Communications Commission

# Annual 2025 Report

Communications Commission

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# Contents

# Goga Gulordava

Chairman of the Communications Commission

Today, we live in a modern digital era - an era in which the development of the telecommunications sector, the broadcasting industry, and media literacy has become more important than ever. The Communications Commission, as an independent public authority responsible for the continuous development of these three critically important fields, will make every effort to ensure the continued and even more effective implementation of technologies and innovations in the country. It will safeguard the interests of viewers and society, address the existing challenges within the broadcasting sector, and further develop and strengthen media literacy in the country in order to help society cope with the challenges of the digital world.

In the modern world, alongside increasing opportunities, there are also numerous challenges. One of the most significant challenges today exists within the broadcasting sector. In addition to disseminating information, the media has a fundamental social function, which comes with great responsibility. Given the substantial influence media has on society, it is essential that it complies with the law and adheres to journalistic standards in order to avoid negative impacts on viewers and society as a whole.

It is important to emphasize that, by the firm decision of the state, media pluralism and freedom of speech are guaranteed in the country. This is clearly demonstrated by the diversity of media outlets and the number of broadcasters operating in Georgia. However, alongside media pluralism, the media sector has, in recent years, faced fundamental challenges. Today, we are confronted with serious issues such as disinformation, the dissemination of unverified information, biased or politically motivated coverage of political and social events, and the blurring of the line between facts and opinions. These practices fuel polarization, incite aggression and hatred, foster intolerance toward differing opinions, and ultimately lead to confrontation within society - a deeply alarming reality that requires immediate attention and resolution. Unfortunately, the media itself has become directly involved in deepening polarization, instead of fulfilling its true role of providing society with impartial, balanced, and fact-based information. Clear examples of polarization and confrontation are also widespread across social media platforms, where aggression and hate speech have reached unprecedented levels.

Disinformation, fake news, manipulation, and attempts to exert negative influence over audiences are among the greatest problems facing the modern world today. Georgian viewers remain under constant threat in this regard. I would like to state with full responsibility that the state is fully prepared to address these challenges, both through legislative mechanisms as well as relevant professional expertise and experience.

The Communications Commission will enforce the law and fulfill its obligations. Accuracy of facts, fairness, impartiality, and the protection of privacy are not merely Georgian standards. All member states of the European Union have similar or even stricter regulations in place. We are all well aware that fueling polarization and deepening aggression is not the function or mission of the media. Unfortunately, in recent years, the media's true role has, to some extent, been undermined. The regulations set forth in the Law of Georgia on Broadcasting are specifically aimed at addressing these problems. Through the enforcement of the law and the Broadcasters' Code of Conduct, adherence to ethical and professional standards is being strengthened. Broadcasters are obliged to demonstrate greater responsibility. Responsible media, oriented toward the interests of viewers, should uphold the fundamental principles of journalism even without the explicit requirement of the law.

Challenges also persist within the telecommunications sector, whose further development is critically important both for the welfare of consumers and for the country's economy. Statistics on the use of telecommunications services clearly demonstrate how essential the provision of high-quality services is in today's technological world. In recent years, the Communications Commission has implemented necessary measures for the telecommunications market and taken significant steps aimed at introducing new technologies, supporting business development, and improving service quality. Nevertheless, challenges remain, including issues related to service pricing, infrastructure development and utilization, as well as ensuring competitiveness for small and medium-sized telecom operators. As Chairperson of the Commission, I will undertake all necessary efforts, through close cooperation with all operators in the telecommunications sector - both large and small - and through united efforts, to ensure the development of the telecom sector and the creation of a competitive market environment. The Communications Commission must create the conditions to encourage to invest in a free and open environment so that, ultimately, consumers can receive diverse, affordable, and high-quality services.

Finally, the Communications Commission will continue promoting the development of media literacy in the country. For the past nine years, together with the Ministry of Education, the Commission has been implementing highly valuable and engaging projects aimed at increasing the level of media literacy among teachers, students, and parents, while equipping them with the relevant knowledge and skills. In addition to the school community, the Communications Commission actively collaborates with universities, professors, lecturers, and students. Our goal is to integrate media literacy even more effectively into formal education at every level of the educational system and to confront the challenges of the modern world with the most powerful tools available - knowledge and critical thinking.

## 5G in Georgia

In 2025, fifth-generation mobile internet (5G) became available to the subscribers of all three mobile operators in Georgia. The Communications Commission (ComCom) held its third 5G auction, where Silknet was declared the winner of Combined Lot No.1 for the deployment of 5G. The final price of the lot amounted to GEL 48,802,257.

In addition to acquiring the frequencies, Silknet is obliged to gradually roll out 5G coverage across densely populated areas of Georgia, tourist zones, ports, airports, railways, and major highways. Furthermore, the company must build the 5G networks in accordance with the technical standards established by the European Union, thereby ensuring a high level of network quality and security.

In total, 11 lots were offered at auction for the deployment of 5G in 2025. The auction included frequency bands in the 700 MHz, 3400–3800 MHz, and 2600 MHz ranges. Out of the 11 lots, two combined abstract lots had identical coverage obligations and pricing. They consisted of two different frequency bands (700 MHz and 3400-3800 MHz), and imposed identical obligations regarding the coverage of populated areas. Notably, the acquisition of a combined lot did not entail a mandatory requirement to allow access to a mobile virtual network operator (MVNO). However, if a company opted to acquire a lot with an MVNO access obligation, a 20% discount on the starting price would apply. Silknet purchased Combined Lot No. 1 without the MVNO access obligation.

In 2023, the Communications Commission held the first auction for the implementation of 5G, in which only Cellfie Mobile took part. Magticom won the second auction, which was announced in 2024. As a result, all three major operators in Georgia are now providing 5G internet services to their customers.


## Mobile Communication Service Quality Monitoring

The Communications Commission regularly monitors the quality of mobile communication services across all regions of Georgia, assessing the service quality of all three mobile operators. Since 2020, the Commission has used a system supporting 2G, 3G, and 4G (LTE) technologies to carry out monitoring.

Following the radiofrequency spectrum auctions conducted in 2023 and 2024, mobile operators actively began deploying 5G technologies using the acquired frequencies and, by 2025, covered the main populated areas of Georgia. As the existing monitoring system of the Commission did not support 5G technology, it became necessary to procure a new system capable of supporting the latest mobile technologies.

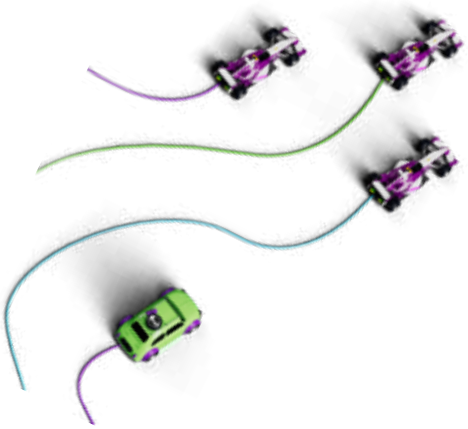
In 2025, the Commission implemented a mobile services monitoring system produced by Rohde & Schwarz, a leading global manufacturer of radio network monitoring systems. In addition to 5G technology, the system also measures calls made through the 4G-based VoLTE technology and the WhatsApp platform.

The monitoring system also uses a new service quality assessment methodology - Network Performance Score (NPS) 3.0 - which is based on the European Telecommunications Standards Institute standard ETSI TR 103 559 V1.2.1.

The NPS methodology calculates an overall quality score for each operator's network, derived from the measurement results of multiple individual KPIs (key performance indicators).

In addition to the NPS score, and in line with the international practices and recommendations, the report presents the main KPI indicators for evaluating mobile networks, including the call performance statistics, availability and performance of voice and data services, geographic coverage area of the network, level of interference, etc.

The implementation of the new system enables the Communications Commission to conduct more comprehensive and higher-quality monitoring. As a result, the Commission can provide consumers with more detailed and accurate information about the quality of mobile communication services, while also assisting operators in improving network performance.



### The Plan for 2026

*The Communications Commission will regularly publish regional monitoring reports conducted across the country. These reports will increase consumer awareness regarding the quality of mobile voice and internet services nationwide.*

## Internetization and Digital Literacy

In 2025, the World Bank published a study analysing mobile and fixed internet speeds in Georgia based on data from 2021-2024.

Based on the analysis of mobile internet services, mobile internet speeds have demonstrated a sharp upward trend since the end of 2024. This development is attributed to the three 5G auctions conducted by the Communications Commission and the subsequent deployment of 5G technology by all three major operators. As a result, Georgia is a regional leader in terms of mobile internet speed. The findings indicate that the average annual growth rate of mobile internet speeds in Tbilisi and the regions between 2021 and 2024 reached 53%, whereas the corresponding figure for fixed broadband services was only 17%. In addition to the World Bank study, according to 2025 data from the Speedtest Global Index, Georgia ranks 14th worldwide in mobile internet speed, with only two EU member states - Bulgaria and Denmark - ahead of it. The ranking includes data from 170 countries.

As for fixed broadband, the World Bank study indicates that despite progress in recent years, low fixed internet speeds remain a significant challenge in Georgia. The analysis shows that as of July 2024, the median download speed in Georgia was approximately 20 Mbps, whereas the corresponding figure in the EU countries stood at around 150 Mbps. Furthermore, 93% of Georgia's speed test results showed speeds below 30 Mbps. By comparison, the same indicator was 80% for Armenia, 90% for Azerbaijan, 43% for Moldova, and 74% for Ukraine.

According to the World Bank's assessment, addressing this issue critically depends on infrastructure development. Evidence of this can already be seen in areas covered by fibre-optic infrastructure under the state Universal Internetization Programme implemented by Open Net, particularly in the so-called 'white zones' (underserved areas), where internet speed trends show improvement.

Specifically, there were 18 internet service providers and 3 mobile operators delivering services to more than 100,000 residents and over 100 schools across 14 municipalities using Open Net's infrastructure in 2025.

In 10 of the above locations, the growth rate of fixed internet speed between 2021 and 2025 significantly exceeded the country's average growth rate of 10%: Abasha - 39%, Ambrolauri - 85%, Baghdati - 27%, Kobuleti - 15%, Lentekhi - 64%, Oni - 84%, Ozurgeti - 14%, Tkibuli - 36%, Tsageri - 58%, and Tskaltubo - 14%.

According to the analysis conducted by the World Bank, the challenges related to fixed broadband speeds in Georgia are also clearly reflected in the internet speed test results of educational institutions, medical centres, as well as financial and public institutions. In particular, broadband speeds for business subscribers mostly did not exceed 30 Mbps. Under the EU standards, such institutions are expected to have access to connections of at least 1 Gbps.

The study also revealed that, as of 2024, the highest median fixed broadband speed of 29 Mbps was recorded in Tbilisi, with an average annual growth rate of 13% since 2021. Among the regions, the highest growth rate was observed in Samtskhe-Javakheti, where speeds increased by 39%, rising from 8 Mbps in 2021 to 22 Mbps. It is worth noting that in 2024, major fixed network operators increased the speeds offered to subscribers, replacing the most widely used 30 Mbps package with a 50 Mbps package. Nevertheless, according to the World Bank study, fixed broadband speed remains a challenge in Georgia.

Significant progress was also achieved in 2025 with regards to national internetization. Within the framework of the Log-in Georgia project, construction of the fibre-optic backbone network was completed in the municipalities of Chiatura, Sachkhere, Terjola, Tkibuli, Chkhorotsku, Khobi, Senaki, part of Tsalenjikha, and Zugdidi, covering a total of 575 km of fibre-optic infrastructure.

In addition, construction works are ongoing in the municipalities of Mestia, Zestaponi, Kharagauli, Sachkhere, Terjola, Khashuri, Gori, Kareli, Kaspi, Dusheti, Mtskheta, Keda, Khelvachauri, and Shuakhevi. These works collectively encompass 1,050 km of backbone infrastructure and approximately 200 populated settlements.

By the end of 2025, the total volume of completed and ongoing works under the programme amounted to 3,000 km of infrastructure, benefiting up to 260,000 residents and creating new opportunities for them.

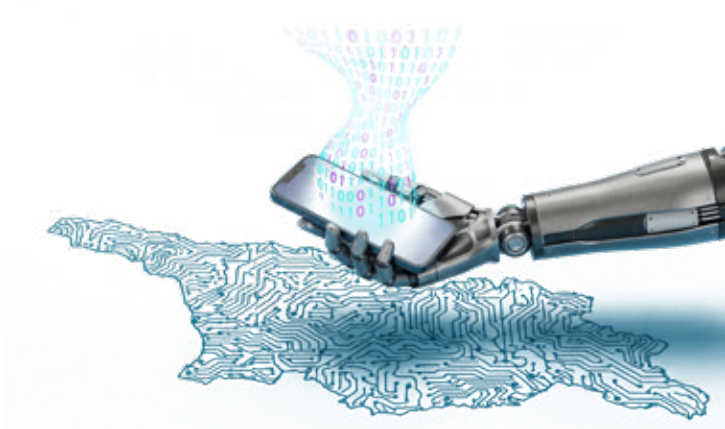
In 2025, three additional tenders were announced for the construction of optical networks along the following routes: Khulo-Akhaltsikhe-Borjomi, Tsalka-Akhalkalaki-Akhaltsikhe, and Tbilisi-Marneuli-Tsalka.

Within the framework of the Log-in Georgia project, both the geographic coverage and the operational scale of optical infrastructure construction expanded significantly. Several hundred different types of telecom services are already operational on the fibre-optic infrastructure built by Open Net. Through these services, telecom operators provide broadband connectivity to their end users.

Information on the completed infrastructure projects, ongoing construction and technical network parameters under the Universal Internetization Programme is freely available through the Open Net digital map at: https://maps.opennet.ge.

The second component of the Log-in Georgia project - the Digital Inclusion Programme - also continued actively in 2025. This component is being implemented by the Communications Commission since 2022.

The programme aims to increase digital awareness among the residents of selected municipalities and rural communities, strengthen their participation in the digital economy, and promote the use of the internet for specific purposes. The program was designed based on the findings of a study assessing the population's internet needs and includes seminars and informational meetings on digital literacy and safe internet use.



As part of the programme, beneficiaries aged 14 and above receive practical knowledge in areas such as information search and verification, the use of digital services and applications, online safety, and the opportunities offered by artificial intelligence. Additionally, special emphasis is placed on the state electronic services, including the use of the state e-auction platform and raising awareness about the rights of internet users.

In 2025, the Digital Inclusion Programme activities covered 80 target villages and settlements across 8 municipalities. More than 300 seminars were conducted, and 4,600 beneficiaries received training.

In addition to thematic seminars on digital literacy and safe internet use, the Digital Inclusion Programme also included informational meetings on media literacy for employees of the municipalities of Oni, Ambrolauri, Lentekhi, Tsageri, Chkhorotsku, Tskaltubo, and Senaki. The meetings addressed several topics, including: the distinction between facts, opinions, informative and persuasive content, and false information; disinformation dissemination techniques; and the identification of trolls and bots. Participants also received comprehensive information on propaganda and conspiracy theories, the risks associated with disinformation, and the capabilities of artificial intelligence.

In addition to theoretical material, the sessions included practical exercises, during which participants engaged in group assignments involving the analysis and discussion of specific case studies. Approximately 300 municipal employees attended these seminars.

Since 2022, the Digital Inclusion Programme has been successfully implemented and is ongoing in 20 target municipalities, including Ozurgeti, Chokhatauri, Samtredia, Khelvachauri, Kobuleti, Ambrolauri, Oni, Tsageri, Lentekhi, Zugdidi, Abasha, Chkhorotsku, Senaki, Tskaltubo, Vani, Baghdati, Chiatura, Sachkhere, and Martvili. The programme has covered 300 villages and settlements, conducted up to 800 seminars, and trained more than 10,000 local beneficiaries. Participants include school teachers, secondary school pupils, persons with disabilities, local women entrepreneurs, housewives, and temporarily unemployed citizens.

Since 2022, the Communications Commission has implemented the Digital Inclusion Programme in 70% of the geographic areas covered by optical infrastructure.

## The Plan for 2026

*Within the framework of the State Internetization Programme, Open Net plans to announce tenders for the Kvemo Kartli and Kakheti–Tianeti routes. The Digital Inclusion Programme will continue in five municipalities and will introduce additional thematic seminars, such as "Practical Applications of Artificial Intelligence" and "The Internet for Employment and Professional Development."*

## Holistic Study of the Telecom Market

In 2025, the Communications Commission proceeded with the second phase of the holistic study of the Georgian telecommunications sector, which included an analysis of the wholesale access to physical infrastructure markets. Based on the preliminary results of the study, the European experts and the ComCom team identified an operator with significant market power in the wholesale physical infrastructure access market - specifically the market for access to communication duct infrastructure. The Communications Commission will review the assessments and recommendations of the experts and adopt the appropriate decisions where necessary. Furthermore, the study showed that the existing regulatory framework in these markets is not sufficient and additional regulations are needed to foster competition. Such measures would increase the available options for small and medium-sized operators, ensure fair access to infrastructure and improve the availability of high-quality services for consumers.

The study of the wholesale physical infrastructure access market covered two separate market segments: access to communication duct infrastructure and access to pole infrastructure. The preliminary findings indicated that Silknet owns approximately 70% of the potentially usable infrastructure in the communication duct infrastructure access market. The analysis was conducted across the five major cities of Georgia, such as Tbilisi, Batumi, Kutaisi, Rustavi and Poti, as well as other part of Georgia. By contrast, the market for access to pole infrastructure was deemed competitive, since the access to electricity and street-lighting poles is already regulated under the law of Georgia on sharing telecommunication infrastructure and physical infrastructure applicable for telecommunication purposes.

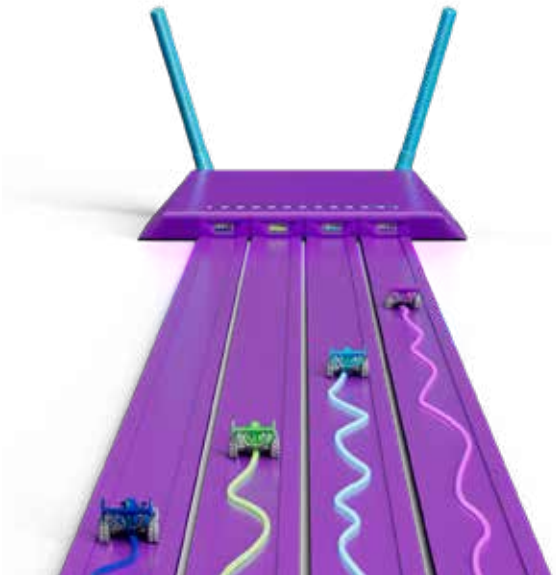
Several significant competition challenges were identified in the wholesale markets for access to communication duct infrastructure, including the high barriers to market entry, limited competition, strengthening of the dominant position of the infrastructure owner and low effectiveness of the existing regulations.

The European experts involved in the study provided recommendations to the Communications Commission aimed at ensuring more effective market regulation. The new regulatory framework should introduce greater transparency, a prohibition of discriminatory practices and standardised access procedures. In addition, the proposed regulations should provide ComCom with more effective tools to monitor the access process and regulate the pricing mechanisms. These regulatory mechanisms reflect the best practices from EU member states and are designed to create a fair, competitive and predictable market environment, increase the availability of high-quality telecommunications services and support the development of the country's digital infrastructure.

The results of the second phase of the holistic study were presented by the experts and the ComCom team to the representatives of telecom operators in late 2025.

Regarding the corporate offers to companies in the retail market for fixed internet services, the study examined the current market situation and key challenges. Detailed information was collected from stakeholders through quantitative and qualitative questionnaires, as well as working meetings and in-depth interviews. Meetings were held with major telecom market players and business subscribers in order to assess the corporate services they receive. The study identified the most in-demand services among the business subscribers, the key factors influencing service selection, and the difficulties companies face when choosing a provider. Based on the information gathered, possible approaches to addressing the identified challenges will be further assessed.

The first phase of the holistic study was completed in 2024. The findings indicated that both the fixed and mobile communications markets were uncompetitive and experiencing stagnation. In the relevant wholesale access markets, Magticom was identified as an operator with significant market power, which led the Communications Commission to impose additional obligations on the company.



Magticom was required to provide wholesale access to its mobile network, including obligations related to national roaming, access for mobile virtual network operators (MVNOs) and co-location. In addition, the company was assigned all five specific regulatory obligations defined under the Law of Georgia on Electronic Communications, which include ensuring information transparency and publishing a reference offer.

According to the decisions adopted by the Communications Commission in 2024, reference offers for access to the network of Magticom, including wholesale access in the VULA and Bitstream markets for local and central access at fixed locations, as well as the wholesale market for access to the mobile network, were published at the beginning of 2025.

The Commission deemed that the published reference offers contained restrictive and unfair conditions. As a result, the Commission and the European experts conducting the holistic study carried out an in-depth review of the documents and instructed the company to amend all the restrictive provisions and bring them into line with the European best practices. Following these changes, the updated reference offers are now available to companies seeking network access. However, the Communications Commission will continue to work with these companies on further revising the documents to ensure that the access conditions are practically implementable and to create commercially viable opportunities for market entry.

A key part of improving the reference offer conditions within the regulatory process is the determination of reasonable, cost-oriented access tariffs under tariff regulation. In this regard, fixed network access tariffs were determined by a decision of the Communications Commission, while mobile network access tariffs were to be determined by Magticom and included in its Reference offer.

The Commission assessed the Wholesale tariff on the access to mobile network published by Magticom in its reference offer for access, and found that the tariffs did not comply with the obligation of cost orientation set by the Commission and were unreasonably high compared to the existing retail offers on the market. In particular, for the most in-demand and fastest-growing mobile services, the wholesale tariffs significantly exceeded the retail tariffs offered by Magticom. As a result, the potential retail revenue of an MVNO would not be sufficient not only to generate profit but even to cover the variable portion of wholesale costs. Taking these circumstances into account, the Communications Commission amended its 2024 decision and determined that the calculation of tariffs for access to the mobile network should be carried out by the Commission itself, rather than by the operator holding significant market power.

The elaboration and practical implementation of a regulatory framework for the study of retail markets for fixed broadband and mobile services, as well as their corresponding wholesale markets, aims to address the challenges identified in the relevant market segments. These challenges include limited competition, low market dynamism, a lack of innovation, and insufficient progress.

The regulatory measures defined in the holistic study are expected to produce multiple benefits. Smaller market participants and new entrants will gain the opportunity to develop their activities and create alternative communication service offerings. At the same time, network-owning operators will be able to better utilise the capacity of their networks, enabling them to generate additional revenue. Ultimately, these outcomes will benefit end users, who will gain access to a wider variety of telecommunications services. This, in turn, will support the digital transformation of various sectors of the economy.

It should be noted that following the completion of the first stage of the holistic study, Magticom increased the internet speed from 30 Mbps to 50 Mbps for approximately 500,000 subscribers of its fixed broadband internet service who had been using the 30 Mbps package. This change represents one of the tangible benefits for consumers resulting from the holistic study.

Another important development concerns the process of developing the margin squeeze methodology and model. According to the decision of the Communications Commission, an operator with significant market power is obliged not to squeeze the margin between retail and wholesale tariffs when granting access in certain segments of the mobile and fixed wholesale markets.

The Communications Commission is required to monitor potential price-based discrimination related to the entry of an MVNO by applying a margin squeeze test. The purpose of this test is to prevent cross-subsidisation by operators with significant market power. It also aims to eliminate situations where an operator offers wholesale access at inflated prices while simultaneously providing retail services at competitive prices, thereby reducing the margins of the competitors and increasing the likelihood of their exit from the market.

With regards to fixed network access, in the case of local access (VULA), the margin squeeze test is applied in specific locations. For these settlements, due to the existing competitive environment, wholesale price caps have not been imposed. It was deemed sufficient for tariff control to be implemented solely through the margin squeeze test.

Accordingly, the Communications Commission has developed a margin squeeze methodology and model aligned with these objectives. The margin squeeze test will be conducted either upon a complaint submitted to the Commission, or periodically on the Commission's own initiative.

As a result, transparency and competition in the telecommunications market will increase, operators with significant market power will have limited ability to engage in tariff discrimination, detection and elimination of cross-subsidization practices will improve, and the Communications Commission will be able to respond promptly to violations and protect both consumers and market participants from unfair pricing practices.

## The Plan for 2026

*At the second stage of the holistic study, the Communications Commission plans to hold public consultations regarding the markets under review. The Commission will analyse the feedback received from companies and adopt the appropriate decisions.*

*Based on the results of the retail market study of high-quality services offered to companies, in 2026 the Commission plans to conduct an analysis of the corresponding wholesale market – specifically, high-quality access to the fixed network. This market is considered one of the two markets potentially subject to regulation by the European Union.*

*Regarding the implementation of decisions adopted during the first stage of the study, in 2026 the Communications Commission plans to review the tariffs for access to the fixed network and adjust them if necessary, and to calculate the mobile network access tariffs. Furthermore, the Commission will continue working on reference offer conditions with both network operators and companies seeking access to fixed and mobile networks, so that the conditions become mutually beneficial and practically implementable.*

## IP Peering and IXP Development Research

In 2025, the Communications Commission conducted a study to examine the barriers to the development of IP interconnection (IP peering) services and Internet Exchange Points (IXPs) in Georgia. The objective of the project was to identify and provide recommendations for the elimination of the obstacles hindering market development, thereby strengthening the competitive environment and enabling users to receive improved internet services. The initiative was also expected to support the development of the local digital ecosystem and increase Georgia's potential to become a regional digital hub.

The study found that the current conditions in the IP peering market are restrictive for small and medium-sized operators, while the development of IXPs face significant delays. These challenges hinder the provision of high-quality internet services to consumers at competitive rates, as well as the growth of the local digital ecosystem and Georgia's prospects of becoming a regional digital hub. According to the experts involved in the research, strengthening competition in both the retail and wholesale markets for fixed internet services is essential to address the identified challenges. Within the framework of the study, the European experts presented the research findings to representatives of telecom operators, including Magticom, Silknet, Skytel, Caucasus Online, as well as small and medium-sized operators. During the meeting, participants discussed the key findings of the study and the recommended actions.

The market environment for peering services is restrictive for small and medium-sized operators. They lack the opportunity to connect to large operators under favourable conditions and therefore cannot obtain full access to resources hosted within Georgia. At the same time, non-standard and non-transparent practices have become established in the IP peering market, which hinder the development of small and medium-sized operators. In particular, under peering arrangements, the receiving network (or sometimes both parties) must pay for traffic, while settlement-free peering agreements are rare. This situation contradicts European practice, where peering is often considered a mutually beneficial and typically settlement-free arrangement. In addition, many providers do not publish their peering policies, which reduces transparency for users of peering services.

Due to the high costs of accessing the global internet, the local deployment of resources from major content providers such as Facebook, Google and Amazon on cached servers becomes particularly important in Georgia. However, small operators face difficulties accessing these resources, placing them at a competitive disadvantage.

The main barrier to the development of an internet exchange point (IXP) is that major internet providers in Georgia are not connected to it. As a result, the volume of exchanged traffic remains insufficient, which in turn reduces the interest of large content providers in hosting their resources on such infrastructure.

According to the conclusions and recommendations of the experts, it is important to promote the development of the IP transit and infrastructure access market, which would enable small operators to reach national borders and independently procure international internet connectivity from global providers. The experts also believe that leveraging the initiative of Open Net to develop infrastructure near border points and ensure interconnection with international providers would strengthen competition and allow local operators to access the national backbone network at competitive tariffs. In addition, the experts highlight the critical importance of the development of IXPs. This requires the active involvement of both the private and public sectors to increase traffic volumes and the number of connected operators at IXPs. In turn, this would help attract global content providers and international IP transit operators to these locations, which is essential for realising the country's potential to become a regional digital hub.

The project was implemented by the Communications Commission with the support of the international consulting firm Plum Consulting Paris SAS, which has extensive experience in telecommunications and digital market regulation. The study was led by highly qualified experts Sam Wood, Grant Forsyth and Mike Blanche.

## Investigation of Price Increase for Mobile and Fixed Internet Services

In 2025, the Communications Commission launched an investigation of the decision made by Magticom to increase internet service prices. The Commission initiated the review following a rise in consumer complaints regarding the increased tariffs. Under Magticom's decision, prices increased for both mobile and fixed internet services.

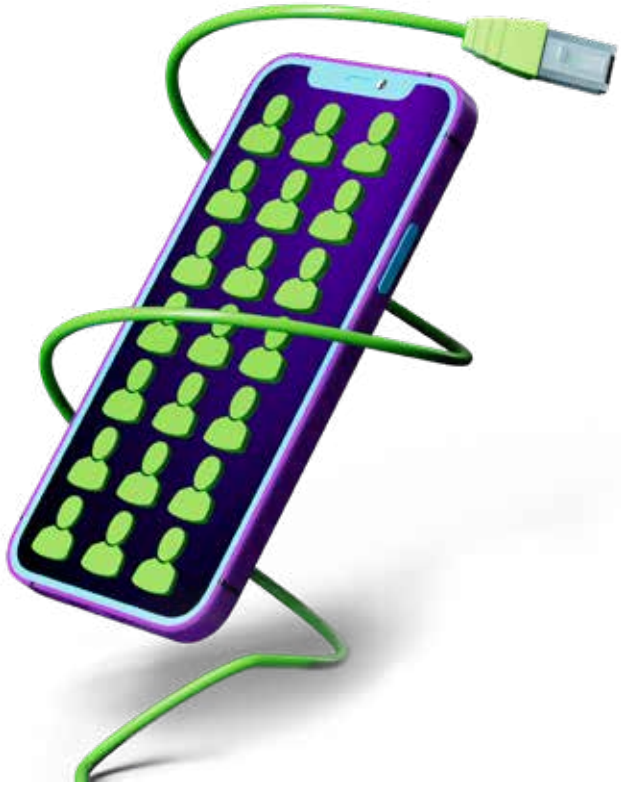
Specifically, Magticom increased the price of its mobile internet package "Unlimited Internet – Week" from GEL 9 to GEL 10, while the "Unlimited Internet – Month" package increased from GEL 32 to GEL 35. According to data available to the Commission, the number of monthly activations for these packages amounts to approximately 499,000 in the case of "Unlimited Internet – Week" and 144,000 in the case of "Unlimited Internet – Month." Accordingly, if the company maintains the current number of activations for these packages, its monthly revenue will increase by a total of approximately GEL 931,000.

