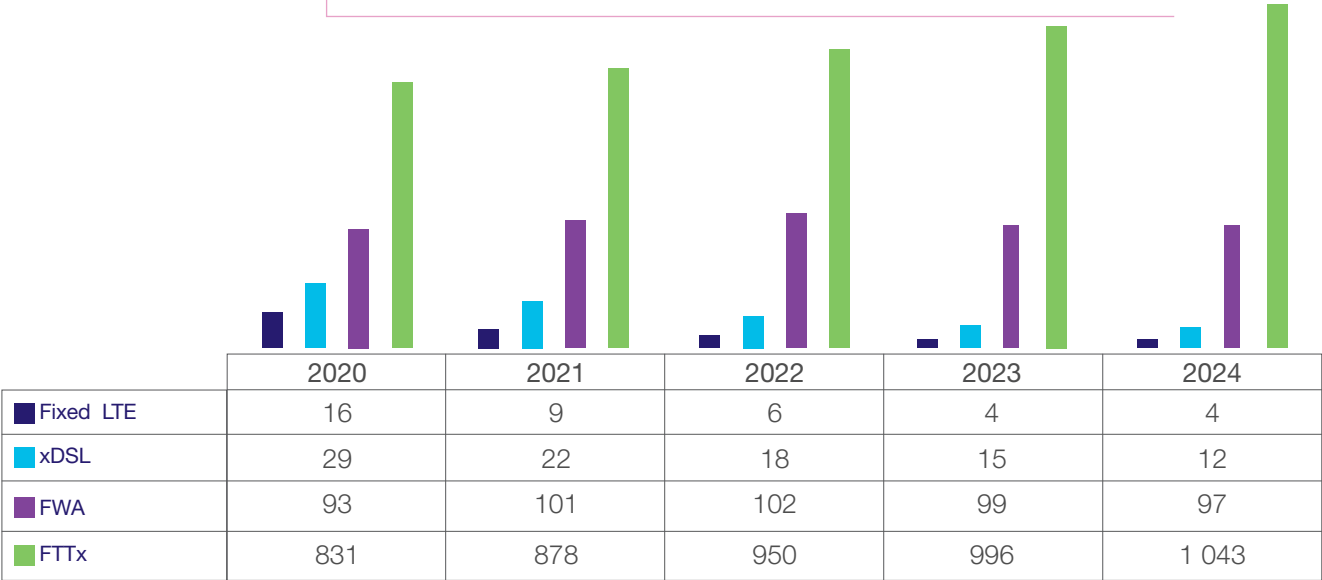


Over the past 5 years, the number of residential and business subscribers using fibre-optic technology has increased at an annual rate of 5.8%. In 2024, the number of subscribers using this technology increased by 46,000 (4.7%) compared to the previous year.

Fibre-optic internet technology ranks first in terms of the number of subscribers (90.1%), followed by fixed wireless access (8.4%). As in the previous year, the number of fibre-optic subscribers increased in 2024, while the number of fixed LTE, xDSL, and FWA subscribers decreased. This change can be explained by the development of the fibre-optic broadband network, which has enhanced its availability. Furthermore, Starlink’s entry into the Georgian market in 2023 made satellite technology available. Starlink had 2,360 subscribers in 2024.

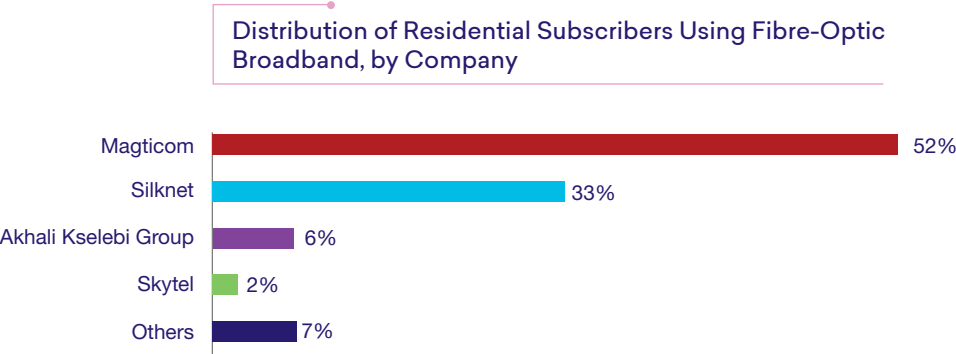
Since 2020, the number of xDSL subscribers and fixed LTE subscribers has been decreasing by an average of 19.1% and 30.3% per year, respectively. Authorised undertakings are actively trying to replace outdated and limited technologies with fibre-optic technology.

Number of Subscribers by Technology (thousands)

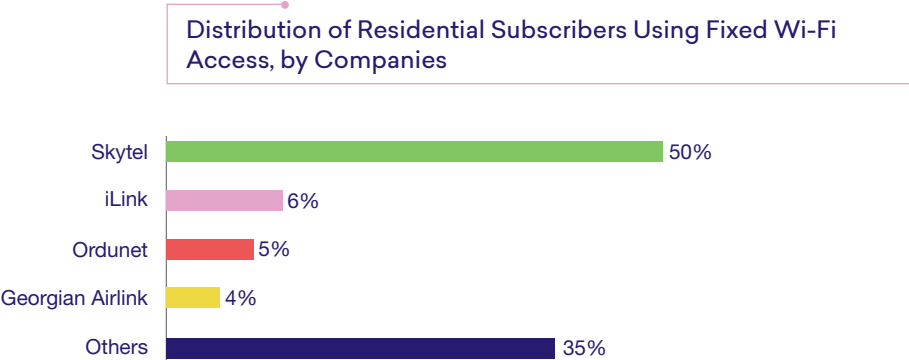


⁴⁴Fixed Wireless Access (FWA).

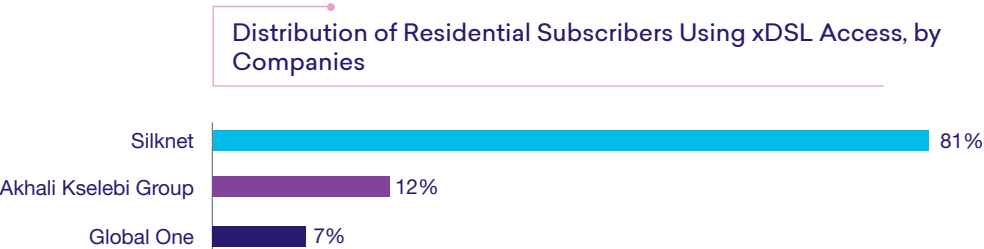
According to the data for the fourth quarter of 2024, 52% of fibre-optic subscribers used Magticom services, 33% used Silknet, while the combined share of other operators was 15%.



According to the data for the fourth quarter of 2024, 50% of residential FWA subscribers used Skytel services, while the combined share of other operators was 50% in total.

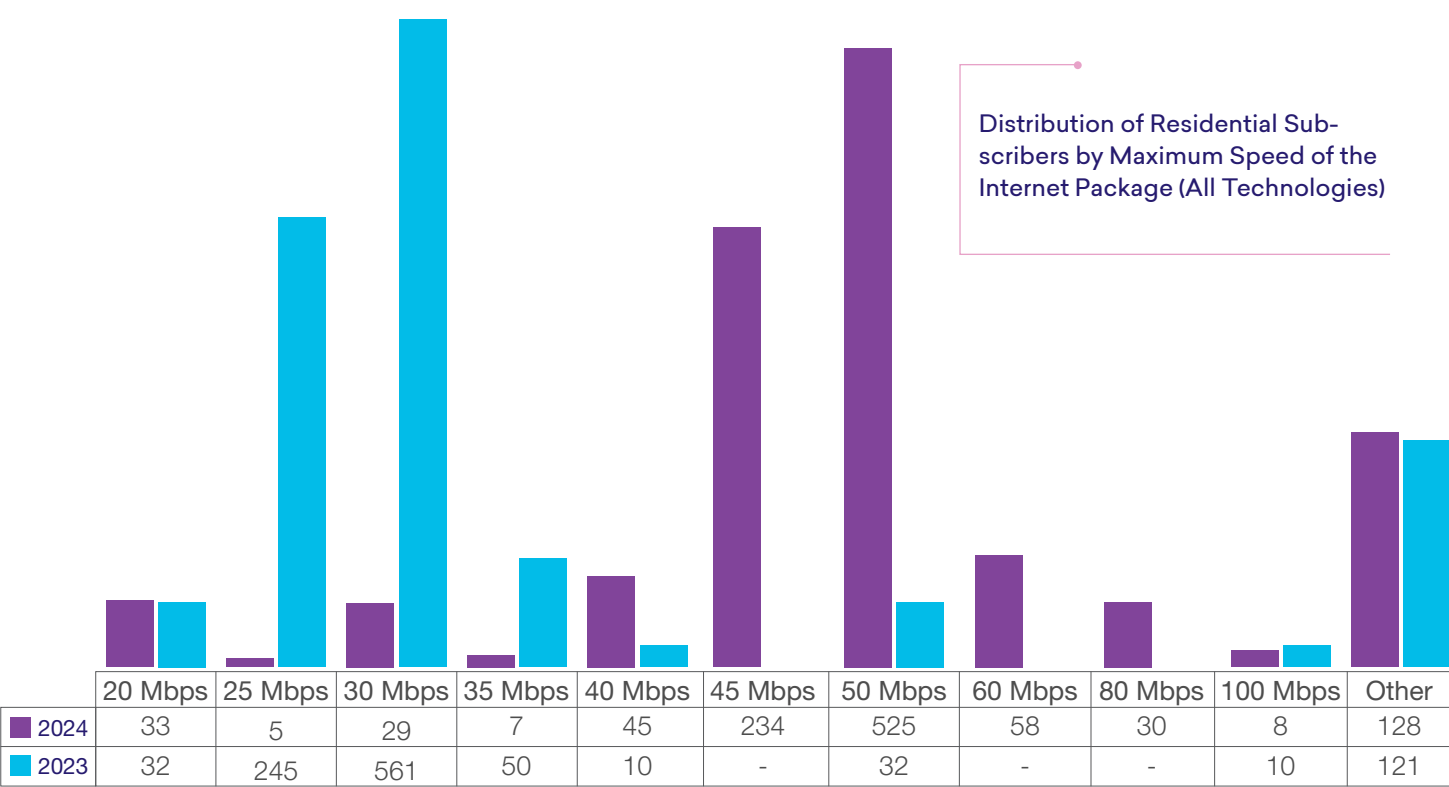


As for the xDSL technology, 81% of residential subscribers (12,000 in total) were Silknet users, 12% were Akhali Kselebi Group users, and 7% were Global One users.

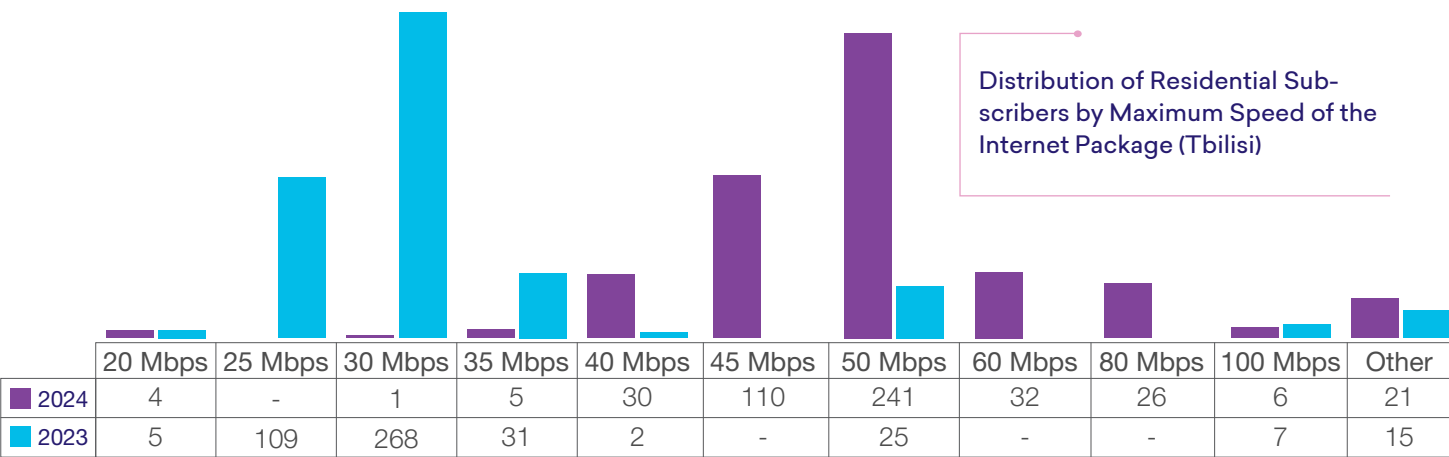


In 2024, the two largest operators in Georgia, Magticom and Silknet, increased the maximum speeds of fibre-optic broadband for residential subscribers. As a result, the distribution of subscribers according to the maximum speed of internet packages has changed. According to the data for the fourth quarter of 2024, the largest number of subscribers (525,000) used the 50 Mbps internet package, followed by the 45 Mbps package (234,000 subscribers). For comparison, in 2023 most subscribers (561,000) used the 30 Mbps package, while the second most popular package (245,000) had a maximum speed of 25 Mbps. These changes took place due to Magticom replacing its 30 Mbps package with the 50 Mbps package, and the 50 Mbps package with the 80 Mbps package. Silknet replaced its 25 Mbps, 35 Mbps, and 50 Mbps internet packages with 45 Mbps, 60 Mbps, and 80 Mbps packages, respectively.

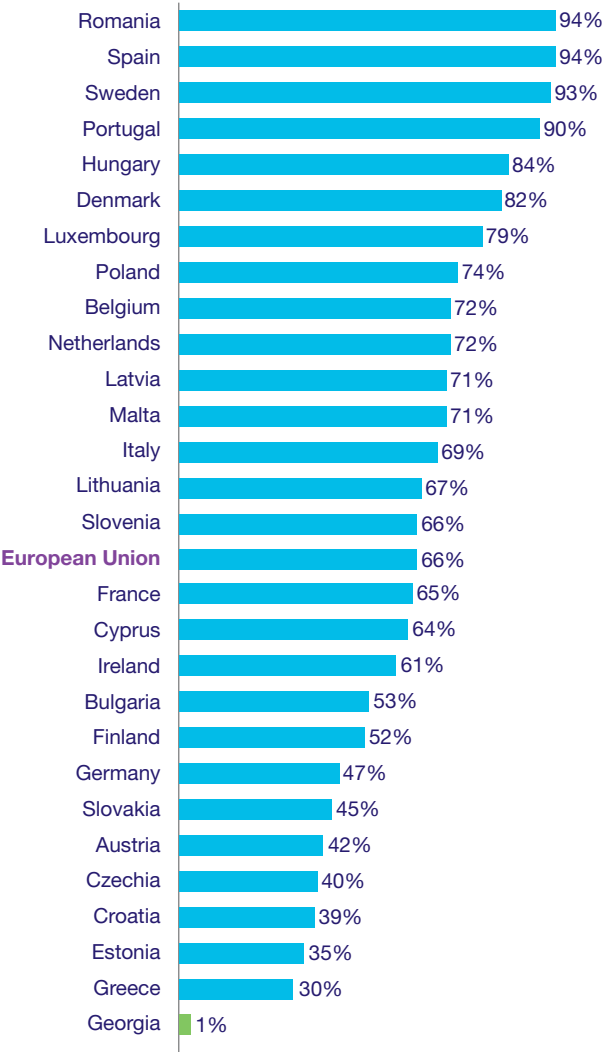
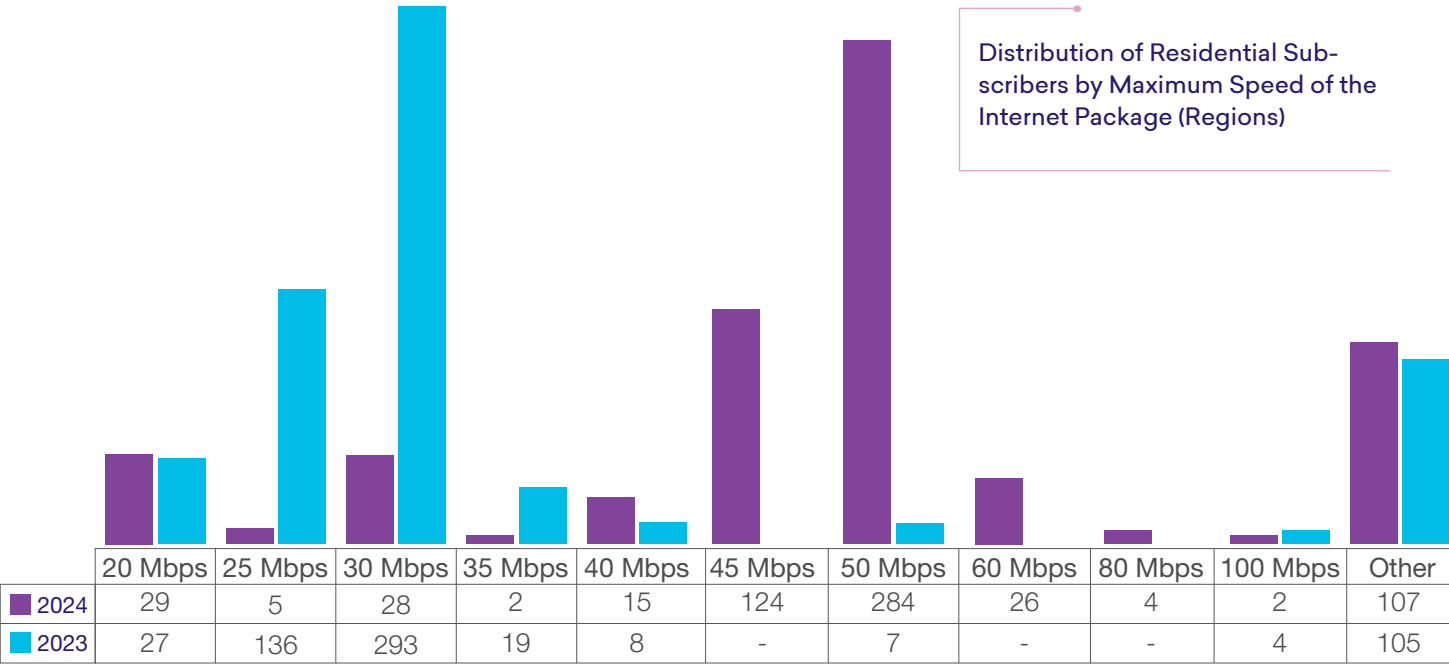
It is also worth noting that for the first time in Georgia, a 150 Mbps internet package has been made available to the residential subscribers of Silknet. However, this package is currently only used by 5,000 subscribers. The 150 Mbps package has replaced Silknet’s 100 Mbps package.



The distribution of residential subscribers in Tbilisi and the regions by the maximum speed of the internet packages is as follows: in Tbilisi, most subscribers (241,000) use the 50 Mbps internet package, followed by the 45 Mbps internet package with 110,000 subscribers.



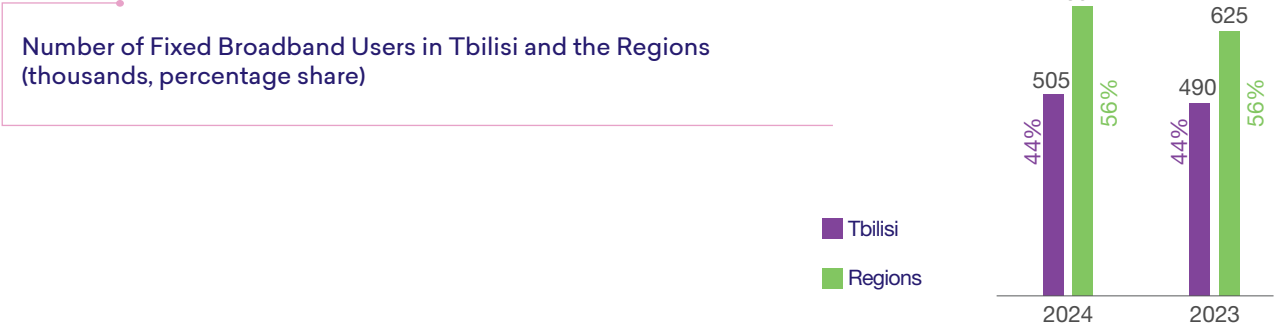
There is a similar picture in the regions: in 2024, the majority of subscribers (284,000) used the 50 Mbps package, while the 45 Mbps package was the second-most popular with 124,000 subscribers.



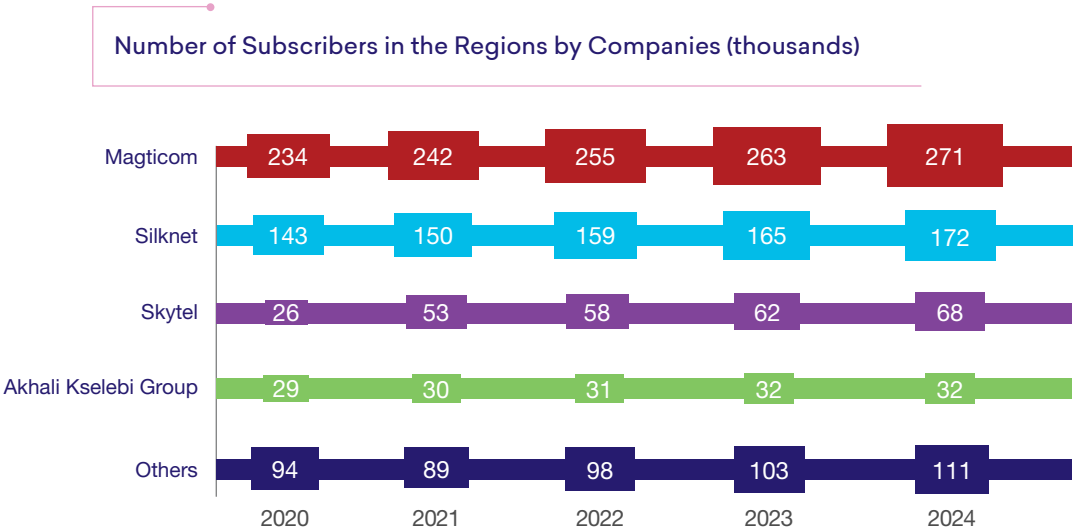
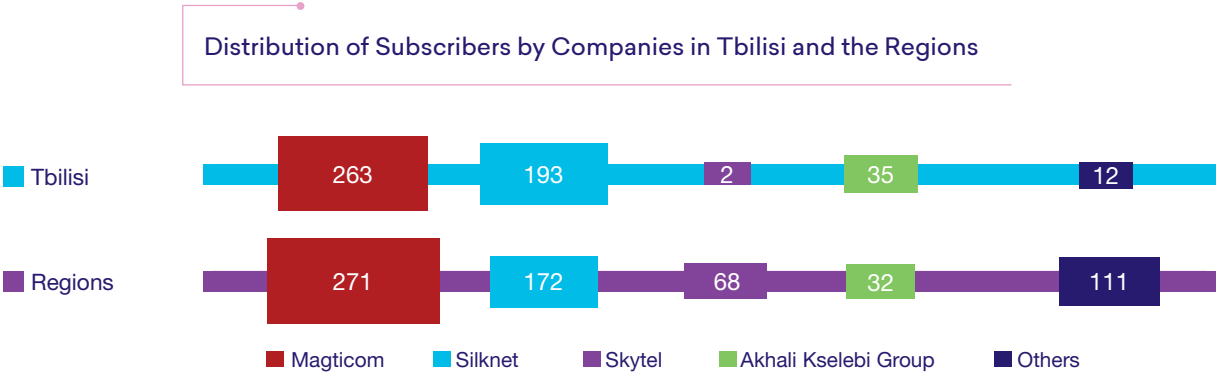
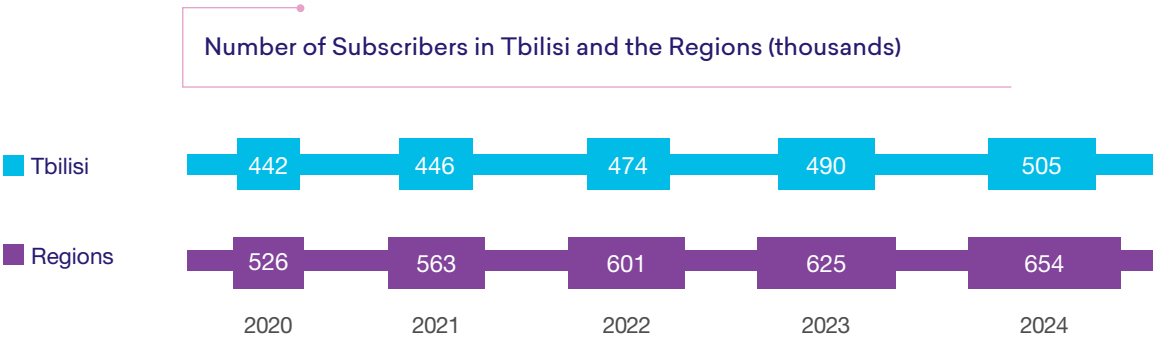
In the European Union, 66% of households use internet packages with a maximum speed of 100 Mbps or more. In 21 out of the 27 EU member states, more than 50% of households use such speeds⁴⁵ (according to the data for 2023, more than 50% of the population in 17 EU countries used internet speeds of 100 Mbps or more). For comparison, only 1% of households in Georgia have internet speeds of 100 Mbps or higher.

⁴⁵The Digital Economy and Society Index (DESI) Indicators, 2024.

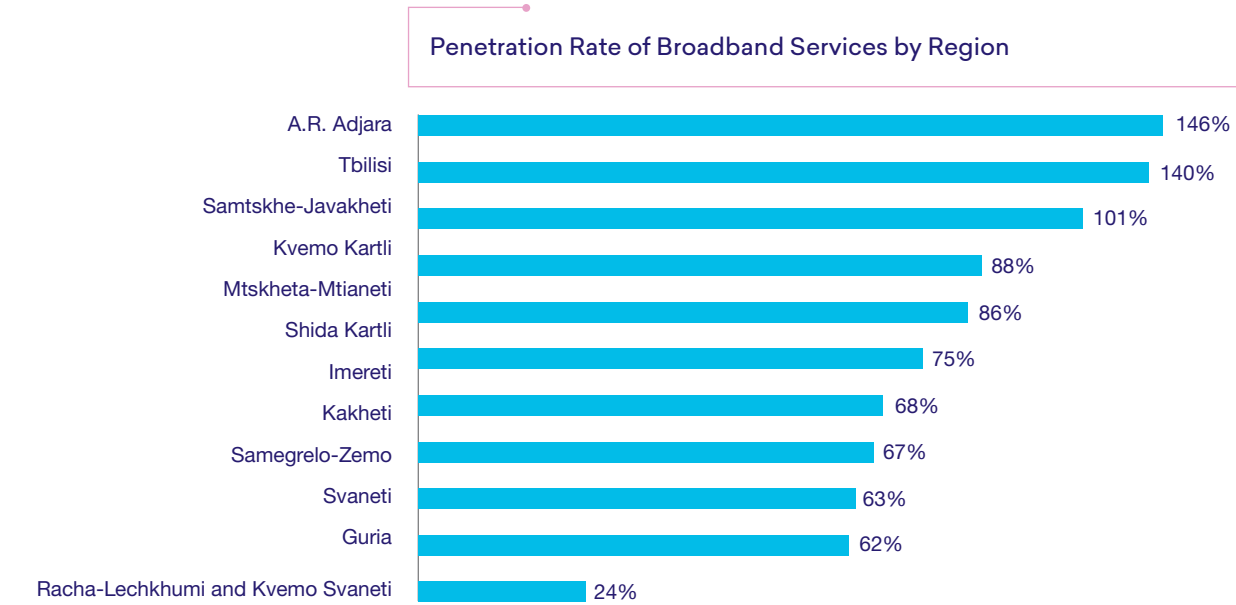
As of the fourth quarter of 2024, the percentage distribution of fixed broadband subscribers in Tbilisi and the regions has not changed year-over-year.



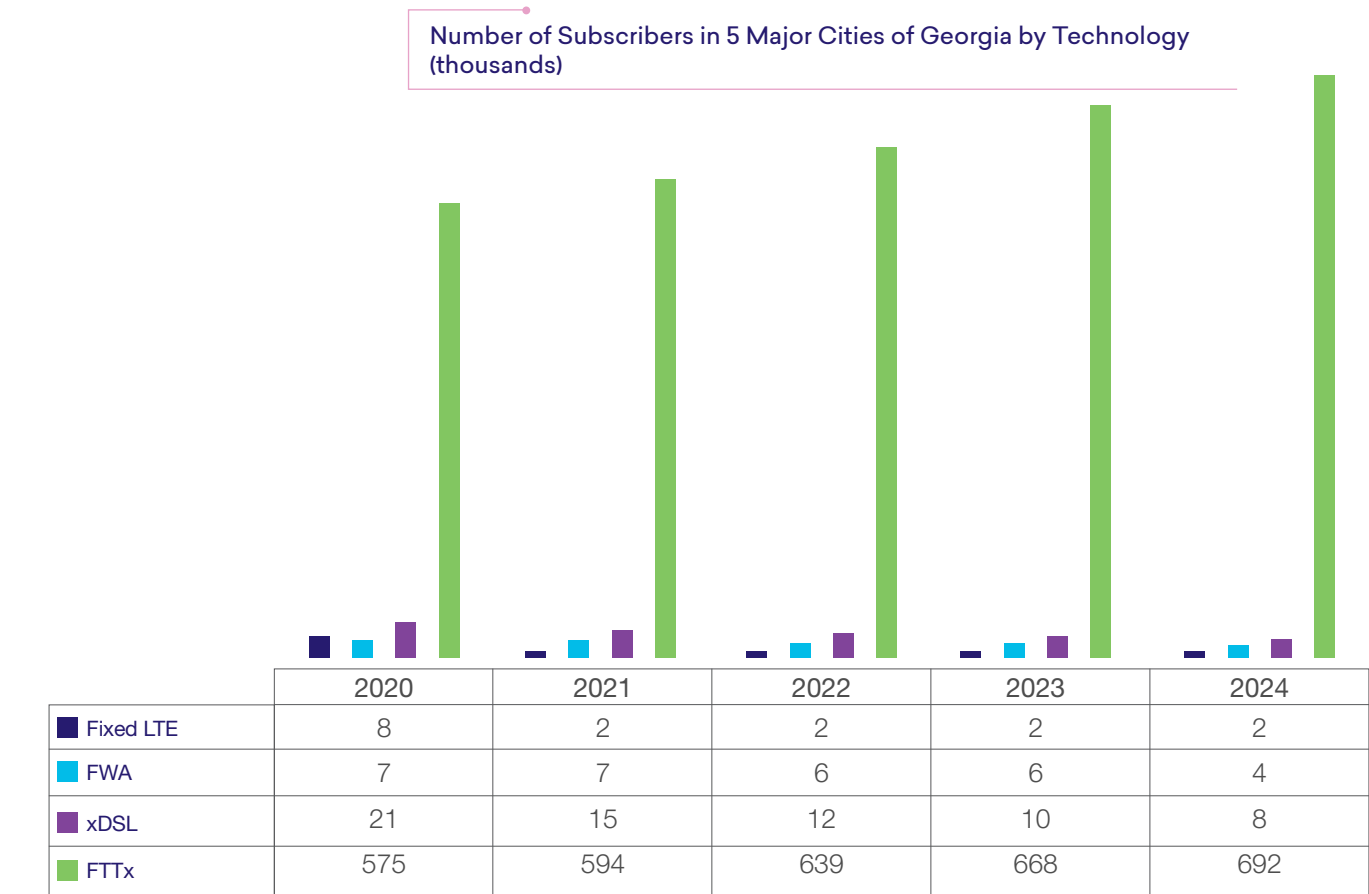
In 2024, subscriber counts rose by 4.6% in the regions and by 3.1% in Tbilisi compared to the previous year.