With regard to fixed internet services, Magticom's decision resulted in a GEL 3 increase in tariffs for subscribers across the country who use either the 50 Mbps fixed internet package or internet + IPTV services. According to the Communications Commission's assessment, the change affected approximately 456,000 subscribers, which, provided the subscriber base is maintained, will increase Magticom's monthly revenue by approximately GEL 1.37 million.

For the purpose of protecting consumer interests, the Communications Commission conducted a preliminary assessment, which gave rise to a reasonable suspicion of a possible violation of Article 6 of the Law of Georgia on Competition (abuse of dominant position).

In accordance with the legislation, a dominant position is determined based on a company's market share, the market shares of its competitors, as well as barriers to market entry and business expansion, absence of or low countervailing buying power, accessibility, network effects, and other factors determining dominance. Abuse of a dominant position may include: imposing unfair prices or unfair trading conditions; restricting production, markets, or technological development to the detriment of consumers; and applying dissimilar conditions to equivalent transactions with business partners, thereby placing them at a competitive disadvantage.

In relation to this matter, investigative proceedings are currently underway at the Communications Commission in order to examine the possible violation of the Law of Georgia on Competition.

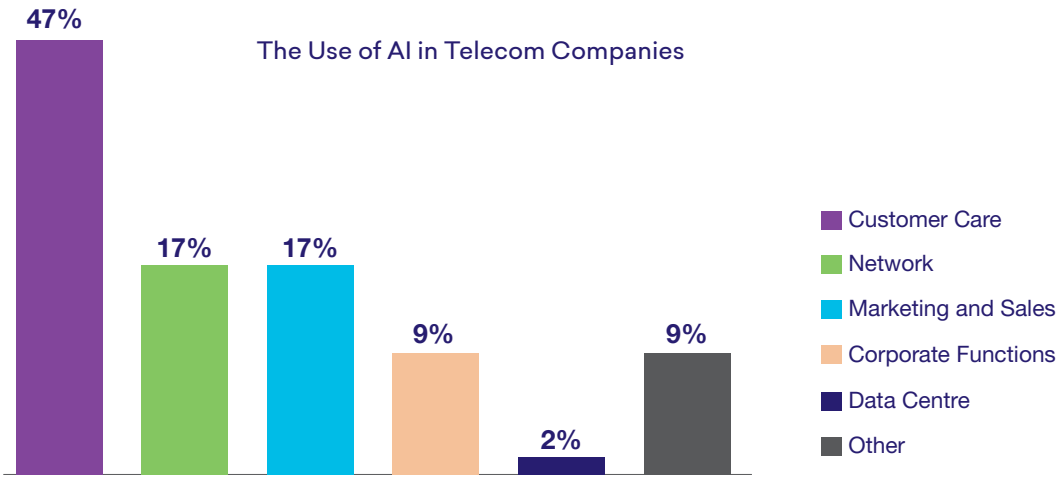


## Overview of Global Trends

The deployment and expansion of 5G technology was once again the primary challenge in the global telecommunications market in 2025. Although 5G networks began to be introduced in countries such as Finland, the United States and South Korea as early as in 2019, the development of this technology remains a priority in many parts of the world[1]. Today, 82% of mobile devices in Europe are connected to fifth-generation networks. The global leaders by this measure are the Arab countries of the Persian Gulf, where 95% of mobile devices are connected to the latest-generation network. According to GSMA[2] forecasts, 57% of mobile subscribers worldwide will have access to 5G networks by 2030. At the same time, the share of mobile devices connected to 2G and 3G networks is expected to decline by 1% and 5%, respectively[3]. In Georgia, 5G technology became available at the end of 2023, initially covering only several districts of Tbilisi. By 2025, all three Georgian mobile operators had obtained the necessary licenses to develop 5G networks and were offering next-generation mobile services to their subscribers.

The development of 5G technology also continued across other countries throughout 2025. In addition, several markets began introducing the 5G-Advanced technology, also known as 5.5G, which provides even faster internet connectivity, lower latency, and improved energy efficiency. A notable feature of 5G-Advanced is its ability to integrate artificial intelligence (AI) and machine learning, enabling greater automation in network optimisation and management. Through AI algorithms, operators can predict network congestion and allocate network resources more effectively, helping to prevent service disruptions for subscribers. Artificial intelligence also plays a significant role in identifying potential threats and preventing cyberattacks. Furthermore, AI helps operators reduce costs by analysing historical data to predict potential equipment failures and alert network operators in advance. This significantly reduces network downtime and lowers operational expenses[4].

In a 2025 GSMA survey, 45% of operators identified AI-powered revenue streams as a strategic priority. It is worth noting that AI plays an important role in both security and incident management, although it also requires continuous monitoring and skilled staff[5].

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[4] Top 3 telecom trends to watch in 2025, GSMA.
[5] The Mobile Economy 2026, GSMA.

The GSMA study found that telecom operators are currently using artificial intelligence primarily for low-risk and relatively simple tasks. Nearly 50% of the deployed AI solutions are focussed on customer care, while less than 20% are dedicated to network automation. Although approximately 80% of AI applications remain focussed on improving internal operational efficiency, operators are increasingly viewing artificial intelligence as a strategic opportunity for revenue growth. This trend is reflected in closer partnerships with global tech companies and cloud service providers that operate large-scale server infrastructures. The process is developing in three main directions: deployment of AI infrastructure in the operators' facilities to enable faster data processing; provision of ultra-fast connectivity between various facilities and systems; and monetising AI services by offering AI platforms and analytical tools to corporate (B2B) customers.

The role of artificial intelligence expanded significantly worldwide in 2025. Its adoption increased not only among the telecom operators, but also among the internet users themselves. The number of users of AI-powered services and large language models (LLMs) exceeded one billion in 2025. For example, billions of conversations take place every day on ChatGPT, one of the most widely used AI platforms based on large language models[6].

It is important to note that the rapid development of artificial intelligence presents major challenges for data centers and electricity providers. AI requires substantial upgrades to data centre infrastructure, including the implementation of innovative power supply solutions and more advanced cooling systems[7].

The growth of artificial intelligence on this scale would not have been possible without widespread internet access, which continues to expand globally each year. As of October 2025, the number of mobile and fixed internet users worldwide exceeded six billion, representing a 5.1% increase compared to 2024[8].

By region, Europe recorded the highest internet penetration rate, with 93.8% of the population using the internet. It was closely followed by North America at 93.3%. The lowest rate remained in Africa, where internet penetration stood at 43.1%, meaning that more than half of the continent's population still lacked access to internet resources.

| Region | Number of Internet Users (million) | Internet Penetration Rate |
|---|---|---|
| Europe | 698 | 93.8% |
| North America | 362 | 93.3% |
| South America | 368 | 83.8% |
| Central America and Caribbean | 180 | 77.9% |
| Oceania | 36.7 | 77.5% |
| Asia | 3,720 | 76.9% |
| Africa | 671 | 43.1% |

[6]Digital 2026: Global Overview Report, 15 October 2025.
[7]State of the Network 2026, TeleGeography.
[8]Digital 2026: Global Overview Report,15 October 2025.

As the number of internet users continues to increase worldwide, global network capacity is also expanding. According to the estimates by the International Telecommunication Union (ITU), total global internet traffic reached 8.8 zettabytes ($8.8 \times 10^{15}$megabytes) in 2025, with mobile internet traffic accounting for 1.5 zettabytes, and fixed broadband accounting for 7.3 zettabytes[9].

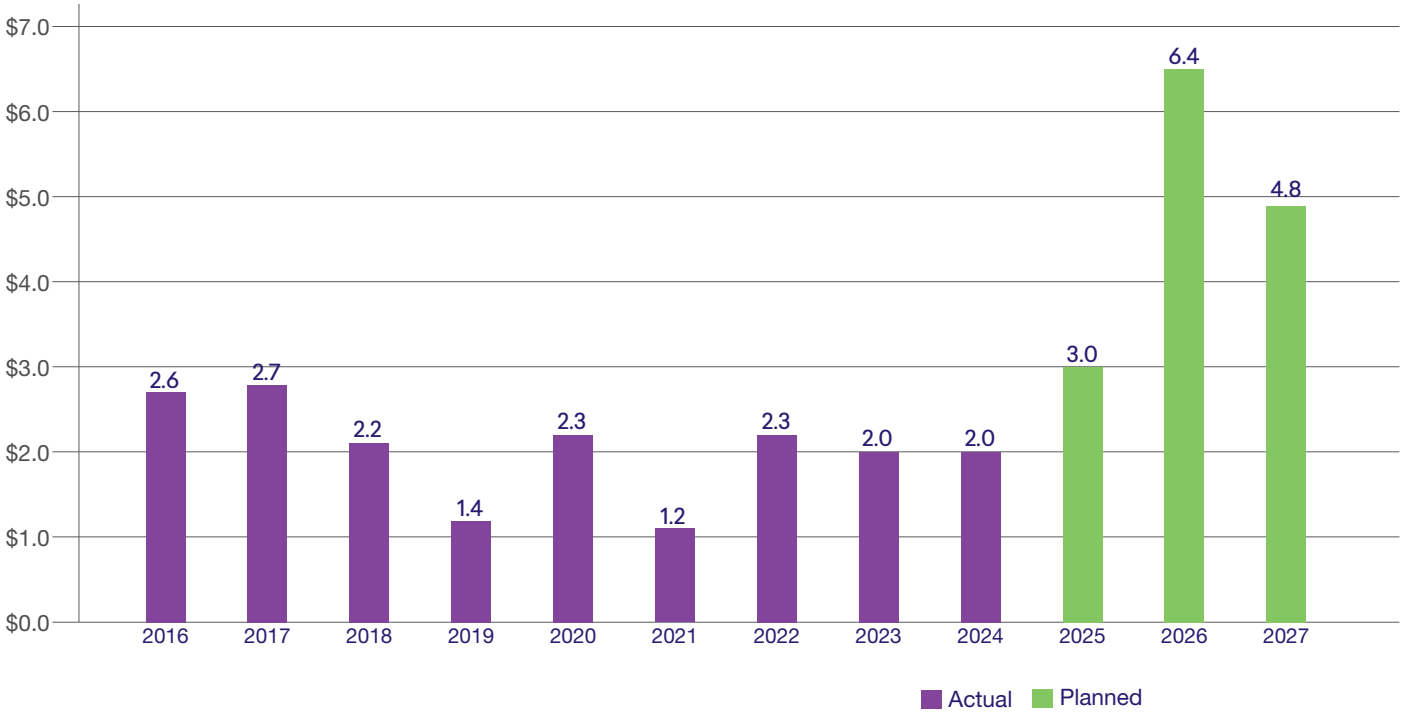
It is unsurprising that as of 2024, the largest share of global internet traffic was generated by content delivery services and cloud storage platforms. Companies such as Google, Meta, Microsoft and Amazon collectively generated approximately three-quarters of global internet traffic. By comparison, nine years earlier in 2016, the majority of the internet traffic demand was generated by backbone internet service providers[10].

Internet consumption continues to grow year after year. Since 2021, mobile internet traffic has increased by an average of 19% annually, while fixed broadband traffic has grown by approximately 16% per year. According to 2025 figures, the average mobile subscriber worldwide consumed 15.3 GB of mobile data per month. The European average stood at 16 GB per month[11]. Similar to Europe, the average mobile internet consumption in Georgia also reached 16 GB per subscriber per month in 2025.

Average fixed broadband internet consumption per subscriber, typically representing a single household, amounted to 369 GB per month, significantly exceeding the volume of data consumed by an average mobile subscriber.

To meet the continuously growing demand for internet capacity, additional investments have become necessary to expand submarine cable infrastructure. Over the past nine years, the annual value of new submarine cable construction projects has exceeded USD 2 billion on average. These investments are expected to continue. The total value of new submarine cable systems scheduled to enter service between 2025 and 2027 could exceed USD 14 billion[12].

Submarine Cable Infrastructure Development Costs (billion USD)

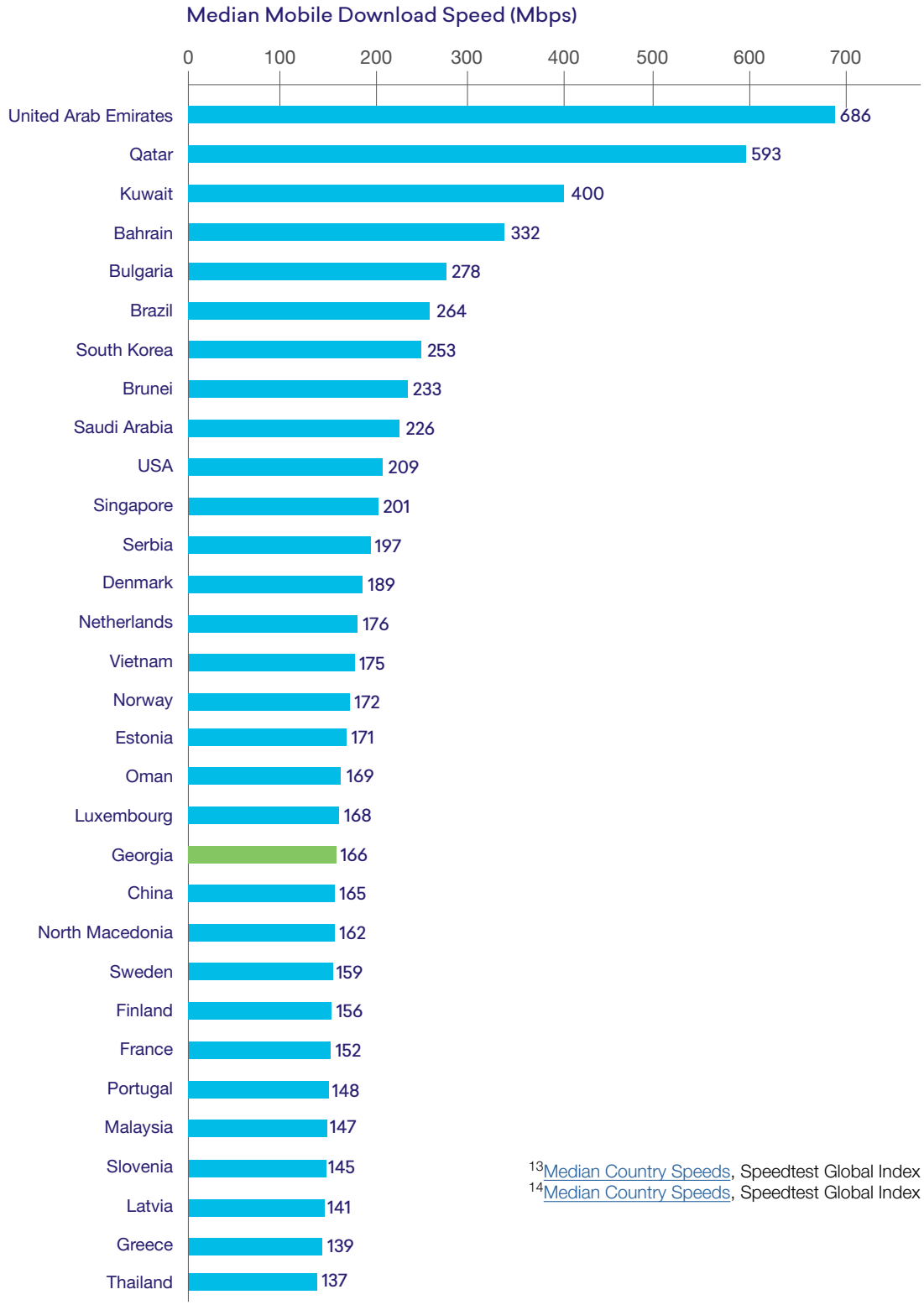



[9]Mobile broadband traffic is growing faster, but fixed networks still carry most of the Internet data, ITU, 2025.
[10]State of the Network 2026, TeleGeography.
[11]Mobile broadband traffic is growing faster, but fixed networks still carry most of the Internet data, ITU, 2025
[12]State of the Network 2026, TeleGeography.

The growth in network capacity, alongside rising demand for internet services, is being driven by the development of new technologies that enable significantly larger volumes of data to be transmitted per second than was previously possible. As a result, internet transmission speeds continue to increase globally. By the end of 2025, the average mobile download speed worldwide had reached 107.14 Mbps, while the average download speed on fixed broadband networks stood at 118.02 Mbps[13].

When comparing countries, the United Arab Emirates remained the global leader in mobile internet speed in 2025, as it had been in 2024. The median mobile download speed in the country exceeded 686 Mbps, representing a 51% increase year-on-year. Bulgaria retained its leading position among the European countries, recording a median mobile download speed of 277.97 Mbps. Here too, median speeds increased by nearly 50% year-on-year.

According to the same source, Georgia's median mobile download speed increased by 18% compared with the previous year, reaching 165.88 Mbps in 2025[14].



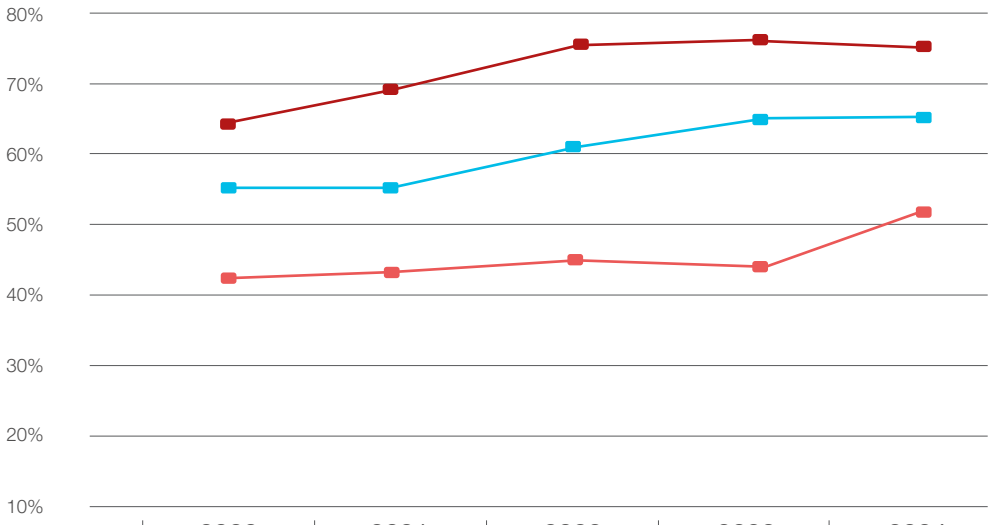

[13] Median Country Speeds, Speedtest Global Index 2026.
[14] Median Country Speeds, Speedtest Global Index 2026.

## Financial Figures

One of the important indicators when assessing the telecommunications markets is the EBITDA margin (earnings before interest, taxes, depreciation and amortisation as a percentage of revenue) of the operators. Based on the data from the first quarter of 2024, the average EBITDA margin of leading telecom operators worldwide was 34%[15].

The situation in Georgia differs significantly. The EBITDA margins of the country's three largest telecom operators substantially exceed those of leading operators worldwide. Specifically, the EBITDA margin of Magticom in 2024 was 74%, while the EBITDA margins of Silknet and Cellfie Mobile were 64% and 53% respectively.

EBITDA Margins of the Three Largest Operators on the Georgian Telecom Market



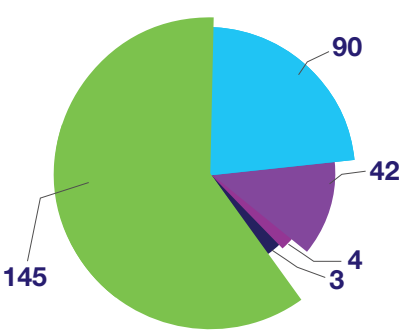

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|
| Magticom | 65% | 69% | 75% | 76% | 74% |
| Silknet | 56% | 56% | 61% | 64% | 64% |
| Cellfie | 42% | 43% | 45% | 44% | 53% |

[15] Global Performance Benchmarks of Telecom Operators, Twimbit, Spring 2024.

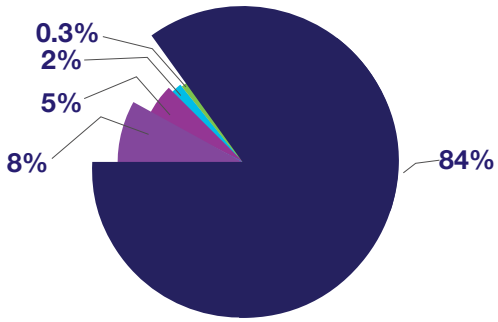
## Revenue of the Electronic Communications Sector and the Number of Active Authorised Companies

In 2025, there were 284 active companies[16] registered in the field of electronic communications in Georgia. Only 3 companies (Magticom, Silknet and Cellfie Mobile) generated revenues of more than GEL 100 million and were recognised as Category A companies[17]. The combined revenues generated by these companies amounted to 84% of the total revenues. The combined revenues of the authorised companies that generated less than GEL 100,000 in 2025 (145 companies of Category E) amounted to 0.3% of the total revenues.

Number of undertakings operating in the electronic communications sector by segment

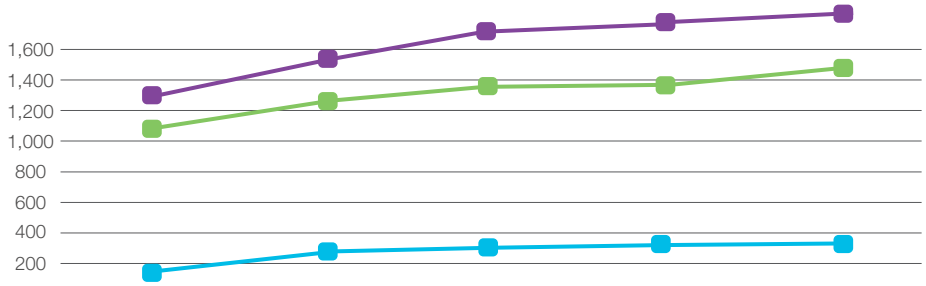



Distribution of revenues of undertakings operating in the field of electronic communications by segment




In 2025, the revenues generated by authorised companies from electronic communication services increased by GEL 112 million over the previous year and amounted to GEL 1,899 million. The compound annual growth rate (CAGR)[18] of retail revenues over the last 5 years was 10%.

Telecom Service Revenues of Authorised Companies Operating in Electronic Communications (million GEL)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Retail revenues | 1,058 | 1,202 | 1,353 | 1,461 | 1,562 |
| Other communication | 181 | 239 | 257 | 274 | 293 |
| Total | 1,239 | 1,441 | 1,610 | 1,735 | 1,855 |

[16]Companies that have generated any form of revenue in the field of electronic communications during the year.

[17]The following categories are considered:

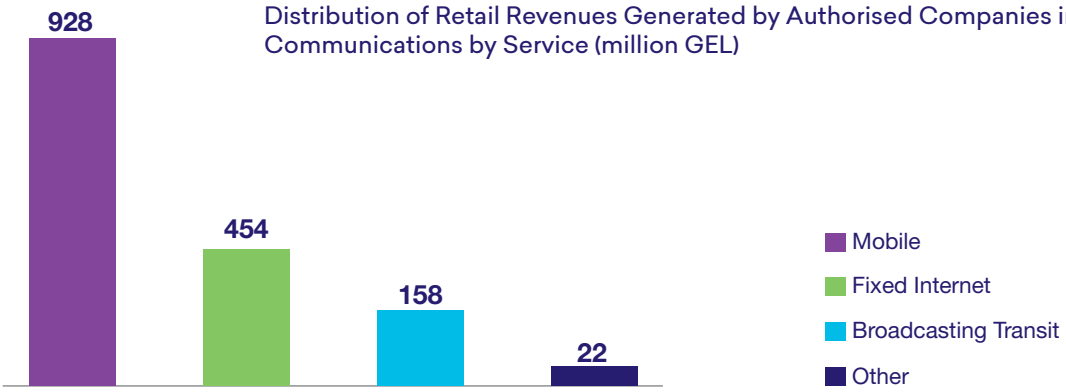
| Category | Revenues generated during the year |
|---|---|
| A | GEL 100 million or more |
| B | From GEL 10 million up to GEL 100 million |
| C | From GEL 1 million up to GEL 10 million |
| D | From GEL 100 000 up to GEL 1 million |
| E | Less than GEL 100 000 |

[18](CAGR – Compound Annual Growth Rate).

The revenues of the telecommunications sector accounted for approximately 1.8% of Georgia's Gross Domestic Product (GDP). This figure is based on the preliminary GDP data for 2025 published by the National Statistics Office of Georgia.

Mobile services generated the largest share of retail telecommunications revenues. In 2025, telecom companies earned more than GEL 926 million from mobile services, followed by fixed internet and broadcasting transmission.

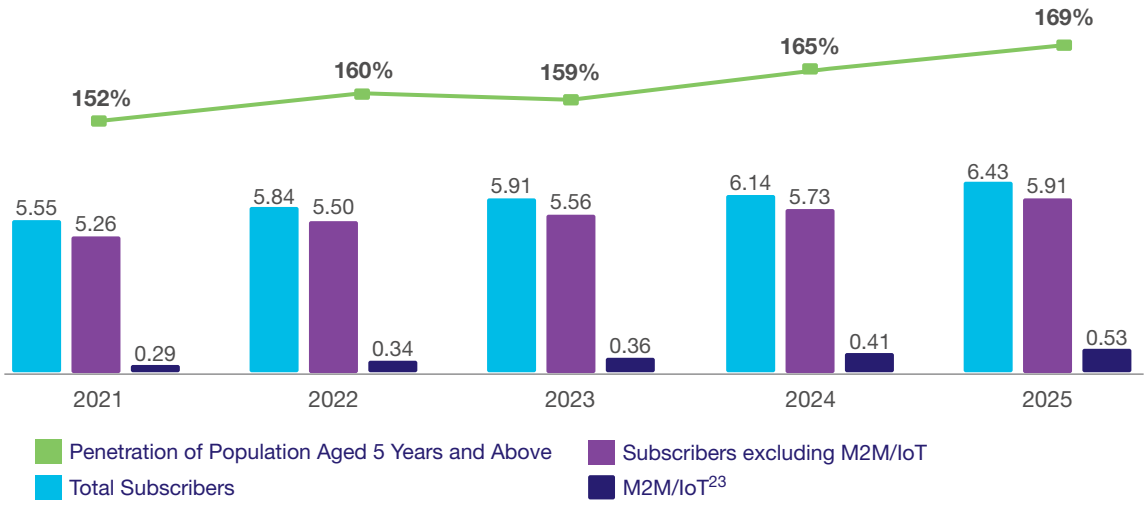
Distribution of Retail Revenues Generated by Authorised Companies in Electronic Communications by Service (million GEL)




## Mobile Communications[19] in Georgia

In 2025, the number of mobile subscribers[20] in Georgia increased by approximately 3% compared with the previous year, reaching 5.91 million by year-end. Mobile penetration also increased, reaching 169% of the population[21]. This figure indicates that a growing number of users own more than one mobile number and subscribe to multiple operators in order to take advantage of the most favorable service conditions for different needs. The increasing adoption of eSIM and iSIM technologies[22] has further enabled consumers to use services from multiple operators simultaneously on a single mobile device.

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

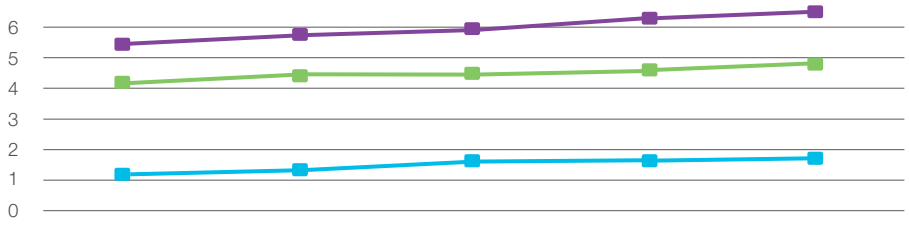



[19]As of 14 February 2025.
[20]A subscriber is a SIM card that has been used at least once during a three-month period to make a voice call, render a service or pay a subscription fee (including company employees, but not including test cards and M2M/IoT devices).
[21]The Georgian population includes persons aged 5 years and above.
[22]eSIM / iSIM are technologies built directly into a mobile device that allows connection to a mobile network without a physical SIM card.
[23]Machine-to-machine and Internet of Things SIM card that has been used at least once during a quarter to utilize mobile network services or sustain an active subscription.

For the purposes of the following analysis, M2M/IoT SIM cards are included in the subscriber count, with the exception of ARPU data.

The growth in subscriber numbers has been driven by increases in both corporate and individual subscribers. By the fourth quarter of 2025, business subscribers accounted for 26.3% of all mobile subscribers.

Number of Subscribers by Type (mln)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Residential | 4,23 | 4,46 | 4,43 | 4,59 | 4,75 |
| Business | 1,32 | 1,38 | 1,45 | 1,55 | 1,68 |
| Total | 5,55 | 5,84 | 5,88 | 6,14 | 6,43 |

Distribution of Subscribers

| Business | | Residential | |
|---|---|---|---|
| 2021 | **23.8%** | 2021 | **76.2%** |
| 2022 | **23.6%** | 2022 | **76.4%** |
| 2023 | **24.7%** | 2023 | **75.3%** |
| 2024 | **25.4%** | 2024 | **74.6%** |
| 2025 | **26.3%** | 2025 | **73.7%** |

The market shares of mobile operators, measured by subscriber numbers, remained virtually unchanged compared with the previous year and were distributed as follows: Magticom – 41%, Silknet – 36%, and Cellfie Mobile – 23%. The virtual operator Eclectic, operating under the brand name Hallo, had approximately 30,000 subscribers in the fourth quarter of 2025, corresponding to a market share of 0.4%.

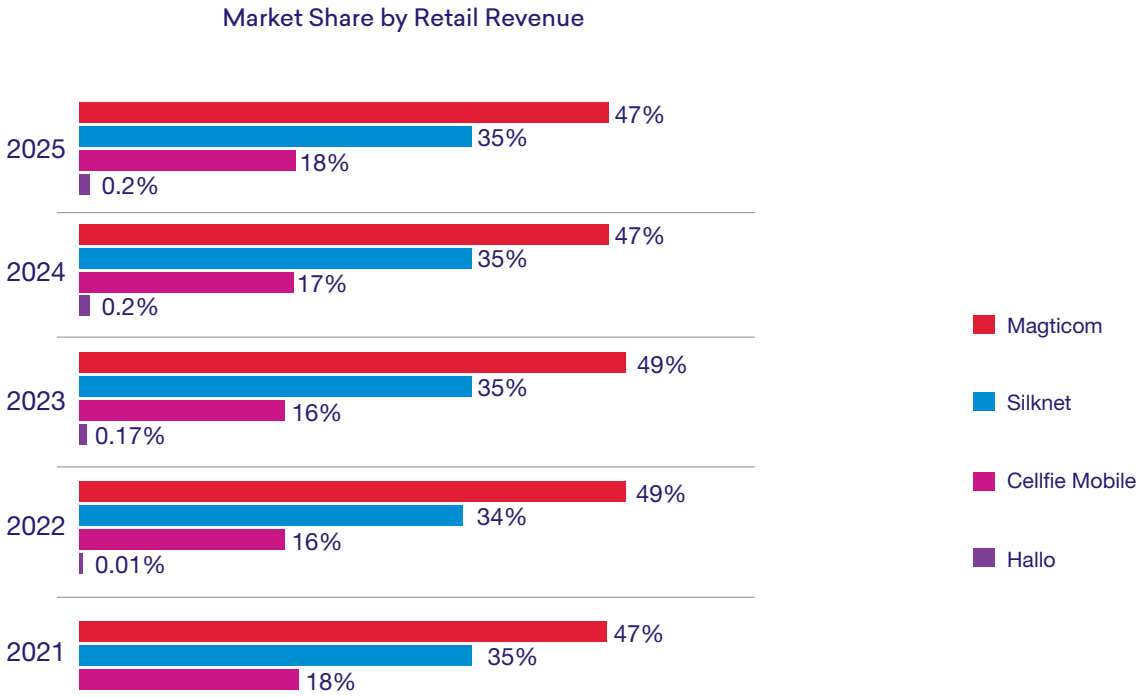
Number of Subscribers and Market Share by Subscribers
(in millions)

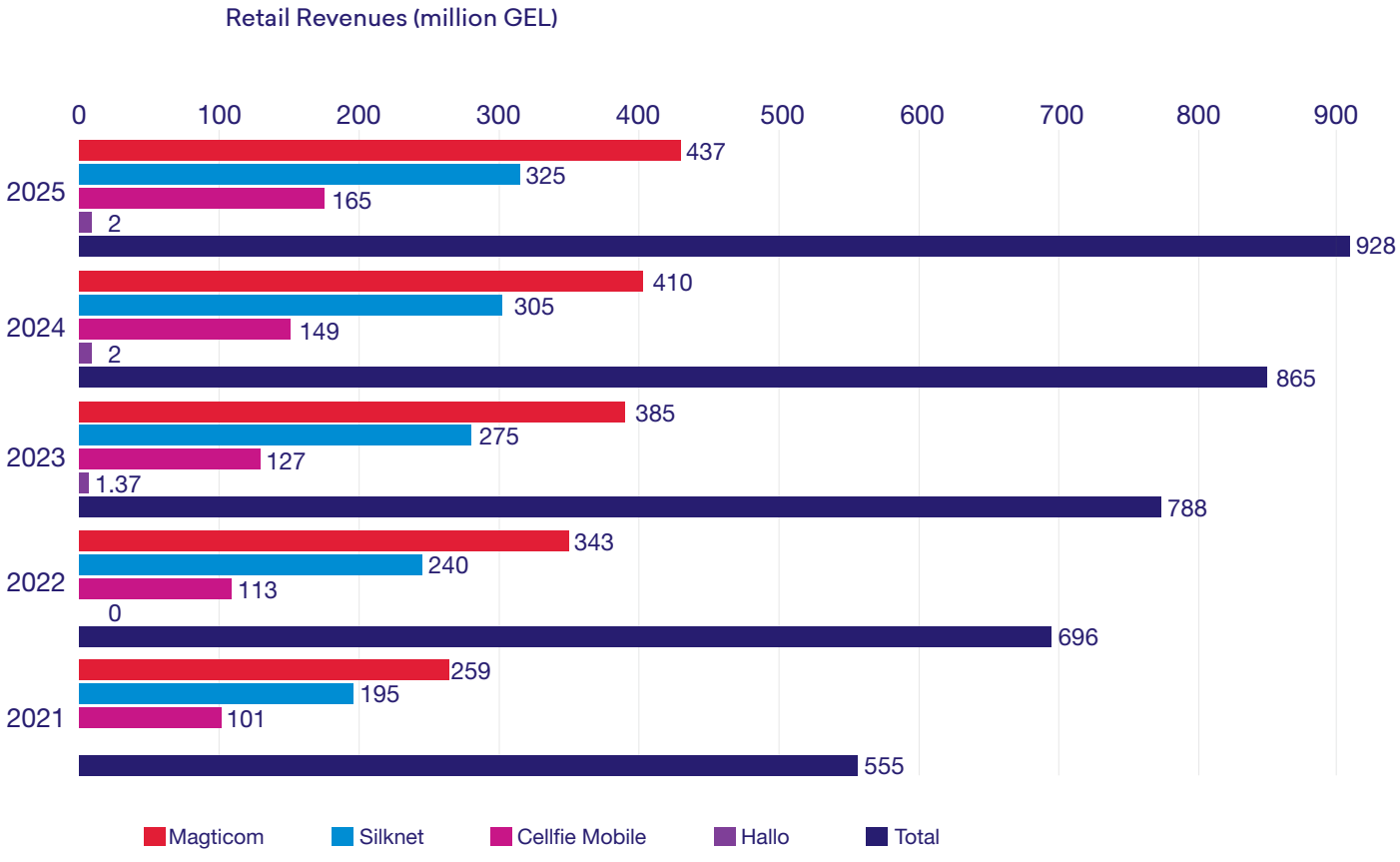
| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| MAGTI | 2.31 | 2.44 | 2.45 | 2.52 | 2.63 |
| | 42% | 42% | 41% | 41% | 41% |
| SILKNET | 1.85 | 1.96 | 2.02 | 2.17 | 2.31 |
| | 33% | 33% | 34% | 35% | 36% |
| cellfie | 1.4 | 1.45 | 1.41 | 1.42 | 1.47 |
| | 25% | 25% | 24% | 23% | 23% |
| Hallo | | 0.004 | 0.03 | 0.03 | 0.03 |
| | | 0.1% | 0.1% | 0.5% | 0.4% |

Number of Residential and Business Subscribers by Company
(in millions)

| | Magticom | Silknet | Cellfie Mobile | Hallo | Total |
|---|---|---|---|---|---|
| Residential | 1.9 | 1.63 | 1.18 | 0.02 | 4.7 |
| Business | 0.72 | 0.67 | 0.3 | 0.0 | 1.7 |

In 2025, the retail revenues of mobile operators totalled GEL 928 million. Magticom had the largest market share in retail revenues (47%), followed by Silknet (35%), Cellfie Mobile (18%) and Eclectic/Hallo (0.2%).



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

By subscriber numbers

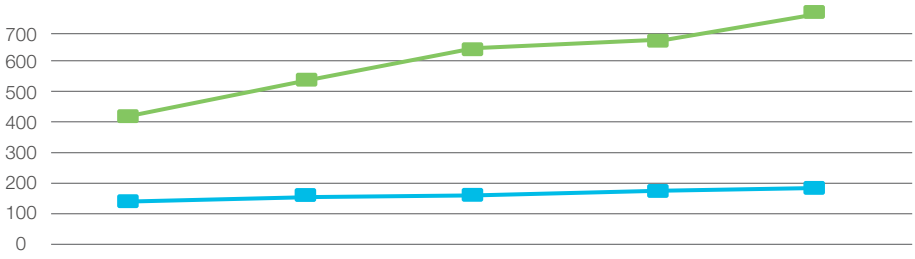
| | |
|---|---|
| Magticom | 41% |
| Silknet | 36% |
| Cellfie Mobile | 23% |
| Hallo | 0.4% |

By revenue

| | |
|---|---|
| Magticom | 47% |
| Silknet | 35% |
| Cellfie Mobile | 18% |
| Hallo | 0.2% |

## Revenues by Subscriber Type (million GEL)

80% of mobile revenues in 2025 were generated by residential subscribers, and 20% by business subscribers. Revenues in both segments are characterised by an increasing trend.




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Residential | 416 | 542 | 619 | 684 | 741 |
| Business | 138 | 154 | 168 | 181 | 187 |

## Revenues by Service (GEL millions)

In terms of services, the largest share of total revenues comes from mobile internet (61%).


Internet **61%**

Voice **30%**

SMS/Other **9%**

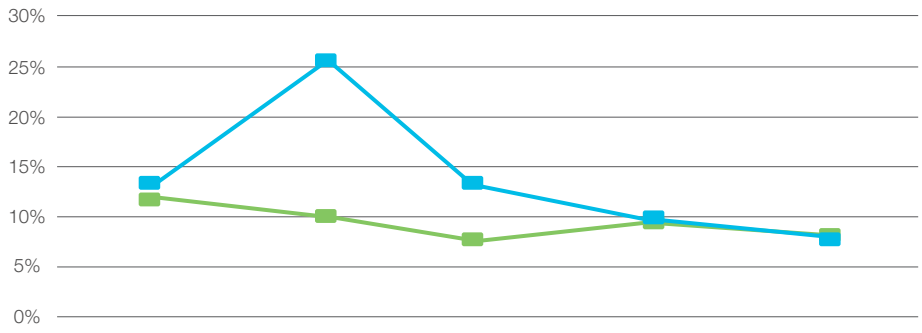
The distribution by residential and business subscribers shows that the ratio is more or less similar for the companies.

Distribution of Revenues from Residential and Business Subscribers by Companies

| | Magticom | Silknet | Cellfie Mobile | Hallo |
|---|---|---|---|---|
| Residential | **47.2%** | **36.3%** | **16.4%** | **0.2%** |
| Business | **50.3%** | **30.1%** | **19.6%** | **0.00001%** |

## Mobile service revenues relative to the country's economic figures

Growth in Mobile Revenues Relative to GDP Growth

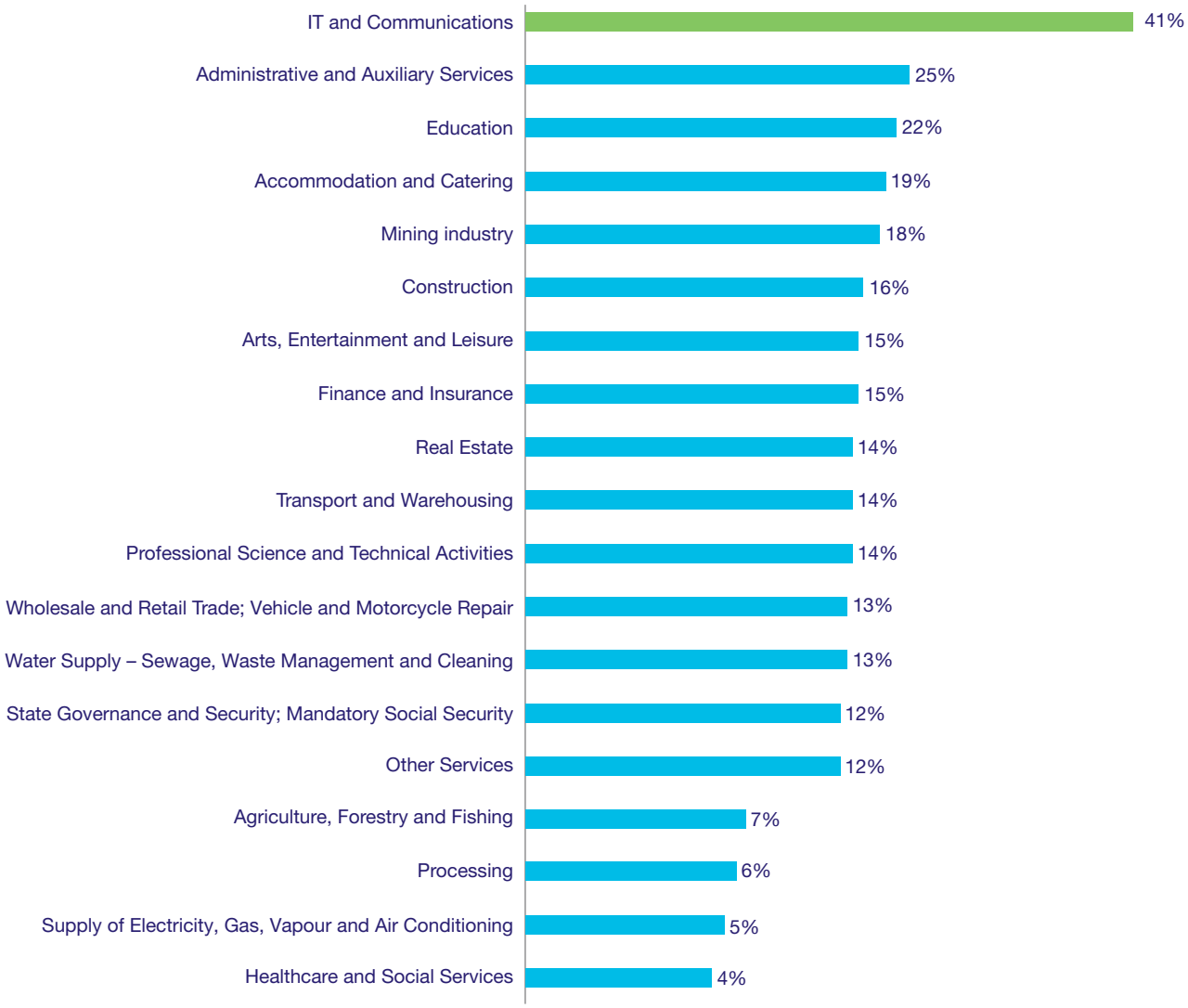



| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| GDP Growth | 11% | 10% | 7.5% | 9.7% | 7.5% |
| Mobile Revenue Growth | 13% | 25.5% | 13.2% | 9.8% | 7.5% |

*Preliminary data on 2025 real GDP growth published by the National Statistics Office of Georgia.

Below is the average growth rate of Georgia's 19 largest industries[24] (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 (Q4 Forecast)




[24] „Other" includes the total growth rate of relatively small industries. These industries are: agriculture, forestry and fishing; administrative and support services; other services; water supply; sewage, waste management and pollution control activities, and activities of households as employers; undifferentiated production of goods and services by households for own consumption.

## Average Revenue per User (ARPU)[25]

According to the 2025 data, the average revenue per user increased by 5% to GEL 14.8 (excluding VAT)[26]. ARPU is calculated without M2M/IoT.

| ARPU (GEL) | |
|---|---|
| 2021 | **10.2** |
| 2022 | **12.5** |
| 2023 | **13.5** |
| 2024 | **14.0** |
| 2025 | **14.8** |

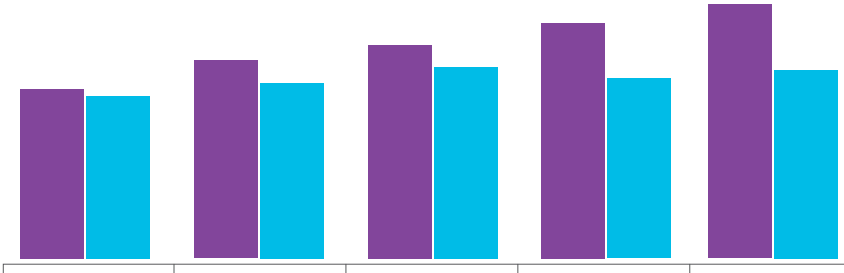
In terms of operators, according to December 2025 data, Magticom has the highest ARPU, followed by Silknet, while Cellfie Mobile and Hallo subscribers spend the least on mobile connections. Furthermore, the ARPU figures have increased for all the operators year-on-year.

ARPU by Companies (GEL)

| | Magticom | Silknet | Cellfie Mobile | Hallo |
|---|---|---|---|---|
| 2021 | **11.8** | **10.9** | **6.9** | **0** |
| 2022 | **15.3** | **13.0** | **7.7** | **7.0** |
| 2023 | **16.1** | **13.9** | **9.0** | **8.5** |
| 2024 | **16.6** | **14.1** | **9.8** | **7.7** |
| 2025 | **17.5** | **14.4** | **10.9** | **9.9** |

According to December 2025 data, the ARPU of residential subscribers exceeds that of business suscribers by 9.5%. It is worth noting that over the years, the difference between the ARPU of residential and business subscribers has been quite dynamic. In 2021, the average revenue of business subscribers exceeded the figure for residential subscribers. Now, the ARPU of residential subscribers has surpassed the average revenue of business subscribers.

ARPU by Subscriber Type (GEL)



| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Residential | 9.8 | 12.4 | 13.4 | 14.2 | 15.0 |
| Business | 11.9 | 13.1 | 13.8 | 13.5 | 13.7 |

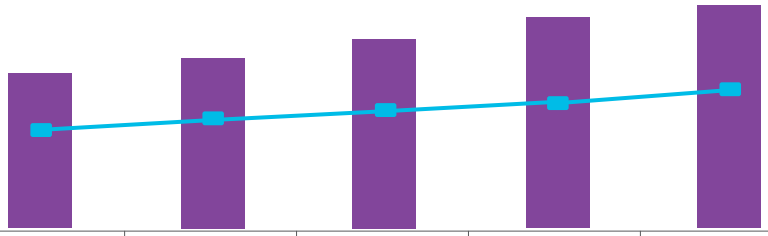
[25]ARPU – Average revenue per user, excluding VAT.
[26]As of December 2025.

## Mobile Internet

The number of mobile internet users in Georgia has been growing significantly each year. Between 2021 and the end of 2025, the compound annual growth rate (CAGR) of the number of mobile internet users was 8.2%[27].

At the end of 2025, 5.1 million mobile subscribers were using internet services through mobile networks. The mobile internet user penetration rate was 80%.

Mobile Internet User Number (mln.) and Penetration Rate



| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Mobile Internet Users | 3.75 | 4.10 | 4.32 | 4.60 | 5.1 |
| Mobile User Penetration Rate | 68% | 70% | 73% | 75% | 80% |

At the end of 2025, Magticom had the highest number of mobile internet users with 1.95 million, followed by Silknet with 1.80 million, and Cellfie Mobile with 1.38 million.

The share of mobile internet users in the total number of subscribers varies by operator. Cellfie Mobile ranks first, with 94% of its subscribers using mobile internet services. Silknet ranks second with a penetration rate of 78%, followed by Magticom with 74%. The particularly high rate observed for Cellfie Mobile is largely attributed to its comparatively lower mobile internet tariffs and the characteristics of its customer base.

Mobile Internet Users (million)

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Magticom | 1.34 | 1.45 | 1.52 | 1.63 | 1.95 |
| Silknet | 1.35 | 1.48 | 1.57 | 1.70 | 1.80 |
| Cellfie | 1.06 | 1.17 | 1.21 | 1.25 | 1.38 |
| Hallo | - | 0 | 0.02 | 0.02 | 0.02 |

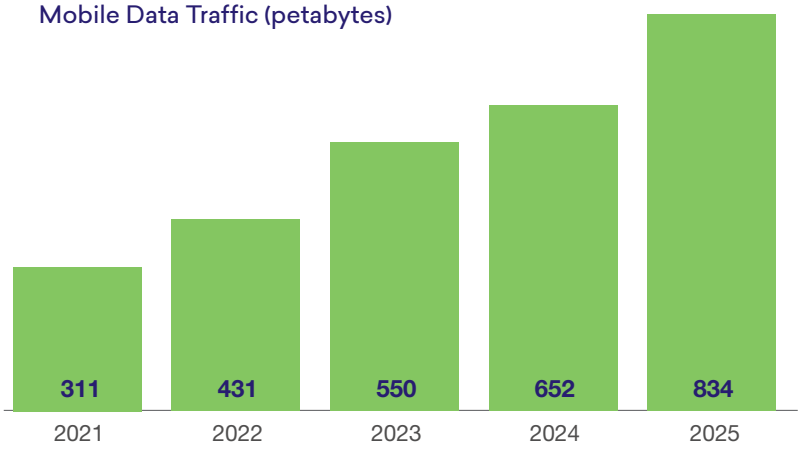
Mobile Internet User Penetration Rate by Companies

| | |
|---|---|
| Cellfie | 94% |
| Silknet | 78% |
| Magticom | 74% |
| Hallo | 71% |

[27] CARG – Compound Annual Growth Rate.

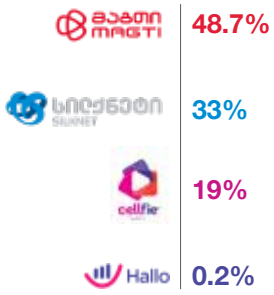
In 2025, the volume of traffic generated by mobile internet users increased by 27% year-on-year to 834 petabytes. This is due to the increase in the number of mobile internet users and the number of new generation phones on the market, as well as the expansion of 5G network coverage and increased demand for Internet connectivity.

Mobile Data Traffic (petabytes)



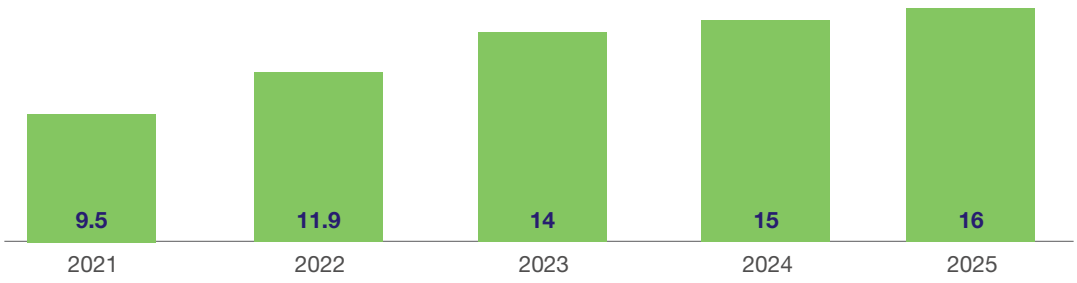

Magticom subscribers generated 48.7% of the total mobile data traffic in 2025, while Silknet and Cellfie Mobile subscribers generated 33% and 19%, respectively.

The Share of Operators in the Mobile Data Traffic




The growth in total mobile internet traffic is also driven by an increase in the average mobile internet traffic per subscriber, which increased by 7% year-on-year to 16 GB.

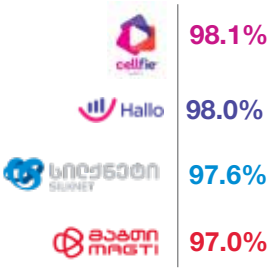
Average Monthly Mobile Data Traffic per Subscriber (GB)




Average Monthly Mobile Data Traffic per Subscriber (GB)

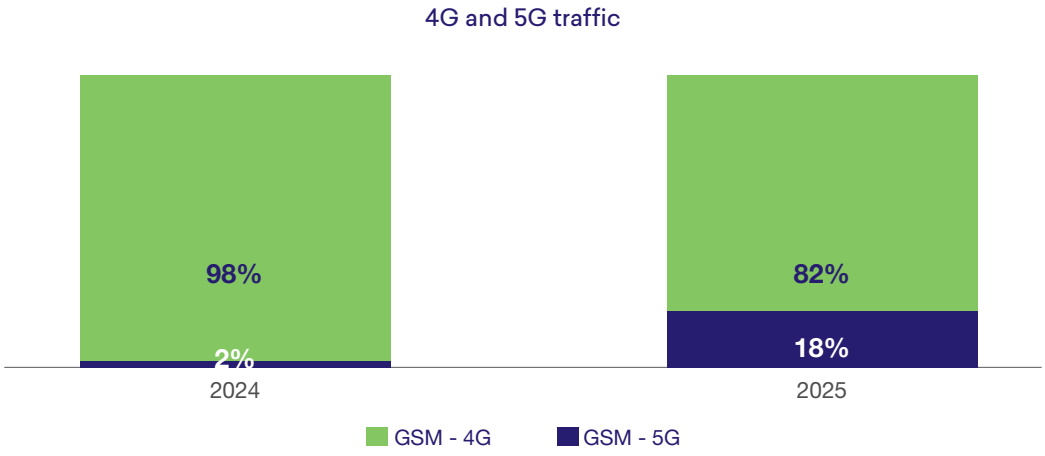

With the growing use of 4G and 5G technologies, the volume of data traffic generated by 2G and 3G technologies is decreasing. In 2025, 4G and 5G accounted for 97.4% of all mobile data traffic.

The Share of 4G+5G in Total Mobile Data Traffic



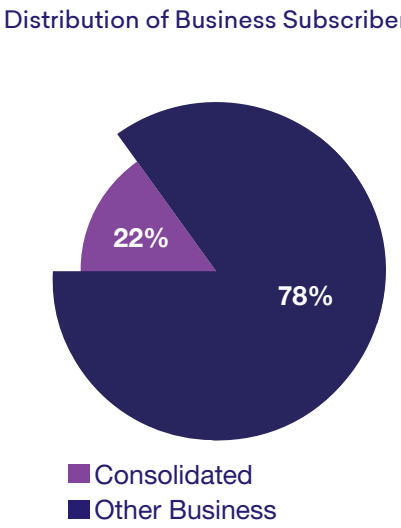
In June 2025, the Communications Commission held an auction to offer mobile operators harmonised frequency resources for 5G technology. During the auction, Silknet acquired the license for the use of the 5G network. Thus, all three major operators have been offering new 5G services from the second half of 2025. Cellfie Mobile was first to obtain a license for 5G frequencies during the auction announced in 2023, while Magticom acquired the license in late 2024 and immediately launched the 5G technology commercially.

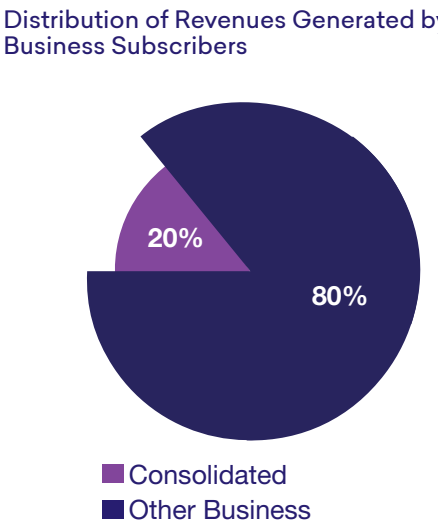
In light of the above, the share of traffic generated by 5G technology in the mobile data traffic in Georgia increased significantly in 2025.



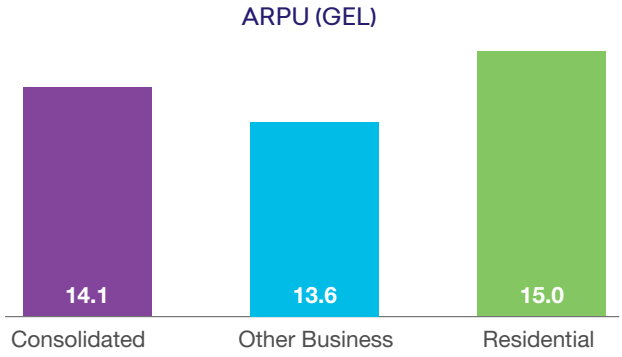

## Business Subscriber Segment

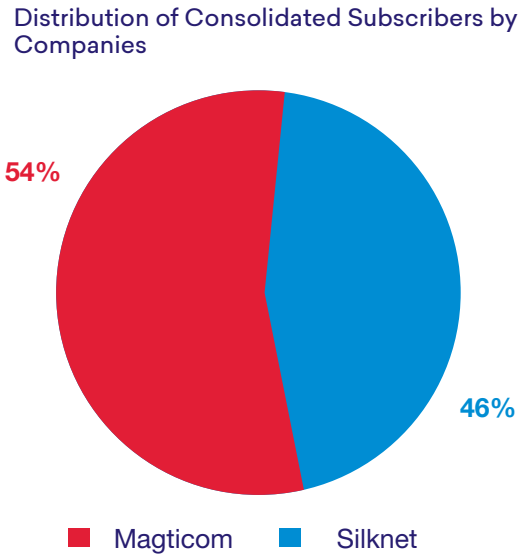
At the end of 2025, there were roughly 299,000 active subscribers included in the consolidated state tender, which is 22% of the total number of business subscribers.