As of Q4 2024, the fixed broadband service penetration rate in Georgia was 99.4%. Penetration is highest in the Autonomous Republic of Adjara (146%), followed by Tbilisi with 140%. Such a high penetration rate is mainly due to the internet services available in leased real estate and/or real estate designated for lease, as well as the difference between the number of registered and actual residents. The lowest penetration rate in the regions is in Racha-Lechkhumi and Kvemo Svaneti (24%).



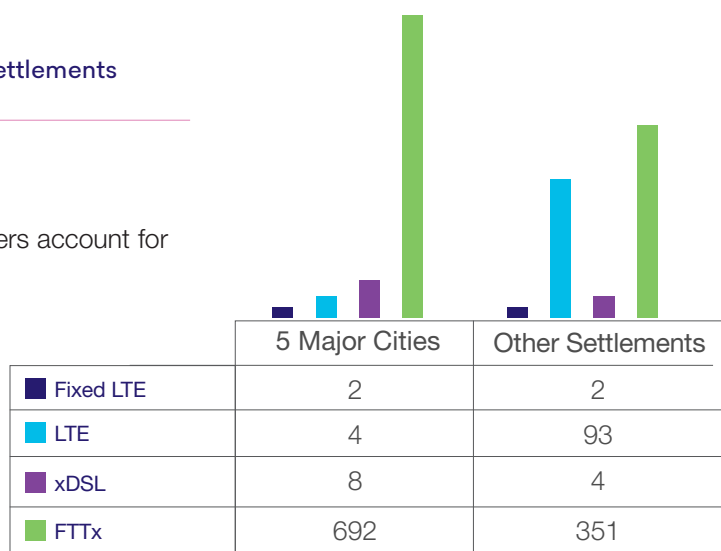
By the end of 2024, the number of fixed broadband Internet service subscribers in the five largest cities in Georgia—Tbilisi, Kutaisi, Batumi, Rustavi, and Poti—will account for 61% of subscribers in the country. Fibre-optic networks are being developed in these cities. Consequently, the number of subscribers to this technology is growing.



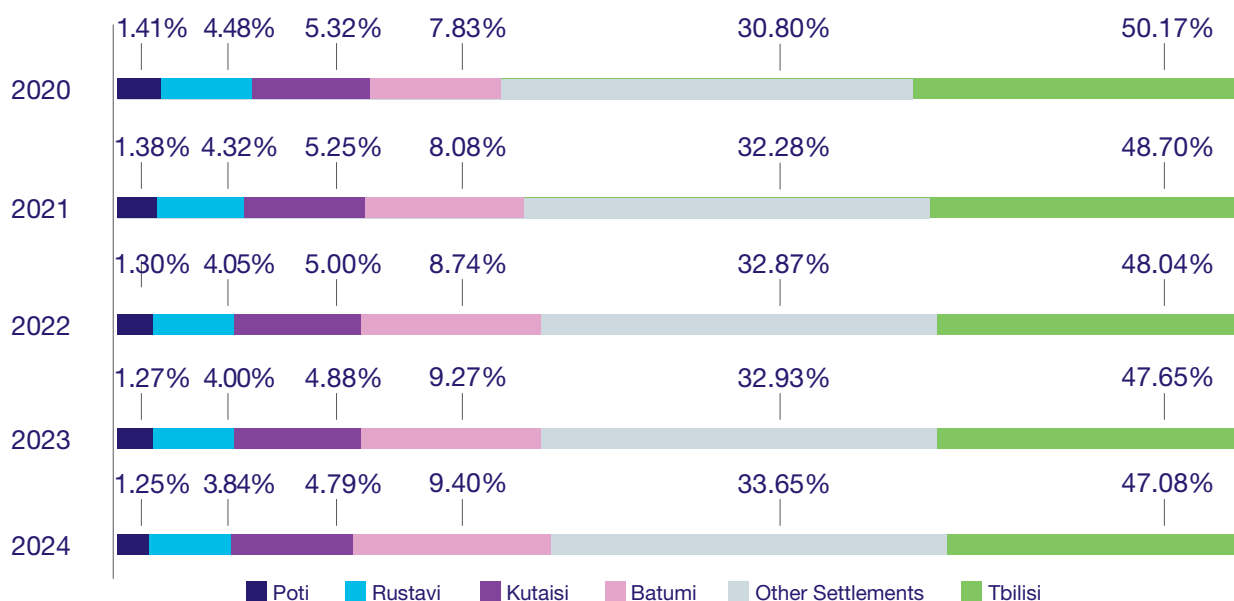
Distribution of Subscribers in 5 Major Cities and Other Settlements in Georgia by Technology

Across all five major cities, fibre-optic broadband subscribers account for 98% of the total broadband subscriptions in each city.

The largest share of fibre-optic broadband subscribers (66%, or 692,000 subscribers) is concentrated in five major cities of Georgia: Tbilisi, Kutaisi, Batumi, Rustavi, and Poti. Tbilisi accounts for 47% of the total number of subscribers (491,000), the other four major cities (Kutaisi, Batumi, Rustavi, and Poti) account for a total of 19% (201,000 subscribers), while the remaining cities, towns and villages account for 34% (351,000 subscribers).

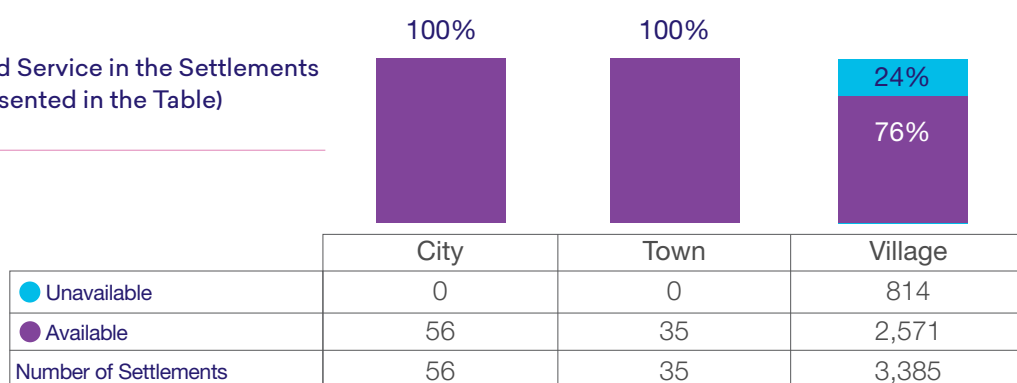


Distribution of Fibre-Optic Broadband Subscribers in 5 Major Cities and Other Cities, Towns, and Villages of Georgia



The fixed broadband service is available in all cities and towns, as well as in 81% of the 3,385 villages in Georgia. The country is also covered by Starlink high-speed satellite internet, which enables fixed internet service in all settlements.

Availability of Fixed Broadband Service in the Settlements (Number of Settlements is Presented in the Table)

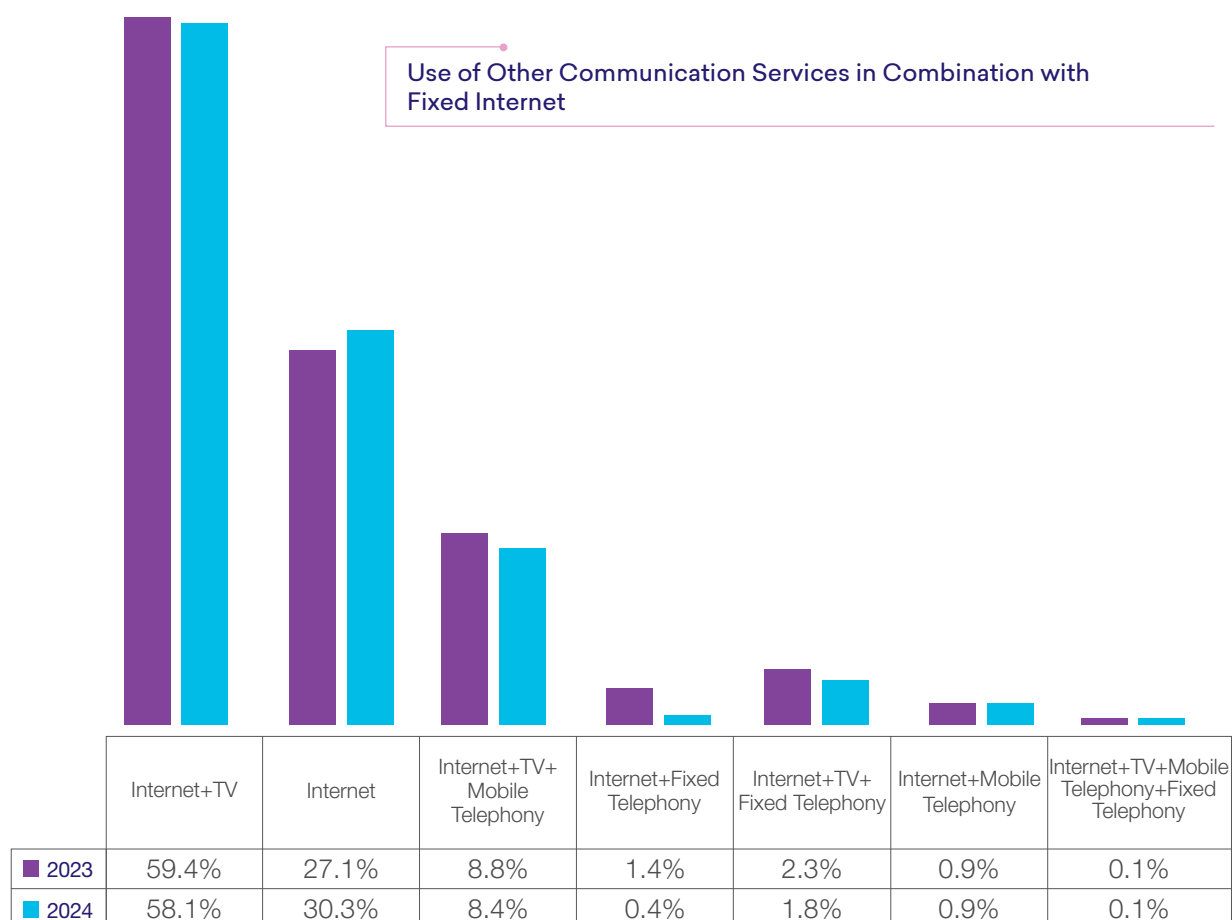


In addition to fixed broadband services, some subscribers in Georgia also use other services offered by the internet service providers. Silknet, Magticom, Skytel and Akhali Kselebi Group are the main operators offering a combination of telecom services.

As of December 2024, the use of broadcast transit (IPTV technology), fixed telephone services (PSTN or VoIP technology), and mobile services in combination with internet services increased by 11.5% year-over-year.⁴⁶ The majority of fibre-optic broadband subscribers (58.1%) use broadcast transit services together with the internet, which is 1.3% less than in the previous year. However, the share of subscribers using internet services alone increased by 3.2%. In absolute terms, the share of standalone internet users increased by 12.9%, while the share of subscribers using a combination of fibre-optic broadband and TV services rose by 11.1%.

Internet, TV, and mobile services remains the most popular three-service combination (8.4%), followed by the combination of internet, TV, and fixed telephony (1.8%). The share of subscribers using four services from the same provider remains negligible (0.1%).

The market share of companies that offer other telecom services in combination with fixed fibre-optic internet accounts for 90% of the total broadband service market (based on the number of subscribers).⁴⁷

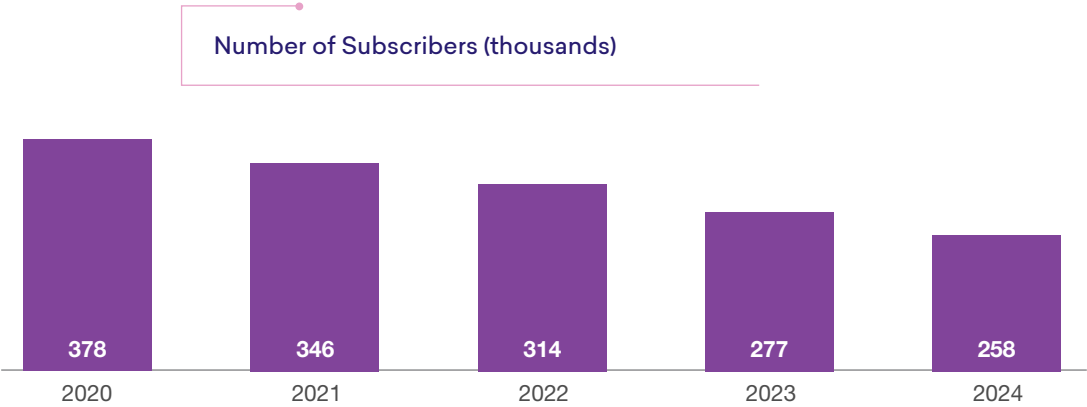


⁴⁶The analysis includes the residential subscribers of Magticom, Silknet, Skytel and Akhali Kselebi Group.

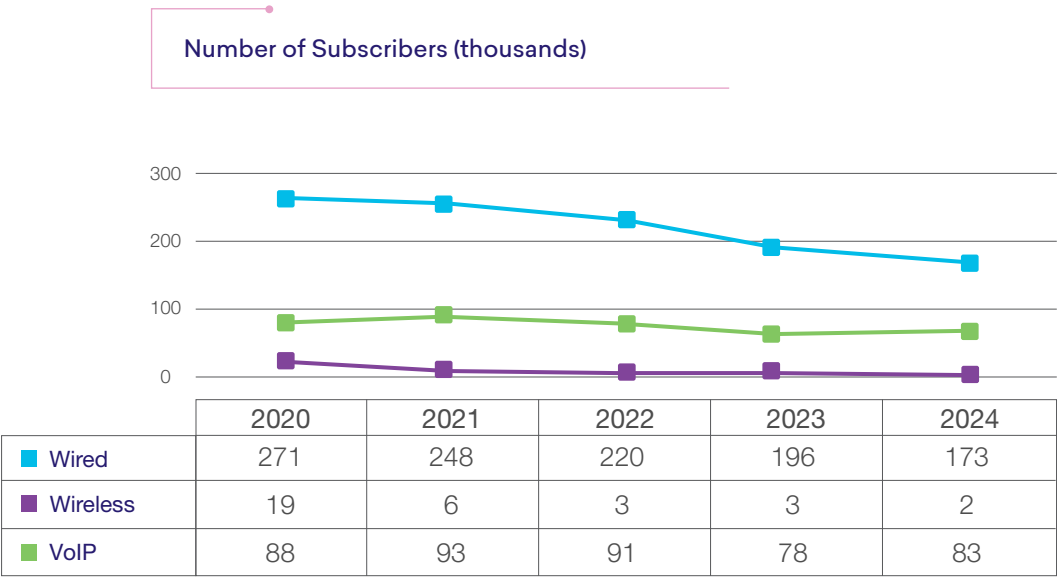
⁴⁷Data for December 2024, Communications Commission.

Fixed telephony service in Georgia is provided through wired, wireless (CDMA), and VoIP (Voice over IP) technologies. According to data for the fourth quarter of 2024, 25 companies provide this service. Six authorised undertakings provided the service through fixed-line technology, one provided the service through wireless technology, and 21 provided the service through VoIP technology.⁴⁹

At the end of 2024, there were 258,000 fixed telephony service subscribers, which is 19,000 (7%) less than in the previous year. The decrease in fixed telephony subscribers, revenues, and traffic is a global trend, which is primarily a result of the development of mobile services, improved internet access, and the resulting increase in the use of OTT services.

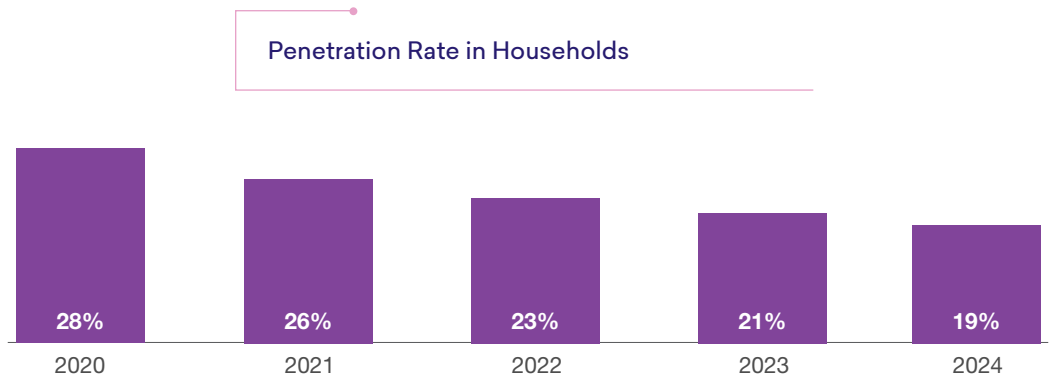


Similar to previous years, the number of subscribers using wired (PSTN) and wireless technology decreased, while there was a minor increase in the number of subscribers using VoIP technology.

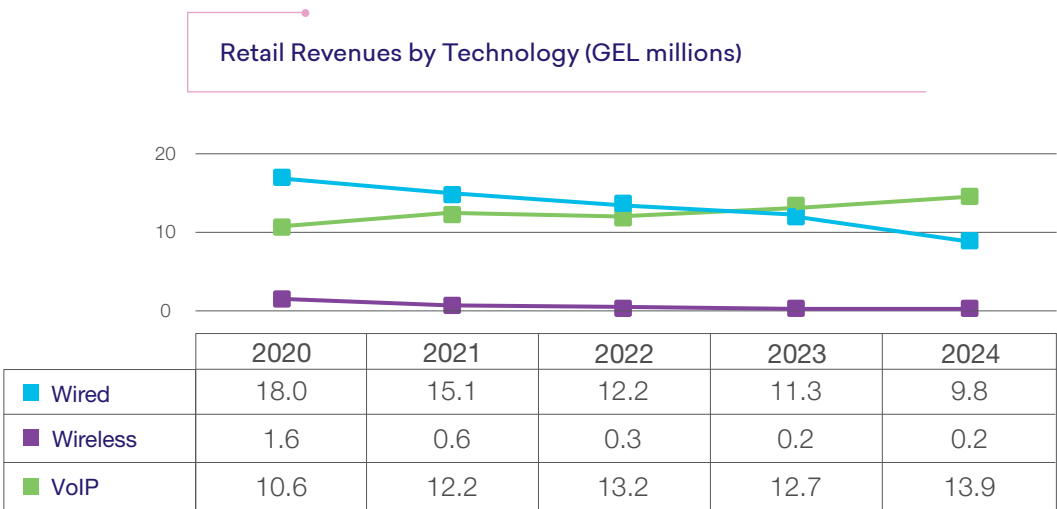


⁴⁸Data for Q4 2024.
⁴⁹Some companies use several technologies simultaneously. Therefore, the total number of operators by technology does not equal the total number of active operators.

Penetration of fixed telephony service subscribers in households has therefore decreased, amounting to 21% in the fourth quarter of 2024.⁵⁰ In contrast to mobile services, if a subscriber does not use a fixed phone service, their phone number/line does not get terminated by the provider in a short period of time, which helps maintain the number of subscribers. Otherwise, the figure would be even lower.

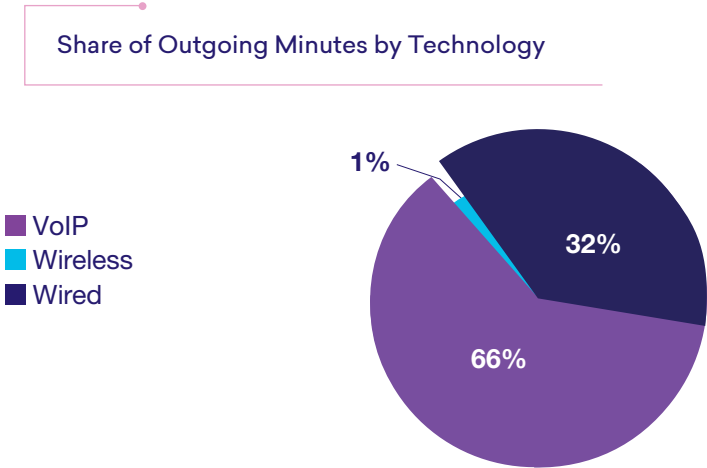
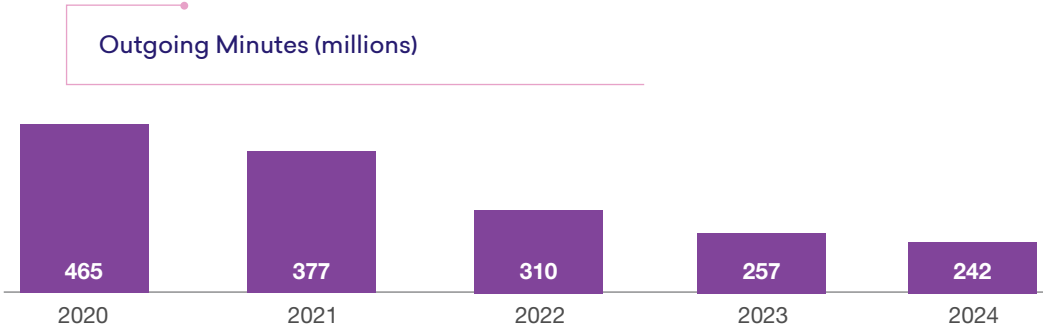


In addition to the decline in the number of subscribers, the total retail revenues generated by fixed telephony services are also characterised by a downward trend.

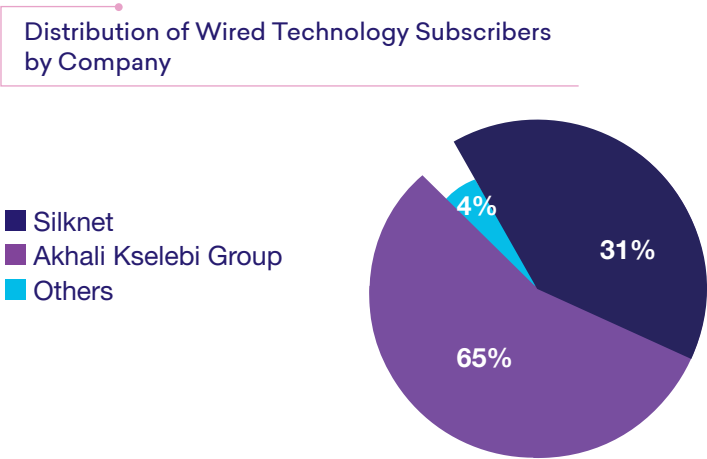


⁵⁰The number of residential subscribers using fixed telephony services is proportional to the number of households in the country, as counted in the 2014 census.

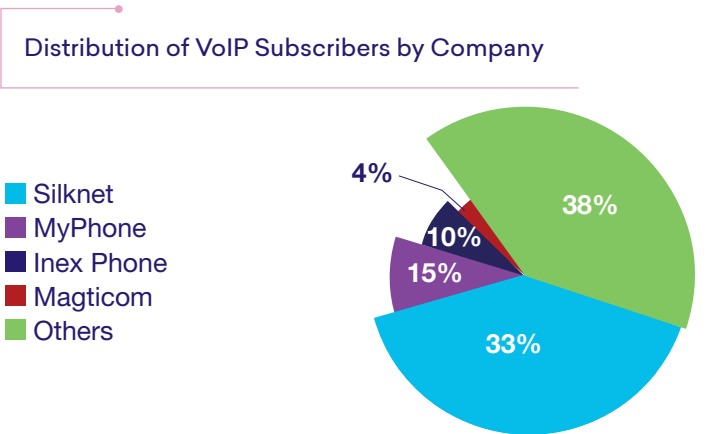
Due to the aforementioned reasons, the outgoing traffic from fixed phone services continues to decrease.



Despite wired technology accounting for the largest share of subscribers, it is evident that traffic generated through VoIP technology accounts for a larger share of the total number of outgoing minutes.



Silknet leads the fixed telephony market among companies providing wired technology services. Silknet holds 65% of this market.



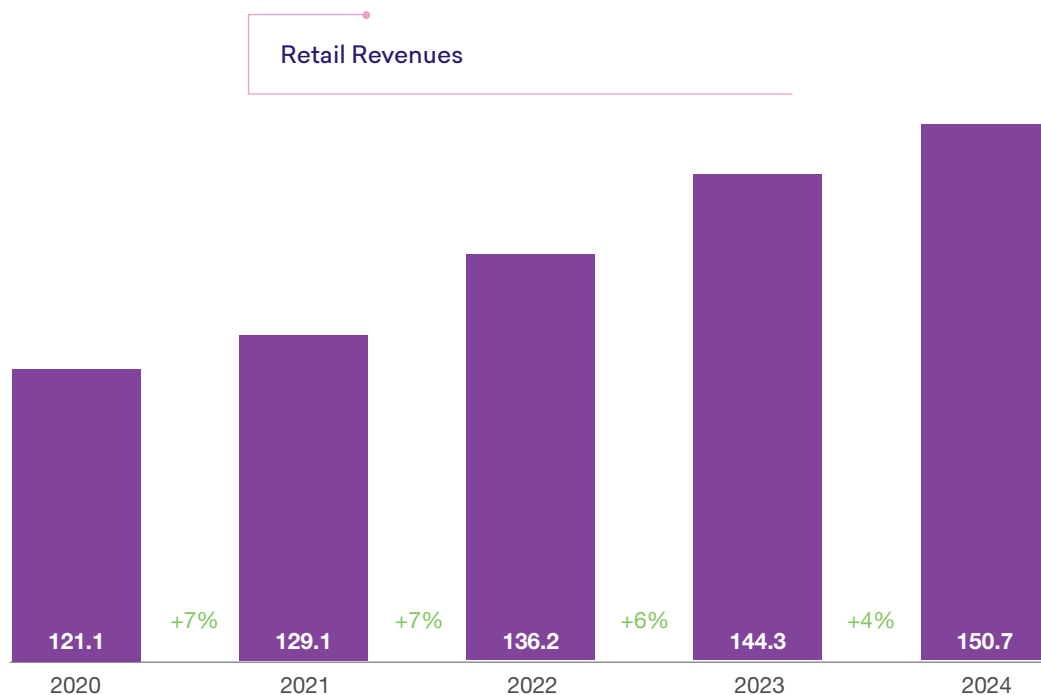
In the VoIP technology segment, Silknet accounts for a third of the market in terms of the number of subscribers, followed by MyPhone with 15%, Inex Phone with 10%, and Magticom with 4%. The remaining 38% are distributed among the other smaller companies.

In the fourth quarter of 2024, 776,000 subscribers received Broadcasting Transit, which is 30,000 (4%) more than in the same period of the previous year. Subscriber numbers have grown by 1.4% annually since 2020.

The penetration rate of Broadcasting Transit subscribers in households was 67.1%.



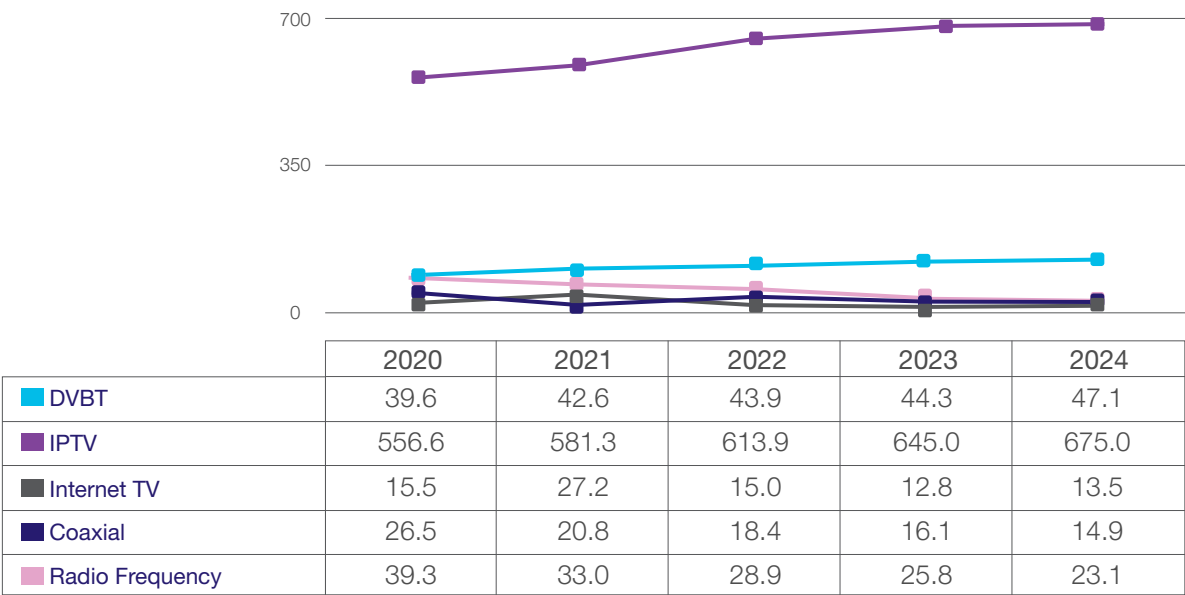
The annual retail revenues from Broadcasting Transit amounted to 150 million GEL, which is 6 million GEL (4%) more than in the previous year. Retail revenues have grown by 6% annually since 2020.