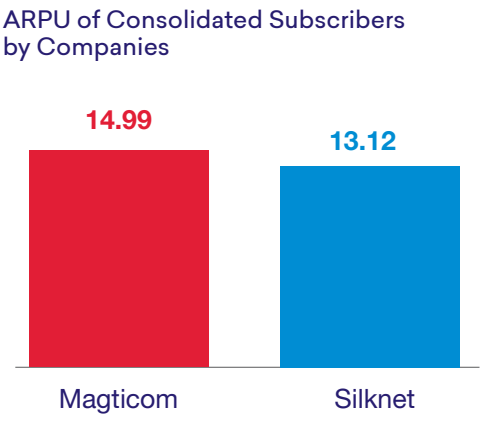



The monthly ARPU of subscribers included in the consolidated tender exceeds the ARPU of other business subscribers by an average of GEL 0.5[28].




The number of subscribers involved in the consolidated tender is almost equally divided between Magticom and Silknet. Magticom serves more consolidated subscribers than Silknet.

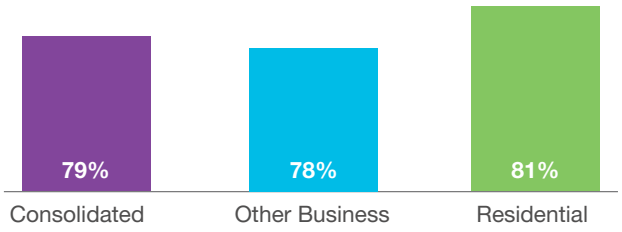



According to the December 2025 data, subscribers connected to the Magticom network as part of the consolidated tender spent GEL 1.87 more than the same segment subscribers on Silknet.

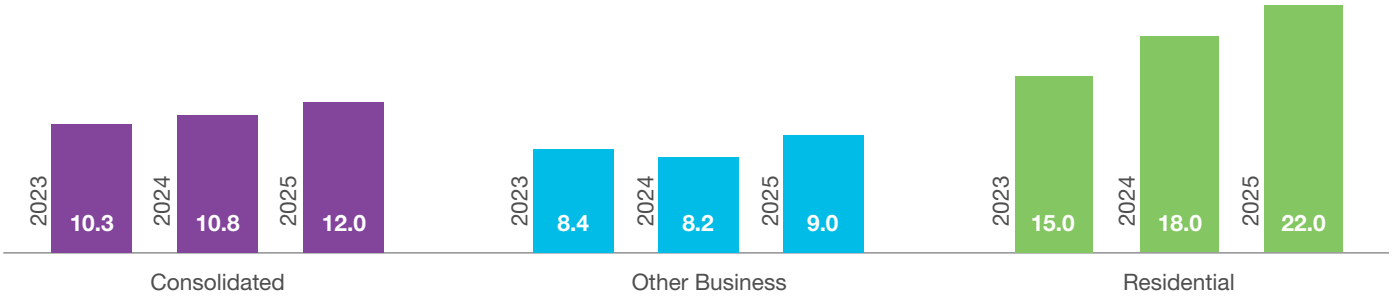
[28]ARPU for December 2025.

At the end of 2025, the penetration rate of mobile internet users among the consolidated tender subscribers was 79%, while the figure for other business subscribers was 78%. The penetration rate of mobile internet users among the residential subscribers was 81%, exceeding the figures for consolidated tender subscribers and business subscribers alike.

Mobile internet subscriber penetration within total subscribers by segment

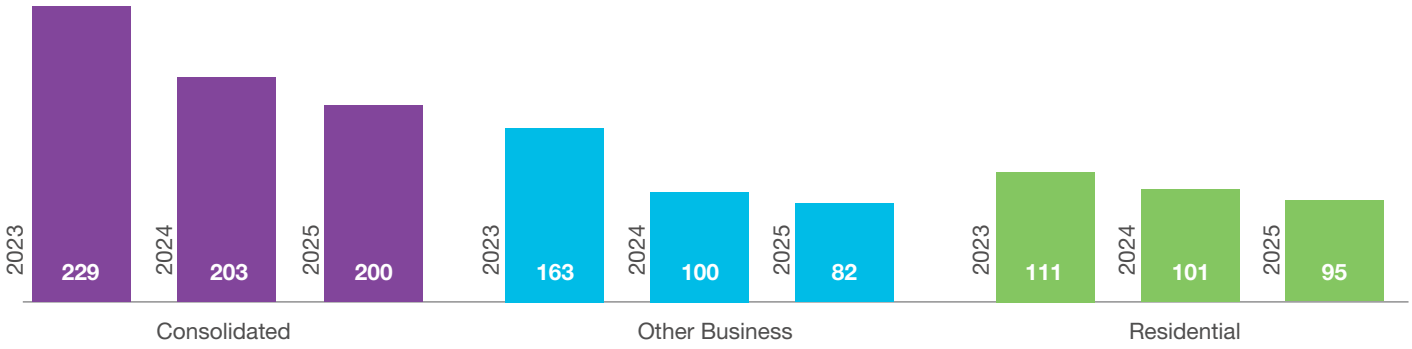



Average Monthly Mobile Data Traffic per Subscriber (GB)




Consolidated tender subscribers once again topped the list of voice service users in 2025, spending an average of 200 minutes[29] talking on their mobile phones each month. Other business subscribers talked for 82 minutes, while residential subscribers talked for 95 minutes. The average number of voice service minutes used by one subscriber decreased for all three segments.

Average MOU (minutes)




[29]Average for the fourth quarter of 2025.

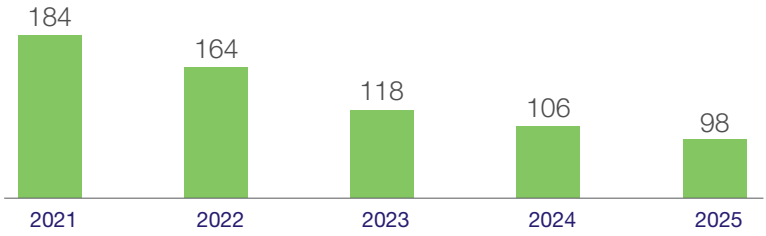
## Voice Traffic and MOU

| Voice Traffic (billion minutes) | |
|---|---|
| 2021 | **10.23** |
| 2022 | **9.17** |
| 2023 | **8.41** |
| 2024 | **8.02** |
| 2025 | **7.50** |

Reflecting the global trend, a decrease in voice traffic delivered through traditional technologies has also been evident in Georgia. The reason for this is the increase in internet usage, which allows subscribers to communicate through various social networks or relevant OTT (Over the Top)[30] applications such as WhatsApp, Viber, Zoom, Teams, etc. without any additional fees.

In 2025, the total outgoing voice traffic decreased by 7% year-over-year and amounted to 7.5 billion minutes. The average minutes of use (MOU)[31] also decreased to 98 minutes[32].

Average MOU




According to the data for the fourth quarter of 2025, 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.

Average Monthly MOU by Companies (billion minutes)


108


95


93

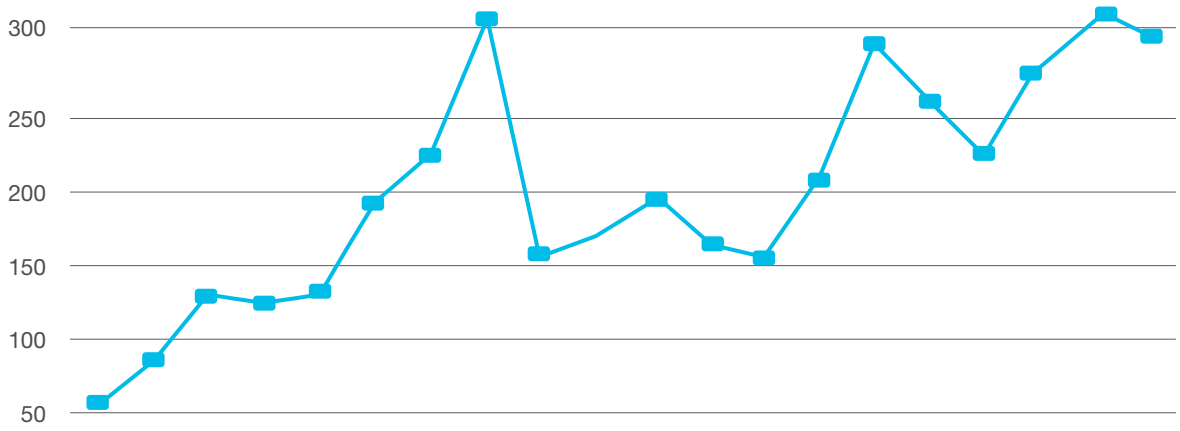

6

[30]An app or service that provides users with telecommunications services such as text and multimedia messages, voice calls (audio), and video content via Internet Protocol (IP), bypassing traditional telecom operators.
[31]Minutes of Use (MOU) – average talking time in a month (outgoing calls only).
[32]Average for the fourth quarter of 2025.

## Roaming

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

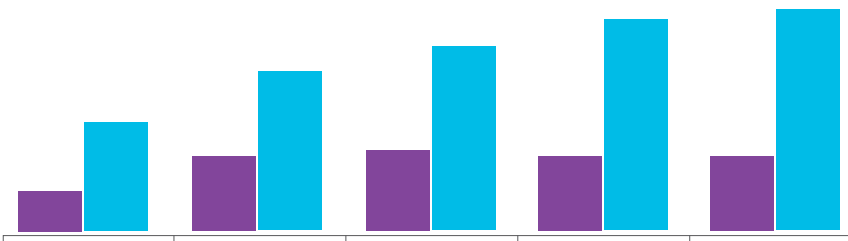
Outgoing Roamers (thousands)




| | I | II | III | IV | I | II | III | IV | I | II | III | IV | I | II | III | IV | I | II | III | IV |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2021 | | | | 2022 | | | | 2023 | | | | 2024 | | | | 2025 | | | |
| Outgoing Roamers | 57 | 87 | 132 | 127 | 132 | 194 | 227 | 309 | 153 | 174 | 196 | 172 | 157 | 219 | 284 | 258 | 242 | 278 | 308 | 296 |

The total revenue from roaming services in 2025 amounted to GEL 36.2 million.

Revenue from Roamers (GEL millions)

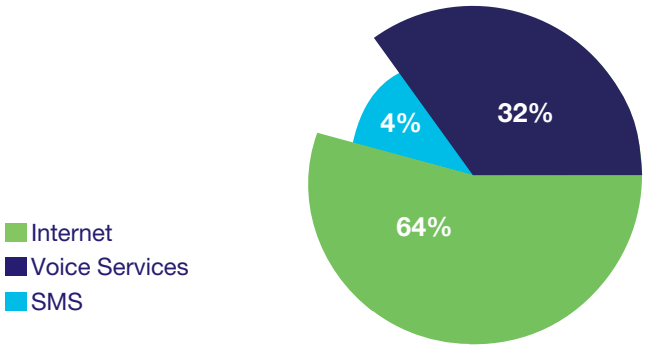


| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Outgoing Roamers | 5 | 7 | 8 | 7 | 7 |
| Incoming Roamers | 15 | 21 | 24 | 28 | 29 |

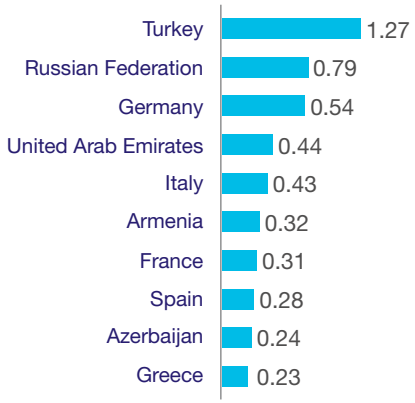
In 2025, outgoing roamers from Georgia spent the most amount of money on roaming services in Türkiye, which was facilitated by their use of Türkiye as a transit country to reach their final destination. Türkiye is also a favorable destination for travel in its own right. The second position was retained by the Russian Federation, while the United Arab Emirates moved from 5th to 4th place, reflecting the increase in the number of Georgian travellers to this country.

Internet services once again accounted for the largest share of the revenues generated by outgoing roamers (64%), while the shares of other services were as follows:

Distribution of Revenues Generated by Outgoing Roamers by Service



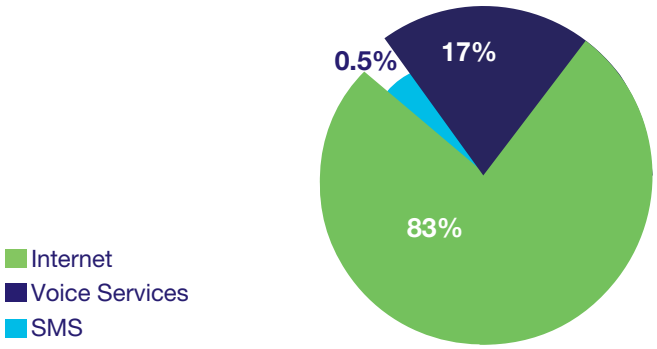

Top Countries for Outgoing Roamers (Revenue, million GEL)



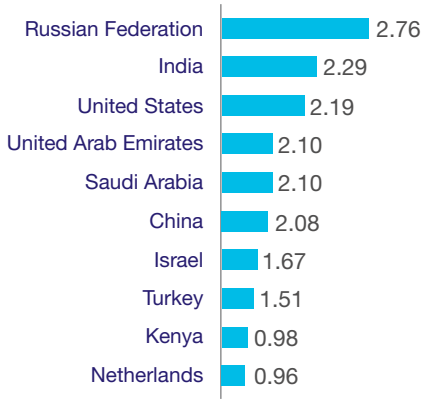

The most money on mobile services during their stay in Georgia was spent by roamers from the Russian Federation.

The distribution of revenues generated by incoming roamers by service was as follows:

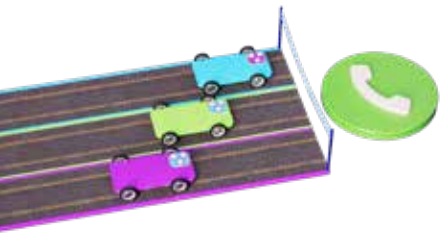
Distribution of Revenues Generated by Incoming Roamers by Service




Top Countries for Incoming Roamers (Revenue, million GEL)



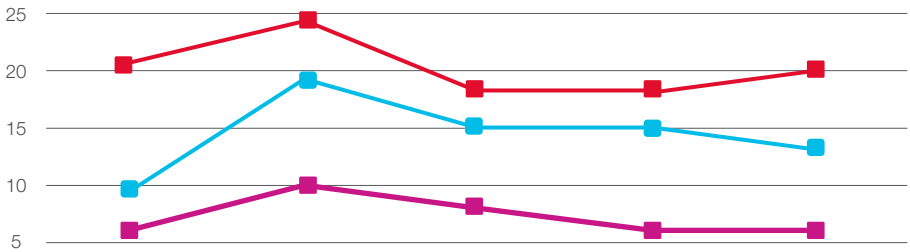
# Mobile Number Porting



| Number of Ported Numbers (thousands) | |
|---|---|
| 2021 | **37** |
| 2022 | **52** |
| 2023 | **39** |
| 2024 | **38** |
| 2025 | **39** |

In 2025, around 39,000 numbers were ported to the networks of mobile operators, which is about 1,000 more than in 2024.

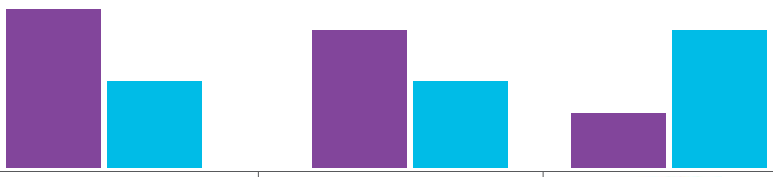
Number of Ported Subscribers (thousands)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| magti | 21 | 24 | 17 | 17 | 20 |
| silknet | 9 | 19 | 15 | 15 | 13 |
| cellfie | 6 | 10 | 7 | 6 | 6 |

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)



| | magti | silknet | cellfie |
|---|---|---|---|
| Ported In | 19.90 | 13.03 | 5.71 |
| Ported Out | 10.40 | 13.51 | 15.26 |

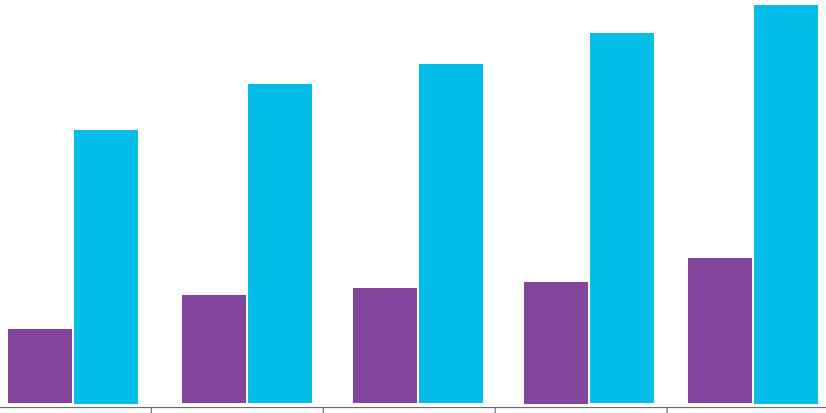
## Fixed Broadband[33] Services

The fixed broadband market in Georgia continues to expand year after year. This growth is primarily driven by an increase in the number of households and businesses across the country, as well as the ongoing development and expansion of fibre-optic infrastructure and coverage. Recent market trends indicate that the number of subscribers using fibre-optic broadband technology continues to grow steadily, while the number of users relying on older technologies such as xDSL and fixed wireless access services, including fixed LTE internet, has been significantly declining. This shift in the technological structure of the market is largely attributable to the technical and economic advantages of fibre-optic technology, including higher data transmission speeds, greater network capacity, and lower latency. In addition, satellite broadband services have begun to develop in Georgia in recent years, driven by the availability of Starlink services in the country. Satellite internet is particularly important for geographically remote areas where the deployment of fixed infrastructure is less economically viable.

As of the fourth quarter of 2025, the number of fixed broadband internet subscribers in Georgia reached 1.21 million, which represents an increase of approximately 54,000 (4.7%) year-on-year. During the same period, both residential and business subscriber segments grew at an identical rate of 4.7%.

Analysis of long-term market dynamics shows that subscriber growth has remained consistently positive over the past five years. During the reporting period, the average annual growth rate for residential subscribers was 4.6%, while the average annual growth rate for business subscribers was 5.4%.

Number of Suscribers by Contract Type (thousands)



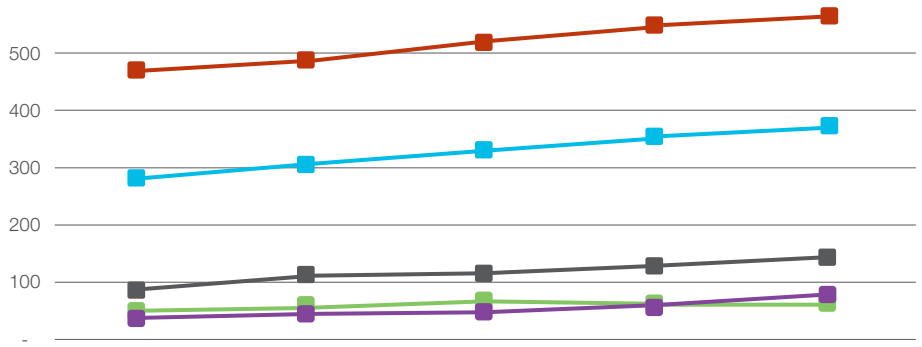
| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Business | 47 | 52 | 54 | 56 | 58 |
| Residential | 962 | 1,024 | 1,061 | 1,102 | 1,154 |
| Total | 1,009 | 1,076 | 1,115 | 1,158 | 1,212 |

[33]According to the ITU, 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.

In 2025, the number of residential fixed broadband subscribers in Georgia reached 1.15 million, an increase of approximately 51,400 subscribers compared with the previous year. At the time this report was prepared, the National Statistics Office of Georgia had not yet published the results of the 2024 household census. Consequently, updated household penetration data will be presented in the next annual report of the Communications Commission.

Compared with 2024, the largest increases in residential subscriber numbers were recorded by Silknet (an increase of about 20,000 subscribers) and Skytel (an increase of about 13,000 subscribers). One of the main factors behind Skytel's growth was the merger of several smaller operators into the company during 2025.

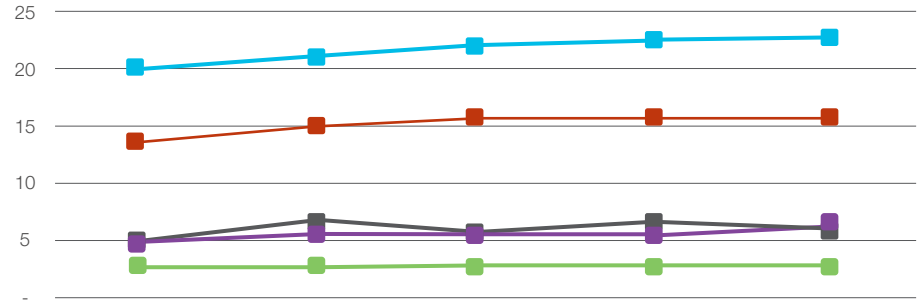
Number of Residential Subscribers by Company (thousands)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Magticom | 474 | 497 | 508 | 518 | 529 |
| Silknet | 285 | 308 | 322 | 341 | 361 |
| Skytel | 50 | 55 | 58 | 64 | 77 |
| Akhali Kselebi Group | 59 | 60 | 64 | 64 | 64 |
| Other | 94 | 104 | 109 | 115 | 123 |

As of Q4 2025, Silknet had the largest number of business subscribers, followed by Magticom and Skytel.

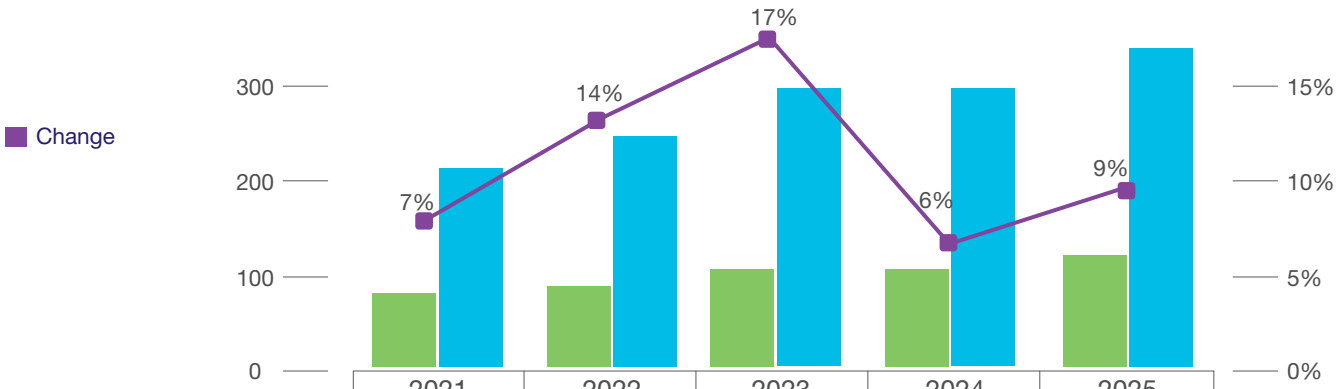
Number of Business Subscribers by Companies (thousands)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Silknet | 20 | 21 | 23 | 24 | 26 |
| Magticom | 14 | 15 | 16 | 16 | 16 |
| Skytel | 5 | 6 | 6 | 6 | 7 |
| Akhali Kselebi Group | 3 | 3 | 3 | 3 | 3 |
| Other | 5 | 7 | 6 | 7 | 6 |

In 2025, retail revenues from fixed broadband services increased by 9% year-on-year to GEL 454 million.

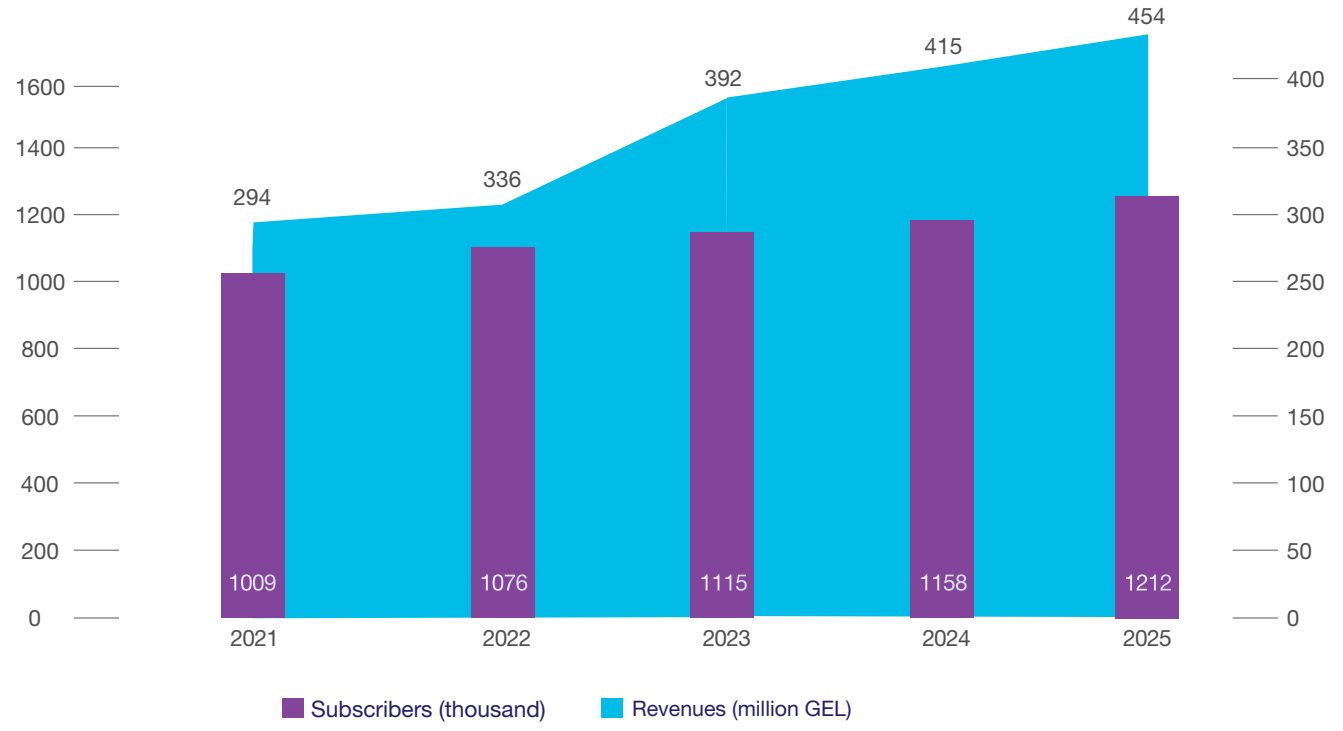
Retail Segment Revenues (GEL millions)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Business | 81 | 92 | 105 | 115 | 127 |
| Residential | 214 | 244 | 287 | 300 | 327 |
| Total | 295 | 336 | 392 | 415 | 454 |

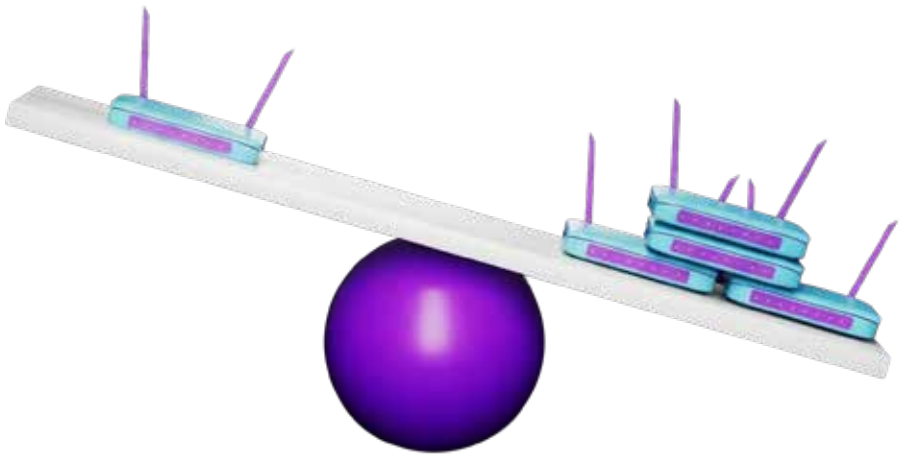
The average growth rates of revenues and subscriber numbers differ from each other. During the last 5 years, the average growth in revenues was 11.4%, while the average growth in subscriber numbers was 4.7%. This disparity suggests that the average amount paid per subscriber has been increasing over time. The trend may be attributable to higher service tariffs, or an increased use of premium services.