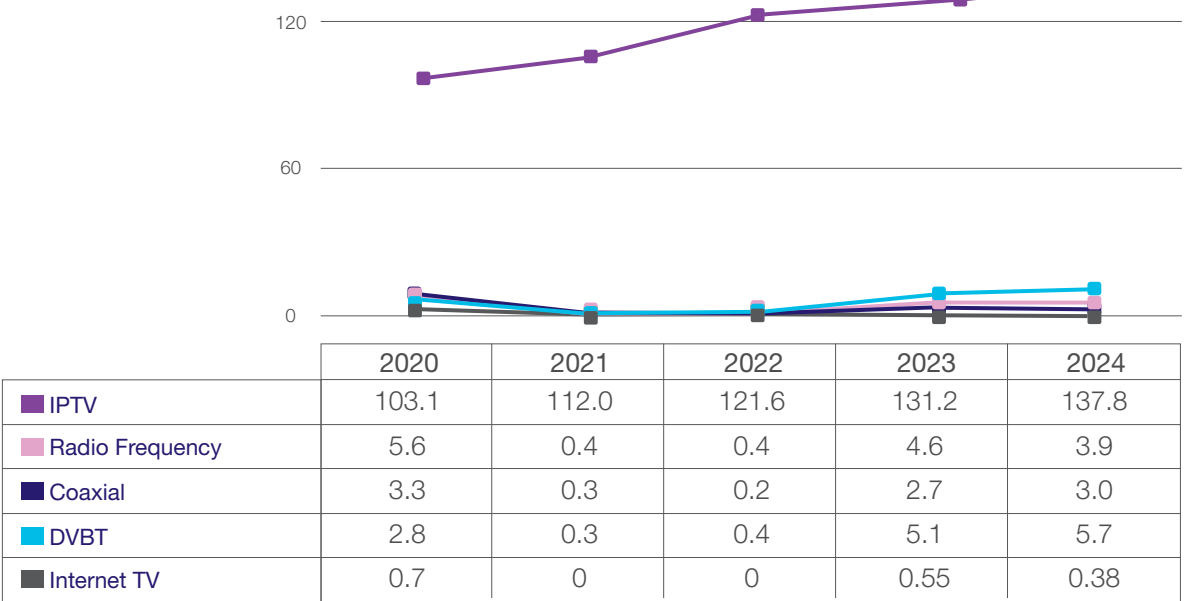
⁵¹As of 20 February 2025.

According to the data for the last quarter of 2024, IPTV technology is still the most common means of Broadcasting Transit. Its share increased by 5% year-over-year to 87%. The share of IPTV retail revenues in total revenues also increased by 6% to 91.4%.

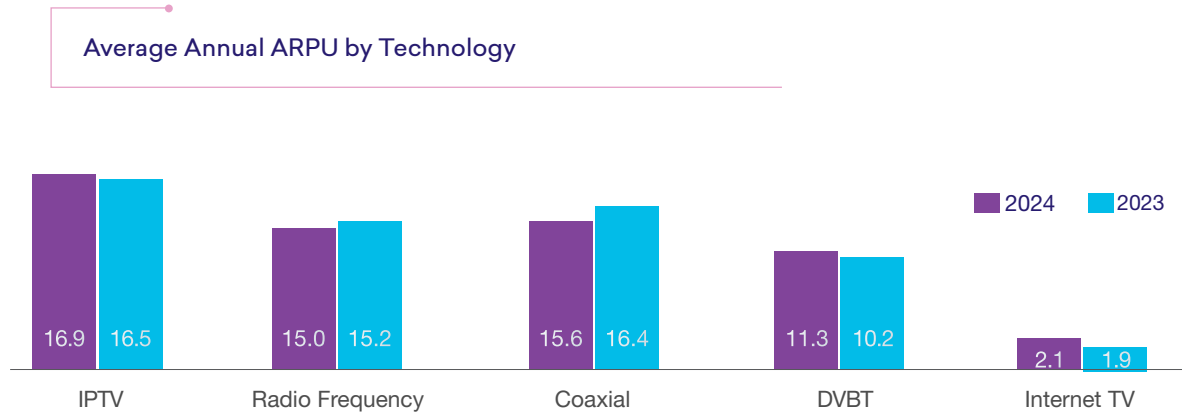
Number of Subscribers by Technology (thousands)



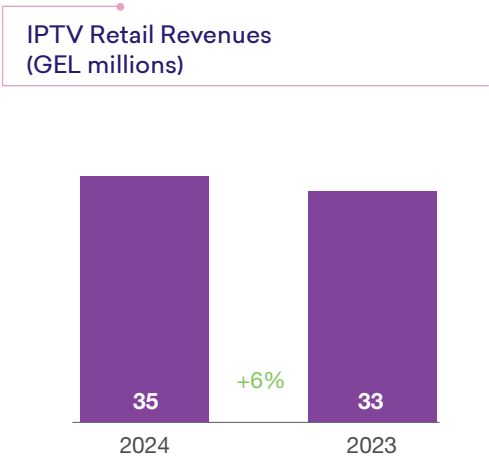
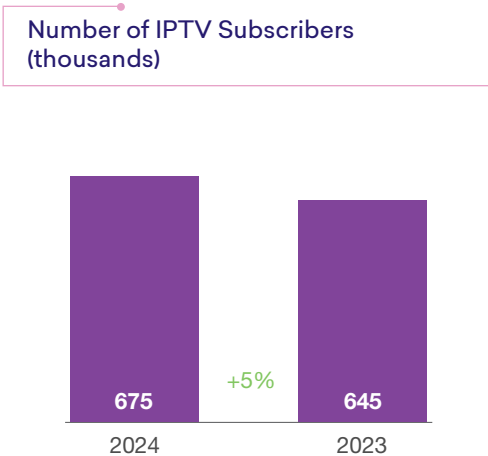
Average Revenue by Technology (GEL millions)



There was a minor increase in the average monthly ARPU for IPTV, DVBT, and Internet TV technologies.



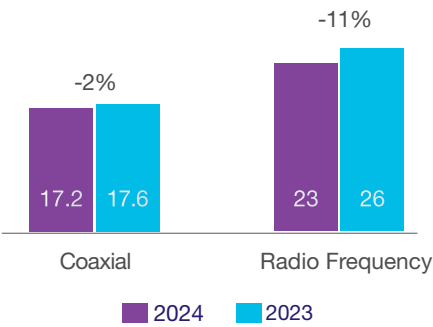
According to the data for the last quarter of 2024, the number of IPTV subscribers increased by 5% year-over-year, while the annual retail revenues increased by 6%.



In the last quarter of 2024, two operators mainly provided IPTV services: Magticom (54%) and Silknet (38%).

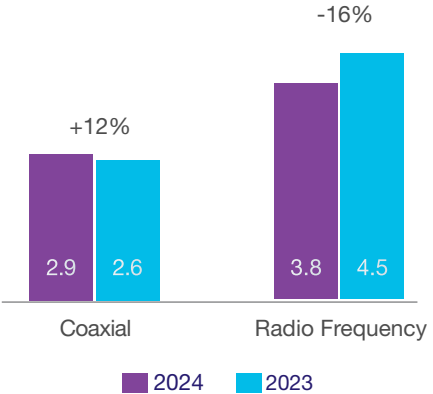


Number of Subscribers Using Coaxial and Radio Frequency Broadcasting Transit Technologies (thousands)



According to the data for the last quarter of 2024, the number of subscribers using coaxial transit technology decreased by 2% year-over-year, while the number of subscribers using radio frequency technology decreased by 11%.

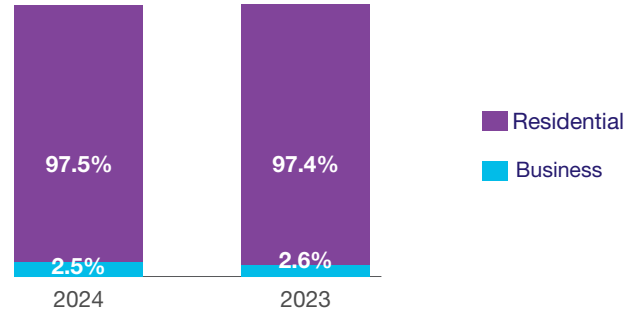
Retail Revenues from Broadcasting Transit Using Coaxial and Radio Frequency Technologies (GEL millions)



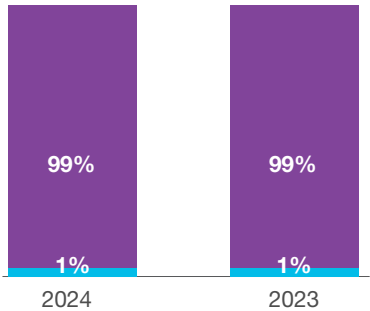
The annual retail revenues for radio frequency transit decreased by 16%, while the annual retail revenues for coaxial technology transit increased by 12%.

In 2024, Broadcasting Transit operators received 97.4% of subscription revenues from residential subscribers, and only 2.5% from business subscribers. For comparison, in 2023 these figures were 97.4% and 2.6%, respectively. In both cases, the distribution of subscribers was similar, and 99% were residential subscribers.

Distribution of Subscriber Revenues by Contract Type



Distribution of Subscribers by Contract Type



Multiplex services

There were 28 multiplex operators in Georgia in 2024, although only 11 of them generated commercial revenues from multiplex services. The remaining operators broadcasted their own channels and therefore did not provide commercial services through multiplexes.

Operators generated 6.3 million GEL in revenues from multiplex services during the year, the bulk of which was accounted for by Stereo+ and Georgian Teleradiocenter:



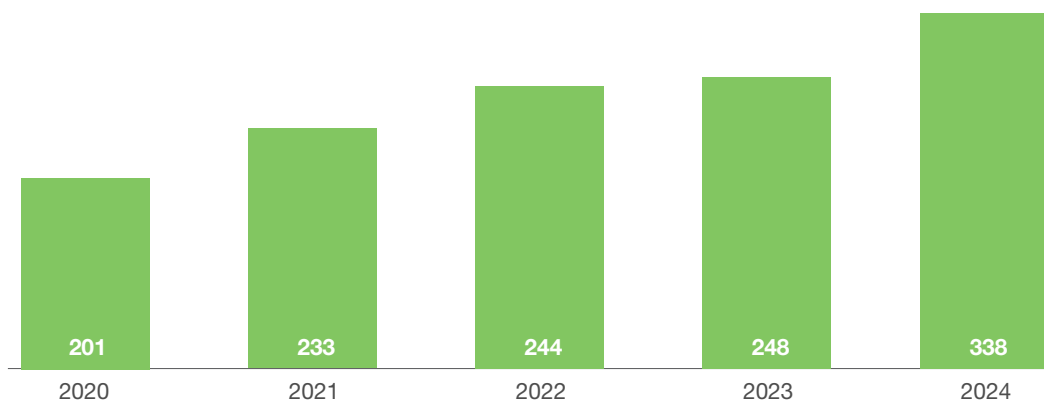
Distribution of Revenues Generated by Multiplexes

Stereo+	74%
Georgian Teleradiocenter	22%
Others	5%

Capital investment in electronic communications

The volume of capital investment⁵² in electronic communications in 2024 exceeded 338 million GEL, which is 36% more than in the previous year.

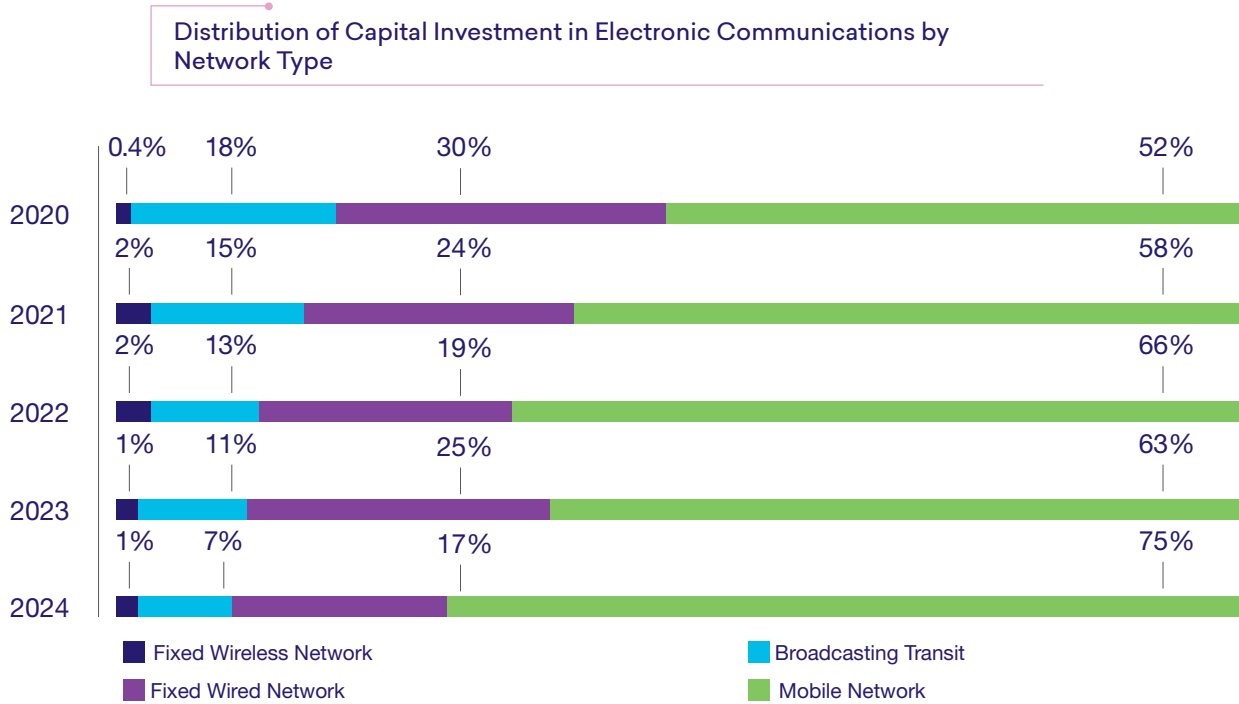
Capital Investment in Electronic Communications (GEL millions)



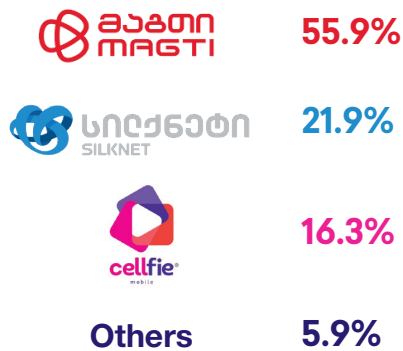
The above data does not include the license fee for the 5G frequency resource purchased by Magticom in 2024 (142 million GEL).

⁵²Includes capital investment in mobile and fixed (wired and wireless) service networks and Broadcasting Transit services. The volume of capital investment includes the data on authorised undertakings operating in the field of electronic communications who generated annual revenues of more than 1 million GEL.

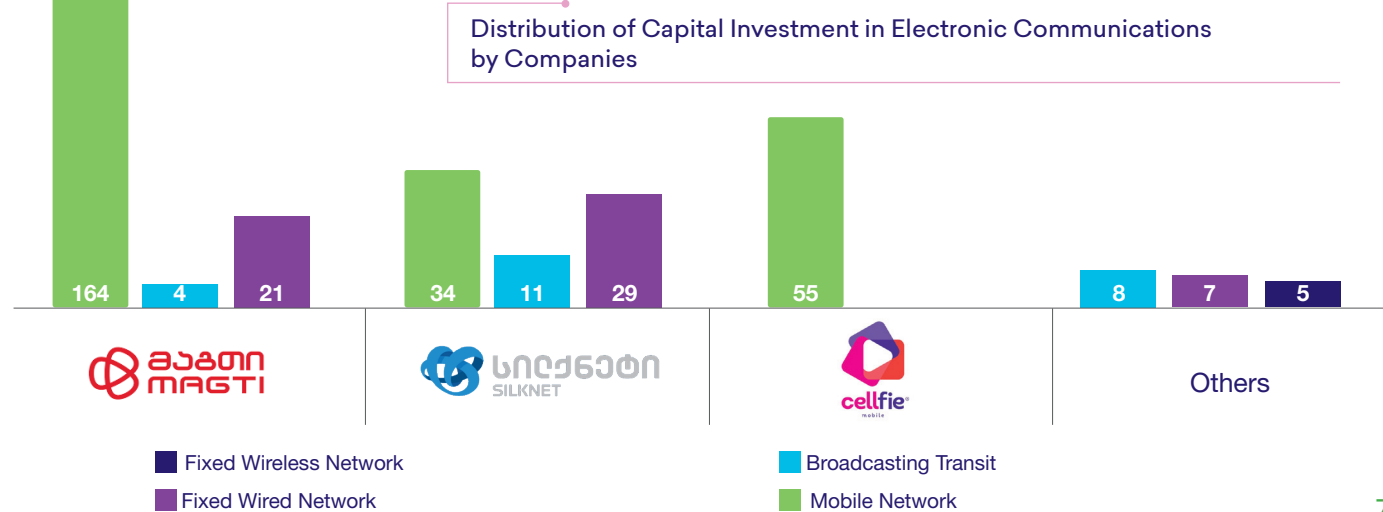
The distribution of capital investment by network type shows that more investment in the electronic communications sector in 2024 was directed towards the development of mobile networks. This is due to the investments made in the implementation of 5G technology in 2024.



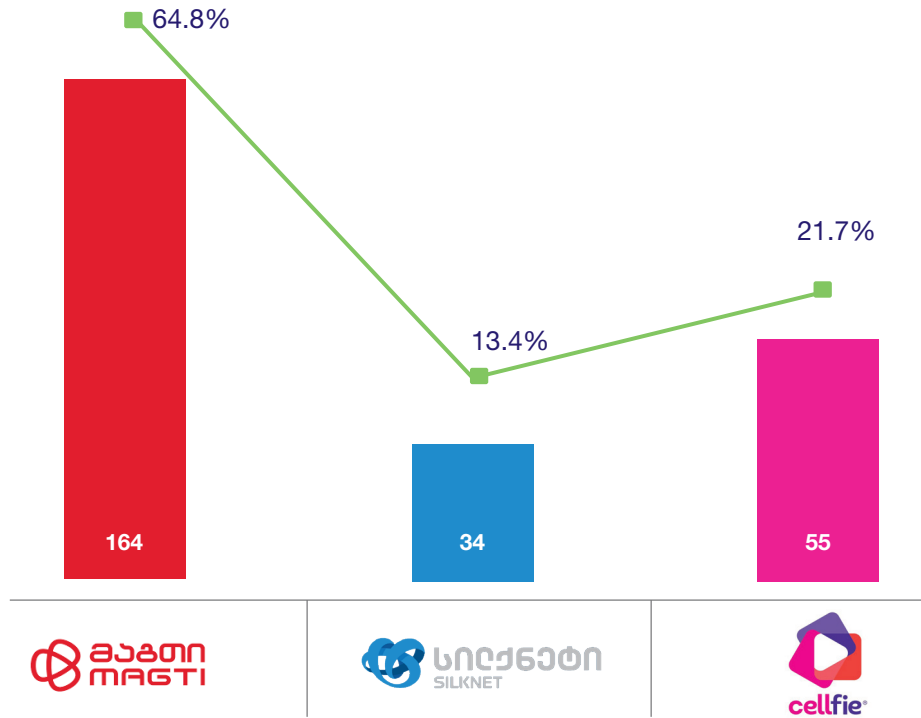
Distribution of Capital Investment in Electronic Communications by Company



Magticom, Silknet, and Cellfie Mobile are the largest companies by capital investment in electronic communications. Their combined investment in 2024 accounted for 94% of the total investment in this field, with Magticom’s investment alone accounting for more than 55%. Mobile networks received the most investment, highlighting a focus on 5G implementation.



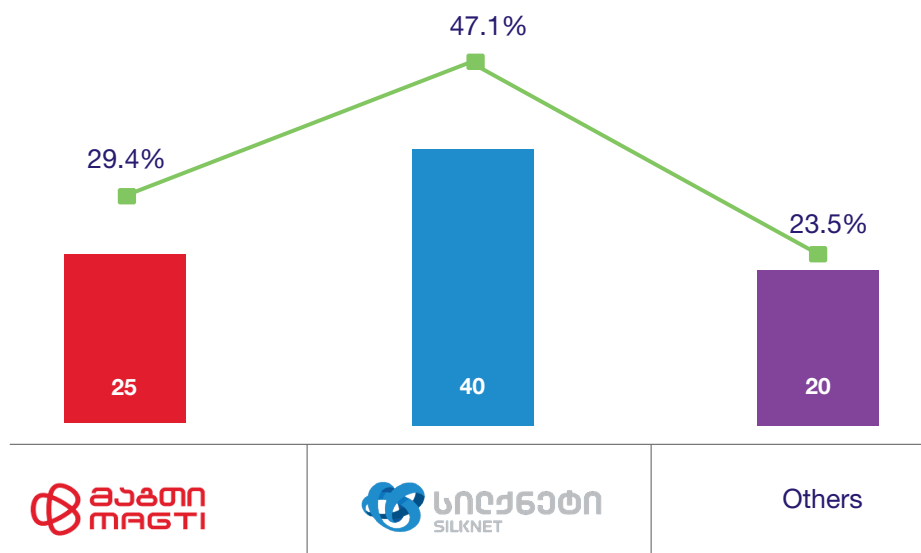
Distribution of Capital Investment in Mobile Services by Companies
(GEL millions)



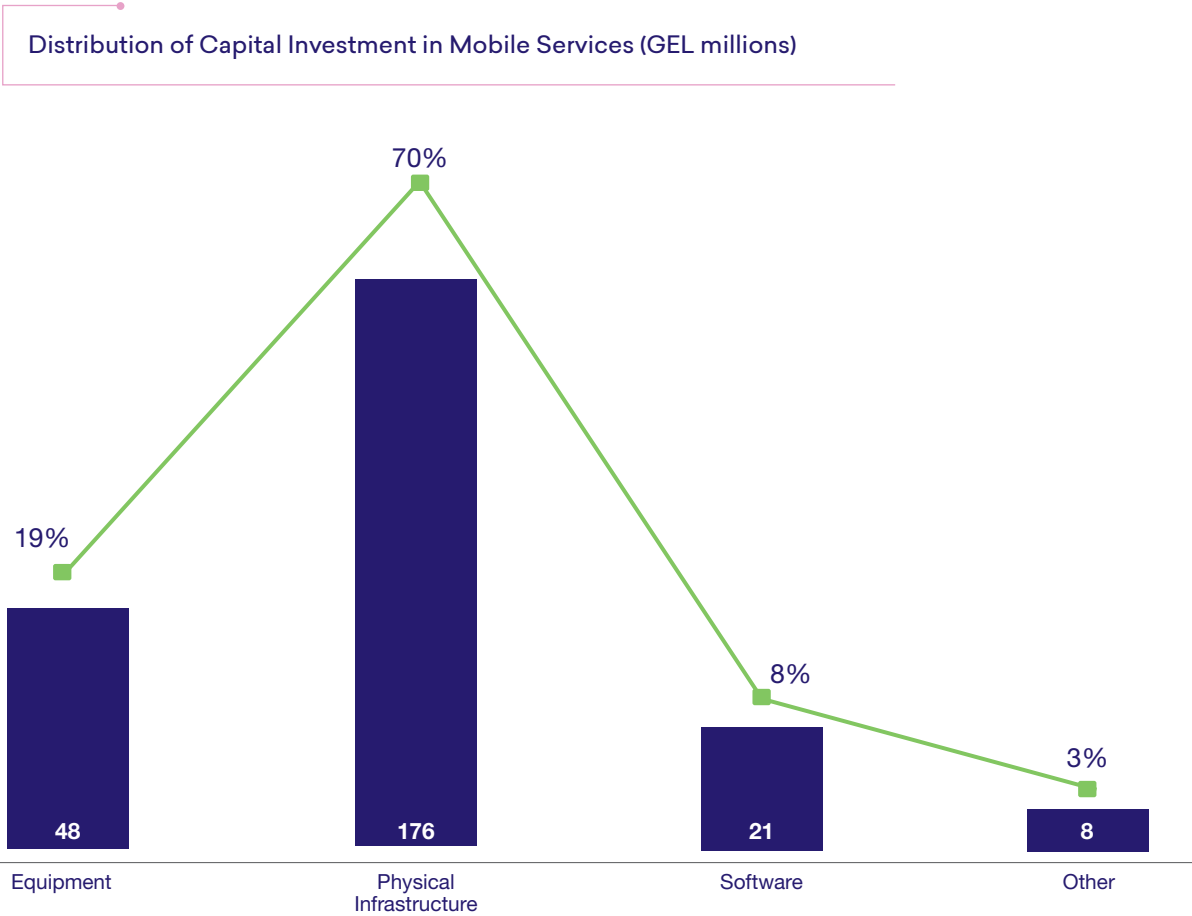
The above data does not include the license fee for the 5G frequency resource purchased by Magticom in 2024 (142 million GEL).

The distribution of capital investment in fixed services in 2024 paints a different picture, with Silknet accounting for the largest share of investments (47.1%).

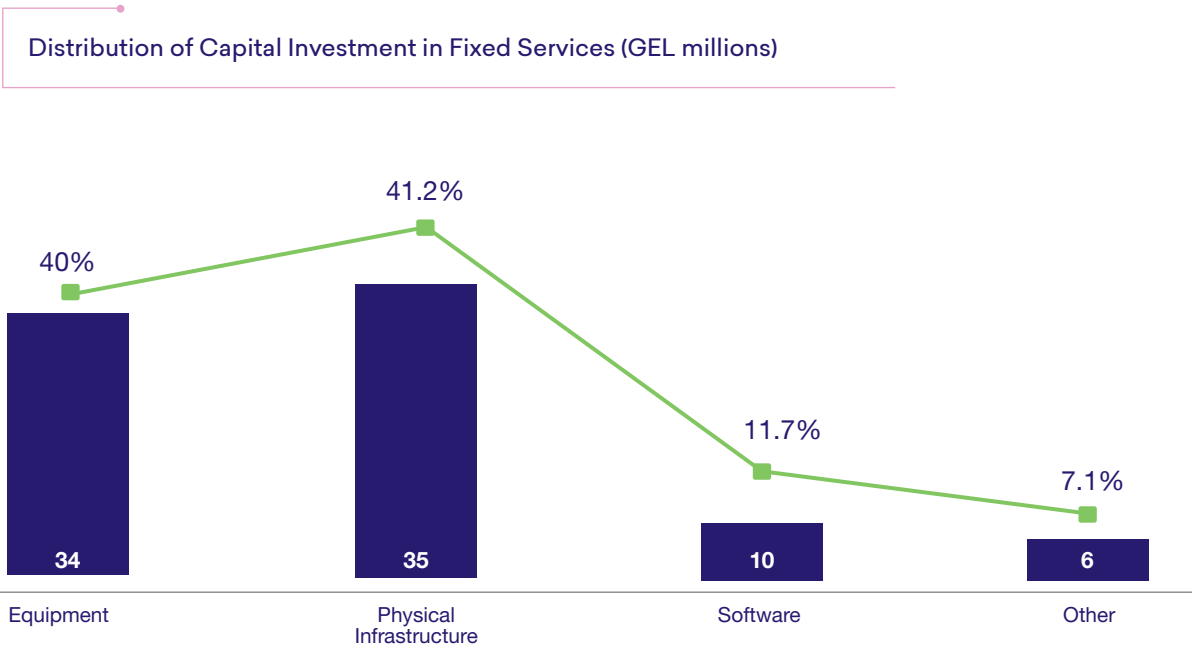
Distribution of Capital Investment in Fixed Services by Company
(GEL millions)



Physical infrastructure accounts for the largest share of capital investment in mobile services (70%).



Around 81% of the investment in fixed services is evenly divided between equipment (40%) and physical infrastructure (41.2%).



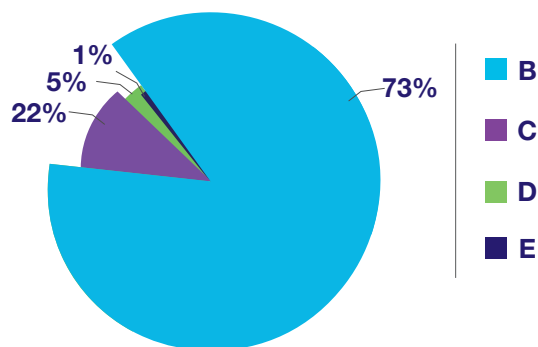
There were 105 active⁵³ undertakings registered in the field of broadcasting⁵⁴ in 2024, whose total revenues, including state funding and other non-broadcasting revenues, amounted to 251.9 million GEL.

None of the broadcasters generated revenues of more than 100 million GEL last year. Six Category B⁵⁵ undertakings accounted for 73% of total broadcaster revenues.

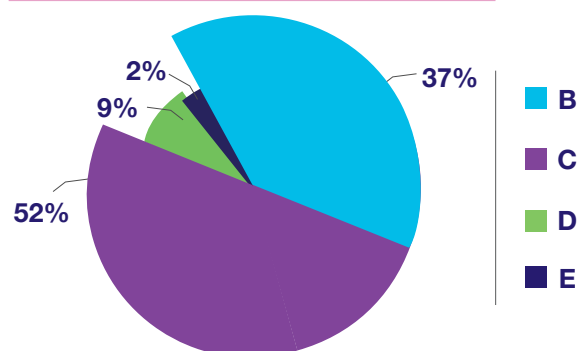
The combined revenues of broadcasters who generated revenues of less than 100,000 GEL in 2024 (53 Category E undertakings) amounted to 1% of the total revenues.

There were 102 active undertakings generating revenues from broadcasting in 2024.⁵⁶ Their combined revenues amounted to 111.1 million GEL. Telemedi and Media Holding generated revenues of more than 10 million GEL and were recognised as Category B companies. Their combined revenues amounted to 37% of the total revenues. The combined revenues of broadcasters that generated revenues of less than 100,000 GEL in 2024 (55 Category E undertakings) amounted to 2% of the total revenues.

Revenue Share of Broadcasters by Category



Distribution of Active Broadcasters by Revenues Generated from Broadcasting

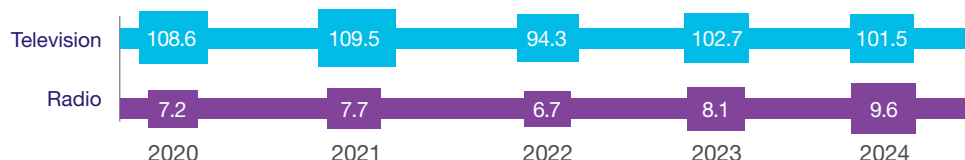


As of December 2024, there were 111 authorised TV broadcasting channels, 54 licensed radio broadcasters and 12 authorised radio broadcasters in Georgia. Of these, 17 were free-to-air national TV broadcasters, in addition to four channels of the Georgian Public Broadcaster and Adjara TV. Thus, there were a total of 21 free-to-air national broadcasting channels operating in 2024.