Growth in Retail Revenues and Number of Subscibers



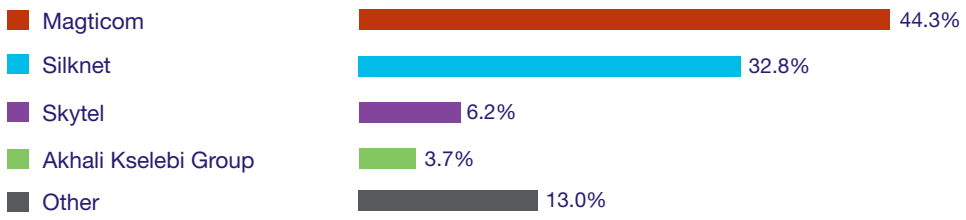
Business subscribers account for 28% of the total revenue, even though they only account for 5% of the total number of subscribers. This indicates that, unlike the mobile services market, the fees paid by business customers for fixed broadband services are significantly higher than those paid by residential subscribers.

Distribution of Revenues and Subscribers by Subscriber Type

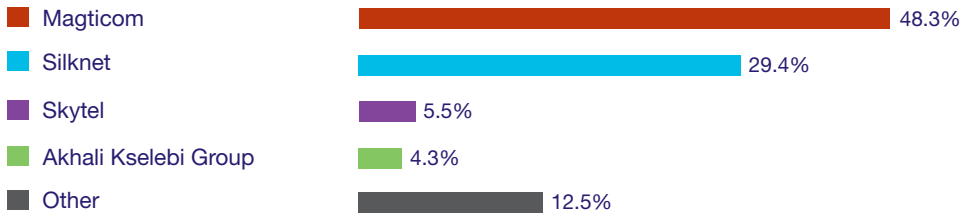
In 2025, 87% of the revenues from fixed broadband services were generated by the four largest players on the market, while the remaining 13% were distributed among the smaller companies. In terms of revenue, Magticom had a 44.3% share of the market, followed by Silknet with 32.8%, Skytel with 6.2%, and Akhali Kselebi Group with 3.7%.

Distribution of Revenues by Companies

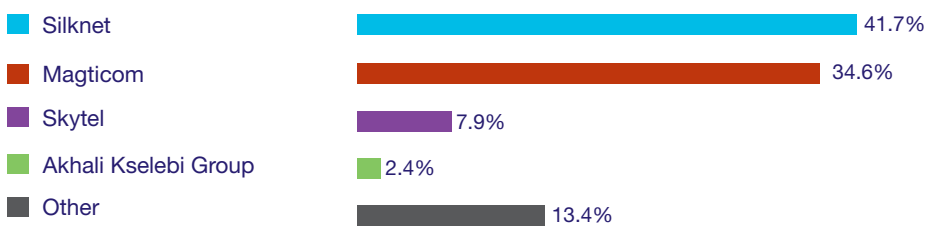



If we compare the residential and business subscriber segments by generated revenues, Magticom has the largest share of revenues among residential subscribers, while Silknet has the largest share among business subscribers.

Distribution of Revenues Generated by Residential Subscribers by Companies

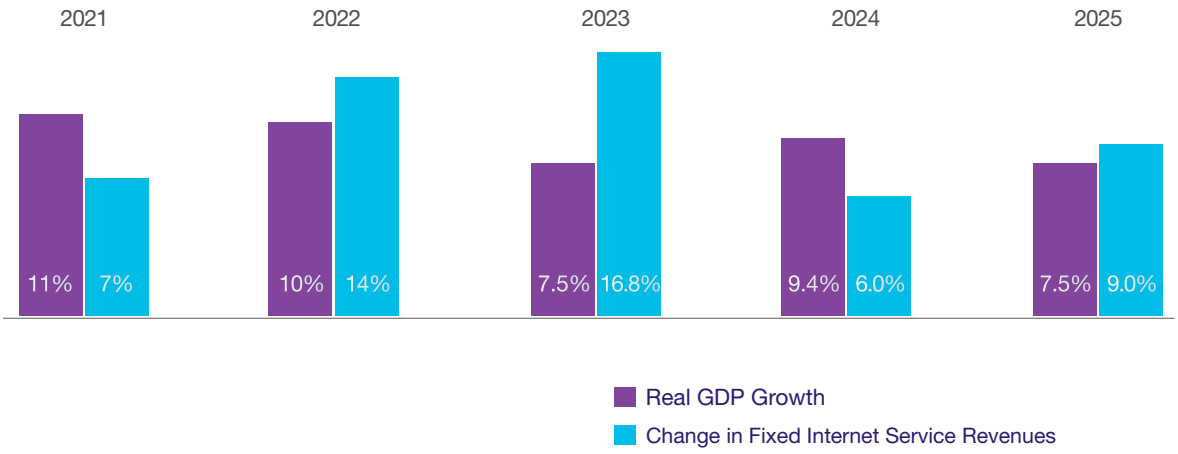



Distribution of Revenues Generated by Business Subscribers by Companies



The percentage change figures for fixed broadband revenues and the GDP in 2025 are positive and closer to each other than in the previous year. The GDP growth rate fell from 9.4% to 7.5%[34], while fixed broadband revenue growth increased from 6% to 9%.

Growth Rate of GDP and Fixed Broadband Revenues




The average revenue per user (ARPU)[35] of residential subscribers in 2025 was GEL 24.8, while the ARPU of business subscribers was GEL 184.8. The ARPU of business subscribers increased by 3.7% year-on-year, while the ARPU of residential subscribers increased by 7.7%.

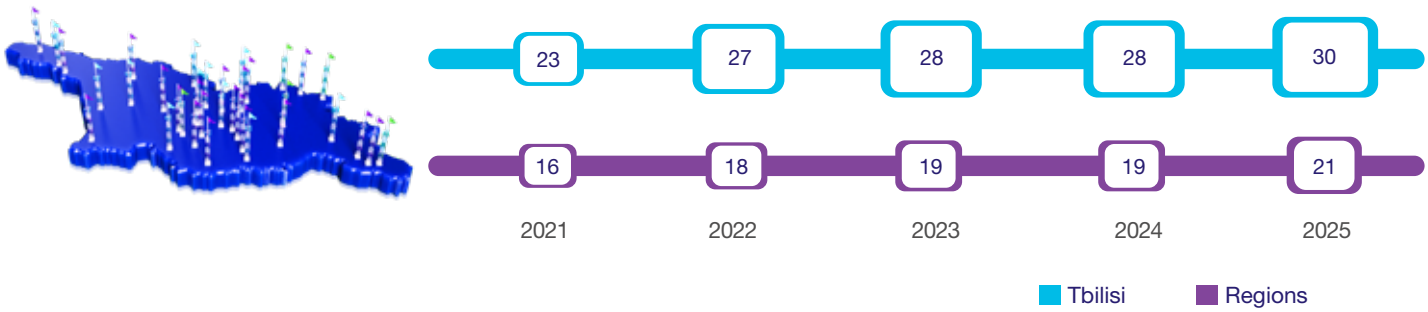
ARPU of Residential and Business Subscribers

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Residential | 149.5 | 157.1 | 169.7 | 178.2 | 184.8 |
| Business | 19.1 | 22.4 | 23.1 | 23.1 | 24.8 |

[34]Preliminary real GDP growth rate for 2025 published by the National Statistics Office of Georgia.
[35]ARPU – Avarage Revenue per User.

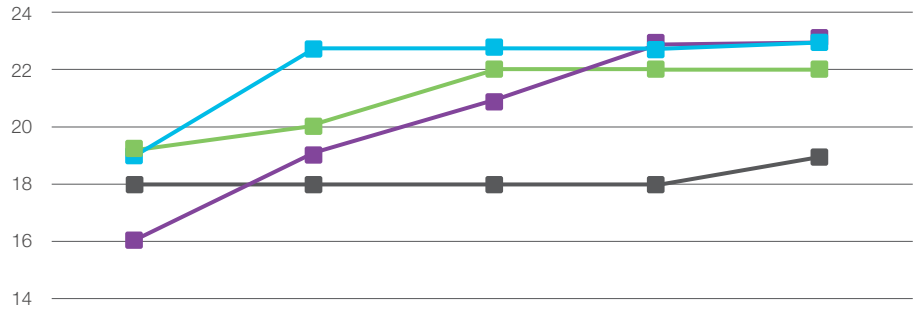
According to the data of the fourth quarter of 2025, the ARPU of residential subscribers in Tbilisi exceeded the ARPU of subscribers in the regions by 40%. Compared with the previous year, the ARPU figures increased by 4% in Tbilisi, and by 12% in the regions.

ARPU of Residential Subscribers in Tbilisi and the Regions




Fibre-optic technology accounts for the highest ARPU among residential subscribers with GEL 24.4.

ARPU of Residential Subscribers by Technology (GEL)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| FTTx | 19 | 23 | 23 | 23 | 24 |
| Fixed LTE | 16 | 19 | 21 | 23 | 24 |
| FWA | 19 | 20 | 22 | 22 | 22 |
| xDSL | 18 | 18 | 18 | 18 | 19 |

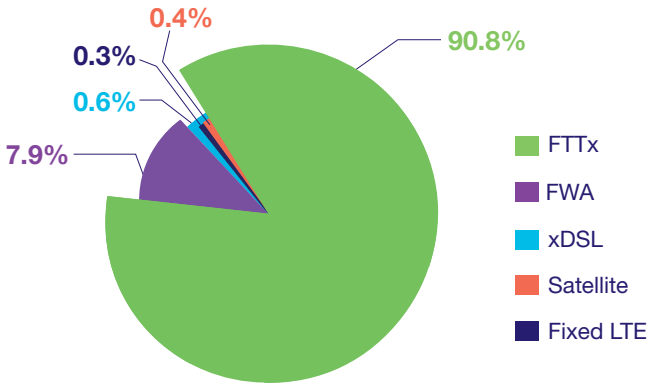
Notably, the ARPU of residential subscribers in the satellite technology segment significantly exceeds the ARPU of other technologies on the market and amounts to GEL 190.8.

The majority of residential subscribers (90.8%) use fibre-optic broadband services. Fixed wireless access (FWA) is the only other technology that accounts for a significant share (7.9%).

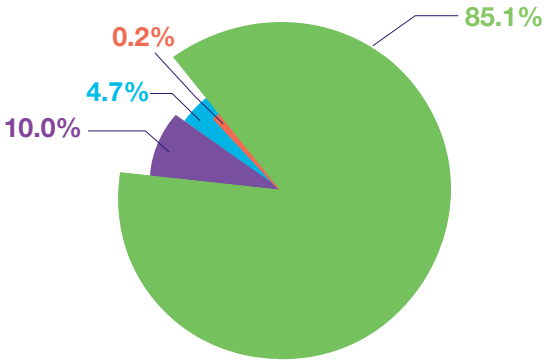
The distribution of business subscribers by technology is somewhat different. In this case, FWA[36] and xDSL technologies hold a larger share of the market than in the residential subscriber segment.

[36]FWA – Fixed Wireless Access.

Distribution of Residential Subscribers by Technology




Distribution of Business Subscribers by Technology

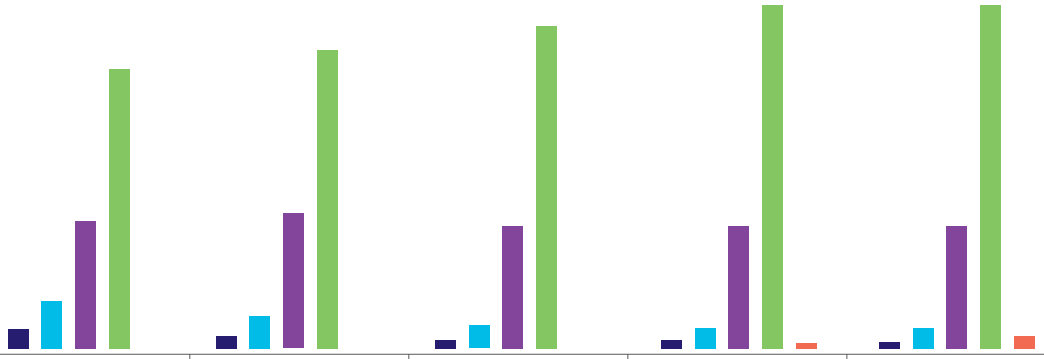



Over the past 5 years, the number of residential and business subscribers using fibre-optic technology has increased at a combined annual rate of 5.7%. In 2025, the number of subscribers using this technology increased by 54,500 (5.2%) compared with the previous year.

Fibre-optic internet technology ranks first in terms of the number of subscribers (91%), followed by fixed wireless access (8%). As in the previous year, the number of fibre-optic subscribers increased in 2025, 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 coverage and thereby increased its availability. Furthermore, Starlink's entry into the Georgian market in 2023 made satellite technology available. Starlink had 4,794 subscribers in 2025.

Since 2021, the number of xDSL subscribers and fixed LTE subscribers has been decreasing by an average of 17.6% per year and 22.6% per year, respectively. Authorised companies are actively trying to replace outdated and limited technologies with fibre-optic technology.

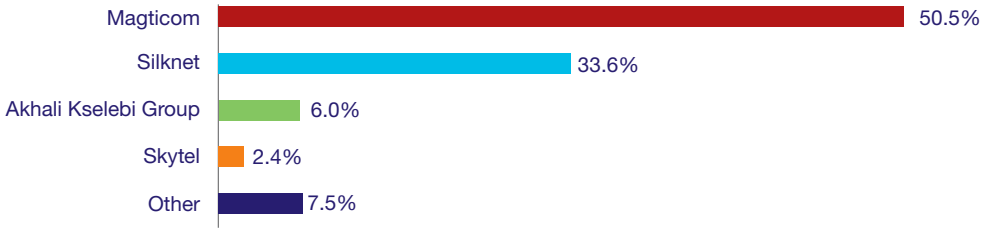
Number of Subscribers by Technology (thousands)



| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Fixed LTE | 9 | 6 | 4 | 4 | 3 |
| xDSL | 22 | 18 | 15 | 12 | 10 |
| FWA | 101 | 102 | 99 | 97 | 97 |
| FTTx | 878 | 950 | 996 | 1,043 | 1,097 |
| Satellite | - | - | - | 2 | 5 |

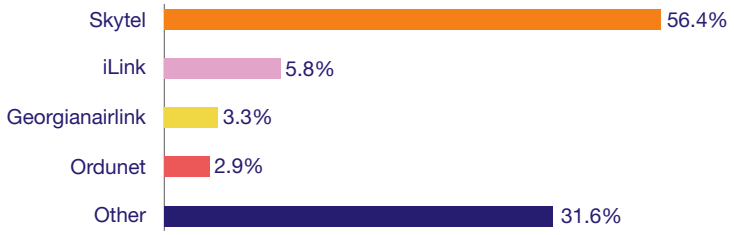
According to the data for the fourth quarter of 2025, 50.5% of residential fibre-optic subscribers used Magticom services, 33.6% used Silknet, while the combined share of other operators was 16%.

Distribution of Residential Subscribers Using Fibre-Optic Broadband, by Companies



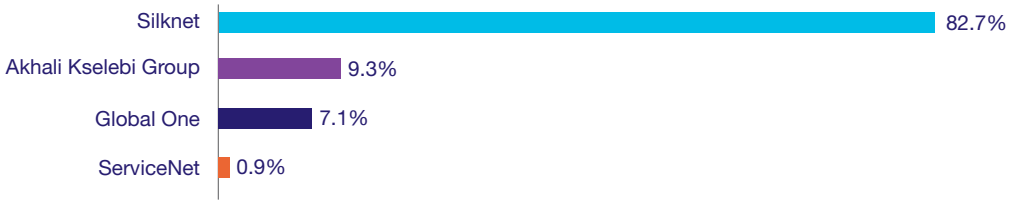

According to the data for the fourth quarter of 2025, 56.4% of residential FWA subscribers used Skytel services, while the combined share of other operators was 43.6% in total.

Distribution of Residential Subscribers Using FWA technology, by Companies



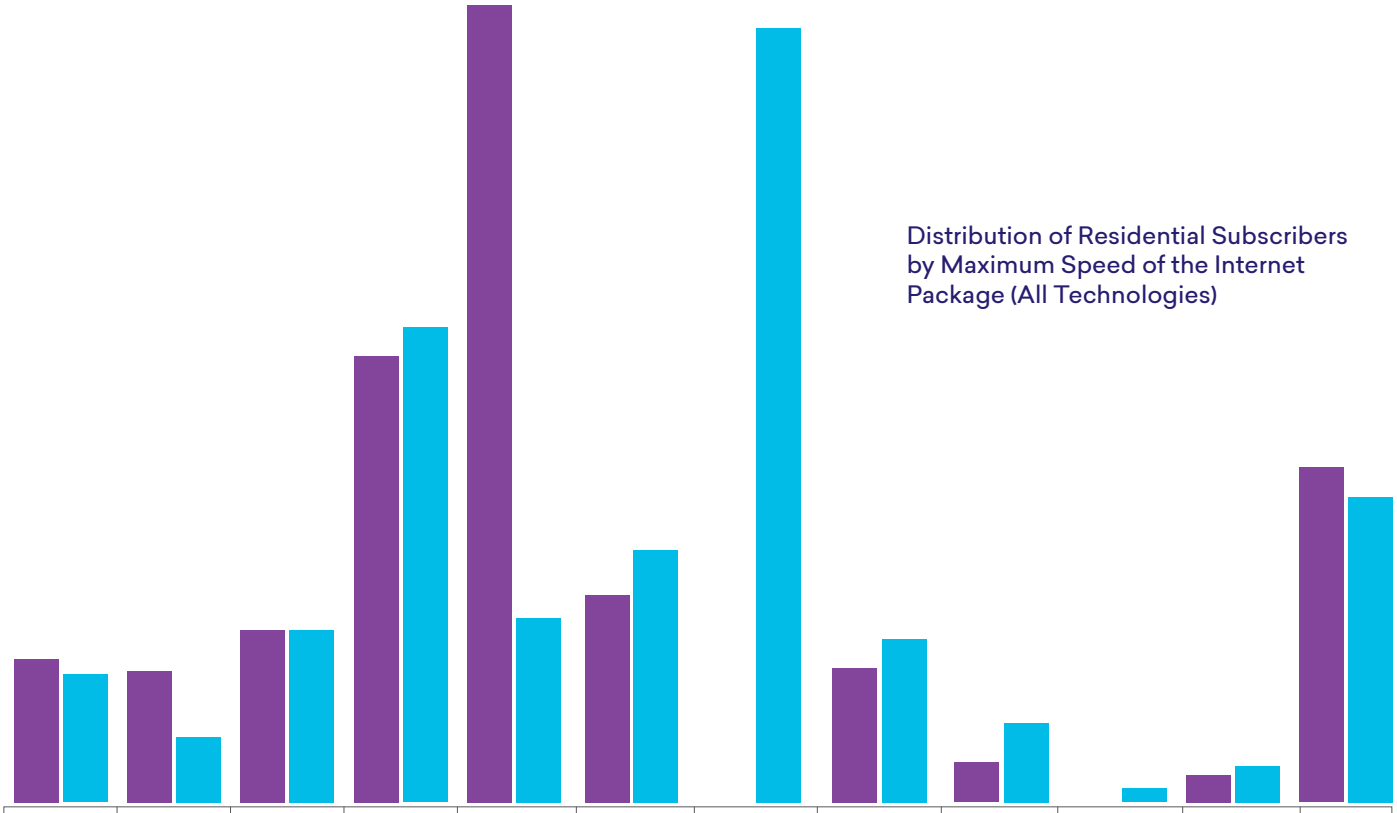

As for the xDSL technology, 83% of residential subscribers (around 9,000 in total) were Silknet users, 9% were Akhali Kselebi Group users, 7% were Global One users, and 1% were ServiceNet users.

Distribution of Residential Subscribers Using xDSL Technology, by Companies



After increasing the price of the 50 Mbps fixed internet package by GEL 3, Magticom increased the speed from 50 Mbps to 70 Mbps in the autumn of 2025.

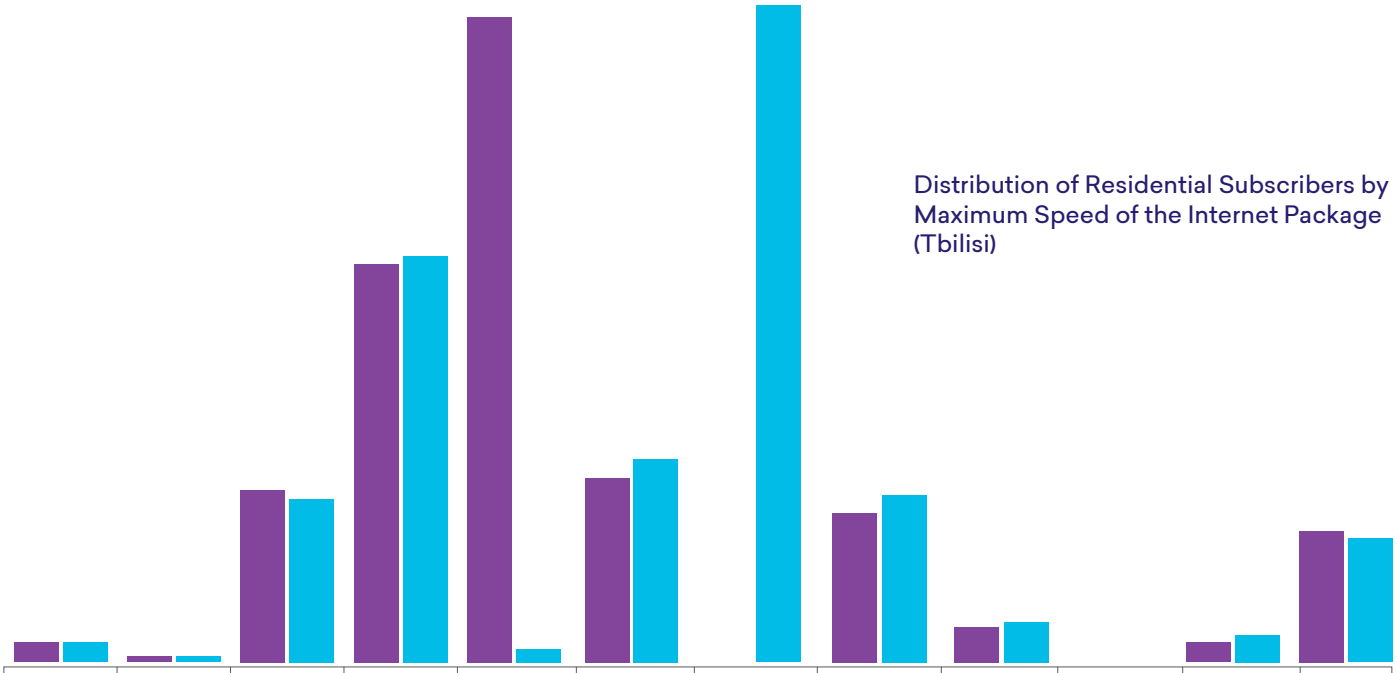
Distribution of Residential Subscribers by Maximum Speed of the Internet Package (All Technologies)



| | 20 Mbps | 30 Mbps | 40 Mbps | 45 Mbps | 50 Mbps | 60 Mbps | 70 Mbps | 80 Mbps | 100 Mbps | 120 Mbps | 150 Mbps | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 33 | 29 | 45 | 234 | 525 | 58 | - | 30 | 8 | - | 5 | 135 |
| 2025 | 28 | 15 | 45 | 242 | 49 | 71 | 511 | 43 | 17 | 2 | 7 | 124 |

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 (about 242,000) use the 70 Mbps internet package, followed by the 45 Mbps internet package with around 114,000 subscribers, the 80 Mbps package with about 29,000 subscribers, and the 100 Mbps package with approximately 7,000 subscribers.

Distribution of Residential Subscribers by Maximum Speed of the Internet Package (Tbilisi)



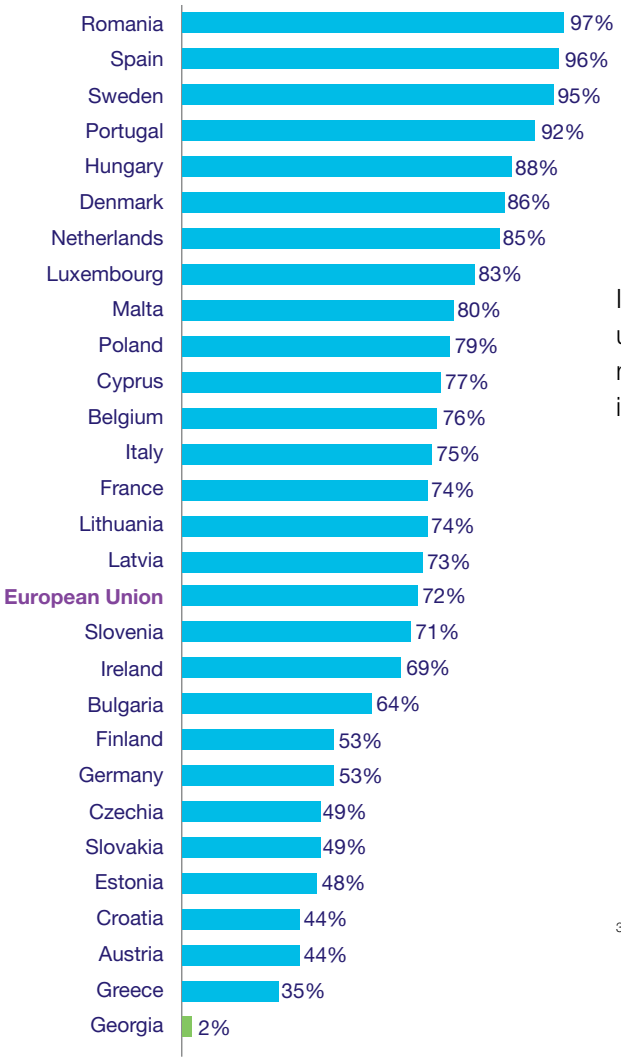
| | 20 Mbps | 30 Mbps | 40 Mbps | 45 Mbps | 50 Mbps | 60 Mbps | 70 Mbps | 80 Mbps | 100 Mbps | 120 Mbps | 150 Mbps | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 4 | 1 | 30 | 110 | 241 | 32 | - | 26 | 6 | - | 4 | 23 |
| 2025 | 4 | 1 | 28 | 114 | 3 | 38 | 242 | 29 | 7 | - | 5 | 21 |

There is a similar picture in the regions: in 2025, the majority of subscribers (approximately 269,000) used the 70 Mbps package, while the 45 Mbps package was the second-most popular with around 128,000 subscribers.

Distribution of Residential Subscribers by Maximum Speed of the Internet Package (Regions)

| | 20 Mbps | 30 Mbps | 40 Mbps | 45 Mbps | 50 Mbps | 60 Mbps | 70 Mbps | 80 Mbps | 100 Mbps | 120 Mbps | 150 Mbps | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 29 | 28 | 15 | 124 | 284 | 26 | - | 4 | 2 | - | 1 | 111 |
| 2025 | 24 | 14 | 16 | 128 | 46 | 33 | 269 | 14 | 10 | 2 | 2 | 104 |

Penetration Rate of Fixed Broadband Subscribers with Speeds of 100 Mbps and above among Households in the European Union and Georgia.

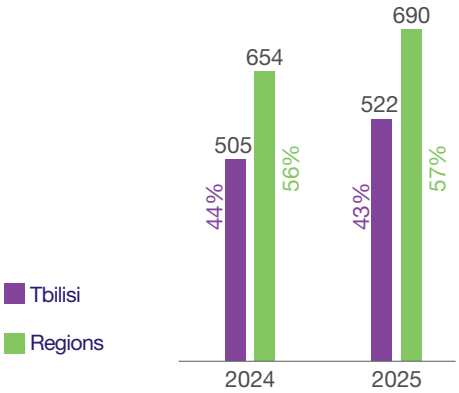



It is worth noting that in the European Union, 72% of households use internet packages with a maximum speed of 100 Mbps or more[37]. In comparison, only 2% of households in Georgia have internet speeds of 100 Mbps or higher.

[37] The Digital Economy and Society Index (DESI) Indicators, 2025.

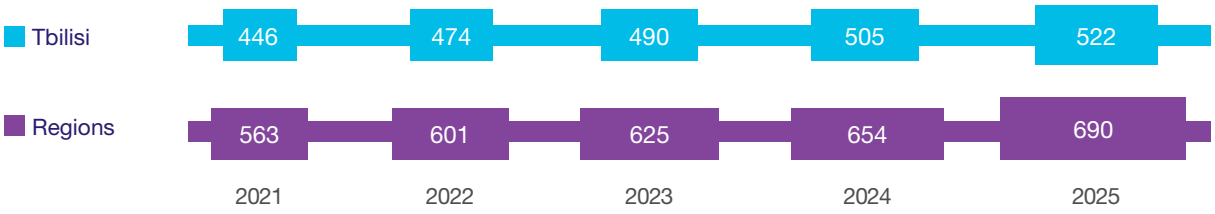
As of the fourth quarter of 2025, the percentage distribution of fixed broadband subscribers in Tbilisi and the regions changed very little compared with the previous year.

Number of Fixed Broadband Users in Tbilisi and the Regions (thousands, percentage share)

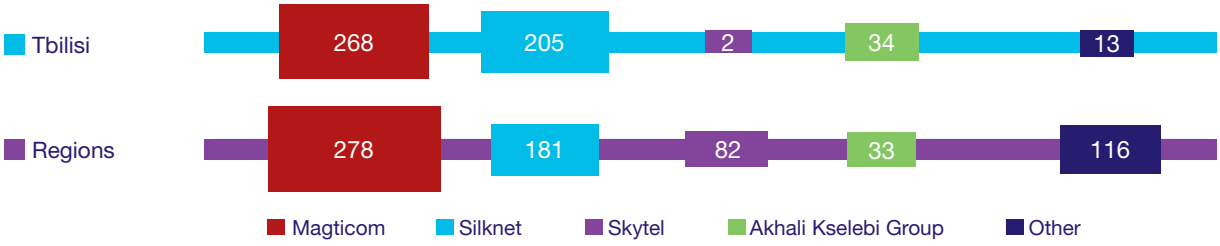



In 2025, the number of subscribers in the regions increased by 5.5% year-on-year, while the number of subscribers in Tbilisi increased by 3.4%.

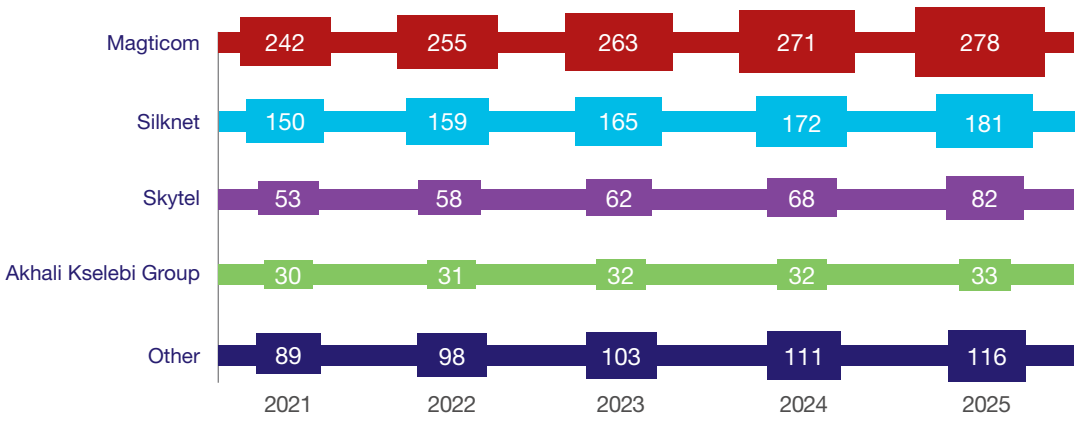
Number of Subscribers in Tbilisi and the Regions (thousands)




Number of Subscribers in Tbilisi and the Regions by Companies (thousands)

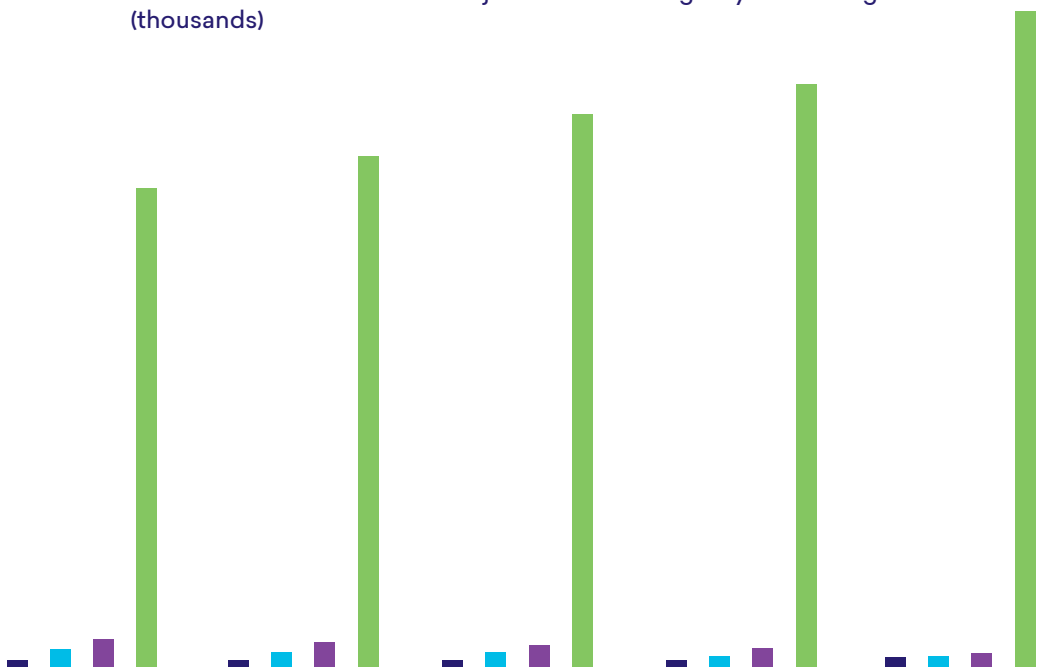



Number of Subscribers in the Regions by Companies (thousands)



At the end of 2025, the number of fixed broadband internet service subscribers in the five largest cities in Georgia – Tbilisi, Kutaisi, Batumi, Rustavi and Poti – accounted 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.

Number of Subscribers in 5 Major Cities of Georgia by Technologies (thousands)

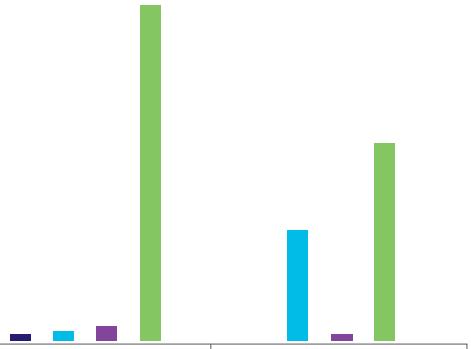


| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Fixed LTE | 2 | 2 | 2 | 2 | 3 |
| FWA | 7 | 6 | 6 | 5 | 5 |
| xDSL | 15 | 12 | 10 | 9 | 7 |
| FTTx | 594 | 639 | 668 | 692 | 722 |

In all five major cities, the share of fibre-optic broadband subscribers is 98% of the total number of broadband subscribers in each city.

The largest share of fibre-optic broadband subscribers (66%, or around 722,000 subscribers), is concentrated in five major cities of Georgia – Tbilisi, Kutaisi, Batumi, Rustavi, and Poti.

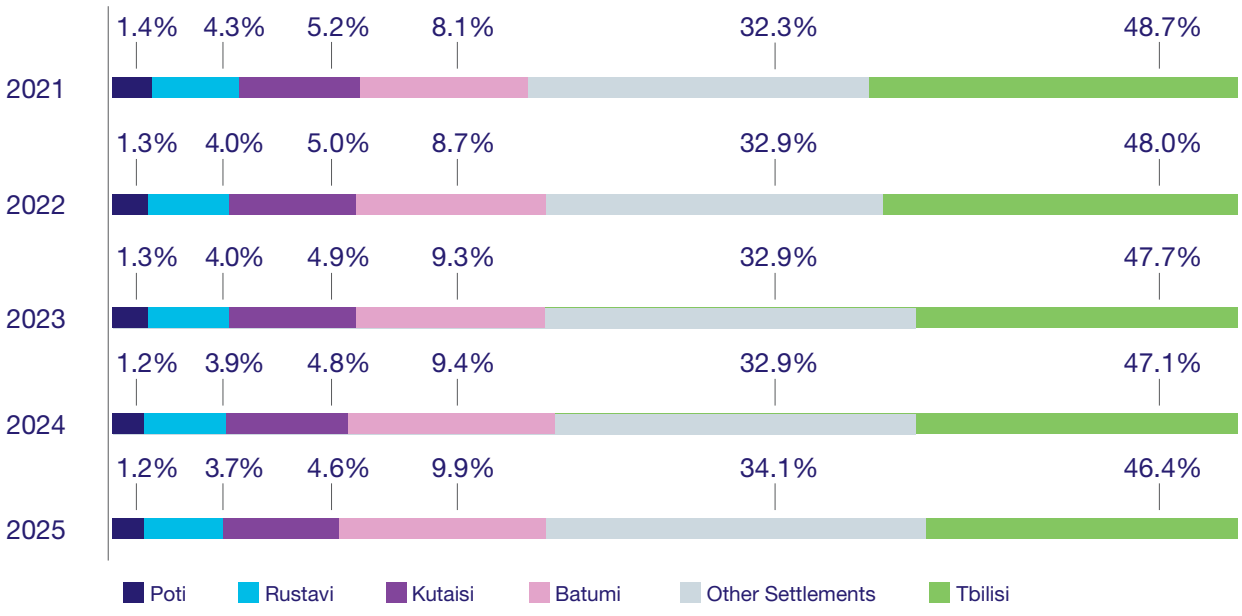
Distribution of Subscribers in 5 Major Cities and Other Settlements in Georgia by Technologies (thousands)



| | 5 Major Cities | Other Settlements |
|---|---|---|
| Fixed LTE | 3 | - |
| FWA | 5 | 92 |
| xDSL | 7 | 3 |
| FTTx | 722 | 375 |

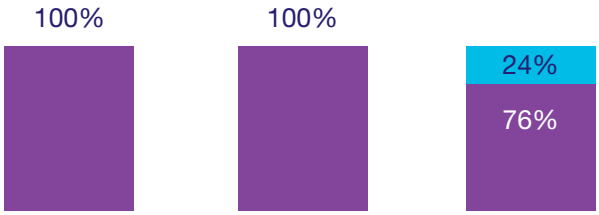
Tbilisi accounts for 46% of the total number of subscribers (approximately 509,000), the other four major cities (Kutaisi, Batumi, Rustavi and Poti) account for a total of 20% (approximately 213,000 subscribers), while the remaining cities, towns and villages account for 34% (approximately 375,000 subscribers).

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 76% of the 3,385 villages in Georgia. The country is also covered by the 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)

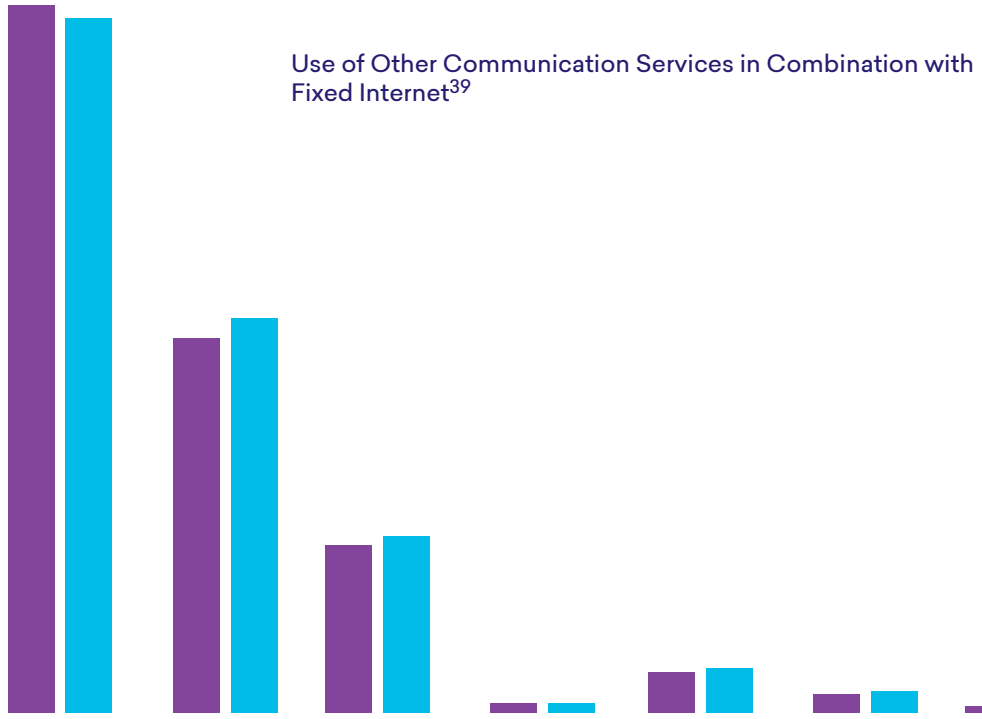



| | City | Town | Village |
|---|---|---|---|
| Unavailable | 0 | 0 | 802 |
| Available | 56 | 35 | 2,583 |
| Number of Settlements | 56 | 35 | 3,385 |

## Use of Other Communication Services in Combination with Fixed Internet

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

The majority of fiber-optic internet subscribers in Georgia consume internet services as part of a bundle that includes broadcasting transit services. In 2025, this group accounted for 61.8% of all fiber-optic internet subscribers, up from 58.1% in the previous year. This trend indicates that consumers increasingly prefer bundled packages combining internet and television services. As a result, the share of subscribers using only internet services continued to decline. While standalone internet subscribers represented 30.3% of the market in 2024, their share fell to 27.4% in 2025. Notably, the number of standalone internet subscribers also declined in absolute terms. Among the bundled service combinations involving three services, the most common package remains the combination of internet, television and mobile services. This package significantly outpaces the combination of internet, television and fixed-line telephony. The share of subscribers purchasing all four telecommunications services from a single provider remains relatively insignificant. It is also noteworthy that companies are offering additional telecommunications services alongside fixed fiber-optic internet account for approximately 90%[38] of the total broadband market, measured by subscriber numbers.



Use of Other Communication Services in Combination with Fixed Internet[39]

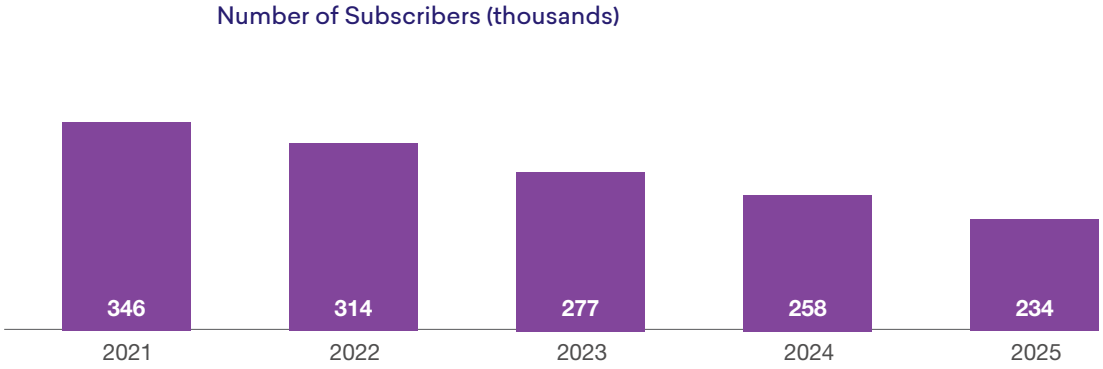
| | Internet+TV | Internet | Internet+TV +Mobile Telephony | Internet+ Fixed Telephony | Internet+TV+ Fixed Telephony | Internet+Mobile Telephony | Internet+TV+Mobile Telephony+ Fixed Telephony |
|---|---|---|---|---|---|---|---|
| 2025 | 61.8% | 27.4% | 7.9% | 0.4% | 1.6% | 0.8% | 0.1% |
| 2024 | 58.1% | 30.3% | 8.4% | 0.4% | 1.8% | 0.9% | 0.1% |

[38]Q4 2025 data, Communications Commission.
[39]The analysis includes residential subscribers of Magticom, Silknet, Skytel, and Akhali Kselebi Group.

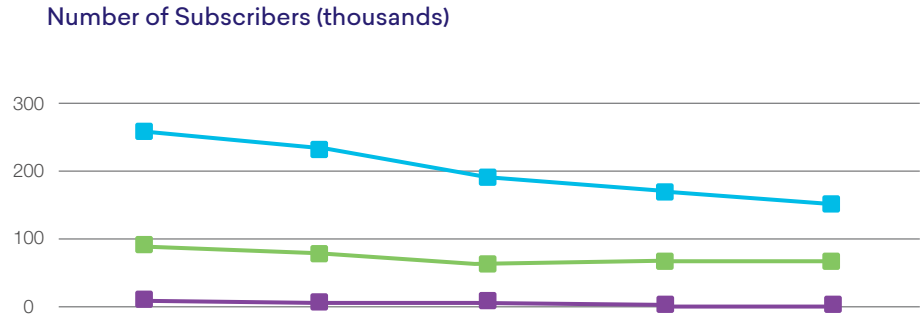
## Fixed Telephony Services[40]

In Georgia, fixed telephony services are provided through wired, wireless (CDMA) and VoIP (Voice over IP) technologies. According to the data for the fourth quarter of 2025, these services are provided by 28 companies. Seven authorised undertakings provided the services through fixed-line technology, one provided the services through wireless technology, and 24 provided the services through VoIP technology[41].

At the end of 2025, the number of fixed telephony service subscribers was approximately 234,000, which is around 24,000 (9%) 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[42] services.




Similar to the 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.



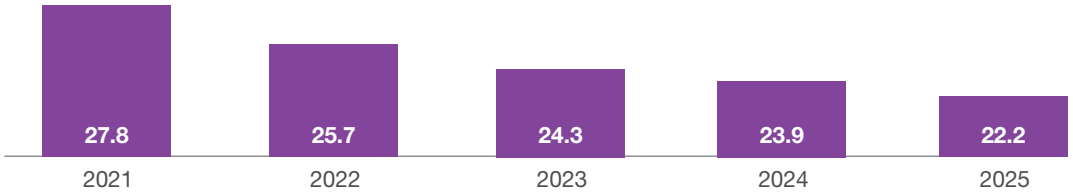

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Wired | 248 | 220 | 196 | 173 | 149 |
| Wireless | 6 | 3 | 3 | 2 | 2 |
| VoIP | 93 | 91 | 78 | 83 | 83 |

[40]As of Q4 2025.
[41]Some companies use several technologies simultaneously. Therefore, the total number of operators by technology does not equal the total number of active operators.
[42]An application or service that allows users to access telecommunications services such as SMS and multimedia messages, voice calls (audio), and video content via the internet (IP).

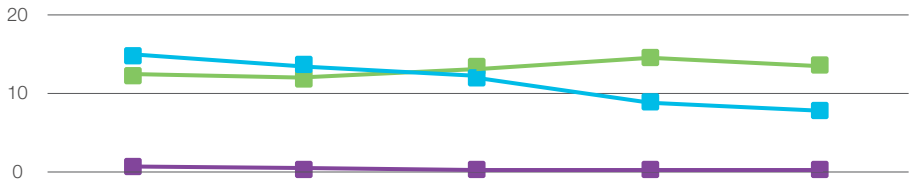
Unlike mobile services, fixed-line service providers generally do not deactivate a subscriber's telephone number or line within a short period if the subscriber ceases to actively use the service. As a result, fixed telephony operators are often able to retain subscribers in their databases for longer periods, which helps slow the decline in subscriber numbers to some extent.

Alongside the decline in subscribers, total retail revenue generated from fixed telephony services has also been following a downward trend.

Retail Revenues (GEL millions)



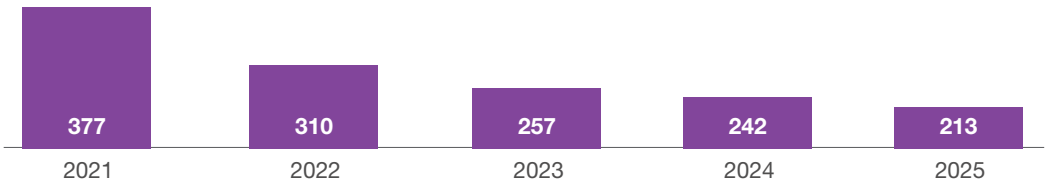

Retail Revenues by Technology (GEL millions)



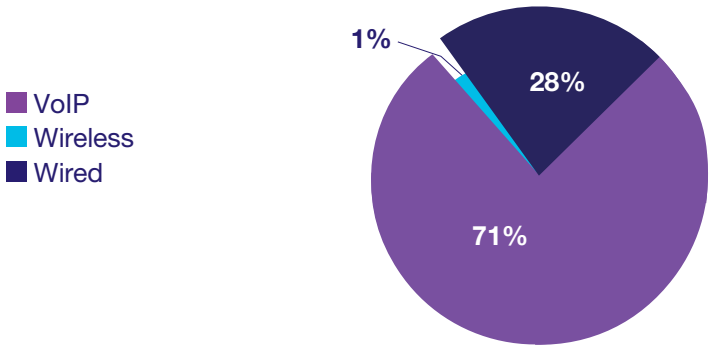

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Wired | 15.1 | 12.2 | 11.3 | 9.8 | 8.4 |
| Wireless | 0.6 | 0.3 | 0.2 | 0.2 | 0.2 |
| VoIP | 12.2 | 13.2 | 12.7 | 13.9 | 13.6 |

Due to the decline in subscriber numbers, the outgoing traffic from fixed telephony services continues to decrease.

Outgoing Minutes (millions)

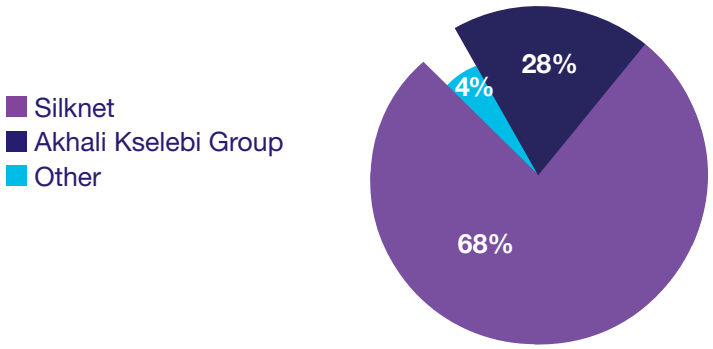


## Share of Outgoing Minutes by Technology



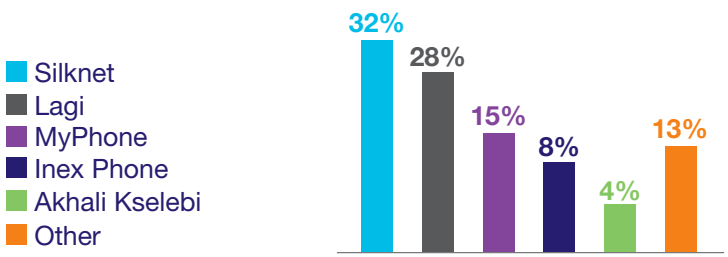

Although wired technology accounts for the largest share of subscribers, it is evident that traffic generated through VoIP technology accounts for a larger share of the total number of outgoing minutes.

## Distribution of Wired Technology Subscribers by Companies




Silknet leads the fixed telephony market among the companies providing wired technology services. Silknet holds 68% of this market.

## Distribution of VoIP Subscribers by Companies

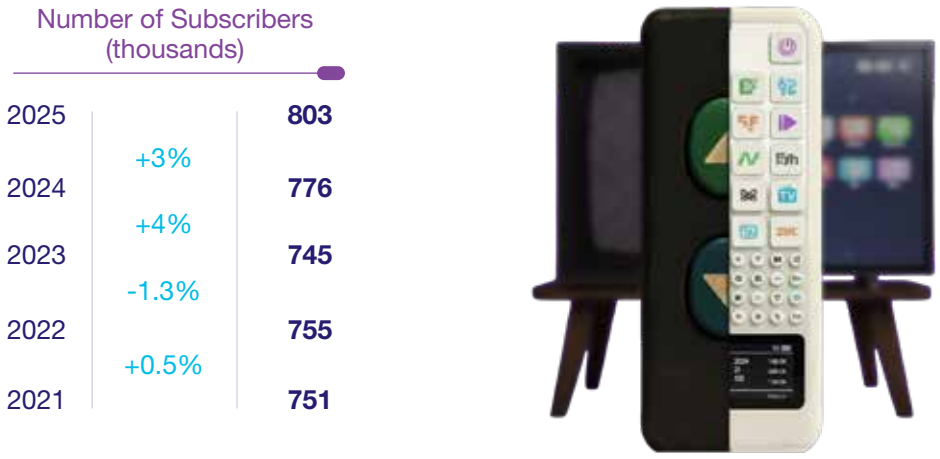



In the VoIP technology segment, Silknet accounts for the largest share (32%) of the market.

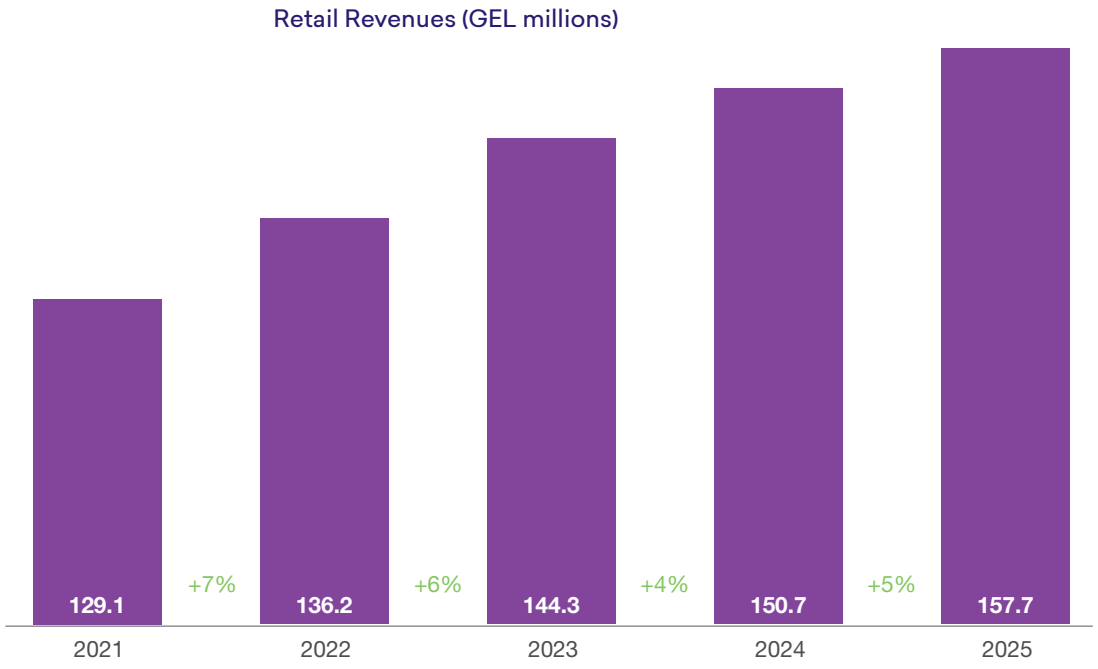
## Broadcasting Transit[43]

As of the fourth quarter of 2025, 803,000 subscribers were using broadcasting transit services in Georgia[44]. Compared with the same period in the previous year, the number of subscribers increased by approximately 3%, or 27,000 subscribers. Since 2021, the average annual growth rate in the number of broadcasting transit subscribers has been 2.75%.

As the National Statistics Office of Georgia (Geostat) had not yet published the 2024 household census at the time of preparing this report, penetration data will be presented in the Communications Commission's report for the following year.



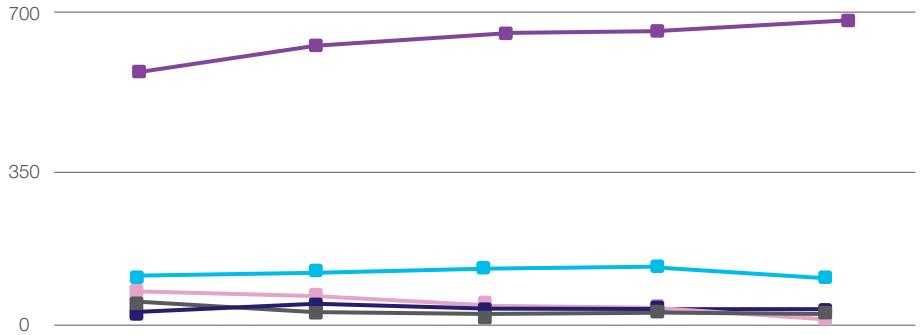

In 2025, the retail revenues from broadcasting transit amounted to GEL 157.7 million, which is GEL 7 million (5%) more than in the previous year. The average annual growth in retail revenues since 2021 is 6%.




[43]As of 20 February 2025.
[44]As of Q4 2025.

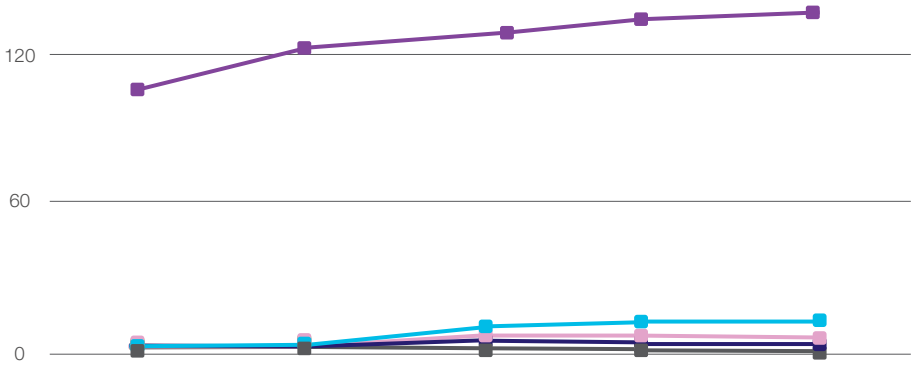
According to the data for the last quarter of 2025, IPTV technology is still the most common means of broadcasting transit. Its share increased by 5% year-on-year to 87%. The share of IPTV retail revenues in total revenues increased by 3% to 92%.