71 TV broadcasters and 38 radio broadcasters generated revenues in 2024.

Revenues generated by broadcasting in 2024 amounted to 111.1 million GEL, with TV broadcasters generating 101.5 million GEL and radio broadcasters generating 9.6 million GEL.

Revenues Generated from Broadcasting (GEL millions)⁵⁷



⁵³Undertakings that have generated any form of revenue in the field of broadcasting during the year.

⁵⁴Including the Georgian Public Broadcaster, and Adjara TV and Radio of the Georgian Public Broadcaster.

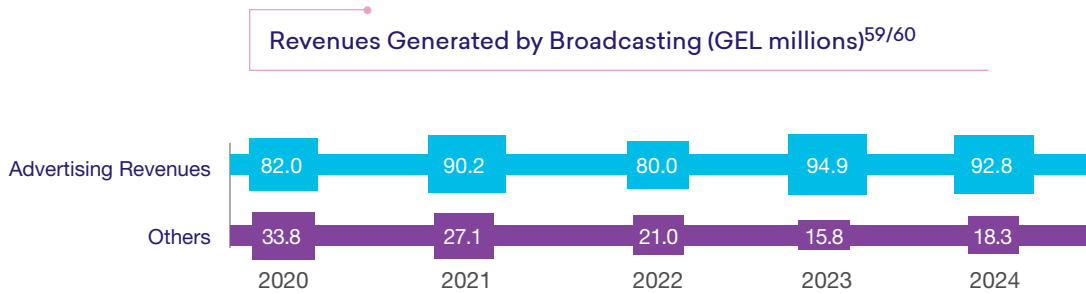
⁵⁵Categories by revenue:

⁵⁶Revenues generated by broadcasting are revenues collected by broadcasters with the exception of state funding and other non-broadcasting revenues.

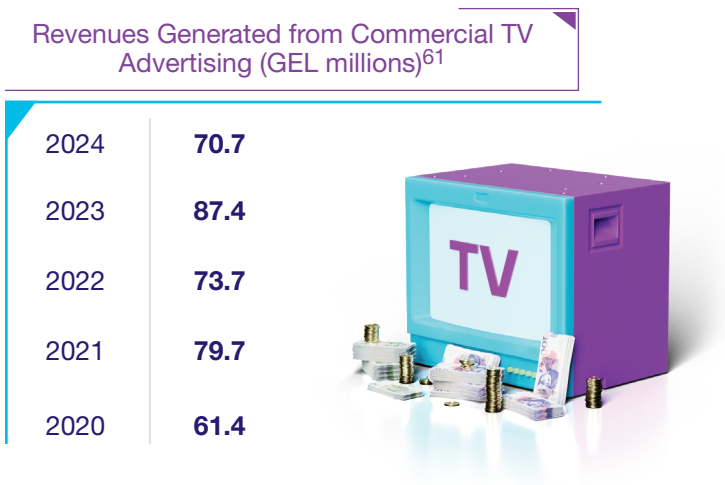
⁵⁷The data above differs from the data presented in last year's report, as some broadcasters corrected their information.

Category	Revenues generated during the year
A	GEL 100 million or more
B	Between GEL 10 million and GEL 100 million
C	Between GEL 1 million and GEL 10 million
D	Between GEL 100 000 and GEL 1 million
E	Less than GEL 100 000

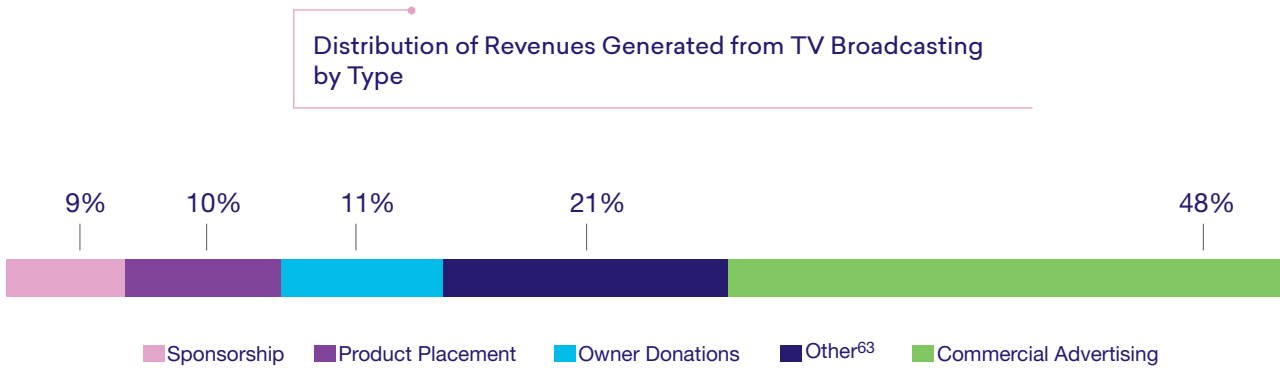
In 2024, the total advertising⁵⁸ revenues of TV and radio broadcasters decreased by 2.3% year-over-year and amounted to 92.8 million GEL.



Revenues generated from commercial advertising by TV broadcasters in 2024 amounted to 70.7 million GEL, which is 19% less than in the previous year.



Advertising and sponsorship accounted for 57% of the total broadcasting revenues generated by TV broadcasters.⁶²



⁵⁸Advertising includes 5 categories: direct advertising (including paid political advertising), sponsorship, teleshopping, advertisements, and product placement.

⁵⁹All revenue types with the exception of state funding and other non-broadcasting revenues.

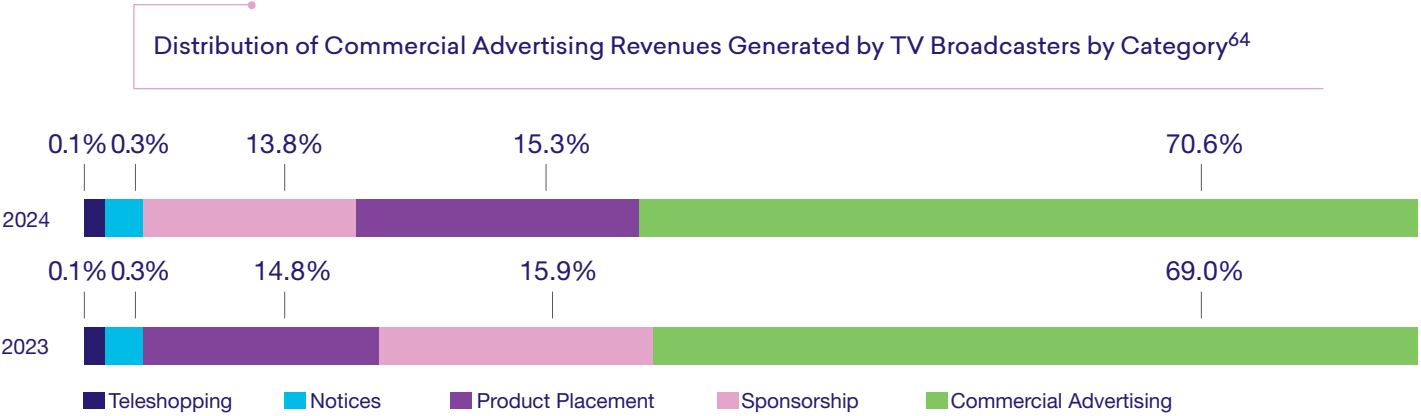
⁶⁰The data above differs from the data presented in last year's report, as some broadcasters corrected their information.

⁶¹The data above differs from the data presented in last year's report, as some broadcasters corrected their information.

⁶²With the exception of state funding and other non-broadcasting revenues.

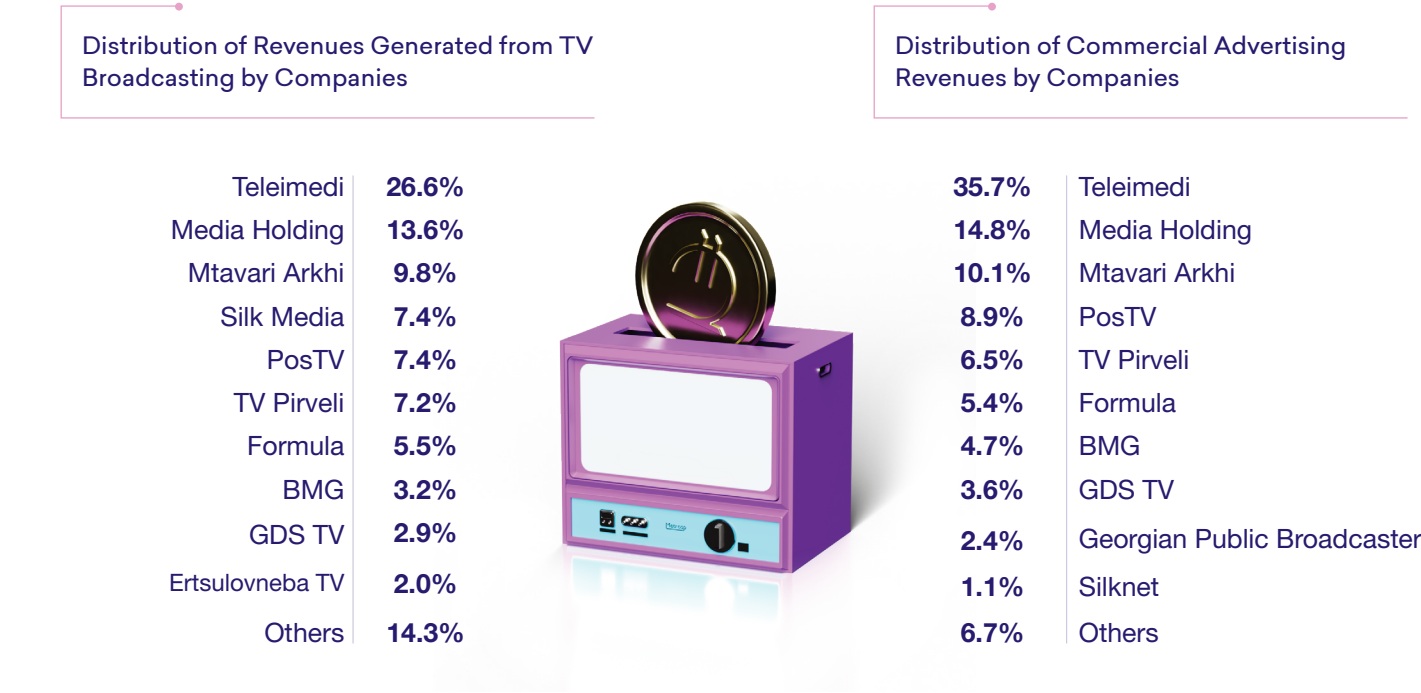
⁶³"Other" includes revenues generated from placement of political advertising.

Advertising, product placement and sponsorship were the main sources of total advertising revenues generated by TV broadcasters.



Teleimedi accounted for the largest share of revenues generated from TV broadcasting in 2024⁶⁵ with 26.6%, followed by Media Holding⁶⁶ with 13.6%, Mtavari Arkhi with 9.8%, Silk Media with 7.4%, PosTV with 7.4%, TV Pirveli with 7.2%, Formula with 5.5%, BMG with 3.2%, GDS TV with 2.9%, and Ertulovneba TV with 2%. The total share of revenues of the other broadcasters amounted to 14.3%.

Teleimedi accounted for the largest share of commercial TV advertising⁶⁷ revenues with 35.7%, followed by Media Holding with 14.8%, Mtavari Arkhi with 10.1%, PosTV with 8.9%, TV Pirveli with 6.5%, Formula with 5.4%, BMG with 4.7%, GDS TV with 3.6%, the Georgian Public Broadcaster with 2.4%, and Silk Media with 1.1%. The total share of advertising revenues of the other broadcasters amounted to 6.7%.



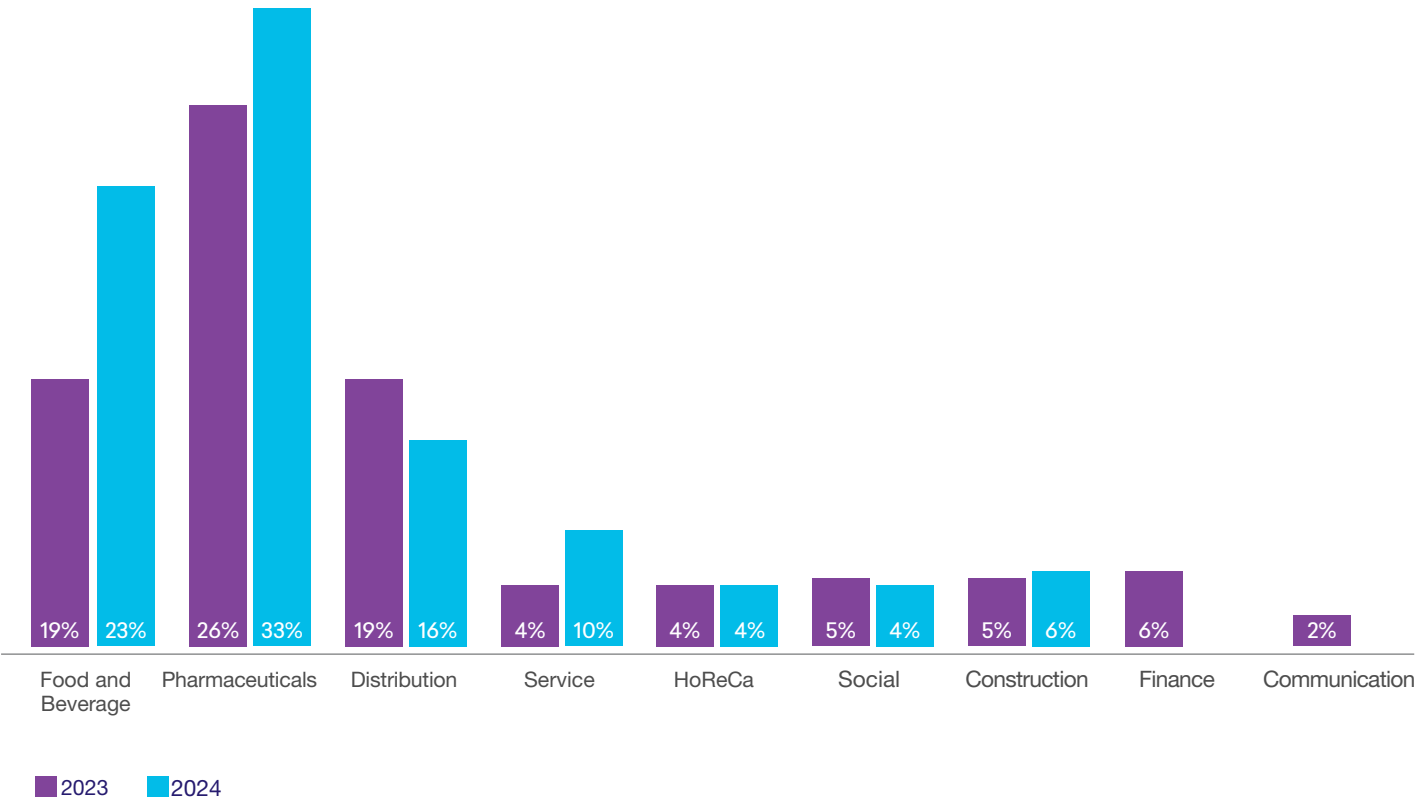
⁶⁴The data above differs from the data presented in last year's report, as some broadcasters corrected their information.
⁶⁵With the exception of state funding and other non-broadcasting revenues.
⁶⁶Media Holding includes Rustavi 2, Marao and Comedy Channel.
⁶⁷Commercial advertising revenue includes: direct advertising, sponsorship, teleshopping, announcements, and product placement.

In 2024, there was a decline in the number of sponsors of TV broadcasters, as well as in the duration and number of adverts placed. Analysis of the 10 broadcasters with the highest revenues shows that despite the increase in the price of 1 second of advertising placed on air, the revenues generated by broadcasters from the placement of commercial advertising have decreased year-over-year.

The decrease in commercial advertising revenues in 2024 was, to some extent, conditioned by the broadcasters devoting advertising time to the placement of paid political adverts during the pre-election period. In addition, broadcasters spent a certain part of the year covering the ongoing events in the country in an emergency mode, in a continuous live broadcast format. This led to changes in the pre-planned broadcasting schedules, which was also reflected in the time allocated for commercial advertising.

The pharmaceutical sector held the leading position among the advertising clients of TV broadcasters in terms of the generated revenues with 8.9 million GEL, followed by the food and beverage sector (6.2 million GEL) and distribution sector (4.4 million GEL).

Percentage Distribution of Revenues by Sector



Top 10 Largest Sponsors of TV Broadcasters

TV broadcasters generated 70.7 million GEL in commercial advertising revenues in 2024. According to the information submitted by the broadcasters to the Communications Commission under the terms of the Law of Georgia on Broadcasting, the following companies spent the most money on advertising time on Telemedi, Rustavi 2, Mtavari Arkhi, PostTV, TV Pirveli and Formula:



Companies that paid more than 500,000 GEL for advertising on Telemedi:

- Coca-Cola Bottlers Georgia
- PSP Pharma
- Henkel Central Asia Caucasus
- Diplomat Georgia
- Aversi Pharma
- Nestle Georgia
- Lactalis Georgia
- Avenue by Orbi
- Central Election Commission of Georgia



Company that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

- Berlin-Chemie Georgia

Companies that paid more than 500,000 GEL for advertising on Rustavi 2:

Coca-Cola Bottlers Georgia

PSP Pharma

Companies that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

Wimm Bill Dan Georgia

Aversi Pharma

Lactalis Georgia

Nestle Georgia

Colgate Palmolive

Henkel Central Asia Caucasus

GM Pharmaceuticals

Ortachala Gate



Companies that paid more than 500,000 GEL for advertising on Mtavari Arkhi:

Coca-Cola Bottlers Georgia

PSP Pharma

Companies that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

Aversi Pharma

Diplomat Georgia

GM Pharmaceuticals

T&K restaurants

Wissol Petroleum Georgia

Cellfie Mobile

Wimm Bill Dan Georgia

Berlin-Chemie Georgia



Companies that paid more than 500,000 GEL for advertising on PosTV:

GeoCap LLC
Natural Gas LLC
Stereo+

Companies that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

Tiflis Pub
Distribution Company
Palavani
Georgian Dairy Products
Respublika
Nestle Georgia
Bumba LLC



Company that paid more than 500,000 GEL for advertising on TV Pirveli:

Coca-Cola Bottlers Georgia

Companies that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

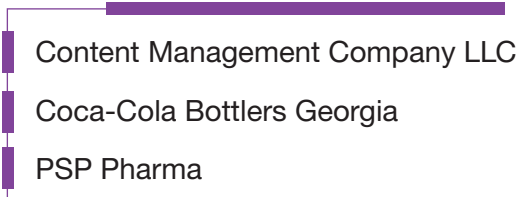
PSP Pharma
Sun Petroleum Georgia
Pirveli Winery
Chinese Medicine Centre
Wissol Petroleum Georgia
Tegeta Motors
Silknet



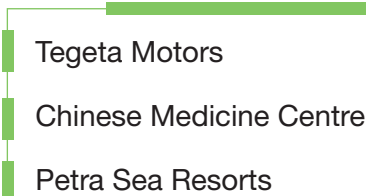
Companies that purchased advertising worth between 50,000 GEL and 100,000 GEL from the broadcaster:

Diplomat Georgia
Nova

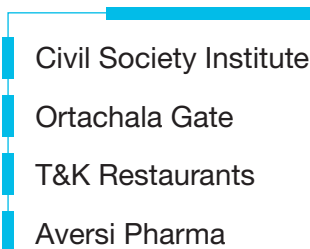
Companies that paid more than 500,000 GEL for advertising on Formula:



Companies that purchased advertising worth between 100,000 GEL and 500,000 GEL from the broadcaster:

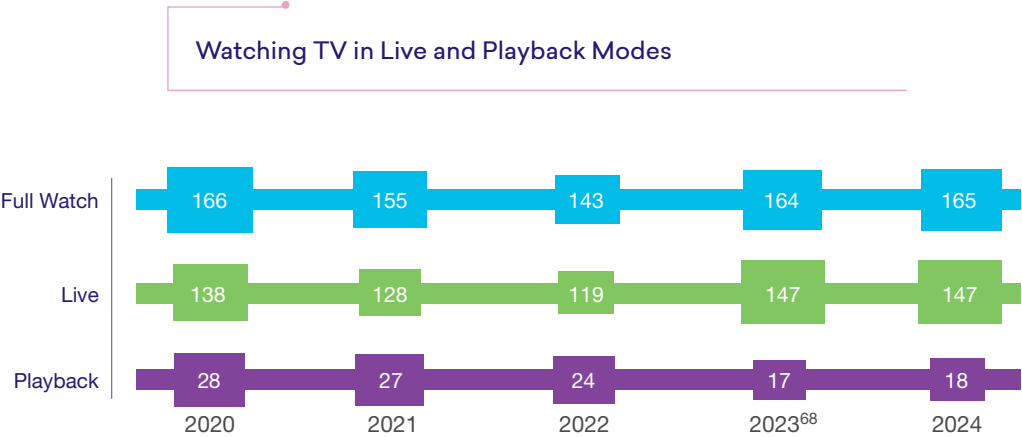


Companies that purchased advertising worth between 50,000 GEL and 100,000 GEL from the broadcaster:



Watching TV in Live and Playback Modes

An average person watched approximately 165 minutes of TV per day in 2024.



⁶⁸The significant increase in data in 2023 is due to the expansion of the audience measurement research panel by Tri Media Intelligence.

The advertising revenues of radio broadcasters in 2024 amounted to 9 million GEL, which is 1.4 million GEL more than in the previous year.

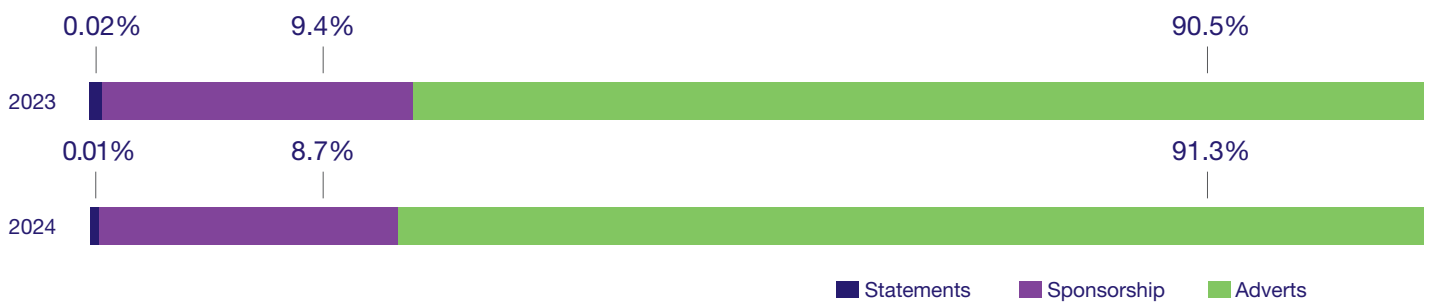


Advertising Revenues of Radio Broadcasters (GEL millions)

2024	9.0
2023	7.6
2022	6.3
2021	7.2
2020	6.8

Adverts and sponsorship accounted for 99.9% of the advertising revenues of radio broadcasters, while the share of statements was negligible.

Distribution of Advertising Revenues of Radio Broadcasters by Category



Radio Holding Fortuna accounted for the largest share of advertising revenues from radio broadcasting in 2024 with 59.6%, followed by Radio Imedi with 10.4%, Radio Palitra with 4.7%, Georgian Radio with 3.7%, Holding – Voice of Abkhazia with 3.6%, Broadcasting Company Hereti with 3.2%, MD Group with 3.2%, Radio Georgian Times with 2.5%, Dzveli Kalaki with 1.0%, and Radio Urbanic with 0.8%. The other radio broadcasters accounted for 7.3% of the total advertising revenues.

Distribution of Advertising Revenues of Radio Broadcasters by Company

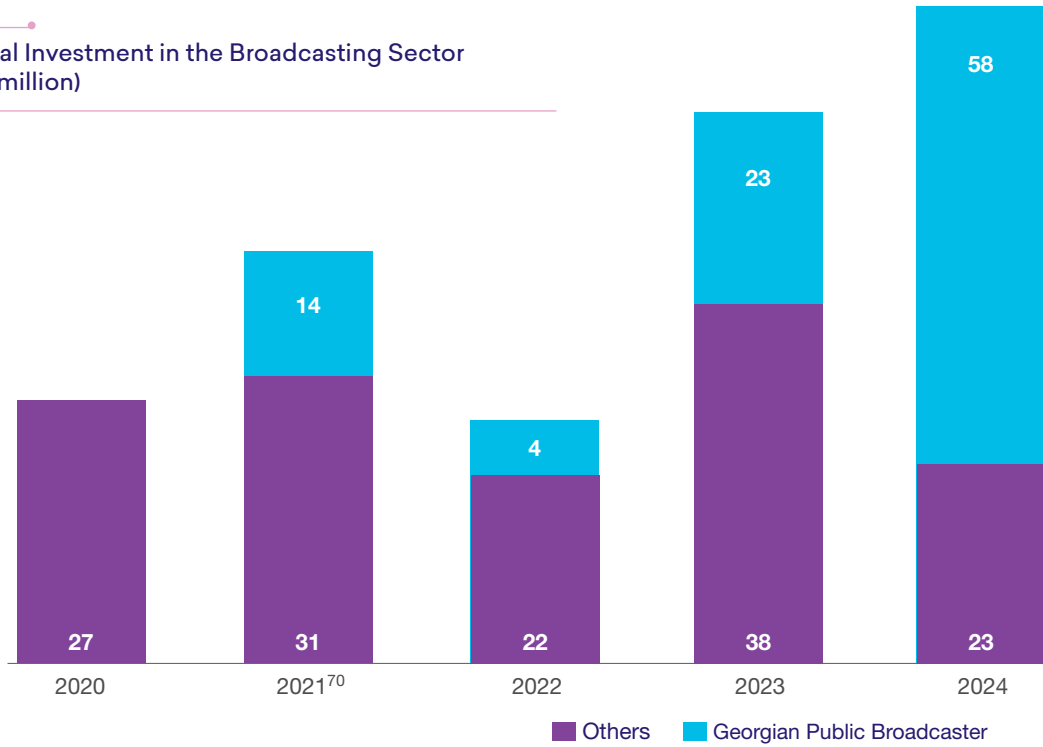
Radio Holding Fortuna	59.6%
Radio Imedi	10.4%
Radio Palitra	4.7%
Georgian Radio	3.7%
Holding – Voice of Abkhazia	3.6%
Hereti	3.2%
MD Group	3.2%
Radio Georgian Times	2.5%
Dzveli Kalaki	1.0%
Radio Urbanic	0.8%
Others	7.3%



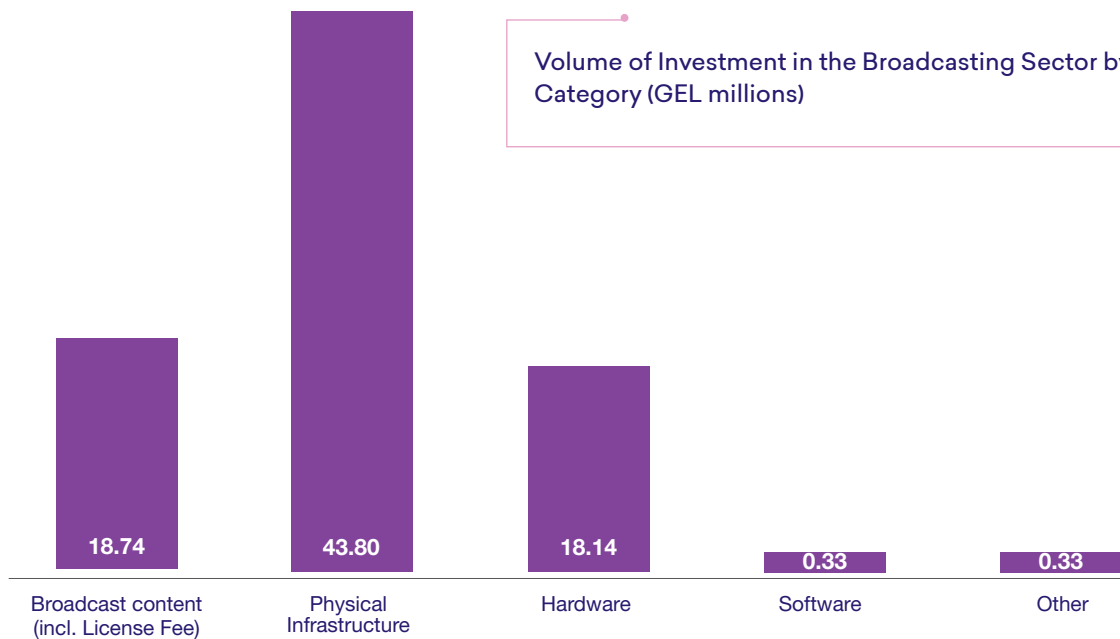
Capital investment in the broadcasting sector

Capital investment⁶⁹ in the broadcasting sector in 2024 amounted to 81.3 million GEL, which is 34.2% more than in the previous year.

Capital Investment in the Broadcasting Sector (GEL million)



Volume of Investment in the Broadcasting Sector by Category (GEL millions)



⁶⁹Includes the data on companies that generated more than 1 million GEL in annual revenue.

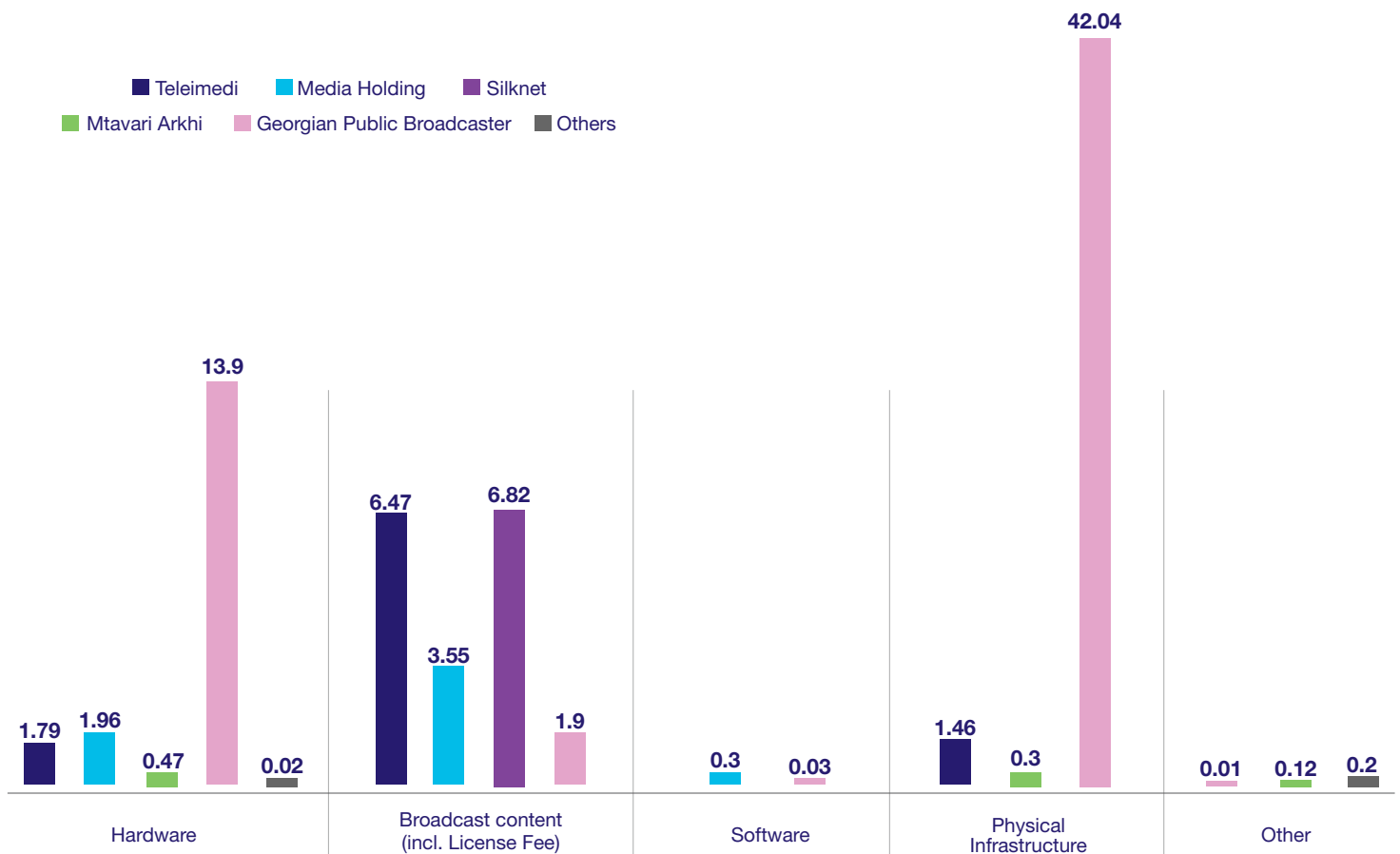
⁷⁰Since 2021, capital investments carried out by the Georgian Public Broadcaster and Adjara TV and Radio of the Georgian Public Broadcaster have been separated.



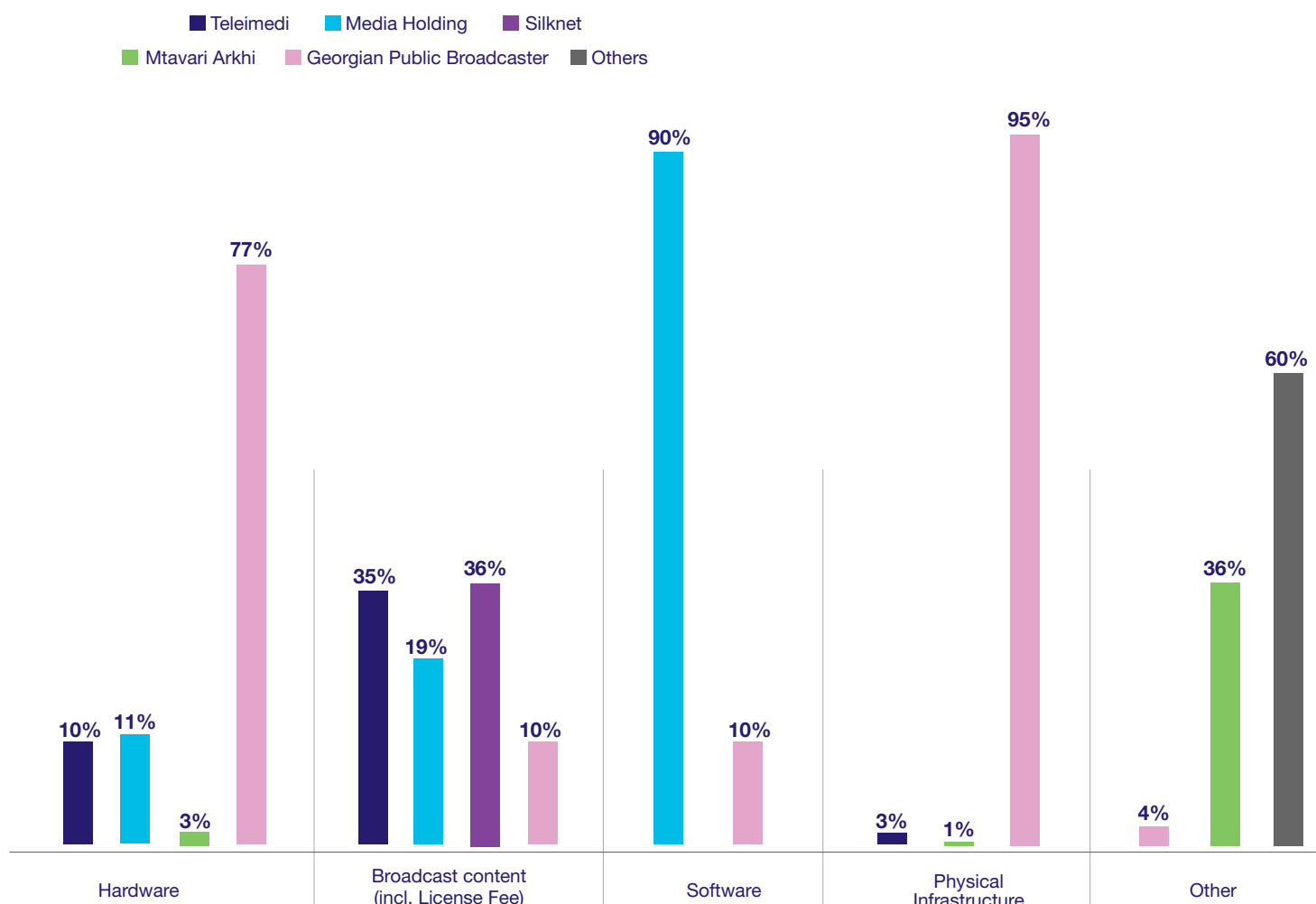
Distribution of Capital Investment in the Broadcasting Sector by Companies

Georgian Public Broadcaster	71.2%
Teleimedi	12.0%
Silknet	8.4%
Media Holding	7.1%
Others	1.3%

Categories of Capital Investment in the Broadcasting Sector by Company (GEL millions)



Shares of Companies in Capital Investment Categories Carried Out in the Broadcasting Sector



Contributions to the State Budget

In 2024, a total of 628,828,011 GEL was paid to the state budget from the communications sector. The amount paid by broadcasters to the state budget⁷¹ in the form of taxes was 46,607,141 GEL, while the amount paid by authorised and/or licensed undertakings in accordance with the Law of Georgia on Electronic Communications was 517,932,633 GEL. With regards to revenues from licensing, a total of 64,249,528 GEL was paid to the state budget from the communications sector in 2024. 38,709 GEL was transferred to the budget as fines for administrative violations.

⁷¹The data are based on the information provided by the Ministry of Finance. Includes: income tax, profit tax, VAT, excise duty, import tax, property tax, and land tax (agricultural-non-agricultural).

The Communications Commission, in accordance with Georgian legislation, conducted media monitoring⁷² during the pre-election period for the 2024 parliamentary elections, during which it monitored up to 55 TV broadcasters on a 24-hour basis. In addition to quantitative monitoring, the Commission carried out qualitative media monitoring of the Georgian Public Broadcasters and the 5 channels with the highest ratings (Telemedi, Rustavi 2, PosTV, Mtavari Arkhi, and TV Pirveli) between 7:00 p.m. and 12:00 a.m. during the period from 27 August to 26 October. To ensure high-quality media monitoring of the 2024 parliamentary elections, Council of Europe expert Rasto Kuzel trained the employees of the Communications Commission and qualitative media monitors in accordance with international standards and European methodology. The monitoring process was implemented by 25 specially trained monitors who observed the pre-election advertisements, debates, news shows, and political programmes, as well as election campaigns and public opinion polls.

Qualitative media monitoring showed that the media environment during the pre-election period was pluralistic and diverse. Viewers received information about the current events and election campaigns from various sources, and electoral subjects had the opportunity to address potential voters and introduce their programmes on air. Unlike in the previous years, hate speech was absent from the broadcasts. Although the media environment was pluralistic and diverse, bias and polarisation remained a challenge, as evidenced by the results of both qualitative and quantitative monitoring. For the most part, the hosts of news programmes and political talk shows of private broadcasters openly expressed their political views and made direct appeals to the viewers.

A highly negative attitude towards the Georgian Dream party and the Georgian government was observed on Mtavari Arkhi and TV Pirveli. The reports, journalistic investigations, and discussions with guests were aimed at presenting the Georgian Dream government and its policies in a negative light. At the same time, a positive attitude towards the opposition parties was evident. Mtavari Arkhi provided a strongly positive coverage of the Coalition for Change, while TV Pirveli demonstrated sympathy for Strong Georgia. These broadcasters violated the standards of journalistic ethics by including misleading information in news reports and programmes and making serious accusations that were not supported by evidence. Journalists displayed a biased attitude and made ironic comments. Journalists also made statements in support of the opposition electoral subjects.

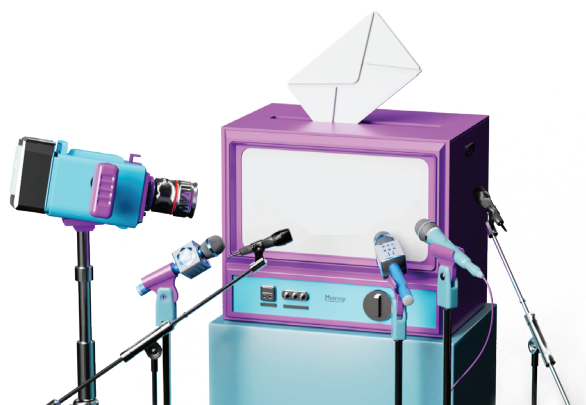
PosTV and Imedi displayed bias towards the ruling party. In news broadcasts and political programmes, the measures implemented by the Georgian Dream government were con-

sistently presented in a positive light. At the same time, the opposition parties and their promises were negatively portrayed. Bias was also observed in the distribution of time allocated to electoral subjects. Furthermore, there were violations of the standards of journalistic ethics by the aforementioned broadcasters. The programmes aired by the broadcasters were aligned with the pre-election programme of the ruling party. The hosts often identified themselves with the ruling party and made statements and comments in support of Georgian Dream.

The coverage of pre-election processes by Rustavi 2 violated the principle of balance in favour of Georgian Dream. A critical attitude towards the pre-election promises of the opposition parties was also observed.

In comparison to private broadcasters, the Georgian Public Broadcaster and Adjara TV of the Georgian Public Broadcaster demonstrated a higher adherence to journalistic ethics.

⁷²The media monitoring report for the pre-election period of the 2024 parliamentary elections has been published on the website of the Communications Commission.





In addition to media monitoring, the Communications Commission actively enforced the standards and requirements set out in the Election Code regarding the coverage of the pre-election campaign. Before the start of the pre-election campaign in the media, the Commission published a guide for broadcasters on the regulation of electoral issues to ensure that they complied with the legislation during the coverage period. The purpose of the guide was to clarify the issues for broadcasters that must be in full compliance with the Georgian legislation during the coverage of the elections. The document was of an informational and recommendatory nature and helped broadcasters conduct their activities properly. In addition, the guide enabled the media to predict the views of the Communications Commission regarding the pre-election media monitoring, as well as its approaches to the cases of legislative violations.

The guide explained the obligations imposed by law on the broadcasters during this period, including the requirements for political advertising, as well as the obligations of broadcasters regarding the airing of paid and free political advertising, the publication of public opinion polls, and the airing of pre-election debates, both in terms of content and the broadcasting period. The document also provided an overview of the legal norms for holding the media accountable for violating the legislation regulating electoral issues, including the Law of Georgia on Broadcasting, the Election Code of Georgia, and the resolutions adopted by the Communications Commission.

Despite the publication of the guide, broadcasters frequently violated the legislation during the pre-election period, compelling the Communications Commission to take the appropriate legal action. There were significant violations concerning the publication of public opinion polls, the failure to publish the price of paid political advertisements, and the granting of the status of qualified subject to political parties by the broadcasters. The most problematic issue was the placement of political advertising on the air.



During the pre-election period, broadcasters were obliged under the Georgian legislation to allocate airtime to political parties free of charge. Broadcasters had to act in a non-discriminatory manner and offer equal terms to the political subjects to enable citizens to make an informed choice.








The pre-election period for the 2024 parliamentary elections was characterised by unprecedented violations, particularly the refusal by some broadcasters to air political advertisements. Initially, Mtavari Arkhi, TV Pirveli, and Formula made a joint illegal decision not to broadcast an election ad of the Georgian Dream—Democratic Georgia party. Moreover, after the broadcasters were issued with a violation report by the Communications Commission, they stated during a public hearing that they would not air the pre-election advertising clips regardless of the court’s decision. The Commission immediately expressed concerns that the unlawful actions by Mtavari Arkhi, Formula, and TV Pirveli were setting a dangerous precedent, as there was a risk that other broadcasters would follow suit and damage the electoral environment.








Due to these risks, the Communications Commission immediately called on the observation missions and international organisations to get involved in the process to help rectify the illegal actions by the broadcasters and ensure that the pre-election campaign would not be damaged. However, there was no response from these organisations.







Indeed, a similar decision was later made by Teleimedi, Maestro, Rustavi 2, and PosTV to refuse to broadcast pre-election advertisements of the opposition parties.

The acts of violation of the law by the broadcasters were confirmed by the court. The violation reports drawn up by the Communications Commission were reinforced by court decisions, namely:








Legal basis for drawing up the report	Broadcaster	Court order
Broadcasters did not air the free pre-election / political advertisement submitted to it.		The Tbilisi City Court found Mtavari Arkhi to be in violation of the law and imposed a fine of 5,000 GEL. The Tbilisi Court of Appeals did not satisfy the appeal of Mtavari Arkhi. The first instance decision remained in force.
		The Tbilisi City Court found TV Pirveli to be in violation of the law and imposed a fine of 5,000 GEL. The Tbilisi Court of Appeals did not satisfy the appeal of TV Pirveli. The first instance decision remained unchanged.

Broadcasters did not air the free pre-election / political advertisement submitted to it.		The Tbilisi City Court found Formula to be in violation of the law and imposed a fine of 5,000 GEL. The Tbilisi Court of Appeals did not satisfy the appeal of Formula. The first instance decision remained unchanged.
		The Tbilisi City Court found Mtavari Arkhi to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Mtavari Arkhi was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Mtavari Arkhi. The first instance decision remained unchanged.
		The Tbilisi City Court found Formula to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Formula was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Formula. The first instance decision remained unchanged.
		The Tbilisi City Court found TV Pirveli to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, TV Pirveli was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of TV Pirveli. The first instance decision remained unchanged.
		The Tbilisi City Court found Telemedi to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Telemedi was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Telemedi. The first instance decision remained unchanged.
		The Tbilisi City Court found Studio Maestro to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Studio Maestro was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Studio Maestro. The first instance decision remained unchanged.
		The Tbilisi City Court found Rustavi 2 to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Rustavi 2 was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Rustavi 2. The first instance decision remained unchanged.

<p>Broadcasters did not air the paid pre-election advertisement submitted to them, despite the fact that they had submitted the tariffs for paid political advertising to the Commission.</p>		<p>The Tbilisi City Court found Rustavi 2 to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Rustavi 2 was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Rustavi 2. The first instance decision remained unchanged.</p>
<hr data-bbox="268 526 470 530"/>		<p>The Tbilisi City Court found Telemedi to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Telemedi was instructed to broadcast the political advertisement submitted to it.</p>
<hr data-bbox="268 790 470 795"/>		<p>The Tbilisi City Court found Rustavi 2 to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Rustavi 2 was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Rustavi 2. The first instance decision remained unchanged.</p>
<hr data-bbox="268 1070 470 1075"/>		<p>The Tbilisi City Court found Telemedi to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Telemedi was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Telemedi. The first instance decision remained unchanged.</p>
<hr data-bbox="268 1350 470 1355"/>		<p>The Tbilisi City Court found Rustavi 2 to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Rustavi 2 was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Rustavi 2. The first instance decision remained unchanged.</p>
<p>Broadcasters did not air the paid pre-election advertisement submitted to them, even though they had submitted the tariffs for paid political advertising to the Commission. Furthermore, broadcasters published results of a public opinion poll in violation of the law.</p>		<p>The Tbilisi City Court found Telemedi to be in violation of the law and imposed a fine of GEL 5,000. Furthermore, Telemedi was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of Telemedi. The first instance decision remained unchanged.</p>
<hr data-bbox="268 1910 470 1915"/>		<p>The Tbilisi City Court found PosTV to be in violation of the law and imposed a fine of GEL 5,000. Furthermore, PosTV was instructed to broadcast the political advertisement submitted to it. The Tbilisi Court of Appeals did not satisfy the appeal of PosTV. The first instance decision remained unchanged.</p>

<p>Broadcasters also aired free pre-election advertisements of political subjects that served the campaigning goals of other electoral subjects. Furthermore, these broadcasters allocated more airtime to specific political subjects than they were entitled to.</p>		<p>The Tbilisi City Court found Mtavari Arkhi to be in violation of the law and freed the broadcaster from administrative liability. The Tbilisi Court of Appeals did not satisfy the appeal of Mtavari Arkhi. The first instance decision remained unchanged.</p>
<hr data-bbox="268 573 472 577"/>		<p>The Tbilisi City Court found TV Pirveli to be in violation of the law and freed the broadcaster from administrative liability. The Tbilisi Court of Appeals did not satisfy the appeal of TV Pirveli. The first instance decision remained unchanged.</p>
<hr data-bbox="268 857 472 862"/>		<p>The Tbilisi City Court found Formula to be in violation of the law and freed the broadcaster from administrative liability. The Tbilisi Court of Appeals did not satisfy the appeal of Formula. The first instance decision remained unchanged.</p>
<p>Further, broadcasters aired free pre-election advertisements of political subjects that served the campaigning goals of other electoral subjects. Furthermore, these broadcasters did not air the pre-election / political advertisement submitted to them.</p>		<p>The Tbilisi City Court found Mtavari Arkhi to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, Mtavari Arkhi was instructed to broadcast the political advertisement submitted to it and was issued with an administrative violation report on this matter. The Tbilisi Court of Appeals did not satisfy the appeal of Mtavari Arkhi. The first instance decision remained unchanged.</p>
<hr data-bbox="268 1529 472 1534"/>		<p>The Tbilisi City Court found TV Pirveli to be in violation of the law and imposed a fine of 5,000 GEL. The Tbilisi Court of Appeals did not satisfy the appeal of TV Pirveli. The first instance decision remained unchanged.</p>
<hr data-bbox="268 1839 472 1843"/>		<p>The Tbilisi City Court found Formula to be in violation of the law and imposed a fine of 5,000 GEL. The Tbilisi Court of Appeals did not satisfy the appeal of Formula. The first instance decision remained unchanged.</p>

Broadcasters aired free pre-election advertisements of political subjects that served the campaigning goals of other electoral subjects.		The Tbilisi City Court found the Georgian Public Broadcaster to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Adjara TV and Radio of the Georgian Public Broadcaster to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Silk Media to be in violation of the law and freed the broadcaster from administrative liability.
Broadcasters aired free political advertisements of political subjects, even though it was not authorised to air free political advertisements under the Election Code.		The Tbilisi City Court found Palitra News to be in violation of the law and imposed a fine of 1,630.48 GEL.
_____		The Tbilisi City Court found Media Union Obiektivi to be in violation of the law and imposed a fine of 250 GEL.
_____		The Tbilisi City Court found BMG to be in violation of the law and imposed a fine of 25,600 GEL. BMG appealed the decision and requested the annulment of the first instance decision regarding the imposition of a fine. The Tbilisi Court of Appeals found BMG to be in violation of the law, while the fine imposed by the first instance court was reduced to 15,000 GEL.
A broadcaster granted the electoral subject the status of a qualified electoral subject without complying with the requirements of the legislation.		The Tbilisi City Court found Formula to be in violation of the law and imposed a fine of 5,000 GEL. Furthermore, the broadcaster was instructed to remove the political advertisement that was subject to the administrative violation report from the air. The Tbilisi Court of Appeals did not satisfy the appeal of Formula. The first instance decision remained unchanged.
Broadcasters published the results of a public opinion poll in violation of the law.		The Tbilisi City Court found BMG to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Teleimedi to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Studio Maestro to be in violation of the law and freed the broadcaster from administrative liability.

Broadcasters published the results of a public opinion poll in violation of the law.		The Tbilisi City Court found PosTV to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Formula to be in violation of the law and freed the broadcaster from administrative liability.
Broadcasters published the results of an exit poll in violation of the law.		The Tbilisi City Court found Kavkasia TV to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Palitra News to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found the Georgian Public Broadcaster to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Silk Media to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found TV Pirveli to be in violation of the law and freed the broadcaster from administrative liability.
_____		The Tbilisi City Court found Media Holding Georgian Times to be in violation of the law and freed the broadcaster from administrative liability.

The Communications Commission conducted an analysis of paid and free political advertising for the 2024 Georgian parliamentary elections.

The analysis showed that TV and radio broadcasters devoted a total of over 20,000 minutes to free political advertising during the pre-election period. If the broadcasters had received money directly proportional to paid advertising during this time, their revenues would have increased by approximately 55 million GEL. As for paid political advertising, the information provided by broadcasters shows that revenues from paid political advertising amounted to 17 million GEL—three times less than from free advertising. The broadcasters devoted over 10,000 minutes to paid advertising.

The distribution of free political advertising by TV channel:



Media Holding (Rustavi 2) placed free political advertisements worth a total of 9.4 million GEL. The average cost of 1 minute of advertising was 8,752 GEL.



Telemedi placed free political advertisements worth a total of 8 million GEL. The average cost of 1 minute of advertising was 8,232 GEL.



PosTV placed free political advertisements worth a total of 7.5 million GEL. The average cost of 1 minute of advertising was 7,628 GEL.



TV Pirveli placed free political advertisements worth a total of 6.5 million GEL. The average cost of 1 minute of advertising was 4,222 GEL.



Mtavari Arkhi placed free political advertisements worth a total of 4.7 million GEL. The average cost of 1 minute of advertising was 3,043 GEL.



Formula placed free political advertisements worth a total of 3 million GEL. The average cost of 1 minute of advertising was 1,735 GEL.

Adjara TV, the Georgian Public Broadcaster, Alt Info, Studio Maestro, Ilioni, and Obieqtivi placed free political advertisements with a total worth of more than 15 million GEL.

The analysis showed that Mtavari Arkhi, Formula, and TV Pirveli generated 2 million GEL more in revenues from paid political advertising than Telemedi, PosTV, and Rustavi 2. Georgian Dream paid the most (4,936,285.16 GEL) for political advertising to Telemedi, PosTV, and Rustavi 2 and received a total of 597.6 minutes of airtime on all three channels. Mtavari Arkhi, Formula, and TV Pirveli were paid a total of 8,146,345.96 GEL by the political unions Strong Georgia (Lelo), Unity—National Movement, Coalition for Change (Akhali), and Gakharia for Georgia for a total of 2,509.14 minutes of airtime, which is approximately 4 times more than the total airtime purchased by Georgian Dream on Telemedi, PosTV, and Rustavi 2.

Mtavari Arkhi generated 3,846,163 GEL in revenues from paid political advertising during the pre-election period—more than any other broadcaster. The average cost of 1 minute of advertising on Mtavari Arkhi was 3,043 GEL. The Coalition for Change paid 2,214,346.32 GEL for political advertising on the channel, Strong Georgia paid 985,565.65 GEL, Unity—National Movement paid 598,781 GEL, while Gakharia for Georgia paid 47,470 GEL.

TV Pirveli ranked second in terms of revenues generated from paid political advertising with 3,275,512 GEL. The average cost of 1 minute of advertising on the channel was 4,222 GEL. The Coalition for Change paid 1,280,120.83 GEL for political advertising on the channel, Strong Georgia paid 1,262,132.33 GEL, Unity – National Movement paid 691,218.66 GEL, while Gakharia for Georgia paid 42,040 GEL.

Rustavi 2 generated 2,781,923 GEL in revenues from paid political advertising during the pre-election period. The average cost of 1 minute of advertising on the channel was 8,752 GEL. Georgian Dream paid 2,048,258.34 GEL for political advertising on the channel and was allotted the largest share of airtime, while Strong Georgia paid 733,665 GEL.

Telemedi generated 2,547,748 GEL in revenues from paid political advertising during the pre-election period. The average cost of 1 minute of advertising on the channel was 8,232 GEL. Georgian Dream paid 1,895,833.49 GEL for political advertising on the channel and was allotted the largest share of airtime, while Strong Georgia paid 651,915 GEL.

Formula generated 1,035,232 GEL in revenues from paid political advertising during the pre-election period. The average cost of 1 minute of advertising on the channel was 1,735 GEL. Strong Georgia paid 518,834.17 GEL for political advertising on the channel, Unity—National Movement paid 270,988 GEL, the Coalition for Change paid 234,850 GEL, while Chven paid 10,560 GEL.

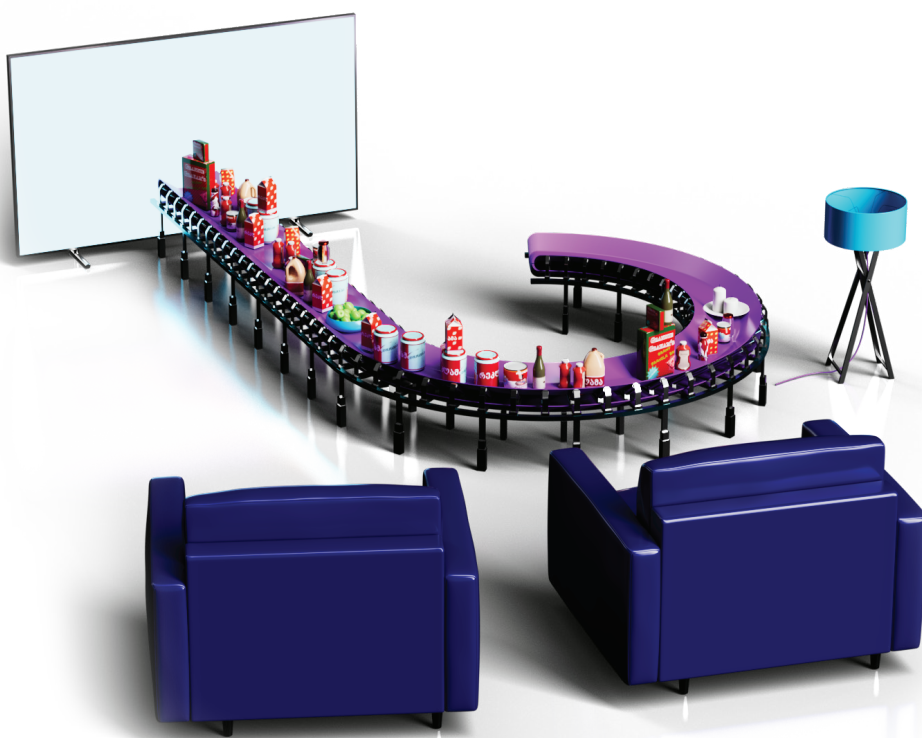
PosTV generated 992,193.33 GEL in revenues from paid political advertising during the pre-election period, which was paid exclusively by Georgian Dream. The average cost of 1 minute of advertising on the channel was 7,628 GEL.

According to the Election Code of Georgia, licensed broadcasters must weekly submit to the Communications Commission the following information regarding airtime for pre-election campaigning and political advertising: from and until what date and at what intervals the airtime is allotted, the duration and schedule of the allotted airtime during one day, the tariff for airtime and the service provided. The analysis of paid and free political advertising for the 2024 Georgian parliamentary elections was conducted based on the information provided by the broadcasters. The average market value of free political advertisements was also determined based on the rates that broadcasters themselves had set for the relevant broadcasts.

To prevent the violations of product placement and sponsorship rules, in 2024, the Communications Commission gave broadcasters a transitional period of 8 months to bring their operating methods and contracts with customers in line with the legislation.

This issue has been on the agenda since the number of violations of the legislation on advertising communications by broadcasters has increased in recent years. Breaching sponsorship and product placement rules prevents viewers from distinguishing advertising from program content when presenters overemphasize product features. Programmes are often tailored to the interests of the advertiser rather than the viewer, which is categorically unacceptable. Violation of advertising rules is also harmful to the advertising market since product placement is cheaper than commercial advertising. Furthermore, product placement is tailored to the interests of clients to such an extent that they spend less money on advertising.

The Communications Commission aims, on the one hand, to protect viewers from covert and misleading commercial communication, and on the other hand, to protect broadcasters from commercial influences. To this end, the Commission, together with European experts, conducted a study and examined the current practice in 14 European countries. The Commission presented the results of the study and additional information on the challenges facing the TV advertising market at a conference that was attended by all interested parties, including the author of the study, EU media expert Jean-François Fournemont, representatives of the regulatory bodies of UK and Lithuania, as well as representatives of the EU Delegation, the US Embassy, TV broadcasters, sales houses, and the non-governmental sector.