Number of Subscribers by Technology (thousands)




| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| DVBT | 42.6 | 43.9 | 44.3 | 47.1 | 42.0 |
| IPTV | 581.3 | 613.9 | 645.0 | 675.0 | 695.9 |
| Internet TV | 27.2 | 15.0 | 12.8 | 13.5 | 13.2 |
| Coaxial | 18.4 | 16.1 | 14.9 | 14.9 | 14.8 |
| Radio Frequency | 29.9 | 25.8 | 23.1 | 23.1 | 19.3 |

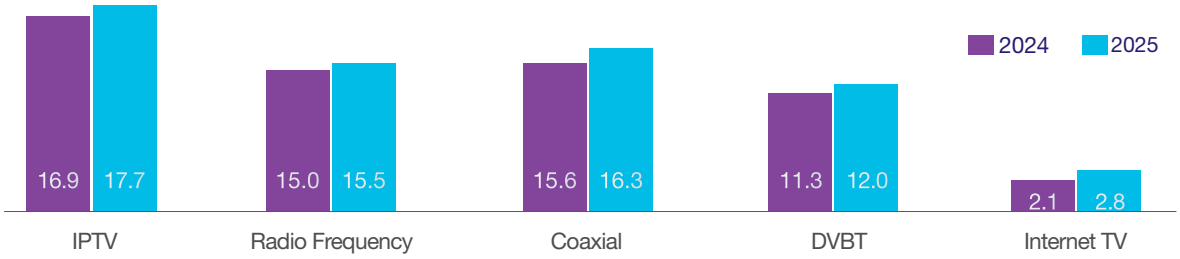
Retail Revenue by Technology (GEL millions)



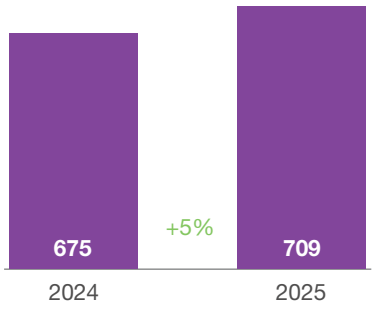

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| IPTV | 112.0 | 121.6 | 131.2 | 137.8 | 144.6 |
| Radio Frequency | 0.4 | 0.4 | 4.6 | 3.9 | 3.8 |
| Coaxial | 0.3 | 0.2 | 2.7 | 3.0 | 3.0 |
| DVBT | 0.3 | 0.4 | 5.1 | 5.7 | 6.1 |
| Internet TV | 0 | 0 | 0.55 | 0.38 | 0.29 |

There was a minor increase in the average monthly ARPU for all types of technology.

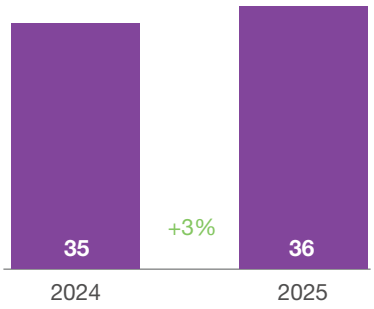
### Average Annual ARPU by Technology




### Number of IPTV Subscribers (thousands)




### IPTV Retail Revenues (GEL millions)



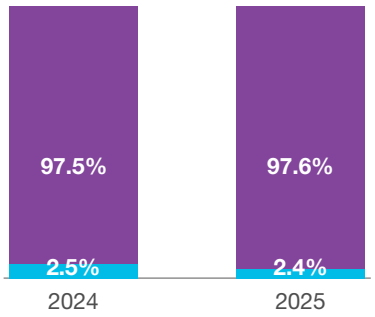

As of the last quarter of 2025, IPTV services were mainly provided by two operators: Magticom (52%) and Silknet (38%).


### Distribution of IPTV Subscribers

| | |
|---|---|
| მაგთი MAGTI | 52.9% |
| სილქნეტი SILKNET | 38.4% |
| Other | 8.7% |

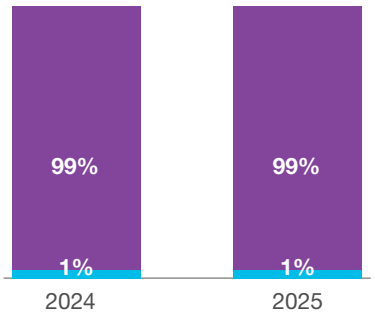
In 2025, providers of broadcasting transit services generated 97.6% of their subscription revenues from residential customers, while business customers accounted for only 2.4% of total subscription revenues. For comparison, in 2024 the residential customers generated 97.5% of the revenues, while business subscribers accounted for 2.6%. The subscriber structure was similarly concentrated in both years, and approximately 99% of all subscribers were residential customers.

Distribution of Subscription Revenues by Contract Type





Distribution of Subscribers by Contract Type




## Multiplex Services

There were 27 multiplex operators in Georgia in 2025, although only 9 of them generated commercial revenues from multiplex services. The remaining operators broadcasted their own channels, and therefore did not provide commercial services through multiplexes.

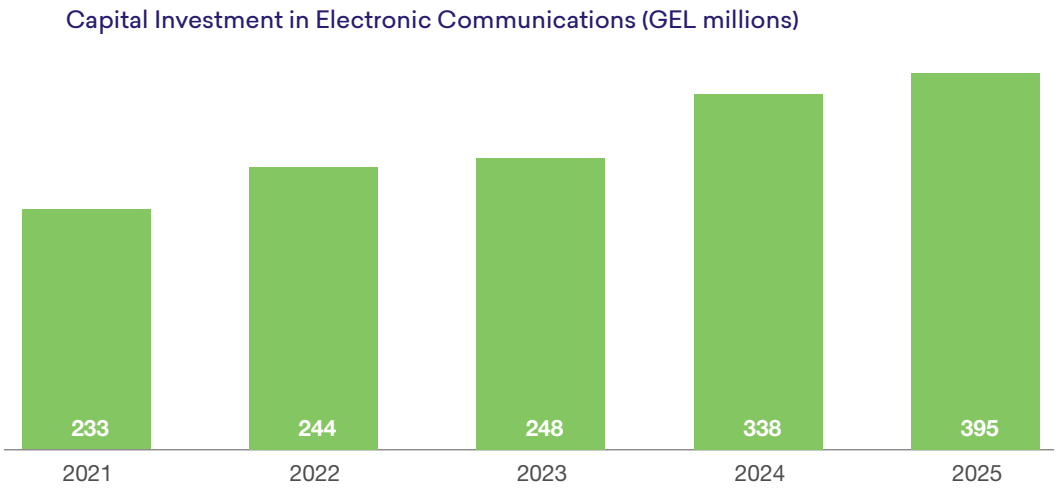
Operators generated GEL 6.3 million in revenues from multiplex services during the year, the bulk of which was accounted for by Stereo+ and Georgian Teleradiocenter:

Distribution of Revenues Generated by Multiplexes

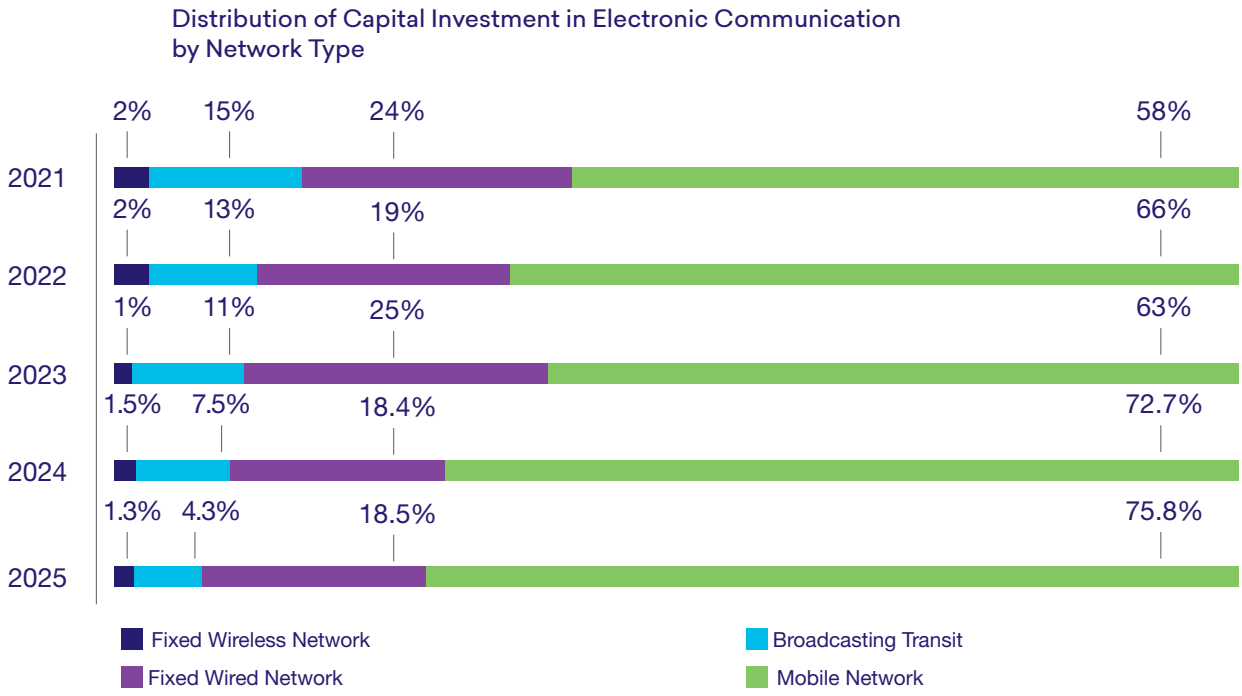
| | |
|---|---|
| Stereo+ | **73%** |
| Georgian Teleradiocentre | **25%** |
| Other | **3%** |

## Capital Investment in Electronic Communications

The volume of capital investment[45] in electronic communications continues to grow each year. In 2025, capital investment increased by 17% year-on-year to GEL 395 million.

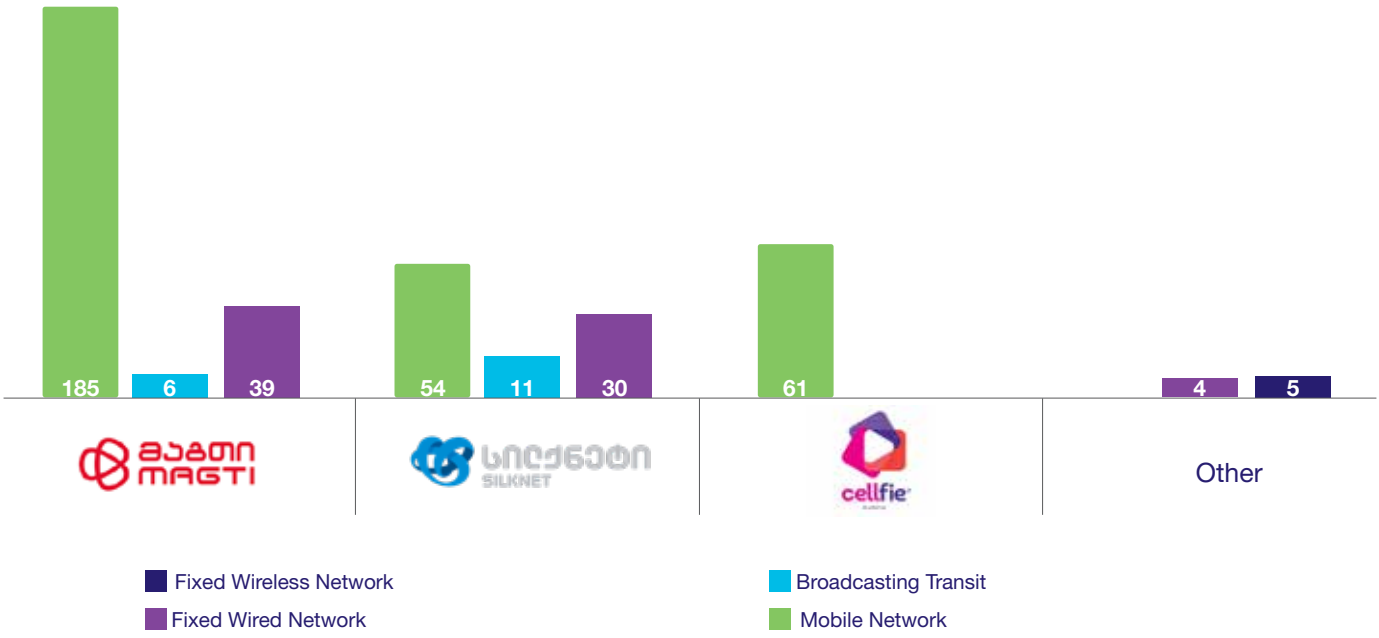



The distribution of capital investment by network type shows that the largest share of investment is directed towards the development of mobile communication networks. In 2025, mobile networks accounted for almost 76% of capital investments. It is worth noting that operators across the country are actively developing 5G technology, which requires substantial investment.

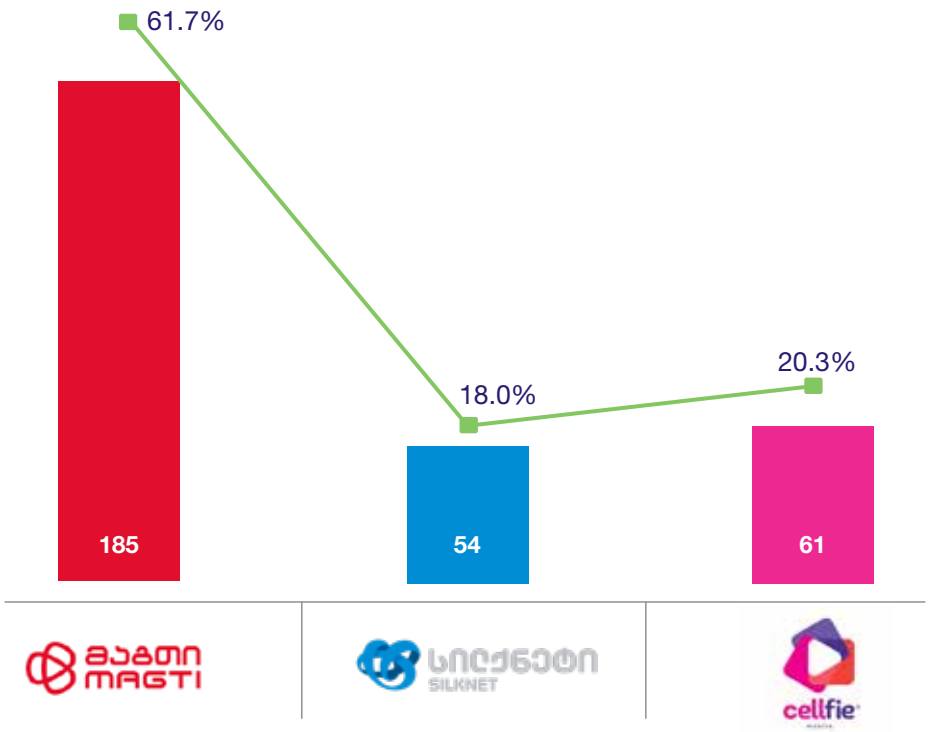



[45]Includes capital investment in mobile and fixed (wired and wireless) service networks and broadcasting transit services. The volume of capital investment includes the data on authorised undertakings operating in the field of electronic communications who generated annual revenues of more than GEL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

Distribution of Capital Investment in Electronic Communications by Companies (GEL millions)



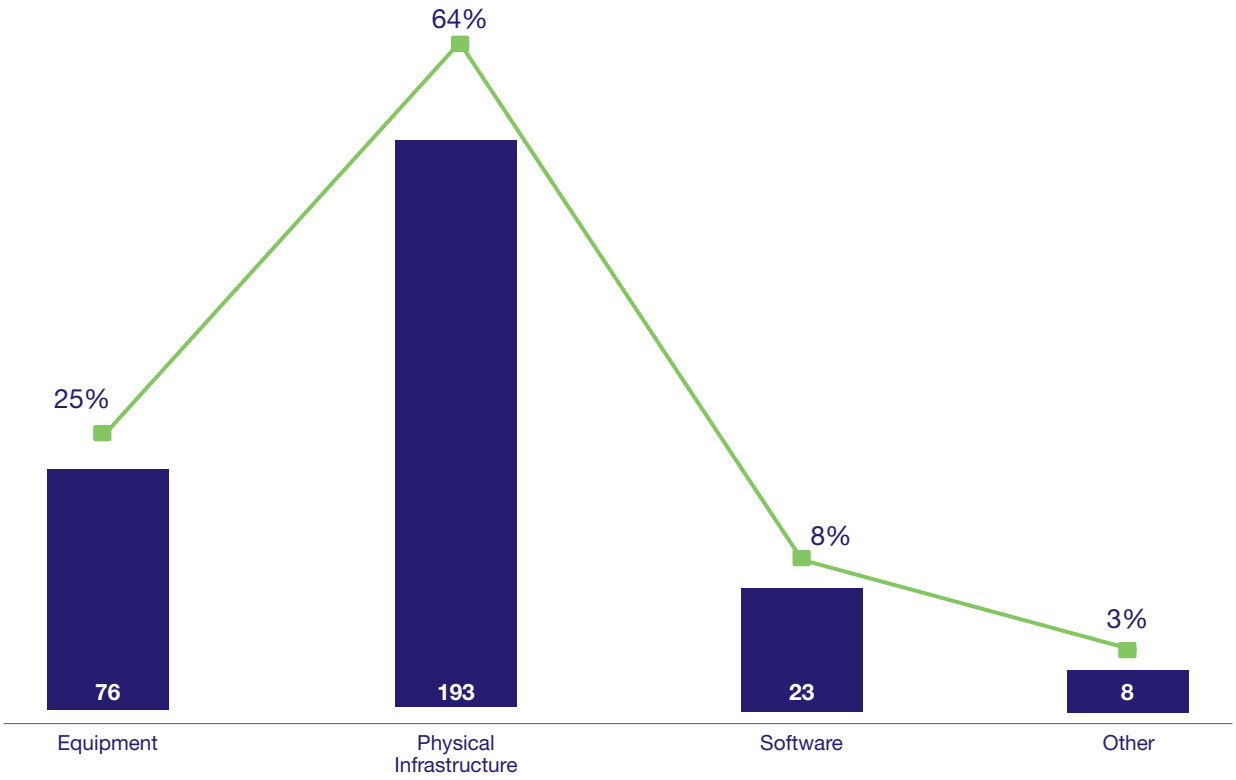

Distribution of Capital Investment in Mobile Services by Companies (GEL millions)



The distribution of capital investment in mobile services does not include the cost of the 5G frequency license purchased by Silknet in 2025 for GEL 48.8 million.

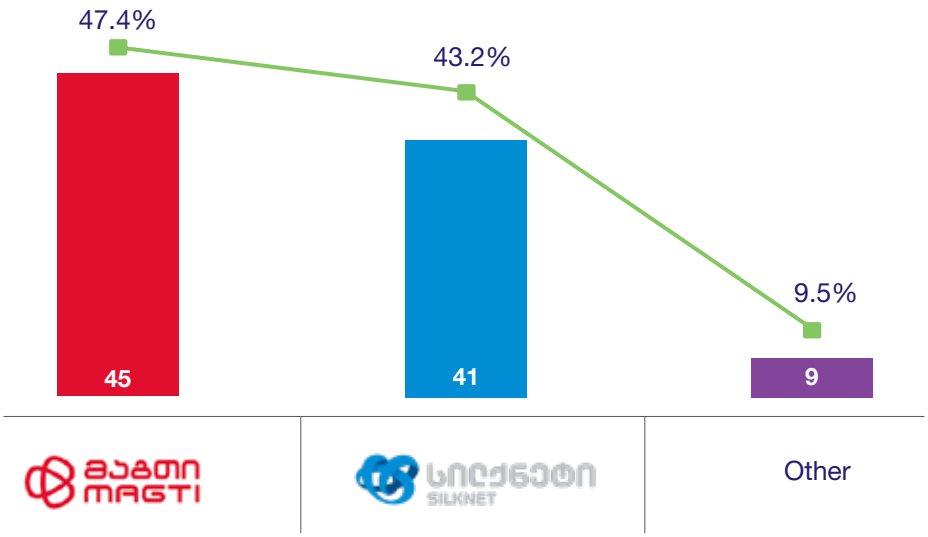
Similar to the previous year, physical infrastructure accounted for the largest share of capital investment in mobile services (64%).

Distribution of Capital Investment in Mobile Services
(GEL millions)



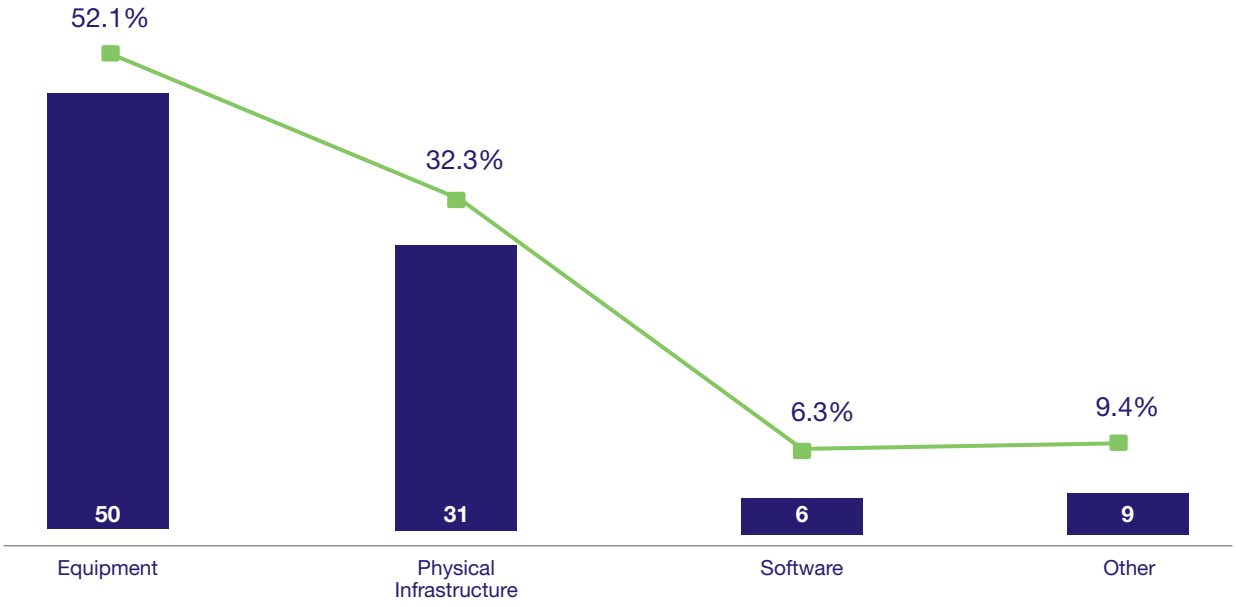
As in the mobile communications sector, Magticom made the largest investment in fixed telecommunications services during 2025. The company accounted for more than 47% of total capital investments made in the fixed services market. It was closely followed by Silknet, which invested more than GEL 40 million and accounted for over 43% of total investments in the sector.

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




More than half (52%) of all capital investments made in fixed services were allocated to telecommunications equipment, while approximately one-third was invested in physical infrastructure.

Distribution of Capital Investment in Fixed* Services
(GEL millions)




*Includes fixed wired and wireless networks, and broadcasting transit services.

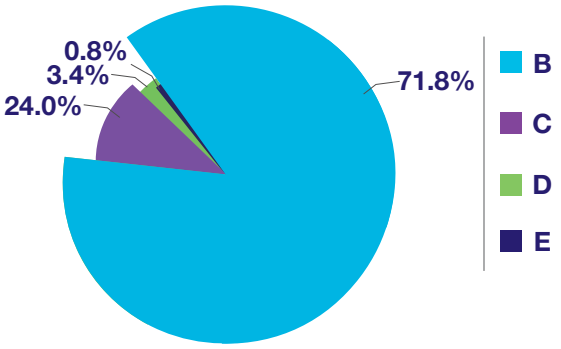
There were 102 active[46] companies registered in the field of broadcasting in 2025, whose total revenues, including state funding and other non-broadcasting revenues, amounted to GEL 240.6 million.

None of the broadcasters generated revenues of more than GEL 100 million during the year. There were 4 Category B[47] companies whose combined revenues amounted to 71.8% of the total revenues of broadcasters.

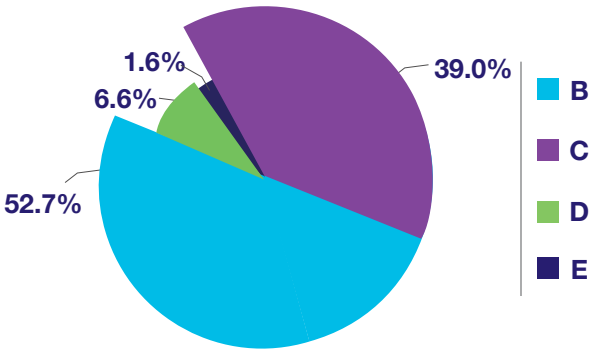
The combined revenues of broadcasters who generated revenues of less than GEL 100,000 in 2025 (59 Category E companies) amounted to 0.8% of the total revenues.

There were 101 companies generating revenues from broadcasting in 2024[48]. Their combined revenues amounted to GEL 123.5 million. Teleimedi and Media Holding generated revenues of more than GEL 10 million and were recognised as Category B companies. Their combined revenues amounted to 52.7% of the total revenues. The combined revenues of broadcasters that generated revenues of less than GEL 100,000 in 2025 (60 Category E companies) amounted to 1.6% of the total revenues.

Revenue Share of Broadcasters by Category




Distribution of Active Broadcasters by Revenues Generated from Broadcasting



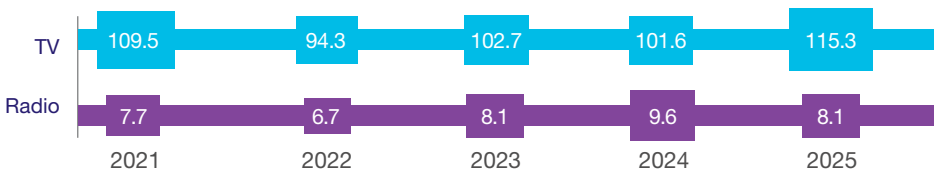

As of December 2025, there were 108 authorised TV broadcasting channels in Georgia. Of these, 17 were free-to-air national TV broadcasters, in addition to the four channels of the Georgian Public Broadcaster and Adjara TV. Thus, there were a total of 21 free-to-air national broadcasting channels operating in 2025.

As for radio broadcasters, there are 46 companies owning 84 radio broadcasting licenses, while 12 of them are authorised radio broadcasters.

68 TV broadcasters and 39 radio broadcasters generated revenues in 2025.

Revenues generated by broadcasting in 2025 amounted to GEL 123.5 million, with TV broadcasters generating GEL 115.3 million and radio broadcasters generating GEL 8.1 million.

Revenues Generated from Broadcasting (GEL millions)[49]



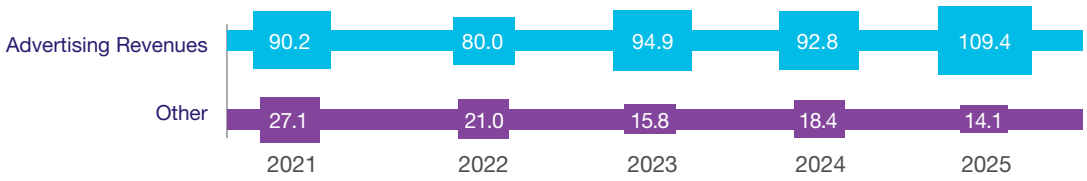

[46]Companies that have generated any form of revenue in the field of broadcasting during the year.
[47]The following categories are considered:

| Category | Revenues generated during the year |
|---|---|
| A | GEL 100 million or more |
| B | From GEL 10 million up to GEL 100 million |
| C | From GEL 1 million up to GEL 10 million |
| D | From GEL 100 000 up to GEL 1 million |
| E | Less than GEL 100 000 |

[48]Revenues generated by broadcasting are revenues collected by broadcasters with the exception of state funding and other non-broadcasting revenues.
[49]The data above differs from the data presented in last year's report, as some broadcasters corrected their information.

In 2025, the total advertising revenues[50] of TV and radio broadcasters increased by 18% year-on-year and amounted to GEL 109.4 million.

Revenues Generated from Broadcasting (GEL millions)[51/52]



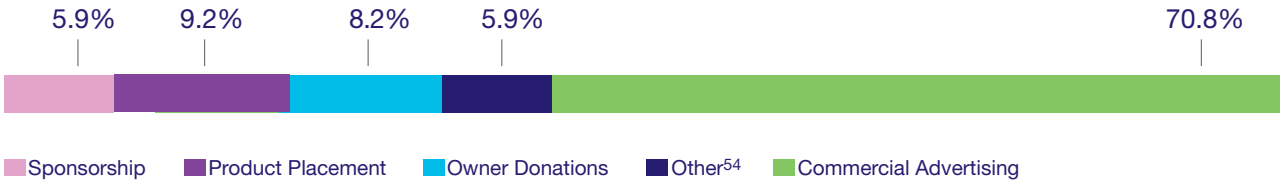

Revenues generated from commercial advertising by TV broadcasters in 2025 amounted to GEL 100.1 million, which is 41.6% more than in the previous year.

Revenues Generated from Commercial TV Advertising (GEL millions)

| | |
|---|---|
| 2025 | **100.1** |
| 2024 | **70.7** |
| 2023 | **87.3** |
| 2022 | **73.7** |
| 2021 | **79.7** |

Commercial advertising and sponsorship accounted for 76.7% of the total broadcasting revenues generated by TV broadcasters[53].