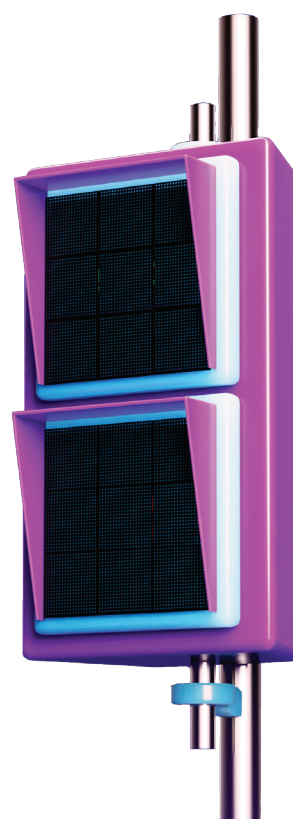


The results of the study presented during the conference showed that the laws and approaches of the regulatory bodies in EU countries regarding product placement violations are very strict. Other topics of discussion included the different types of advertising communication, their distinguishing features, the need for regulation, and the negative impact of product placement violations on the consumers. The conference featured panel discussions involving the Principal of the Broadcasting and Online Content Group at Ofcom, Suzanne Wright, and Head of Legal Division at the Radio and Television Commission of Lithuania (RTCL), Vadim Gasperskij, who provided an overview of the regulatory frameworks and approaches towards product placement in their respective countries. The panel discussed the importance of product placement being conducted in full compliance with the rules and the laws, the international practices regarding product placement regulation, and the factors that need to be considered by the broadcasters to avoid harming the interests of the viewers and prevent the loss of commercial revenues at the same time.

Following the conference, the Communications Commission actively started holding individual working meetings with broadcasters. Commissioner Ivane Makharadze, together with representatives of the Media Services Regulation Department, held meetings with the television broadcasters Rustavi 2, Telemedi, PosTV, BMG, and TV Pirveli. The meetings served to raise awareness among the representatives of television broadcasters, including lawyers, producers, programme hosts, and marketing staff, about product placement violations, as well as to discuss the legislative framework and existing guidelines on product placement developed by the Communications Commission. The consultations involved the discussion of individual examples of both outstanding and infringing product placement in domestic and international media.

Plan for 2025

It is important for the Communications Commission to protect both the rights of viewers and the interests of broadcasters. Therefore, after the end of the transition period granted to the broadcasters, the Commission will conduct active monitoring and start enforcing the legislation.



The Communications Commission shared the draft Guidelines on the regulation of hate speech, incitement to terrorism and obscenity in the media with the European Commission, broadcasters, and non-profit organisations for feedback. After receiving the feedback, the Commission will approve the final document. The Guidelines were developed based on the amendments to the Law of Georgia on Broadcasting and were supported by the European Union and non-governmental organisations.

As it is important for the approach of the Communications Commission to be clear and predictable, the Guidelines will simplify the work process for media service providers and explain the content of the law in detail. Specifically, the document explains how the Commission will enforce the norms, how each of the norms will be interpreted, what level of responsibility may be imposed on companies committing violations, and what the procedure will look like. The manual also includes relevant practical examples.

The development of guideline documents by the Communications Commission is a proven practice. Similar documents on product placement, social advertising, and sponsorship already exist. This is also a common practice in Europe, implemented by regulators from countries such as Italy (AGCOM), United Kingdom (Ofcom), Lithuania (RTK), and others.

Amendments to the law on Broadcasting are mandatory under the EU-Georgia Association Agreement. Their purpose is to harmonise the law with the EU's Audiovisual Media Services Directive 2010/13/EU and support Georgia's EU integration process.



Having assumed the chairmanship of the European Audiovisual Observatory (EAO) Executive Council in 2024, Georgia hosted a working meeting of the organisation, titled 'Market Competitiveness—Implications for the Industry and for the Regulators of Smaller Countries'. The meeting was opened by Communications Commission member and Georgia's representative on the Executive Council, Ivane Makharadze, who assessed the current state of the audiovisual sector in Georgia and the role of the main players in the sector. EAO Executive Director Susanne Nikoltchev also addressed the audience and highlighted the importance of the meeting.

The opening part of the meeting was followed by a presentation from the EAO Head of Department for Market Information, Gilles Fontaine, who introduced the main trends of the audiovisual market, the current influences on content production, as well as examples of the market players' responses and the role of artificial intelligence in this process. The following presentation was conducted by the EAO Deputy Head of the Department for Legal Information, Sophie Valais, who focussed on the implementation of the Audiovisual Media Services Directive, as well as the standard for promoting market competitiveness and the current situation in non-EU countries in this regard.

The event also featured a panel discussion moderated by Head of Legal Support Group of the Communications Commission, Levan Maisuradze. Participants in the discussion included Deputy Director of the Georgian Public Broadcaster,

Giorgi Gvimradze, Cavea+ co-founder Otar Bubashvili, Team Leader for Media Research at the Swiss Federal Office of Communications (BAKOM), Samuel Studer, Director General of the Norwegian Media Authority (NMA), Mari Velsand, and Acting Director of the Polish National Broadcasting Council (KRRiT), Ewa Murawska-Najmiec. The panel discussion was devoted to the process of transition of the media to digital platforms and its impact on the broadcasting editorial policy and the activities of regulatory bodies. In addition, the speakers discussed new monetisation opportunities and their personal experiences. They also discussed the dilemma facing the regulators and legislators, and how it is possible for traditional and digital media to coexist on equal terms despite the significant differences. The discussion also addressed the current situation in Georgia, and the challenges of competition between large and small audiovisual content creators. At the end of the panel meeting, participants discussed the use of social platforms by traditional media outlets both globally and in smaller countries and assessed the needs for the involvement of regulatory authorities.

The European Audiovisual Observatory has been operating under the umbrella of the Council of Europe since 1992. Its purpose is to analyse facts and data in the film, broadcasting, and audiovisual industry in Europe. The organisation currently has 41 members. Georgia became a member in 2016 and is represented in EAO by the Communications Commission. Each June, the chair country of the EAO Executive Council conducts a public media conference on various current topics.

To align with the EU's Audiovisual Media Services Directive, in 2024 the Communications Commission approved a code of conduct for on-demand audiovisual media service providers, and a code of conduct for video sharing platforms. According to the normative acts, the Communications Commission has established the rules, principles, and guidelines for the provision of on-demand audiovisual media services (including fairness, right of reply, coverage of court hearings and armed conflict, and inviolability of private life).

Furthermore, in the case of video-sharing platforms, significant attention will be paid to security mechanisms such as the development of age verification and parental control systems. Platforms of this type will also have the opportunity to develop their own rules of conduct together with other market players.

In addition, the Communications Commission has adopted new guidelines on the definition of on-demand audiovisual media service providers with low income and/or a small audience for the purposes of exemption from obligations regarding European products. Providers of on-demand audio-

visual media services in Georgia are obliged under the Law on Broadcasting to ensure at least a 30% share of European content in their catalogues and to give prominence to such content. However, the Commission's guidelines state that if a service provider's annual income does not exceed 2 million GEL, and/or if the number of its customers does not exceed 10,000, it shall be categorised as a service provider with low income and/or small audience and shall be freed from obligations regarding European products.

Based on the 22 December 2022 amendments to the law of Georgia on Broadcasting, the Communications Commission was instructed to adopt a code of conduct for on-demand audiovisual media service providers and a code of conduct for video sharing platform service providers. The draft changes were published on the website of the Communications Commission for a period of 1 month, during which the stakeholders were able to submit their comments and objections.

The Commission incorporated some stakeholder feedback and provided justified explanations for rejecting other comments.

To align with the EU's Audiovisual Media Services Directive, in 2024 the Communications Commission approved regulations on the accessibility of audiovisual products for persons with disabilities. The Commission had assumed the responsibility in this regard under the amended provisions of the Law of Georgia on Broadcasting.

The new regulations oblige media service providers to progressively make their content accessible to people with disabilities, which involves introducing subtitles, sign language,

and audio description. In addition, the Commission developed the rules for the operation of the specially adapted online portal through which persons with disabilities will be able to submit complaints to the Public Defender's Office.

Based on the regulations concerning the accessibility of audiovisual products for individuals with disabilities, the obligations for media service providers are set to take effect in 2029, with full implementation of the specified standards required by 2033.

According to the public opinion poll commissioned by the Communications Commission in 2024, the majority (58%) of respondents identify general radio as the most popular type of radio broadcasting that requires additional programmes, while 22% believe that additional programmes are needed on specialised radio. Furthermore, the vast majority (91%) of respondents believe that radio stations should broadcast across the whole country, while only 6% prefer regional radio.

The Communications Commission identified radio broadcasting priorities during its study and approved them in line with legislation. The study covered 14 broadcasting zones throughout Georgia, including Tbilisi, Kakheti, Mtskheta-Mtianeti, Stepantsminda and Gudauri, Shida Kartli, Kvemo Kartli, Samtskhe-Javakheti, Imereti, Racha, Lechkhumi, Kvemo Svaneti, Samegrelo, Svaneti, Guria and Adjara. The Commission will announce contests for radio broadcasting licenses, considering the approved priorities.

The study established that music and news programmes are the main factors that determine the listeners' choice of radio station. Specifically, 74% of the respondents listen to music on a daily basis, while 39% listen to the news. 14% stated that they prefer sports programmes, while 11% attach importance to programmes with medical content.

According to the respondents, the quality of radio reception is generally good, although there are still gaps in reception. This problem is mainly encountered when traveling over a long distance, on the central highway or in the mountainous regions. According to the participants of the study, the needs identified in the Georgian radio space are mostly related to programme content and the technical side of radio accessibility.

One of the key issues identified during the study is the ideal radio. For the majority of respondents, an ideal radio station should be diverse and balanced in terms of content, while also appealing to the interests of a wide age range. According to the respondents, ideal radio should be popular and universal, reflecting the interests and problems of the population. In

addition, presenters must maintain ethical standards and create a positive atmosphere. The research also established that respondents prefer learning, entertainment, and music programmes with short informational inserts. It was also pointed out that ideal radio should have high-quality coverage, be accessible on different devices, and offer access to archived radio materials.

The study, which involved more than 4,000 participants from 14 broadcasting zones, focussed on public attitudes and demand for both private specialised radio broadcasting and private general radio broadcasting. The study also included information about the demand for different themes and genres, as well as the accessibility of local radio stations, their quantity, and coverage quality.



One of the main priorities for the Communications Commission is to integrate media literacy into all levels of formal education. To achieve this, the Commission has been actively integrating media literacy into general education in recent years.

The number of public schools teaching media literacy as a separate elective subject increased to 227. It is also worth noting that 90% of the 227 schools are regional public schools. This significant outcome has been achieved as a result of the project to integrate media literacy into formal education, which the Communications Commission launched together with UNICEF and the Ministry of Education, Science, and Youth of Georgia in 2022.

The project introduces media literacy to 10th–12th graders, focusing on information processing, identifying disinformation, and promoting awareness of media-related issues.

As part of the project, the Communications Commission has conducted a media literacy needs assessment study among the school community. This study aimed to assess the attitudes, awareness levels, readiness and needs of high school students and teachers regarding media literacy. Furthermore, the Commission devised an educational standard for the secondary level of general education, the standard-based guidebook *Media Literacy Lessons* for teachers, as well as a training module. The textbook describes key principles of media literacy, such as the nature of the media and information literacy, information processing, disinformation scanning, and cyberbullying. In addition, the textbook includes complex practical tasks that will assist the educators in the teaching process.



The project to integrate media literacy into formal education was devised to improve the media literacy competencies of the teachers. Based on the high demand, the Communications Commission trained 1000 teachers in 2024. In partnership with the Teachers' Professional Development Centre and UNICEF, a total of 2,300 teachers have been trained across the country since the launch of the project. In addition, the Commission organised informational meetings with more than 300 school principals in order to familiarise them with the subject of media literacy and the relevant educational resources, besides advocating the integration of media literacy into formal education. In 2024, the Commission held such meetings in Gori and Rustavi, with more than 60 school principals attending the events.

Media literacy has been integrated into various subjects in the third-generation National Curriculum since 2018. However, as a result of the measures implemented by the Communications Commission, media literacy is being taught as a separate elective subject in 227 schools in the 2024-2025 academic year. It is also worth noting that a significant number of the trained teachers are integrating media literacy into different subjects.

In addition, the Communications Commission is cooperating with the Teachers' Professional Development Centre and the Ministry of Education, Science and Youth of Georgia on the non-Georgian language schools support programme, which is designed to assist the professional development, teaching and learning processes for teachers in non-Georgian language schools in the regions densely populated by ethnic minorities. Within the framework of the cooperation, 8 consultant teachers were trained. The teachers will be sent to non-Georgian-language schools in the regions of Samtskhe-Javakheti, Kvemo Kartli and Kakheti, where they will facilitate the implementation of media literacy activities, clubs, and projects.

One of the top priorities for the Communications Commission, as the organisation responsible for the development of media literacy in Georgia, is to encourage more schools to teach this subject and to promote the establishment of media-literate citizens. Therefore, the Commission will continue to promote the integration of media literacy into formal education and provide teachers with additional learning resources.



Integrating media literacy into higher education and raising awareness about the telecommunications sector

The Communications Commission continues to cooperate with higher education institutions in several areas. To promote the integration of media literacy into formal education, the Commission expanded the list of its partner universities in 2024 and signed cooperation agreements with the European University, Sokhumi State University, and Samtskhe-Javakheti State University. The cooperation involves implementing joint projects in the field of media literacy, holding masterclasses by local and international experts, and organising academic events in various formats.

With the support of the Communications Commission, media literacy is currently being taught as an elective subject at the Business and Technology University and European University. More specifically, Business and Technology is offering the Digital Literacy and Cyber Ethics course, as well as teaching the basics of media literacy as part of the Strategic Communications course. The European University has introduced 'Media and Information Literacy' as an elective course.

In 2024, the Communications Commission offered partner universities a new, specially designed professional training programme that included curriculum development in media and information literacy with 3-4 assigned ECTS credits. The programme, specially designed for academic staff, included topics such as the concepts of media literacy and information literacy, their historical development, the features of social media and digital platforms, methods of their safe use, and the analysis of sources and media influence. In addition to the theoretical topics, the training included practical work that allowed the participants to develop working versions of the syllabus.

Furthermore, the Communications Commission continued to raise student awareness about the telecom sector and the media environment, particularly in the following areas: mobile virtual network operators and the opportunities they offer compared to traditional operators, the development of 5G in Georgia and across the world, the opportunities provided by the new generation of internet technology, the current trends on the telecom market, the current media environment and media policies in Georgia, the areas regulated by the Georgian legislation, the challenges faced by the Georgian media, and the role of the Communications Commission in these areas. These topics were covered in the public lectures held last year at the Georgian Technical University, Tbilisi State University, Kutaisi International University, European University, and Batumi State University.



The Communications Commission will continue cooperating with partner universities and offering activities tailored to their needs. To integrate media literacy into formal education, the Commission is planning to expand its network of partner universities, which will further strengthen the importance and scope of the cooperation. From 2025, the Commission intends to establish a cooperation with vocational schools in this field.

The Communications Commission, as the authority responsible for media literacy development in Georgia, has endorsed the international 'Guidelines for Effective Media Literacy Initiatives' developed by the European Digital Media Observatory (EDMO). The document serves to increase the effectiveness of media literacy initiatives and aims to strengthen critical thinking and information resilience in society.

The document consists of guidelines for the development, implementation, and evaluation of media literacy initiatives based on the following 12 principles: has clearly defined goals, focuses on strengthening the target audience, facilitates the understanding of the digital media ecosystem, ensures inclusiveness, transparency, and sustainability is inclusive, complies with ethical principles, is transparent, is properly prepared, is adaptable, identifies potential improvement opportunities, evaluates results.

The guidelines were developed by the EDMO Working Group for media literacy standards and best practices, including international experts such as Martina Chapman, Maja Cappello, Sonia Livingstone, Vitor Tome, and others.

The guidelines were supported by around 70 organisations from 28 countries, including the British Communications Regulator (Ofcom) and the Council of Media Services of Slovakia (CMS).

The Communications Commission will actively use the guidelines in the process of developing the national media literacy policy and implementing media literacy activities.

As part of the UNESCO Global Media and Information Week, the Communications Commission celebrated the 2024 Media Literacy Day in various schools across Georgia and organised diverse activities designed to help young people develop critical thinking skills and tackle disinformation.

Within the framework of the educational activities, pupils and teachers discussed fake news and its harmful effects, created posters, watched videos about disinformation, searched for information on recognising manipulated images and prepared video projects.

In addition, the Communications Commission conducted an awareness-raising campaign on social media, where information about media literacy was presented to the audience in a simple and coherent way.

The Communications Commission, as the authority responsible for media literacy development in the country, has celebrated the UNESCO Global Media and Information Literacy Week with various activities and events for the past five years, while the Media Literacy Day has been held in Georgian schools for four years.

The UNESCO Global Media and Information Literacy Week has been held annually since the adoption of the 2021 UN resolution, serving to raise public awareness about media literacy and its importance.



As part of the 2024 'UNESCO Global Media and Information Literacy Week', the Communications Commission held the first edition of the Media Literacy Olympiad, which was designed to raise awareness about media literacy in schools and encourage school children to tackle disinformation.

The Olympiad was open to teams composed of 1-5 and 6-12 grade pupils led by the teacher. The teams had to answer the question, 'How to tackle disinformation?' in the form of a blog, essay, article, video, podcast, digital poster, or comic and submit their work to the Communications Commission.

An unprecedented number of schools showed interest in the contest. The Commission received submissions from more than 500 teams involving around 2,800 pupils and 450 teachers. Only a third of the teams were from the capital city, while the majority of the submissions came from different regions

across Georgia, pointing towards the project's success with regard to the inclusivity of educational opportunities.

The submissions were assessed by a competent jury, which selected the most creative and informative projects in both grade categories. The winning teams represented the Saint George International School in Tbilisi and Public School N45 in Kutaisi.

The Communications Commission granted the winning schools with modern media labs to facilitate them in creating high-quality media products. The winners received high-tech prizes such as a laptop, an interactive smartboard, a microphone, LED lighting, a mobile tripod, a media literacy banner, and a desk. The ten best submissions were placed on the media literacy platform (<https://mediatsigniireba.ge/>), while all participants received a certificate.

Plan for 2025

Due to the high demand, the Communications Commission will hold a second edition of the Media Literacy Olympiad in 2025 with the aim to raise awareness about media literacy in the school community.



The Communications Commission and the Media Lab of the Media Academy held the second edition of the Global Media Literacy Hackathon for young people under 35. The event took place within the framework of the 2024 UNESCO Global Media Literacy Week. The main topics of the hackathon were disinformation, digital literacy, and cybersecurity. The event aimed to identify challenges in media literacy and present innovative solutions on the subject matter.

As part of the contest, 40 teams consisting of 130 participants submitted their projects, from which the top 10 were selected. For two days, the selected participants worked actively on improving their projects together with professional mentors. The three winners were chosen by a competent jury, who considered the relevance of the challenge, the effectiveness of the solution, and the sustainability of the project idea. The Communications Commission awarded the winners 5,000 GEL, 3,000 GEL and 1,000 GEL.

The participants were given training on 'How to Validate an Idea' and 'How to Create and Test a Prototype', where they learned about different ways of validating an idea before the start of a project, how to make a product valuable to the consumer, and how to create and test a product prototype.

In addition to the training, the teams worked intensively with professional mentors for two days to improve their projects. Startup advisor and Mentor Tatia Okriashvili held meetings with the teams on marketing and how to present the idea. Revaz Kakabadze assisted the participants on UI/UX design,

while Startupper Demetre Mildiani consulted the teams on customer acquisition. Startupper Sandro Bolkvadze worked with the participants on product development, while the meetings on team management were led by the head of Fab-lab Iliani, Avtandil Mghebrishvili.

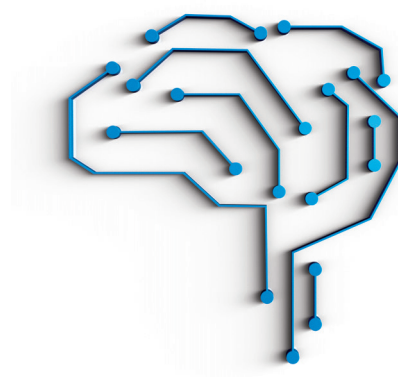
During the closing event of the hackathon, the teams presented their projects to a jury panel consisting of Mariam Dakhondaridze, Rati Skhirtladze, Nino Nanitashvili, and Nata Goderdzishvili. They selected three winning teams based on specific criteria, including the relevance of the challenge, the effectiveness of the solution, and the sustainability of the idea. The top prize was won by the Web Boyzz project, which presented a browser extension that aims to strengthen online security for children. The platform provides parents with information about their child's online activities, blocks content that is inappropriate for minors, and teaches teenagers through games why a particular website or online activity may be harmful to them.

The second prize was won by the Emotisense project, which seeks to facilitate the detection of disinformation online. It includes a browser extension that analyses the emotional tone of the content and employs a chatbot to help users evaluate the information.

The third prize was won by the SeverityAI project, which identifies vulnerabilities and errors in code and simplifies the remediation process.

Plan for 2025

The Communications Commission and the Media Lab will continue to organise media literacy hackathons, which will foster identification and promotion of the development of innovative projects to solve challenges related to media literacy.



The Communications Commission held the eleventh edition of the media literacy contest ‘Truth or Fiction?!’ for school pupils in 2024. The project serves to develop analytical, fact-checking, and critical thinking skills among young people. Apart from the contest, it also includes an awareness campaign and educational seminars. According to the rules of the contest, participants are required to identify fake news in the media space that has not yet been confirmed as fake. Using the format of their choice, the students then must explain how they identified the information, present the relevant sources, and establish the real facts surrounding the case.

Within the framework of the contest, the Commission held 18 educational seminars that were attended by 835 pupils in total. The Commission received 106 submissions. A jury selected the three winners, who were rewarded with high-tech prizes.

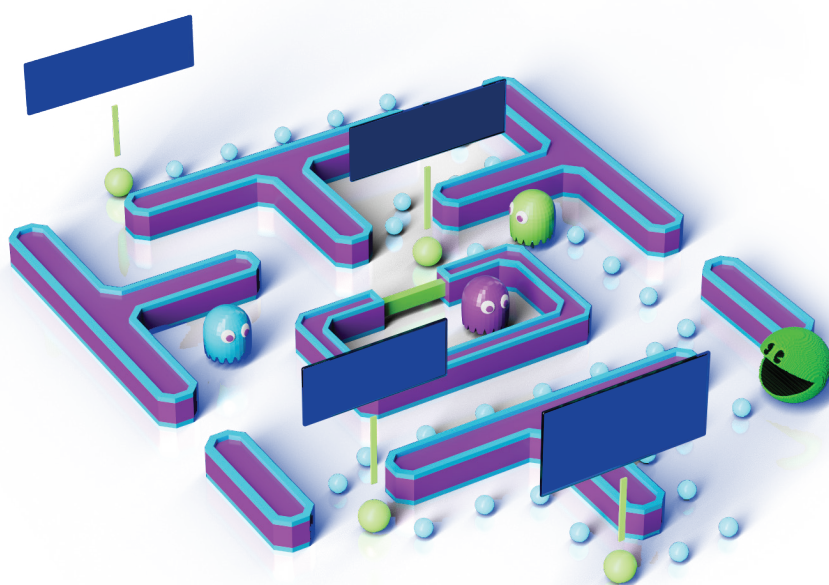
In parallel with the contest, students who participated in the 2023 edition underwent certified training to deepen and develop their knowledge in media literacy. This allowed them to conduct media literacy seminars for their peers.

The Communications Commission has held eleven editions of the ‘Truth or Fiction?!’ contest—seven for school pupils and 4 for university students. Within the framework of the contest, the Commission has also held over 180 seminars on media literacy for 4,600 pupils and students.

In addition, within the framework of the contest, the first online meetings were held with teachers in Tbilisi and the regions. Teachers received detailed information about the contest and learned more about methods for identifying disinformation which they subsequently shared with their students.

Plan for 2025

The Communications Commission will organise another edition of the ‘Truth or Fiction?!’ contest for school pupils to facilitate the integration of media literacy in schools and develop critical thinking skills in young people.



Since 2024, the Communications Commission, with the support of the Ministry of Education, Science and Youth of Georgia, has created a new edition of the computer science textbook Hello, Ruby and made it available to all schools. As part of this initiative, Hello, Ruby author Linda Liukas trained 20 teachers in the teaching methods and better use of the book. In addition, the Commission developed a Hello, Ruby educational resource that includes detailed information on each chapter, the teaching principles, ways to effectively use the book, and the activities implemented by teachers on the basis of exercises.

Around 50 seminars were held across Georgia for teachers, including those from ethnic minorities. In total, more than 800 computer technology teachers from 750 schools received training and were given the Hello, Ruby books and

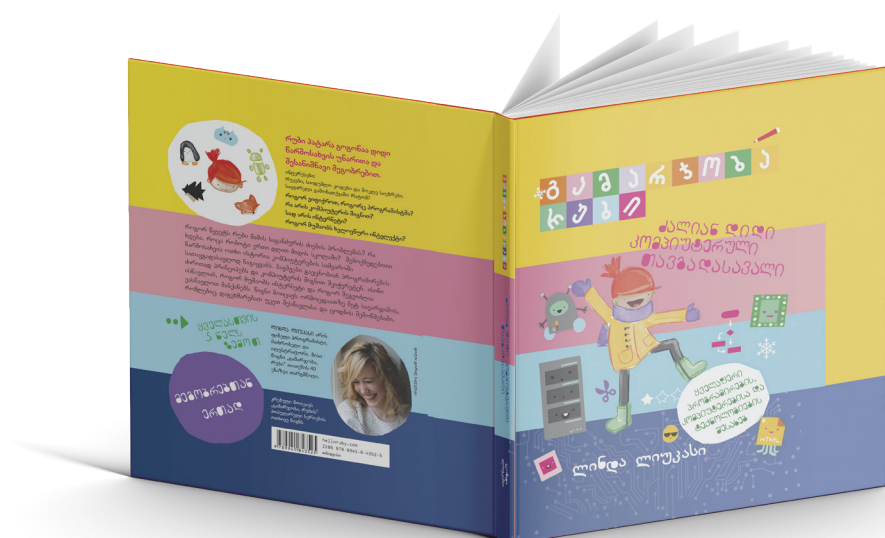
other supporting resources, which they will integrate into their classes. To this end, the teachers will continue to receive support from technology coaches.

The Communications Commission printed 17,500 Hello, Ruby books in 2024. The books are used by up to 900 schools across Georgia as an auxiliary resource for teaching computer technology.

Hello, Ruby is a series of Finnish textbooks translated and adapted into Georgian by the Communications Commission, which aims to develop digital literacy, critical thinking, and analytical skills among 2-6 grade pupils, as well as teach them the basics of programming and computer science. The book has been adapted in 36 countries and has been integrated into the school curriculum in New York.

Plan for 2025

The Communications Commission will continue the process of integrating Hello, Ruby into schools across Georgia, as well as training computer technology teachers in teaching with this book.



One of the main objectives of the Communications Commission is to engage more stakeholders in promoting media literacy in the country and to facilitate active coordination. This purpose is served by the online media literacy platform www.mediatsigniereba.ge, which acts as a hub for public, international and non-governmental organisations working in the field of media literacy in Georgia.

In 2024, the platform added 46 educational articles and international sources. The website currently features more than 140 articles for teachers, students, and teenagers,

covering topics such as media literacy education, information verification and analysis tools, methods for identifying fake news, the role of a digital citizen in society, gender disinformation, artificial intelligence, cyber hygiene, child safety, etc. The platform also provides access to the digital version of the teachers' guidebook Media Literacy Lessons, which was created by the Communications Commission for the school community.

www.mediatsigniereba.ge had more than 117,000 visitors in 2024.

Plan for 2025

The Communications Commission will continue to provide access to international educational resources in the Georgian language on the media literacy platform, strengthen cooperation with partner organisations, and expand its network to promote the development of media literacy across the country.



Through its media literacy projects, the Communications Commission has trained 16,200 pupils, 6,000 teachers, and 1,800 university students in 2019-2024 to develop their media literacy and critical thinking skills. A total of 980 seminars and informational meetings have been held, while the 'Digital Adoption Program' has more than 6,200 participants. The total number of beneficiaries included in diverse media literacy projects and programs was 30,200.

MEDIA ACADEMY



The Media Academy has been operating successfully for six years. Its Media School, Media Lab, and Media Criticism platforms are implementing important projects to support and improve the skills of media representatives, establish media standards, help the youth, and promote startups.

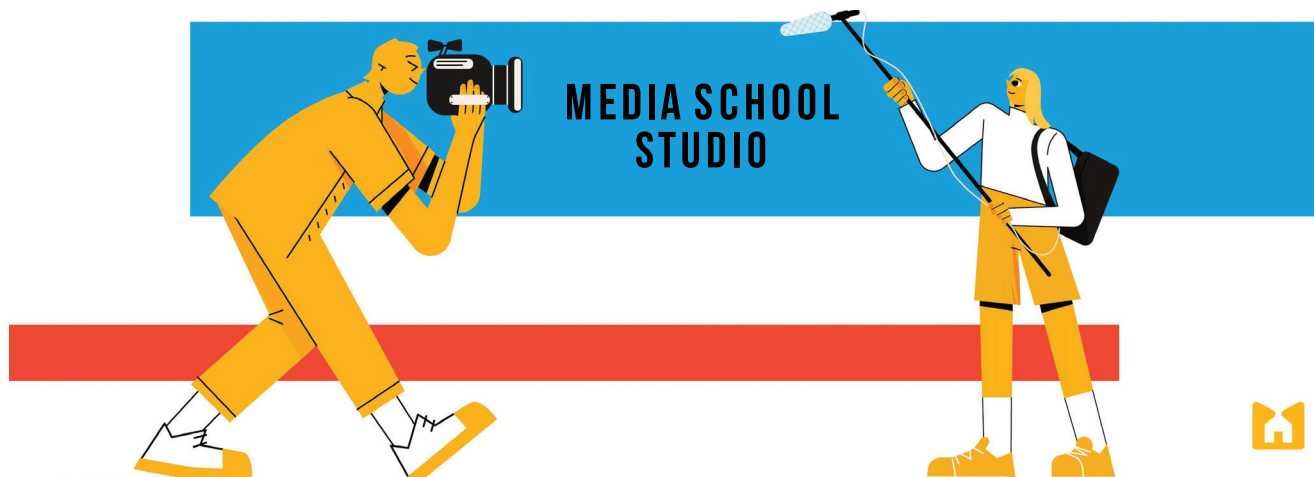
2025 Plan for

The Media Criticism and Media School platforms will continue their activities with the aim of raising media standards in Georgia and enhancing the knowledge, qualifications, and experience of people interested in journalism through both short-term and long-term courses, as well as through high-quality critique and analysis of media products. Due to high interest, the Media School will add new masterclass videos to its library, while Media Criticism will offer more diverse materials to readers in 2025.

As for the Media Lab, in addition to the successful projects already being implemented in support of the startup ecosystem, the platform will continue to showcase startups on the international stage and allow them to expand globally. The Media Lab will continue to work closely with potential investors both in Georgia and abroad to support the startups operating in the digital media sector. The Media Lab aims to create a strong community of investors who will actively engage in the activities of startups, support their development, and seek to share resources and experience. The establishment of such a community will contribute to the strengthening of the startup ecosystem and the success of innovative projects at the local and global levels. To this end, Media Lab representatives will engage in international projects and participate in Startup Grind Global Conference 2025 and CES tech events.

To ensure effective communication with the target audiences of all three platforms, and to help expand and unite the startup community, the Media Academy plans to update its websites and create an online app equipped with more diverse technical tools.





In 2024, the Media School established the Media School Studio to offer people with an interest in journalism a unique opportunity to launch and develop their media careers. The Media School Studio has 14 certified graduates, some of whom are already working for various media organisations.

The four-month intensive practical course allows students to work in a real Newsroom environment, learn journalism, and create a diverse portfolio free of charge. The course includes both theoretical and practical activities that enable graduates to independently create high-quality media products.

Throughout the intensive course, students have access to the necessary equipment and technology. Through practical activities, they learn all of the following: preparing radio newscasts, stories, and podcasts; the art of the cameramen; speech and television skills; preparing and delivering news for radio, television, and online platforms; audio editing and sound direction; researching non-news stories and programmes; sound editing; researching, producing and conducting interviews for radio and television; creating a TV network; as well as multi-platform reporting, production, and social media journalism.

During the 2024 course, students were guided by industry professionals such as Head of Information Service at Rustavi 2, talk show host, and presenter Nino Shubladze; Rustavi 2 presenter Davit Kakulia; Head of Production of the Georgian Public Broadcaster (GPB), Rusudan Manjgaladze; GPB producer Ekaterine Talakhadze; GPB journalist Teona Managadze; GPB cameraman Giorgi Kasrashvili; Head of GPB Sound Group, Maka Kuchaidze; Imedi journalist, reporter, and filmmaker Mariam Bakuradze; Imedi editor Nana Ugulava-Janisiani, verbal and non-verbal text management trainer at Imedi, Tamta Tsintsadze; and Digital Marketing Manager at Communications Commission Media Academy, Lasha Darbaiseli.

Media School Studio students went through a three-stage selection process. The best candidates were chosen based on a written test and interviews.

For more than four years, the Media School has been providing people interested in journalism completely free of charge with an opportunity to learn from successful professionals about the media in general, the preparation of high-quality media products, and the requirements of professional journalism. The Masterclass project offers the audience online lectures where managers, producers, TV presenters and camera operators share their knowledge and experience.



MASTERCLASS

24 video lectures by four new authors were added to the Masterclass library in 2024:

— David Kakulia

TV presenter and military reporter David Kakulia recalls numerous episodes from various battlefields and emergency situations and lists the important nuances that reporters need to take into account to better cover the stories. Furthermore, he discusses mistakes frequently made by journalists, and how the advancements in military technology have changed the safety norms for the media.

— Nata Asatiani

Public speaking specialist and psychologist Nata Asatiani talks about the ways of overcoming stress, the mechanisms of attracting attention, the methods of studying the audience, as well as effective and convincing non-verbal communication techniques.

— Naniko Khazaradze

TV presenter Naniko Khazaradze talks about the transformation of educational and entertainment programmes over time and the skills required to achieve success as a TV presenter. Furthermore, the author talks about the role and benefits of individualism, the strategies for managing stress in the TV industry, and the off-screen process of preparing a programme.

— Nino Shubladze

TV presenter and producer Nino Shubladze talks about the interview techniques, the difficulties in finding exclusive, newsroom challenges during the coverage of emergency situations, as well as the preparation of reports for news programmes and the dilemmas faced by news producers and managers during that process.

The Masterclass lectures are freely available on the YouTube channel of the Media Academy, and have accumulated more than 4 million views.

The Masterclass series includes lectures by 16 experienced professionals—journalists Eka Beridze, Tamta Sanikidze, and Maka Antidze, playwright Basa Janikashvili, photo reporter David Mdzinarashvili, cameraman David Chkhikvishvili, media manager Giorgi Khaburzanian, quality control manager Natia Abramia, producers Irakli Kakabadze and Noe Sulaberidze, TV presenters Nikoloz Tsulukidze and Naniko Khazaradze, media manager Tinatin Berdzenishvili, public speaking specialist and psychologist Nata Asatiani, military reporter David Kakulia, and TV presenter and producer Nino Shubladze.

To help establish high media standards and improve qualifications, the Media School held a series of seminars and practical trainings for current and aspiring journalists, including camera operators and producers.

” How the News Departments Cover the Elections “

TV presenter and producer Nino Shubladze discussed topics such as election coverage strategies, ensuring information accuracy, working with sources, and the best fact-checking practices. Nino Shubladze also talked about the ethical standards that journalists need to maintain while covering the elections and described differences in how a journalist is to work before and after elections.

” Journalists Covering Business and Economics “

journalist and trainer Maka Antidze shared her experience in news coverage, reporting, interview preparation, and coverage of business and economic issues.

” Course for Cameramen “

reporter Davit Chkhikvishvili led the seminar for TV cameramen, who learned about the technique of telling a story through film, planning the filming, choosing the proper lighting, focus and composition, and managing stress during the coverage of conflicts and emergency situations.

” Emergency Event Coverage and Safety Standards “

photo reporter Davit Mdzinarashvili and safety expert Irakli Andronikashvili discussed important topics such as the strategies for safe coverage of emergency events, frequent mistakes made by media representatives while covering emergency situations, mechanisms for working safely in a strange environment, and issues to be considered while traveling. In addition to the theoretical part, the seminar included activities that introduced the participants to the mandatory technical equipment and practical details that they need to consider while covering emergency events.

” Propaganda Methods: Georgia in the German-Language Media “

psychologist Rusudan Gorgiladze discussed propaganda methods based on materials published about Georgia in the German-language media. Participants were given different examples of disinformation and distorted information and learned about the consequences of their dissemination.

” Brand Media: Creation and Development Strategies “

journalist and media communication specialist Tea Skhiereli discussed the essence of brand content and brand journalism, their functions, and tools, as well as the process of creating and distributing brand media. In addition, participants learned about the methods for devising a brand media concept and discussed successful examples of brand journalism with the trainer.

” Humour and Humorous Formats “

producer Irakli Kakabadze and TV presenter Irakli Vakhtangishvili discussed the meaning of humour, and to what extent it can be learned the same way that people learn different subjects or sports. Participants learned about the main forms of humour and the formulas that can be used to produce good jokes. The trainers used practical examples to discuss the main rules for creating a humorous format.



MEDIA CRITIC

For six years, the online Media Criticism platform mediacritic.ge has been offering critical analysis of the media and promoting the professional development of journalists and producers.

Disinformation and fake news continue to pose a serious challenge across the world, including in Georgia. Against this background, the Media Criticism platform provides a professional and qualified filter for information.

The online Media Criticism platform serves as a guide for the public and the media and operates based on its own editorial code which was developed together with media professionals.

The main principles of the Editorial Code are: information accuracy, impartiality and integrity, public interest and accountability, separation of facts and opinion, balance, privacy, non-discrimination, and editorial independence.

The publications placed on the Media Criticism website concern the violations of the aforementioned media standards.

A total of 88 materials were published on the Media Criticism platform in 2024, including:

33

articles

analytical articles that include the analysis of one or several media products

26

reviews

small critical review articles that often concerned everyday news

29

blogs

analytical blogs of a personal nature

The Media Criticism platform had 256,000 visitors in 2024. The materials published on www.mediacritic.ge have been read by more than a million users since the launch of the platform, while the website had over three million visitors.

The Facebook page of Media Criticism has 25,500 subscribers, 1,500 of whom were added in 2024.

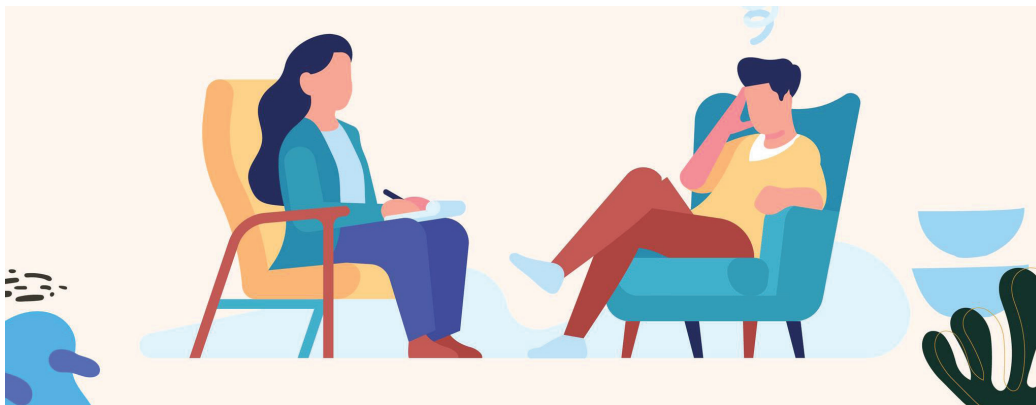
The Media Lab of the Media Academy, which facilitates the development of digital literacy, supports startups working in the field of digital media, and promotes innovations, had an active year in 2024.

The Media Lab ensures the development of innovative projects and creates new opportunities for startups that implement modern and progressive digital solutions.

The Media Lab accelerator offers the startups support in the form of consultations, training, and expert advice. It also provides access to resources such as the latest technologies, free workspace, equipment, and software. In addition, the Media Lab helps connect startups with potential investors and partners.

The Media Lab also organises events and projects that bring together professionals from different backgrounds. In this way, the Media Lab contributes to the formation of a strong startup community, which supports the sustainable development of the ecosystem.

An environment where people with common interests are given the opportunity to get to know each other, share their experience, and unite around a common interest plays an important role in implementing innovative ideas. To this end, the Media Lab created a free shared workspace where freelancers and small startup teams can work in a cosy, comfortable environment. The shared workspace features modern office equipment, fast internet, an isolated meeting room, and many other tools necessary for comfortable work. The space can be used by small startup groups as well as freelancers, programmers, designers, sound engineers, bloggers, and all stakeholders who want to help the startups develop their products. The workspace is designed for 10 teams and meets all the requirements of startups. The space can host various events for up to 50 participants.





CYBER SECURITY FORUM

The Media Lab, in cooperation with the Scientific Cyber Security Association, organised the first cyber security forum Tech Trek, which served to strengthen the positions of startups and tech companies in the field of cyber security, and to raise awareness in this field. The main topics of the event were the latest methods for protecting digital assets, innovative data management strategies, and secure ways of storing and processing data.

The meeting was attended by around 100 beneficiaries, including startups, digital product developers, programmers, cyber security specialists, and IT experts. They learned about the current global trends in digital media and technology, heard advice from leading experts on managing, storing, and protecting digital data, and learned about the international regulations and local legislation concerning these topics.

Tech Trek included interactive training, presentations, a Q&A session, and a seminar, which allowed the participants to gain practical knowledge from leading industry experts, familiarise themselves with international regulations and the Georgian legislation concerning cyber security, and learn about the main mechanisms for detecting cyber-attacks and verifying the digital security of their product in real time.

Training and Workshops at the Media Lab

In 2024, the Media Lab held 15 meetings and workshops for startups, covering product development, marketing, legal, and financial issues. The trainings also covered topics such as communication with customers, the art of purposeful delivery of an idea, proper and consistent process planning, stress management, and cybersecurity tools to protect and increase product reliability and saving startups time and resources in the long term.

In addition, the Media Lab actively collaborated with personal and organisational development specialists throughout the year, conducting trainings on mental health, leadership, and team management. The meetings also addressed stress management and the ways of preventing work-related burnout.

Furthermore, in 2024 the Media Lab held a 'meetup' of all former participants of Ideadrome, which served to strengthen the startup community.

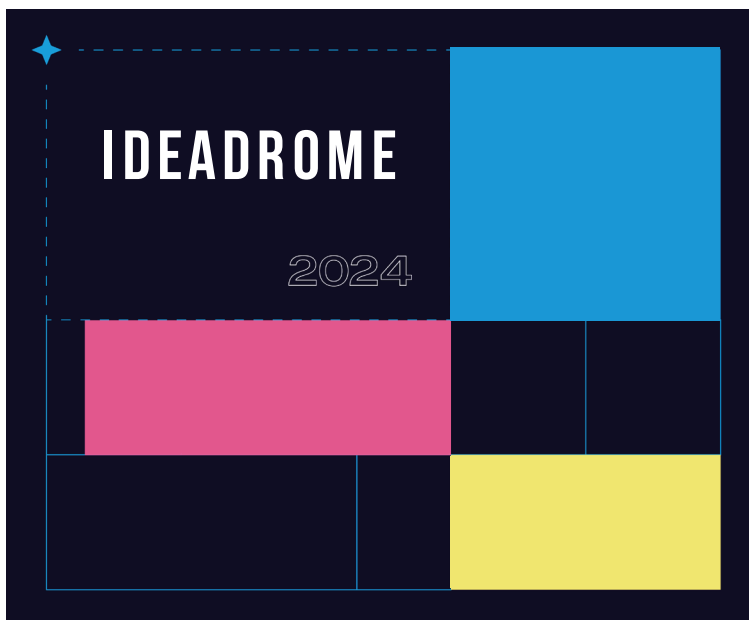
In total, more than 500 people have benefited from the trainings and workshops organised by the Media Lab on the following topics: marketing for startups; proper communication with customers and development of customer habits; cyber security; managing, storing and protecting personal data in accordance with the regulations; team management and leadership; managing stress and related problems; competitive analysis and market research; process management in a startup; establishing a startup in different jurisdictions; presenting an idea; managing finances in a startup, etc. In addition, a series of training sessions titled 'From the Idea to the Product' were held last year, dealing with the most common mistakes made by novice startups, and the effective ways of avoiding them.

In addition to the trainings, the meetings also included workshops on the following topics: Ideal Customer Profile (ICP), value proposition, and building a minimum viable product (MVP).

Last year, the Media Lab actively cooperated with other organisations representing the startup ecosystem. Within the framework of this cooperation, more than 10 joint meetings and trainings were held to connect startups with investors, attract venture capital, and highlight the potential of the Georgian startup ecosystem. The Media Lab remains a member of the European Business Angel Network (EBAN), which includes more than 100 organisations.

Notably, four Media Lab startups have received 150,000 GEL co-financing grants from the Georgian Innovation and Technology Agency, along with the regional grants.





The Media Lab held two editions of the startup competition Ideadrome in 2024. The goal of the contest is to discover potential startups and startup ideas and help realise them. The startups participating in the competition undergo a week of intensive training. As part of the programme, they receive assistance from specialists. The teams are supported by experienced startupperes and commercialisation experts, lawyers, financiers, and marketers, as well as personal and organisational development specialists. Participants receive training on topics such as startup validation, team management, prototyping and product testing methods, simple finance, and legal issues for startups, choosing the right business model for an idea, etc.

The participants present their ideas to a panel of jurists, who select the winners. The prize fund of Ideadrome is 10,000 GEL.

The topics of last year's competitions were simplifying communication in the digital space, educational gaming, protection against fake news, and increasing the access to information.

Ideadrome prepares startups for global challenges in a comfortable environment. Five-day trainings and intensive interaction with mentors allow the startupperes to familiarise themselves with common practices and optimal approaches. Ideadrome teaches team building and management and helps startups establish the necessary contacts.

The Media Lab has already held 9 successful editions of Ideadrome since 2020. Previous participants of the contest have already managed to realise their ideas and take their products to the international market.

Last year's winners of Ideadrome were STAMO.AI and PixelVision. Both teams won various competitions and continue to develop their projects. STAMO.AI was selected for the Future Laboratory acceleration programme and received a grant of 10,000 GEL, which allowed the team to refine the product and attract new customers. The startup was also selected for a mentorship programme by lecturers from the universities of Stanford and Berkeley, to adapt the product to the American market. Last year, STAMO.AI was invited to DataFest, Women Entrepreneurship EXPO, and finally to the Touch and Axel events. The startup is currently working on a new version of the product to attract more American users, increase traction, and present itself to American investors.

PixelVision is a platform which helps people with vision problems improve their eyesight with the help of a specially designed video game. After going through the Ideadrome accelerator, the team have refined and diversified its product. They are already working on a modified prototype that will be launched in a few months and will allow them to develop the main product. At the same time, the team are working on attracting medtech grants and venture capital.

Media Lab Acceleration and Incubation Programme

The goal of the Media Lab acceleration programme is to help startups refine their ideas, raise funds, and bring their products to the market.

2024 was a successful year for the participants of past Ideadrome contests that joined the acceleration programme. Widgera, a website and application builder with adaptive intelligence, successfully tested its first MVP at the Latitude festival in Estonia, after which it was included among the top five startups in the Product of the Week category on the Product Hunt platform. The startup was invited to the world's leading summits, such as Web Summit and CES, where its representatives met with more than 60 investors. In 2024, Widgera was selected for 500 Eurasia and received 100,000 USD in funding. It was also named among the top 10 Georgian startups by Axel and Forbes. The startup is already present on the US market and operates in more than 30 countries.

STORI, which uses artificial intelligence to help customers create brands and conduct marketing, continues to maintain its position on the American market. As of 2024, STORI is already represented in two strategic locations: part of the team is in Georgia, while the other part operates in San Francisco. During the year, STORI was able to attract investment worth 650,000 USD and launch an updated version of the product with additional functionality and capabilities. It was ranked in the top four in the Product of the Day category on Product Hunt. In addition, the startup was invited to the renowned TechChill, Startup Grind, and CES conferences, allowing it to reach a wide audience and attract thousands of customers.

The startups received free training and assistance from experienced mentors, as well as mentorship from lawyers, developers, financiers, and other specialists. The startups participating in the acceleration programme were allowed to use the Media Lab's modern workspace and free software. They have already launched their products on the market.

Educational, Informative and Motivational Content of the Media Lab

The development of startup education is essential to strengthen Georgia's startup ecosystem. Therefore, in addition to supporting startups, the Media Lab implements projects to improve digital literacy. It develops educational materials and disseminates different products on its platforms to provide information about modern approaches and opportunities to as many people interested in digital media and startups as possible.

In 2024, the Media Lab website published various articles of interest to the startups, on topics such as: finding a solution to a problem and justifying it; the methods for turning a product into a habit; lessons for novice startuppers; the behaviour and qualities necessary for a leader; the ways to recognise customer needs and startup value; the positive aspects of partnering with other brands; the dangers of premature success; the experience of successful startups and startuppers, along with the experience gained from unsuccessful startups; the methodologies and standards for creating a successful startup; the characteristics and signs whose observation and analysis simplifies the startup processes; the complex art of saying it simply; networking as a business connection hub; guidelines for startups; technology trends from CES 2024; the new rules of the game from Gen Z and the new wave of AI innovation; the productivity paradox; etc.

In addition, the Media Lab actively worked on educational video content in 2024, the main topics of which were technology, finance, and cyber security. The videos included practical materials on the following topics: principles of cloud technologies; functionality and specifics of programming languages; the basics of computer systems; the features of programming languages and their practical application; and proper implementation of security systems in a product; as well as financial metrics and ratios. In addition to providing information about the latest news from the startup world, the content is aimed at raising awareness, sharing experience, and developing digital literacy.

The Facebook page of the Media Lab has 27,000 subscribers who follow the content, read the articles, watch the video lessons, and listen to the podcasts.

Eastern Partnership Electronic Communications Regulators Network (EaPeReg)

In 2012, the Eastern Partnership Electronic Communications Regulators Network was founded at the suggestion of Austria and with the support of the European Commission. The network members and observers are Azerbaijan, Moldova, Georgia, Armenia, Ukraine, Austria, Germany, Spain, Latvia, Lithuania, Poland, Portugal, Romania, Hungary, Sweden, Czech Republic, Croatia, and North Macedonia. The network aims to bring the electronic communications markets of the Eastern Partnership countries closer to the EU's Digital Single Market. In 2024, EaPeReg successfully continued to facilitate this process with the active involvement of the Communications Commission, as evidenced by the projects implemented by the network's expert groups with the support of EU4Digital, and the expanded international relations of the network, namely:

Expanding EaPeReg's International Cooperation:

- In May 2024, Member of the Communications Commission Ekaterine Imedadze took part in the high-level event of the World Summit on the Information Society (WSIS) representing both the Communications Commission and EaPeReg. Specifically, she attended the session 'Enabling Environment: Collaborative Regulation Interactive Workshop with the Active Participation of Regional Regulatory Associations';
- In July 2024, at the Global Symposium of Regulators (GSR 24), which was organised by the International Telecommunication Union (ITU), Ekaterine Imedadze represented the EaPeReg at the sessions for regional regulatory associations (RAs) and digital regulation;
- GSR-23 saw the establishment of the Digital Governance Network (DRN) at the initiative of ITU, bringing together regulatory networks, including EaPeReg. The DRN aims to promote enhanced interregional cooperation. The DRN Governing Board was established in 2024 to guide the work of the DRN. The board consists of representatives of the regulatory networks. Ekaterine Imedadze was nominated and elected as a member of the Governing Board representing EaPeReg for a two-year term;
- At the EaPeReg plenary meetings in May 2024 in Bucharest, and in November 2024 in Chisinau, Ekaterine Imedadze presented the international activities carried out by EaPeReg in 2024. Participants at the meetings included the representatives of EaPeReg, the European Commission, the Body of European Regulators for Electronic Communications (BEREC), the International Telecommunication Union (ITU), and the Euro-Mediterranean Regulators Group (EMERG). During the subsequent roundtable discussions, Ms. Imedadze talked about the ongoing projects of the Communications Commission.



In addition to EaPeReg's international activities, the practical activities of the network are successfully carried out by its expert working groups on roaming, independence of regulators, and broadband services, and spectrum.

Roaming Expert Working Group (REWG)

The signing of the Regional Roaming Agreement (RRA) by the partner countries was planned for the end of 2024. However, due to the ongoing hostilities in Ukraine, the signing was postponed until 2025. The Regional Roaming Agreement between the Eastern Partnership countries (Azerbaijan, Moldova, Georgia, Armenia, and Ukraine) envisages the reduction of roaming tariffs and creation of a single roaming space. At the initiative of the REWG Chair and with the support of EU4Digital, the group has pre-emptively begun implementing the studies that were supposed to be conducted after the signing of the agreement. Specifically, EU4Digital experts helped to conduct the research of the voice call termination market in the partner countries and prepare a draft regional report reflecting the results of the research. The work on the report will be completed in 2025.

Independence of Regulators and Broadband Expert Working Group (IRB EWG)

During the year, the group worked in several areas, including:

- **Broadband Access:** Within the framework of the Digital Economy and Society Index (DESI), annual monitoring and analysis of the availability of broadband services has been implemented in the EU countries. For the purposes of alignment with the EU's Digital Single Market, this opportunity has also been provided to the Eastern Partnership countries. The monitoring of broadband access is carried out by the Independence of Regulators and Broadband Expert Working Group (IRB EWG) with the assistance of EU4Digital experts, in line with the current methodology in the European Union. Within the framework of the project, the experts prepared a report that presents information on the development of the broadband market in the partner countries. The report states that the development of fixed broadband services in Georgia is characterised by rapid growth and the advancement of fibre-optic technology. It also points out that SpaceX Starlink has ensured access to high-speed, high-quality internet throughout Georgia. The report highlights the Log-in-Georgia project, which was launched by the Georgian government with the support of the World Bank to implement the National Broadband Strategy. The project aims to increase the access to broadband services. The report also notes that within the framework of the Association Agreement, Georgia is focussing on the process of transposing EU regulatory framework, namely the universal service and the European Electronic Communications Code (EECC), into the Georgian legislation.
- **Monitoring the quality of regulatory independence:** The governance of electronic communications regulatory authorities in the partner countries was studied in accordance with the new European code (EECC). Recommendations were prepared for the countries where inconsistencies were identified. The report emphasises that the Georgian legislation is in line with the EU standards with regards to the presence and governance of an independent regulator for electronic communications.

Spectrum Expert Working Group (SEWG)

The signing of the regional spectrum agreement has been postponed indefinitely due to the ongoing hostilities in Ukraine. The agreement envisages the harmonisation of terrestrial mobile radiocommunication networks in the 694-790 MHz and 3400-3800 MHz bands among the Eastern Partnership countries. In 2024, SEWG also addressed topics such as defining 5G frequency bands—including the 700 MHz, 2.3 GHz, and 2.6 GHz priority bands—and harmonising strategies related to 5G. Experts from the regulatory authorities of EU member states shared their experience with the group on these topics.



The 17th meeting of the Spectrum Expert Working Group was hosted by the Communications Commission. The meeting took place in May 2024 in Tbilisi. Representatives of the national regulatory authorities of the EU Member States, the International Telecommunication Union (ITU), the European Commission's Directorate-General for Communications Networks, Content and Technology (DG CONNECT), and other EU institutions took part in the meeting. The purpose of the meeting was to identify the current challenges and opportunities in the use of radio frequency spectrum in the field of electronic communications and discuss the ways to solve them. The issues discussed during the meeting included: the needs for the development of the 5G network and its effective operation, as well as ensuring the security and harmonisation with EU standards; expansion of the Regional Spectrum Agreement (RSA); the use of additional frequency bands for 5G services and their impact on network capacity and their coverage; and use of new technologies. In addition, the meeting discussed issues such as 5G encryption, authentication, network security and resilience against new cyber threats.

EaPeReg-EMERG-ITU: Trilateral Cooperation

The global symposium for regulators organised by the International Telecommunication Union (ITU) in 2023 involved the signing of a memorandum of understanding on trilateral cooperation between ITU, EMERG, and EaPeReg. Member of the Communications Commission Ekaterine Imedadze signed the agreement on behalf of EaPeReg in her capacity as the Chair of the Network for 2023. The trilateral cooperation envisages the exchange of experiences and expert assistance on important regulatory issues. Within the framework of the cooperation, working meetings were held in 2024 on the topics of quality of service (QoS) with regards to the protection of consumer rights, and the development of broadband infrastructure.

Cooperation with the International Telecommunication Union (ITU)

The Communications Commission continued to actively cooperate with the International Telecommunication Union in 2024:

- Member of the Communications Commission Ekaterine Imedadze and Head of the International Relations Service Nino Grdzlishvili attended the Global Symposium of Regulators (GSR-24) organised by ITU. During the symposium, Ekaterine Imedadze took part in a roundtable meeting of the heads of regulatory bodies, where she highlighted the ongoing projects and priorities of the Communications Commission. They include Georgia's ambition and potential to become a regional centre for digital services, which is achievable due to our country's geopolitical configuration, the existing telecom infrastructure, and a harmonised legislative and regulatory framework. The symposium also included a panel discussion on the sustainability of space satellite systems, which was moderated by Ekaterine Imedadze. The discussion was attended by the Head of Global Licensing at Amazon's Project Kuiper, the lead engineer of the ITU Radiocommunication Bureau, and representatives of the European Satellite Operators Association and Telesat Canada. The session focused on regulatory mechanisms, spectrum allocation, and flexible licensing for sustainable satellite business models.

Within the framework of the symposium, Ekaterine Imedadze and Nino Grdzlishvili held meetings with ITU Secretary-General Doreen Bogdan-Martin and Director of the ITU Development Bureau Cosmas Zavazava. The meetings discussed the issues of cooperation between the ITU and the Communications Commission, as well as future joint initiatives.



- Member of the Communications Commission Ekaterine Imedadze and Head of the Market Regulation Department Ekaterine Sichinava took part in the 19th World Telecommunication/ICT Indicators Symposium (WTIS-24) of the International Telecommunication Union (ITU). In addition, representatives of the Communications Commission attended the meetings of the Expert Group on Telecommunications and IT Indicators (EGTI) and the Expert Group on Household Indicators. During the high-level session held in the opening part of the symposium, Ekaterine Imedadze introduced the participants to the projects of the Communications Commission that served to improve data collection and analysis. She also held a meeting with the Director of the ITU Development Bureau (ITU-D) Cosmas Zavazava on new and innovative models of data collection and processing. During the meeting, the parties reviewed the long-standing cooperation between the Communications Commission and the ITU and discussed future prospects. Mr. Zavazava thanked the Commission member for her active involvement in ITU's events and noted that Georgia is an important and reliable partner for the ITU.
- Member of the Communications Commission Advisory Council, Professor Sergo Shavgulidze, was elected as the Deputy Chair of Study Group 7 of the International Telecommunication Union's Radiocommunication Sector (ITU-R SG7) for a four-year term. ITU-R SG7 is tasked with developing recommendations, reports, and manuals on topics such as space operations, space research, terrestrial research and meteorological systems (including the use of links in satellite services), remote sensing systems, passive and active sensor systems operating on ground and space platforms, radio astronomy and radar astronomy, as well as worldwide distribution, reception and coordination of standard frequency, and time signal services, including the use of satellite technologies.
- In 2024, Professor Sergo Shavgulidze received a certificate of recognition from the International Telecommunication Union (ITU), signed by the ITU Secretary-General, Doreen Bogdan-Martin. In a letter attached to the certificate, the ITU thanked Sergo Shavgulidze for his important contribution as Vice-Chairman of Study Group 5 of the International Telecommunication Union's Radiocommunication Sector (ITU-R SG5). Professor Shavgulidze served a full 8-year term as Vice-Chairman of ITU-R SG5 in 2015-2023.

EURODIG 2024

As part of the 2024 European Dialogue on Internet Governance (EuroDIG), Head of Competition and Market Regulation Department of the Communications Commission, Ekaterine Sichinava, moderated a session titled 'Connectivity Corridors between Europe and the Middle East and Europe and Asia'. Ekaterine Imedadze took the role of online moderator. During the meeting, representatives of the Commission provided the participants with detailed information about Georgia's experience with regards to international connectivity and the country's potential of becoming a digital hub. Participants in the panel session included Deputy Head of the Communications, Information, and Modern Technologies Department of the Ministry of Economy and Sustainable Development, Sopio Tvalavadze; Head of Department of Infrastructure at the Directorate-General for Communications Networks, Content, and Technology (DG CONNECT), Franco Accordino; and senior business infrastructure developer for Amazon Web Services, Fredrik Korsback. The meeting discussed the transformative potential of connectivity corridors and technology hubs in shaping the regional and global digital landscapes. Participants emphasised how

countries can pave the way for new cooperation opportunities by strengthening international online connectivity and technological innovation. In addition, it was pointed out that in order to turn these regions into a potential digital hub and an important driving force of the global economy, it is necessary not only to develop innovative and effective approaches to digital infrastructure, but also to ensure their security and sustainability.



IGF 2024

As a part of the Internet Governance Forum (IGF 2024), the Communications Commission organised a session titled 'Strengthening the Region and Sustainable Digital Development', which discussed topics such as Georgia's potential as a digital hub, the growing technology ecosystem, and human resources. In addition to the representatives of the Communications Commission and the Ministry of Economy and Social Development of Georgia, participants included the representatives of Google, Starlink, and Stratgeast. The session reaffirmed Georgia's strategic vision to strengthen its status as a regional hub for digital technologies and emphasised the importance of international cooperation in this regard.

At IGF 2024, Ekaterine Imedadze also took part in the session 'Digital Innovation Forum – Solutions for People Left Without Internet Connection', the panel discussion 'Breaking Barriers: Empowering Women Online', and in the session on digital sovereignty.



The Mobile World Congress (MWC) of the Global System Mobile Association (GSMA) is the largest event in the field of telecommunications. It is held annually in Barcelona. The Communications Commission, which prioritises deepening international cooperation and sharing the experiences of regulatory networks in the process of establishing the EU legislative framework, takes part in this event every year.

Member of the Communications Commission Ekaterine Imedadze made a speech during a session devoted to global cooperation in the fields of security, telecommunications, and technologies, focussing on the possibility of establishing Georgia as a digital hub: 'Georgia is situated at the junction of Europe and Asia. Historically, it has had to deal with various geopolitical challenges and difficulties. Today, we have the ambition and vision to turn this situation into an opportunity and make our country a regional hub for safe and sustainable digital services', Commissioner Imedadze stated.

During the session, Ekaterine Imedadze also talked about the importance of cooperation between the parties involved in the digital ecosystem and emphasised the role of the regulatory bodies in this process.

Apart from Imedadze, the thematic session involved representatives of the European Union Agency for Cybersecurity (ENISA), Interpol, Google, and Etisalat (E&). They discussed issues such as the unprecedented opportunities and challenges of cyber security in the era of technology, as well as the cooperation between different regional and sectoral organisations to create a secure ecosystem, avoid fragmentation and maintain openness and interoperability.

Within the framework of the 2024 Mobile World Congress, Ekaterine Imedadze held meetings with Deputy Director-General for Communications Networks, Content, and Technology of the European Commission, Renate Nikolay. The bilateral meetings discussed the areas of cooperation between the Communications Commission and GSMA, namely: engagement in sectoral research, capacity building, and the potential for Georgia to host a regional event in the field of mobile communications and telecommunications. A plan for future cooperation with the international research organisation Cullen International was also developed.

Member of the Communications Commission Ekaterine Imedadze, Head of the International Relations Service Nino Grdzeliashvili, Head of Competition and Market Regulation Department Ekaterine Sichinava, and Spectrum and Technology Department representative Giorgi Papava held further meetings with U.S. Federal Communications Commission (FCC) members, heads of the regulatory bodies of Portugal (ANACOM), Czech Republic (CTU), Lithuania (RRT) and Brazil (ANATEL), and the CEOs of the regulatory bodies of Bahrain (TRA), Singapore (IMDA), United Arab Emirates (TDRA) and Saudi Arabia (SCT). During the bilateral meetings, Communications Commission representatives introduced the main priorities of the Commission to their colleagues and discussed joint initiatives and opportunities for broadening cooperation.

Ekaterine Imedadze also held a working meeting with the 2024 chair of BEREC, the president of the Croatian telecom regulator HAKOM, as well as with the 2023 and 2025 BEREC chairs and the office director of BEREC. The main topic of the meeting was Communications Commission's application for membership in BEREC. It was noted that BEREC had approved the procedure for evaluating the applications of countries seeking to join the organisation, and the Communications Commission will be one of the first regulators whose application will be considered in accordance with the new procedure. Communications Commission representatives reiterated their desire to join BEREC and informed their partners about the steps taken towards this goal. To promote the development of strategic projects, the Communications Commission also held a bilateral meeting with the representatives of ICANN.

During the trip, Communications Commission representatives also visited the headquarters of the Spanish regulator CNMC, where they met CNMC board members, the Director of Telecommunications, and the heads of departments for market regulation, market analysis and technical units. Communications Commission representatives informed their Spanish colleagues about key projects such as the wholistic study of the telecom market, the updated market analysis methodology, integration into the EU single roaming space, and others. On their part, CNMC representatives presented the Spanish practice of implementing the Broadband Cost Reduction Directive (BCRD), highlighting it as one of the most successful cases in the European Union. The bilateral meeting also addressed the experiences and successful approaches in dealing with the challenges in the process of opening the market.



Communications Commission at the European Telecommunications and Media Forum

Member of the Communications Commission Ekaterine Imedadze took part in the annual European Telecommunications and Media Forum, where she spoke at the panel session on innovations and the role of regulators in the telecom sector.

Using Georgia as an example, Ekaterine Imedadze talked about the priority projects of the Communications Commission that serve to implement innovative telecom models in the country. More specifically, the Commissioner discussed the activities carried out to harmonise the country's telecom framework, which has enabled Georgia to secure a leading position in the region with regards to the development of the digital ecosystem. Along with Commissioner Imedadze, the session was attended by Director-General of the Swedish Post and Telecom Authority (PTS) Dan Sjöblom, General Counsel of the Jersey Competition Regulatory Authority (JCRA) Rory Graham, and Executive Board Member of the Belgian Institute of Postal Services and Communications (BIPT) Bernardo Herman.

The forum, which served to review the state of the telecommunications and media sectors in the European region, discuss the future strategic projects of regulatory networks, and deepen cooperation between regulators, was opened by the chairmen of the Body of European Regulators for Electronic Communications (BEREC) and the European Regulators Group for Audiovisual Media Services (ERGA).

The event also discussed issues such as the future priorities of the European Commission, the challenges facing the digital economy, stable connectivity and cyber security, the establishment of a single European digital market, the changing framework of media regulation and related challenges, the Digital Market Act (DMA) and Digital Services Act (DSA), the General Data Protection Regulation (GDPR) and its implications, as well as online safety of minors, the use of artificial intelligence in the media, etc.

The annual European Telecommunications and Media Forum was hosted by the International Institute of Communications (IIC) and the Belgian Institute of Postal Services and Communications (BIPT).

EU Conference „Media Literacy Matters”

The goal of the EU digital and media literacy conference 'Media Literacy Matters' is to share the initiatives, tools, projects, and practices across the European Union and strengthen European cooperation in facilitating the development of digital and media literacy.

During the conference, Commissioner Natia Kukuladze held a presentation on the policies and projects implemented by the Commission in the field of media literacy and digital inclusion. In her speech, Kukuladze talked about Georgia's positive experiences with regards to integration of media literacy into formal education, improving the rural population's digital skills, as well as other achievements in this field.

During her speech, Commissioner Kukuladze emphasised the importance of systematically integrating media literacy into formal education to ensure sustainable development and address the challenges posed by technological progress.

Aside from Natia Kukuladze, participants in the panel session included international media literacy experts Renee Hobbs and Yonty Friesem. Head of the Media Literacy Development Department of the Communications Commission Mariam Dakhundadze also took part in the event. The participants noted the progress achieved by the Communications Commission in the field of media literacy, and the fact that significant results have been achieved in a very short period.

Member of the Communications Commission Ekaterine Imedadze and Head of the International Relations Service Nino Grdzlishvili took part in the annual forum organised by the Body of European Regulators for Electronic Communications (BEREC), which aimed to facilitate discussion between stakeholders on topical issues concerning the telecommunications sector.

In the first part of the event, the chairs of the BEREC working groups introduced the stakeholders of the telecommunications sector to the activities planned for 2024 and the priorities of each working group, after which they heard the opinions of the participants. BEREC currently has 12 working groups composed of experts from the regulatory bodies of EU member countries. They cover topics such as economic and market analysis, regulatory environment, consumer rights, roaming, evolution of fixed networks, digital markets, cyber security, etc.

The second half of the forum was devoted to thematic reports and panel sessions, where new policy initiatives developed by the European Commission to address Europe's digital infrastructure needs were discussed. During the relevant panel discussion, representatives of the Directorate General of Communication Networks, Content and Technologies of the European Commission, BEREC and the telecommunications sector (specifically, the French telecom firm Iliad Group and the Spanish telecom company Telefonica) presented their opinions on the European Commission's White Paper.

Forum attendees also had the opportunity to participate in the process of reviewing the 2025 BEREC work plan, which was presented by BEREC Chair 2024 and head of the Croatian telecom regulator (HAKOM), Tonko Obuljen, and BEREC Chair 2025 Robert Mourik of the Irish regulator ComReg.

WSIS+20 – High-Level Event of the World Summit on the Information Society

In 2025, the United Nations General Assembly will discuss the outcomes of the World Summit on the Information Society (WSIS) to assess the progress made in the development of information and communication technologies, and particularly internet governance. The Communications Commission actively participated in the preparatory work for the summit throughout 2024. Member of the Communications Commission Ekaterine Imedadze and representative of the International Relations Service Mzia Gogilashvili took part in the high-level event WSIS+20 organised by the International Telecommunication Union (ITU). During the panel sessions 'Roundtable Discussions of Leaders on the Future of the Digital World' and 'Interactive Workshop on Collaborative Regulation with the Active Participation of Regulatory Associations', Ekaterine Imedadze represented the experience and ongoing projects of the Communications Commission.

During the summit, representatives of the Communications Commission held bilateral meetings with the Head of ITU Office for Europe Jaroslav Ponder, and the heads of the regulatory authority of Cyprus. The meetings outlined the future ways of cooperation.



Member of the Communications Commission Ekaterine Imedadze took part in the high-level Middle East 2024 Global Carrier Community Meeting (GCCM) in Oman. During the panel discussion devoted to the topic of strengthening digital connections, Commissioner Imedadze presented Georgia's potential as a regional digital hub, the opportunities on the local digital market, and the steps taken by the Communications Commission to promote investment in the telecom ecosystem.

During the event, Ekaterine Imedadze also took part in the panel discussion of executives on the subject of 'People with a Special Contribution in the Telecommunications Sector: Equality and Inclusion as a New Priority', where together with the representatives of leading international telecom companies she discussed the ways of encouraging inclusivity in the digital industry and facilitating the involvement of women in the executive functions of the telecom sector.

The speeches and discussions during the event focussed mainly on the sustainability and strengthening of underwater infrastructure, new data centres, digitization, electronic communications, as well as the analysis of the ICT sector's influence on the economy. The 12th Carrier Community meeting was hosted by Oman with the support of the local telecom regulator.

GCCM brings together over 1,000 high-ranking representatives from telecommunications companies, policy-making organisations and regulatory bodies in the telecommunications sector each year. The event aims to strengthen ties between the participants and discuss new opportunities for cooperation.

Commissioner Natia Kukuladze took part in the Digital Skills Forum organised by the International Telecommunication Union (ITU). During the high-level dialogue on digital transformation and disparities in digital skills, she outlined the Commission's initiatives to enhance digital competencies, highlighted the significance of fostering media literacy, and addressed the associated challenges. 'Along with other important initiatives and projects, I would like to highlight the State Internetisation Programme and the Log-in Georgia project, which is being implemented in Georgia with the support of the World Bank and European Investment Bank (EIB). Within the framework of this project, the Communications Commission is actively working with the rural population in Georgia to improve their digital skills', Natia Kukuladze stated.

The session was moderated by the Director of the ITU Development Bureau Cosmas Zavazava. Participants included the Minister of Transport and Telecommunications of Bahrain, the Minister of Digital Economy and New Information Technologies of Gabon, Chairman of the Governing Board of the Lithuanian Communications Regulatory Authority, and others. Participants also discussed the initiatives and existing challenges in addressing the digital skills gap, the role of education, and other important issues.

In addition, Commissioner Kukuladze was invited by the ITU to moderate the session on online security, which discussed threats associated with the use of digital technologies and online information, including disinformation, hate speech, cyber bullying, and others. The panellists discussed specific initiatives to deal with these threats, and the role of awareness raising and digital skills development in managing them.

The event was also attended by Head of the International Relations Office of the Communications Commission Nino Grdzeliashvili and Head of the Office of the Chairman of the Commission Maia Bigvava.

The Digital Skills Forum was organised by the ITU and hosted by the Telecommunications Regulatory Authority of Bahrain (TRA). It aimed to promote dialogue between industry experts, state agencies, and ministries responsible for the development of digital capabilities, national regulatory bodies, telecom operators, and representatives of national, international, and regional educational organisations on important issues such as digital transformation, strategies for closing the digital skills gap, safe use of digital technologies and online information, green and digital transformation, the impact of emerging technologies on future skills, etc.



Communications Commission at the Summit of Telecom Industry Leaders

Commissioner Ekaterine Imedadze took part in a roundtable discussion held within the framework of the summit of telecom industry leaders that was dedicated to the topic of successful funding models for broadband internet. During her speech, Ekaterine Imedadze focussed on the importance of international strategic partnerships in the field of broadband infrastructure development and realising the country's digital potential. Other issues addressed during the discussion included the universal framework of financing in the regions, and sharing international experience, which in turn implies development of specific action plans by the leading industries promoting the digital economy.

The summit of telecom industry leaders is an annual event organised by the council composed of South Asia, the Middle East, and North Africa (SAMENA) countries. This year's event was held with the support of the Telecommunications and Digital Government Regulatory Authority of UAE (TDRA). The main theme of the event was 'Developing the Telecom Infrastructure in the Region by Ensuring its Integration and Sustainability'.

Communications Commission at the 5G Conference

Commissioner Ekaterine Imedadze and Head of the Spectrum and Technology Department Sandro Karumidze took part in the European conference on 5G network in Brussels, where they discussed the political and strategic importance of a successful implementation of 5G internet in the EU countries. The event focussed on the implemented and planned activities aimed at harmonising the EU spectrum, promoting investment in the telecom sector, and strengthening the single digital market.

The topics of discussion at the conference included the status of the 2030 Digital Decade Goals, the results of the World Radiocommunication Congress WRC-23, and the planned activities aimed at developing the vision for 6G. High-level panel discussions included presentations on the spectrum allocation strategy for the 5th and subsequent generations of the network in EU countries at national and European levels, and facilitating investment in innovative telecommunication models, as well as the security and sustainability of networks.

The European 5G Conference has been held annually since 2016 with the aim of developing the European 5G ecosystem and telecom sector.

Communications Commission at the 19th European Spectrum Management Conference

Head of the Spectrum and Technology Department at the Communications Commission, Sandro Karumidze, and Head of the Planning Group Giorgi Papava took part in the 19th European Spectrum Management Conference in Brussels. The event was aimed at deepening regional dialogue and promoting discussion on spectrum management issues.

During the meeting, participants had the opportunity to deepen their knowledge and share the best practices of fellow regulators. The conference discussed important issues such as the need to coordinate spectrum policy and institutional structures to ensure a single EU digital market; innovative spectrum sharing strategies; internal connectivity challenges; and related regulatory and technological solutions. In addition, the meeting focussed on the issues of artificial intelligence and spectrum management; granting and renewing spectrum licenses against the background of 5G development; and the preparatory topics for the introduction of 6G and the potential challenges that may accompany this process.

Bilateral Cooperation

The Communications Commission places great importance on cooperation with fellow regulators. To this end, in 2024 the Commission signed memoranda of understanding with the Regulatory Authority of the Kingdom of Bahrain and the regulator of Malta.

The cooperation involves sharing experience and information on important regulatory topics, holding joint working meetings, and providing expert assistance.

Communications Commission Joins the UNESCO Media and Information Literacy Alliance

The Communications Commission became a member of the UNESCO Media and Information Literacy (MIL) Alliance in 2024. As part of its membership in the global network, the Communications Commission will actively promote the development of media and information literacy, collaborate with international partners, and share the best practices to address the challenges in the digital environment.

By joining the UNESCO MIL Alliance, the Communications Commission joins the global effort to reduce the digital divide, raise public awareness and promote sustainable development. This step once again confirms the importance of international cooperation and the special role of the Communications Commission in developing and strengthening media literacy in Georgia.

Communications Commission in the Council of Europe Expert Committee

Head of the Legal Support Group of the Communications Commission Levan Maisuradze took part in the meeting of the Steering Committee on Media and Information Society of the Council of Europe (CDMSI) and the Committee of Experts on Online Safety and Empowerment of Content Creators and Users (MSI-eSEC) as member of CDMSI. The CDMSI committees are composed of independent international experts and national experts from the Council of Europe member states. Only seven members are elected from among the experts. The main responsibility of the expert committees is to address the challenges related to the media and information society. The committees are involved in carrying out recommendations and assisting states with the implementation of relevant standards.

Two working meetings of MSI-eSEC were held in 2024. The Committee discussed a draft recommendation on online security, content creators, and consumer empowerment, which should be prepared and submitted to the CDMSI before the expiration of the Committee's mandate.

Communications Commission and EPRA

Members of the Communications Commission Ivane Makharadze and Natia Kukuladze and Head of the IR Service Nino Grdzlishvili took part in the 59th meeting of the European Platform of Regulatory Authorities (EPRA) hosted by the Dutch media regulator CvdM.

The event included two themed sessions: 'Media Literacy and Elections', and 'Artificial Intelligence and Media Regulation'. The first session focussed on the issues of media literacy and digital citizenship, as well as the importance of media literacy during the elections. More specifically, the discussion addressed the risks of information chaos in the context of the tense geopolitical situation, and the tendency to use technological innovations for destructive purposes. In eliminating these risks, media literacy has a crucial role as a means of understanding the democratic values of the media and facilitating pluralism of information. During the meeting, the speakers shared their experiences and best practices with the audience and discussed the role of national regulatory bodies and their forms of cooperation with media service providers in the process of encouraging civic engagement. In addition, the session emphasised the need for multilateral engagement and cooperation.

As part of the initiative by the Steering Committee for Education of the Council of Europe (CDEDU), member of the Communications Commission Natia Kukuladze and Head of Media Literacy Department Mariam Dakhundaridze conducted a visit to Strasbourg to attend a workshop for national experts on digital citizenship education (DCE). The aim of the meeting was to create a DCE framework document. The workshop covered important topics such as age-appropriate learning, lesson plans, project ideas, online courses, and educational resources for different age groups.

During the workshop, participants discussed the experiences of their countries with regards to digital citizenship and developed recommendations for accessibility and inclusion, teaching and creativity, media and information literacy, ethics and empathy, health and well-being, digital identity and communication, active participation, rights, and obligations, privacy and security, and user awareness. The DCE framework document will help member countries implement digital citizenship education.

Communications Commission Shares Media Literacy Development Practices with Colleagues

The Communications Commission hosted a delegation from the Ministry of Foreign Affairs of Armenia to share local practices and information about activities in the field of media literacy. The meeting was led by member of the Communications Commission Natia Kukuladze, Head of Media Literacy Department Mariam Dakhundaridze, and Head of the International Relations Service Nino Grdzlishvili, who provided the guests with detailed information about the media literacy projects implemented in Georgia, and the results achieved thus far.

During the visit, special attention was devoted to the project to integrate media literacy into formal education, as well as the results achieved with regards to raising awareness about media literacy in Georgia through the other projects of the Commission. Another topic of discussion was international cooperation in the field of media literacy, and specifically the annual UNESCO Media and Information Literacy Week, during which the Communications Commission holds various activities for students, teachers, and parents each year.

International Publications of the Communications Commission

The Communications Commission has prepared four publications to raise awareness at the local and international levels about the activities, goals, plans, and successful experiences in the field of media literacy and digital skills development, which were published on various platforms, namely:

1. [“Georgia’s Achievements in Media Literacy: ComCom’s Vision in Action”](#) - for the European Platform of Regulatory Authorities (EPRA)

2. [“Strengthening Media Literacy in Georgia: a Holistic Approach through Education”](#) - for the Media & Learning Association (MLA)

The Commission also prepared a Georgian-language article ‘Integrating Media Literacy into General Education’, which was published in the Key Competencies journal of the National Centre for Teacher Professional Development.

Furthermore, the European Audiovisual Observatory (EAO) reviewed the media literacy development projects implemented by the Communications Commission in its publication ‘Media Literacy and Consumer Empowerment’. In particular, the article discusses the efforts by the Communications Commission, the Ministry of Education, Science and Youth, and UNESCO to integrate media literacy into formal education, and the results achieved in this regard. In addition, the publication highlights the joint activities of the Communications Commission and the National Centre for Teacher Professional Development, which serve to raise awareness about media literacy among students, teachers, and parents. The document discusses the critical importance of media literacy and provides an overview of the existing strategies for strengthening and developing media literacy skills among consumers.

Monitoring of Cross-Border Telecom Services

Representatives of the Department of Spectrum and Technology of the Communications Commission, together with the employees of the Ministry of Digital Development and Transport of Azerbaijan (MDDT), carried out joint cross-border monitoring of TV and radio broadcasting and mobile communication networks. Afterwards, the parties held a coordination meeting in Ganja, which was devoted to discussing the issue of effective operation of radio stations and mobile networks in the border areas.

The joint cross-border joint monitoring found no harmful interference and established that TV and radio broadcasts are carried out in line with the terms of coordination between the two countries.

During the coordination meeting, which was also attended by specialists from the Georgian and Azerbaijani mobile operators, an agreement was reached between Communications Commission representatives and MDDT employees to ensure smooth operation of the existing and future FM radio stations in the border areas. In addition, the sides discussed joint activities for better coexistence of mobile operators' networks in the border areas, as well as the ongoing work related to the transition to 5G technology in both countries.

Communications Commission Employees Trained in Strategic Communication

British experts David Watson and James King held a seminar at the Communications Commission on the subject of strategic communications. The issues discussed included the use of emotional and rational arguments to influence opinion; effective strategies for neutralising disinformation; the 'opinion wall'; techniques for perceiving and analysing opinions; important aspects of crisis communication; predicting public behaviour during a crisis; and the methods of building an organisation's reputation through proper work with the target audience.



Collaboration with Local Partners

Communications Commission at the ICT Forum

Commissioner Ekaterine Imedadze took part in the annual forum organised by the ICT Association of Georgia. During the panel discussion, the commissioner talked about the need to create a supportive environment for establishing Georgia as a technology hub, as well as about the role of the Communications Commission in this regard. During her speech, Ekaterine Imedadze introduced the strategic projects of the Commission, including the wholistic study of the mobile and fixed internet markets, and noted that opening the telecom market is a priority issue for the Commission.

Apart from Ekaterine Imedadze, participants in the panel discussion was also joined by the executive director of ICTA Mariam Koiava, Member of Parliament Mariam Lashkhi, GITA Chairman Avtandil Kasradze, and representatives of tech companies. Topics of discussion included Georgia's role in the global digital ecosystem, the strategy for strengthening the country's position in this field, the action plan for establishing Georgia as a regional digital hub, as well as the current situation in the country in terms of access to fast high-quality internet, and the 5G development process.

International Conference on Competition and Consumer Rights

In 2024, Georgia hosted the 2nd International Conference on Competition and Consumer Protection, which was organised by the Communications Commission, the Georgian Competition and Consumer Agency, National Bank of Georgia, the Georgian National Energy and Water Supply Regulatory Commission, and the Insurance State Supervision Service. The purpose of the event was to share information and experience in the field of competition and consumer protection, as well as to enhance the cooperation in this area. Along with representatives of the regulatory bodies, the event was attended by representatives of the Parliament of Georgia, central and regional governments, businesses, international organisations, as well as the academic and non-governmental sectors.

The conference was opened by member of the Communications Commission Vakhtang Abashidze, who reviewed the Commission's projects aimed at ensuring the provision of quality services to the consumers in the telecommunications sector, and highlighted the importance of cooperation between regulators. During his speech, Vakhtang Abashidze spoke in detail about the wholistic study conducted by the Communications Commission, the comparative price analysis, as well as the roaming and internet quality control mechanism, and assessed the effectiveness of the current projects that aimed at protecting consumer rights.



International Conference on Competition and Consumer Rights

In 2024, Georgia hosted the 3rd International Conference on Competition and Consumer Protection, which was organised by the Communications Commission, the Georgian Competition and Consumer Agency, National Bank of Georgia, the Georgian National Energy and Water Supply Regulatory Commission, and the Insurance State Supervision Service. The opening session of the event, which focussed on the achievements, results, and challenges in the field of competition and consumer protection, was attended by the member of the Communications Commission Vakhtang Abashidze and the heads of other regulatory authorities. During the panel session, Vakhtang Abashidze highlighted the projects implemented by the Commission with regards to consumer protection, facilitating competition, and media literacy development, including the implementation of 5G.

During the conference, Head of the Market Regulation Department of the Communications Commission Ekaterine Sichinava presented the results of the wholistic study of the telecom market. At the subsequent panel session, Ekaterine Sichinava noted that the study assessed both the fixed and the mobile service markets, and found them to be stagnant, uncompetitive, and requiring ex-ante regulation. Based on the study, the Commission recognised Magticom as an operator with significant market power and imposed specific obligations on the company in order to create favourable conditions for consumers and improve competition on the market.

The event also included a panel session on the subject of 'Fighting the Cartel on Vulnerable Markets—Main Trends and Challenges', where the Head of Legal Support Group of the Communications Commission, Levan Maisuradze, talked about the prevention of anti-competitive collaborations in the field of electronic communications and media services, and reviewed the current Georgian legislation and practical examples in this regard. Maisuradze highlighted the precedent of broadcasters violating the Law on Competition, which concerned the broadcasting transit rights market, and spoke about Communications Commission's decision in this regard.

A further panel session titled 'Protection of Consumer Rights in Regulated Markets—Main Trends and Challenges' was held. The Public Defender of Consumer Interests of the Communications Commission, Gvantsa Chkheidze, took part in the panel and reviewed Communications Commission's approaches and activities carried out with regards to protecting consumer rights.

Commissioner Ekaterine Imedadze took part in an event organised by the Georgian Competition and Consumer Protection Agency (GCCA), which was held in a roundtable format with the participation of national regulators. The meeting was designed to strengthen competition policy, improve the enforcement of legislation, and share international best practices. The main topics of the event were mechanisms for the effective enforcement of competition law in the regulated sectors, as well as the achievements and challenges at the local and international levels.

During the discussion, Ekaterine Imedadze focussed on the strategic objectives of developing the telecommunications and media sector in Georgia and highlighted the challenges facing the Georgian telecom market.

Apart from Ekaterine Imedadze, participants at the round table included GCCA Chairman Irakli Lekvinadze, Acting First Vice-President of the National Bank of Georgia Natia Turnava, Chairman of the Georgian National Energy and Water Supply Regulatory Commission Davit Narmania, and Head of Insurance State Supervision Service of Georgia Davit Onoprishvili. Other participants included employees of the Competition Council of Lithuania and the Federal Competition Authority of Austria, representatives of regulators, industry experts, and members of Parliament.

Strong Diaspora in the Service of the Motherland

Member of the Communications Commission Natia Kukuladze took part in the forum Strong Diaspora in the Service of the Motherland, organised by the Ministry of Foreign Affairs to mark Diaspora Day. The purpose of the meeting was to deepen the ties and cooperation between the state and the diaspora, as well as to discuss the existing challenges and opportunities and increase the role of the diaspora in the development of the country.

Participants worked in three different thematic groups, exchanging information on issues such as education and culture, business and economy, as well as the flow of information used to aid in the successful pursuits of the diaspora.

During the thematic panel 'Information—The Mechanism of Success of the Diaspora', Natia Kukuladze highlighted the importance of raising awareness about media literacy in the society, as well as integrating media literacy into formal education. She reviewed the Commission's projects and achievements in this field. In addition, the Commissioner talked about disinformation and fake news as the accompanying dangers of technological progress, and about media literacy as a crucial weapon against these challenges.

International Conference—Telecommunications and Security

The 4th international scientific conference Telecommunications and Security was held in Tbilisi with the support of the Communications Commission. The event served to discuss new ideas and initiatives, and exchange experience between representatives of academia, scientists, professors, researchers, and experts in the field of telecommunications and cyber security.

In the opening session of the conference, Ekaterine Imedadze highlighted the importance of raising awareness and promoting the field of telecommunications. She delivered a presentation about Georgia's potential in the context of the development of digital corridors and technology hubs in the region. She also discussed relevant topics such as different routes of international internet connectivity, the importance of safe and secure internet infrastructure, and the establishment of a harmonised telecommunication and digital ecosystem in the country to promote digital transformation and innovation.

The event was organised by the Scientific Cyber Security Association and Internet Development Initiative, with the support of Caucasus University, Caucasus Online and RIPE NCC together with the Communications Commission. Representatives of the regulatory authorities, institutes of higher education, research centres and labs from the United States, United Kingdom, France, Spain, Portugal, Austria, Norway, Romania, Ukraine, Poland, Lithuania, Uzbekistan, Kazakhstan, Armenia, Azerbaijan, and Georgia took part in the conference.

The Communications Commission, ISOC-Georgia, and the Ministry of Economy and Sustainable Development of Georgia organised a conference devoted to the 2024 International Safer Internet Day. Last year's edition of SID was held under the motto of 'Together for a Better Internet'. The purpose of the event was to encourage safe use of the internet and digital technologies in Georgia, as well as to deepen cooperation and share the experiences and opinions between the agencies in this field. The meeting was opened by Commissioner Natia Kukuladze, together with Director of the Internet Society Ketevan Rekhviashvili, and Head of the Department of Telecommunications, Information and Modern Technologies Eka Kubusidze. Natia Kukuladze talked about the role of the Communications Commission and the projects implemented in this field.

Head of the Media Literacy Department of the Communications Commission Mariam Dakhundaridze provided a more detailed overview of the projects implemented by the Commission to support safer use of the internet. She highlighted the Digital Support Programme, which is implemented within the framework of the Log-in Georgia project and aims to teach the population how to navigate the internet safely. Other projects discussed by Mariam Dakhundaridze included the Happy Onlife game for children, and the Hello Ruby textbooks.

During the meeting, stakeholders and representatives of the relevant bodies discussed topics such as online law, personal data protection, cyber security, cyber hygiene, the projects implemented in this field, as well as the future plans.

Media Academy at the TMI Conference

The TV audience measuring firm Tri Media Intelligence (TMI), which is the official licensing partner of global industry leaders KANTAR in Georgia, held an annual meeting in 2024, which was attended by representatives of the Communications Commission and the Media Academy of the Communications Commission, together with other partners. The main goal of the conference was to share experience regarding the current challenges in the field of media and innovations.

During the meeting, Head of the Media Academy Shorena Shaverdashvili introduced the activities of the Academy and talked about the areas through which the Academy improves the media standards in the country. More specifically, Shorena Shaverdashvili informed the public about the activities of the Media Criticism, Media School, and Media Lab platforms of the Media Academy, and presented the results achieved over the past years.