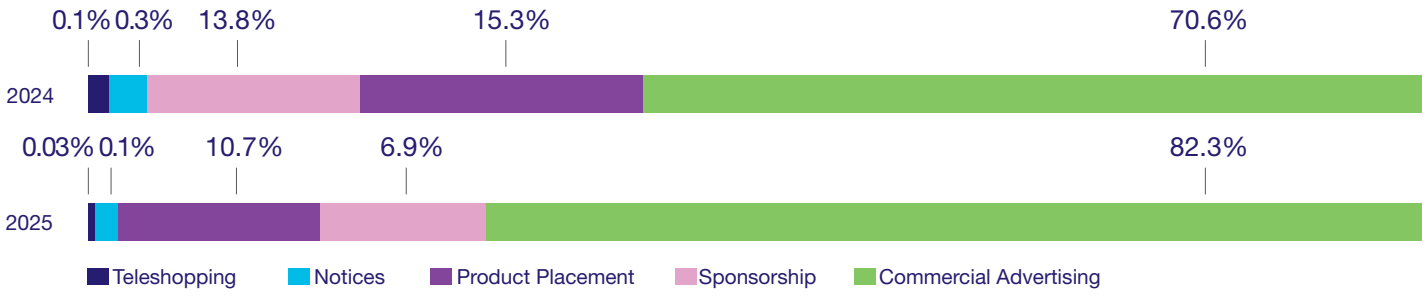
Distribution of Revenues Generated from TV Broadcasting by Type




[50]Advertisement includes 5 categories: direct advertising (including paid political advertising), sponsorship, teleshopping, notices and product placement.
[51]All revenues except state funding and other non-broadcasting revenues.
[52]The data above differs from the data presented in last year's report, as some broadcasters corrected their information.
[53]With the exception of state funding and other non-broadcasting revenues.
[54]"Other" includes revenues from paid political advertising.

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

### Distribution of Commercial Advertising Revenues Generated by TV Broadcasters by Category




Teleimedi accounted for the largest share of revenues generated from TV broadcasting in 2025[55] with 39.1%, followed by Media Holding[56] with 17.4%, POSTV with 6.9%, Silk Media with 6.5%, TV Pirveli with 6.4%, GDS TV with 5.7%, Formula with 4.5%, BMG with 3.6%, Georgian Patriarchate Television Ertsulovneba with 1.7%, and the Georgian Public Broadcaster with 1.3%. The total share of revenues of the other broadcasters amounted to 6.9%.

Teleimedi accounted for the largest share of commercial TV advertising[57] revenues with 45.4%, followed by Media Holding with 18.7%, POSTV with 7.7%, GDS TV with 6.7%, TV Pirveli with 5.9%, Formula with 4.8%, BMG with 4.2%, the Georgian Public Broadcaster with 1.3%, Silknet with 1%, and Palitra News with 0.6%. The total share of advertising revenues of the other broadcasters amounted to 3.8%.

### Distribution of Revenues Generated from TV Broadcasting by Company

| | |
|---|---|
| Teleimedi | **39.1%** |
| Media Holding | **17.4%** |
| PosTV | **6.9%** |
| Silk Media | **6.5%** |
| TV Pirveli | **6.4%** |
| GDS TV | **5.7%** |
| Formula | **4.5%** |
| BMG | **3.6%** |
| Ertsulovneba TV | **1.7%** |
| Georgian Public Broadcaster | **1.3%** |
| Others | **6.9%** |

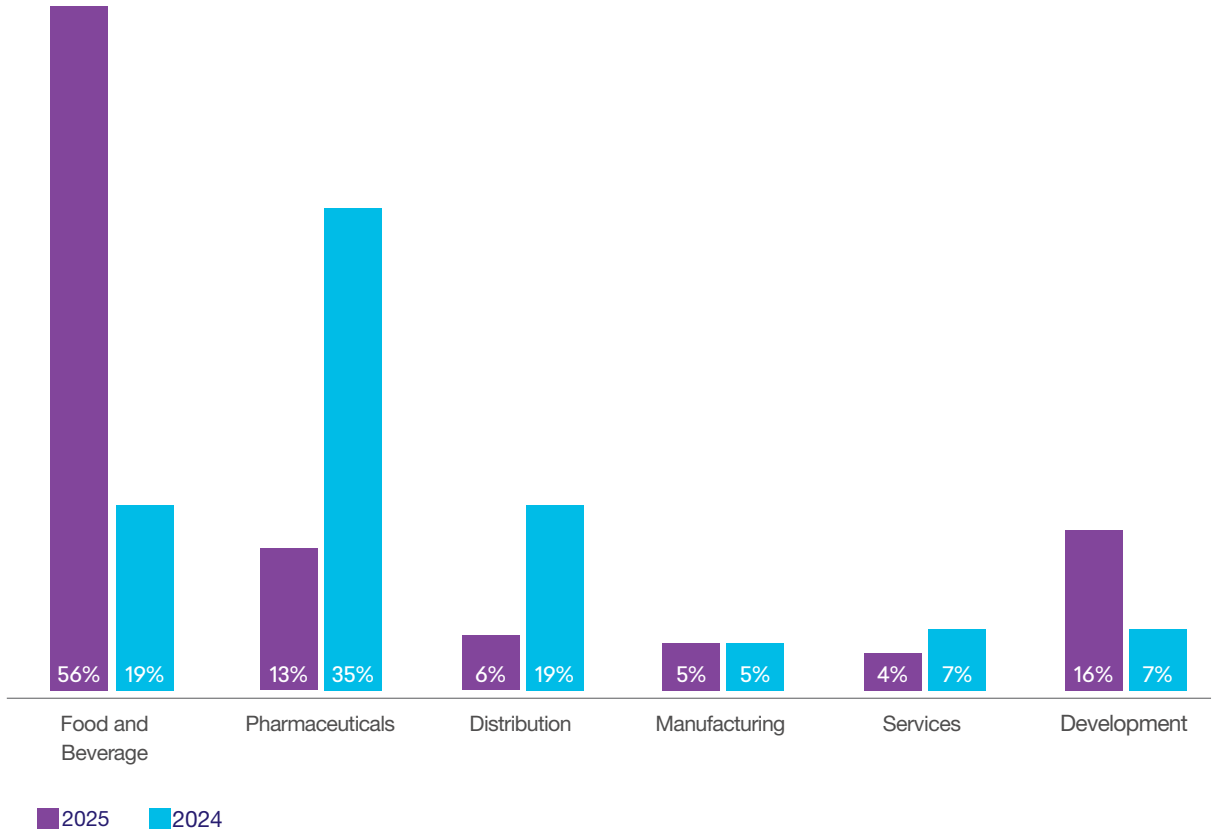
### Distribution of Commercial Advertising Revenues by Company

| | |
|---|---|
| **45.4%** | Teleimedi |
| **18.7%** | Media Holding |
| **7.7%** | PosTV |
| **6.7%** | GDS TV |
| **5.9%** | TV Pirveli |
| **4.8%** | Formula |
| **4.2%** | BMG |
| **1.3%** | Georgian Public Broadcaster |
| **1.0%** | Silknet |
| **0.6%** | PalitraNews |
| **3.8%** | Others |

[55]With the exception of state funding and other non-broadcasting revenues.
[56]Media Holding includes Rustavi 2, Marao and Comedy Channel.
[57]Commercial advertising revenues include: direct advertising, sponsorship, teleshopping, notices and product placement.

In 2025, the food and beverage sector held the leading position among the advertising clients of TV broadcasters in terms of generated revenues with GEL 27.3 million, followed by the pharmaceutical sector (GEL 6.2 million) and distribution sector (GEL 3 million).

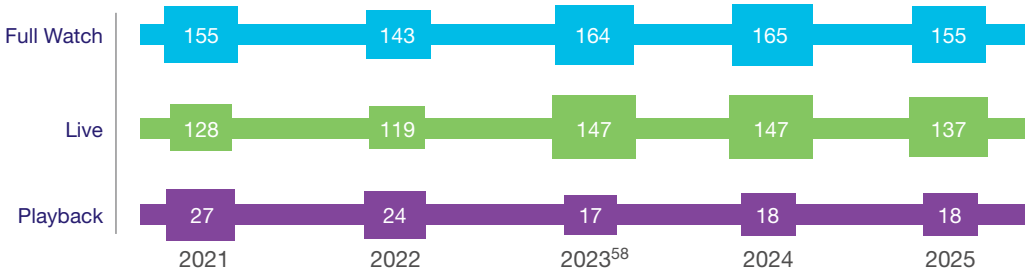
Percentage Distribution of Revenues by Sector




## Watching TV in Live and Playback Modes

In 2025, an average person watched approximately 155 minutes of TV per day.

Watching TV in Live and Playback Modes




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

## Radio Broadcasting

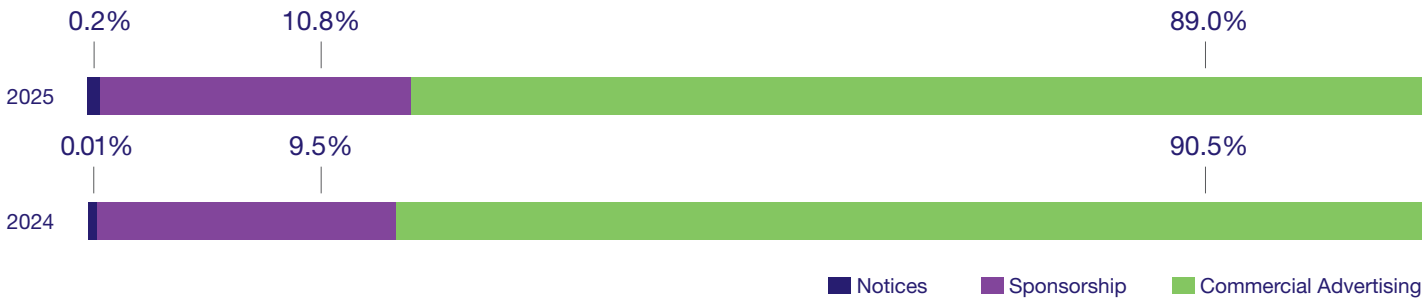
The advertising revenues of radio broadcasters in 2025 amounted to GEL 7.7 million, which is GEL 1.3 million less than in the previous year.

Advertising Revenues of Radio Broadcasters (GEL millions)

| | |
|---|---|
| 2025 | **7.7** |
| 2024 | **9.0** |
| 2023 | **7.6** |
| 2022 | **6.3** |
| 2021 | **7.2** |

Adverts and sponsorship accounted for 99.8% of the advertising revenues of radio broadcasters, while the share of product placement and notices 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 with 61.4%, followed by Radio Imedi with 8.9%, Radio Palitra with 5%, Holding – Apkhazetis Khma with 4.5%, Georgian Radio with 3.8%, MD Group with 3.3%, Broadcasting Company Hereti with 2.4%, Radio Georgian Times with 1.9%, Dzveli Kalaki with 1.1%, and Radio Urbanic with 0.9%. The other radio broadcasters accounted for a combined share of 6.9% of the total advertising revenues.

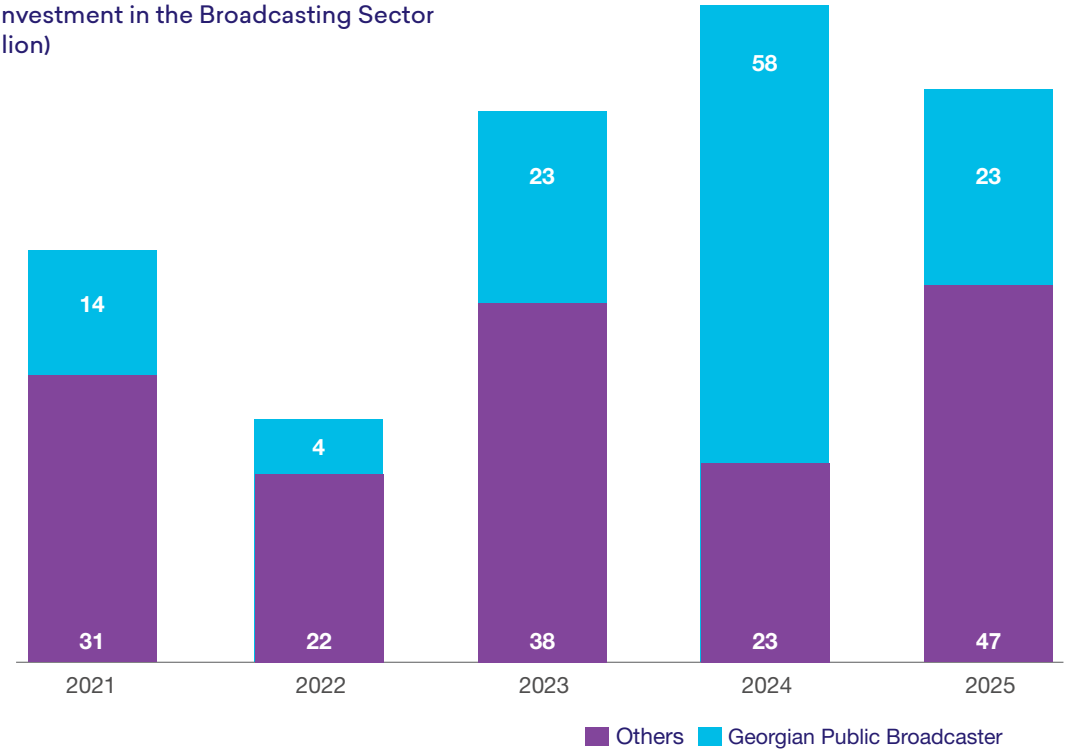
Distribution of Advertising Revenues of Radio Broadcasters by Company

| | |
|---|---|
| Radio Holding Fortuna | **61.4%** |
| Radio Imedi | **8.9%** |
| Radio Palitra | **5.0%** |
| Holding - Apkhazetis Khma | **4.5%** |
| Georgian Radio | **3.8%** |
| MD Group | **3.3%** |
| Hereti | **2.4%** |
| Radio Georgian Times | **1.9%** |
| Dzveli Kalaki | **1.1%** |
| Radio Urbanic | **0.9%** |
| Others | **6.9%** |

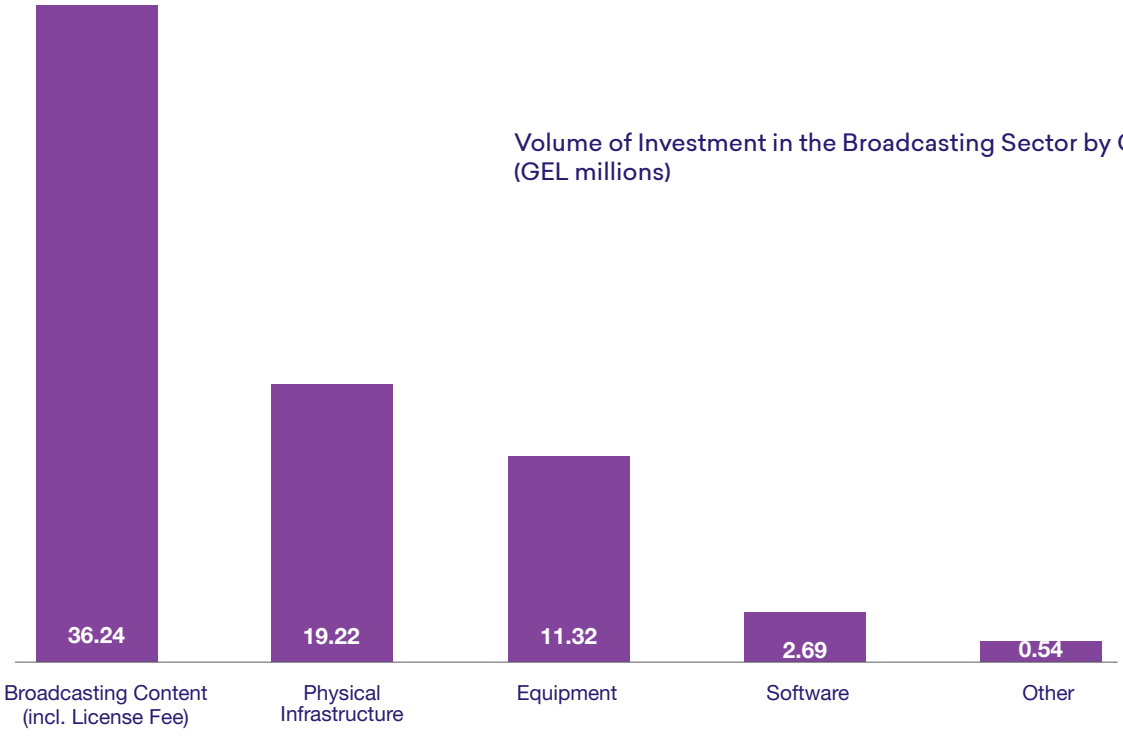
## Capital Investment in the Broadcasting Sector

Capital investment[59] in the broadcasting sector in 2025 amounted to GEL 70 million, which is 13.9 less than in the previous year.

Capital Investment in the Broadcasting Sector
(GEL million)




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

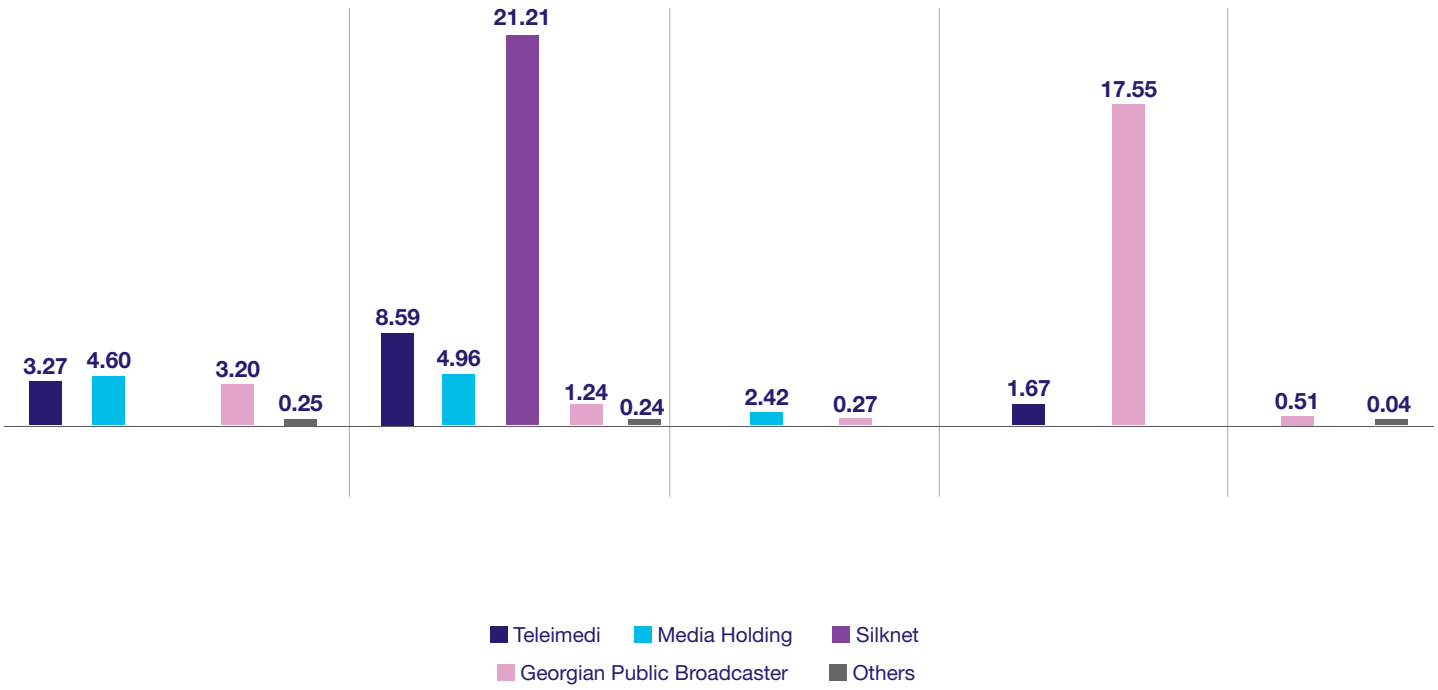



[59]Includes the data on companies that generated more than GEL 1 million in annual revenue.

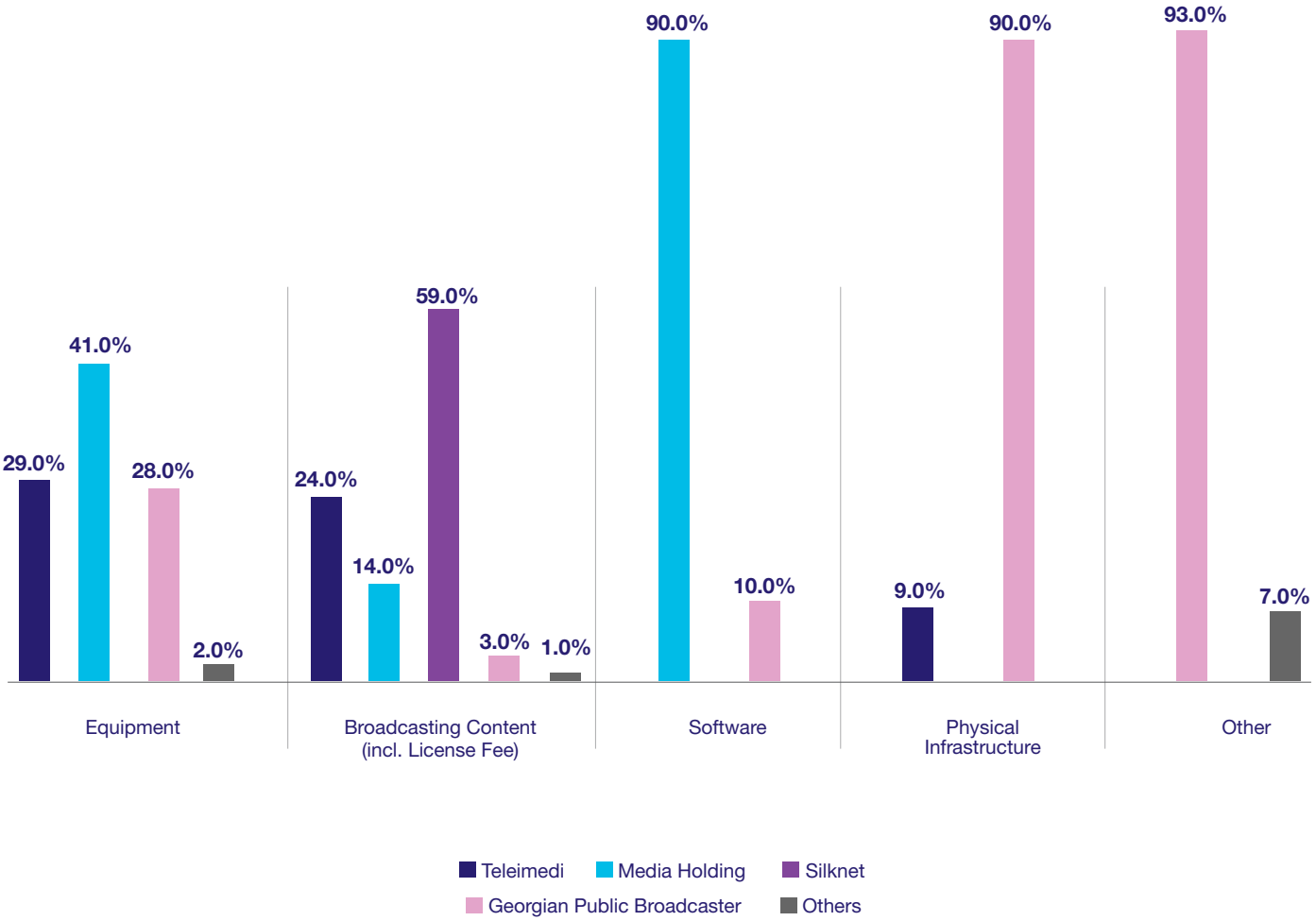

## Distribution of Capital Investment in the Broadcasting Sector by Companies

| | |
|---|---|
| Georgian Public Broadcaster | 32% |
| Silknet | 30% |
| Teleimedi | 19% |
| Media Holding | 17% |
| Others | 1% |

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



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




## Contributions to the State Budget

In 2025, a total of GEL 643,842,117 was paid into the state budget by the communications sector. The amount paid by broadcasters into the state budget in the form of taxes[60] was GEL 47,200,867, while the amount paid by authorised and/or licensed companies in accordance with the Law of Georgia on Electronic Communications was GEL 470,768,047. With regards to revenues from licensing, a total of GEL 125,816,349 was paid into the state budget by the communications sector in 2025. A total of GEL 56,854 was paid into the budget in the form of fines for administrative violations.

[60]The data is based on information provided by the Ministry of Finance. It includes: income tax, profit tax, VAT, excise duty, import tax, property tax, land tax (agricultural and non-agricultural).

## Media Challenges: Disinformation, Fake News, and the Blurring of Fact and Opinion

Media pluralism and diversity in the country have, in recent years, given rise to a number of challenges in the media sector, including disinformation, fake news, and the blurring of the line between fact and opinion. These issues have a significant impact on audiences and hinder their ability to make informed choices. To address these challenges and achieve full harmonisation with the EU legislation, amendments were introduced to the Law of Georgia on Broadcasting on 1 April 2025. As a result, the regulations now cover due accuracy of facts, the right of reply, fairness and impartiality, protection of privacy, and the coverage of emergency situations.

Under the law, broadcasters are required to deliver news and fact-based information to their audiences with due accuracy. They must also uphold the standards of fairness and impartiality, clearly distinguish between fact and opinion, and ensure that news and socio-political programmes are not influenced by the broadcaster's personal views or opinions. The law also regulates issues such as the protection of privacy, the use of covert methods by broadcasters to obtain and/or disseminate information, coverage of armed conflicts, accidents, and other emergency situations, as well as the protection of the rights of minors participating in programmes. It is worth noting that such legislation has been in force in Europe for many years, where compliance is supervised by the regulatory authorities in the media services sector. Adherence to these journalistic standards is critically important for protecting the rights of viewers.

Notably, some of these issues were not previously regulated by the Law of Georgia on Broadcasting and were only defined by the Code of Conduct for Broadcasters. However, the amendments introduced to the Law of Georgia on Broadcasting on 1 April 2025 established a new enforcement mechanism for these requirements. Prior to the amendments, most content-related requirements were enforced solely by the broadcaster's self-regulatory body, and the decisions of this body could not be appealed in court, before the Communications Commission, or before any other administrative authority. Under the amendments, the Communications Commission has been granted the authority to take legal action on these matters.

The Communications Commission began enforcing this law in April 2025. To ensure effective enforcement, the Commission is actively cooperating with its British counterpart, as the amendments to the Law of Georgia on Broadcasting are modelled on the British legislation. The Commission has thoroughly studied the practices and decisions of the UK regulatory authority (Ofcom), and subsequently developed the Guidelines on Broadcasting Content Requirements – Fairness, Impartiality, Due Accuracy, Right of Reply, Protection of Privacy, and Coverage of Emergency Situations. The purpose of the guidelines is to make the approaches and positions of the Commission on these issues more predictable for broadcasters, particularly in cases of legal violations, thereby helping the broadcasters properly conduct their activities and comply with the law. The guidelines serve to illustrate the regulatory authority's interpretation of the legislation in the field of media services and do not have binding legal force. The Commission's objective is to assist the broadcasters in properly fulfilling their legal obligations.

The Communications Commission is closely cooperating with broadcasters through working meetings and recommendations. To ensure proper and effective enforcement of the legislation, ComCom has developed guidelines for broadcasters covering content requirements such as fairness, impartiality, due accuracy, the right of reply, protection of privacy, and coverage of emergency situations.

Within the framework of the aforementioned law, the Communications Commission reviewed seven complaints in 2025, including those against Teleimedi, TV Pirveli, Formula, Mtavari Arkhi, and Obieqtivi. Four of these complaints were upheld, the broadcasters were found to be in violation, but were released from liability.

### The Plan for 2026

*Based on the fact that the Communications Commission, as the organisation creating media policy in the country, prioritises the protection of interests of the viewers and the public, and the establishment of high media standards, the Commission will continue the aforementioned process and effective enforcement of the law.*

## Challenges in the Television Advertising Market - Product Placement

In 2025, the Communications Commission actively responded to the increasing number of violations by broadcasters of the legislation governing advertising communications. Violations of sponsorship and product placement rules undermine the rights of viewers, as excessive emphasis by presenters on product features and advantages makes it difficult to distinguish between advertising and programme content. Programmes are often tailored to advertisers rather than the interests of viewers, which is categorically unacceptable. The Commission's objective is, on the one hand, to protect viewers from hidden and misleading commercial communications, and on the other hand, to protect broadcasters from undue commercial influence. Therefore, throughout the past year, the Commission conducted intensive monitoring of compliance with the product placement regulations, and took the appropriate enforcement actions in line with its legal mandate.

The monitoring activities carried out in 2025 identified 15 violations. In 7 cases, broadcasters were fined a total of GEL 47,500, while in 8 cases, written warnings were issued.

Financial penalties for violations of product placement rules in 2025 were imposed as follows:

- Teleimedi – GEL 22,500;
- Media Holding (Rustavi 2) – GEL 12,500;
- Formula – GEL 10,000;
- TV Pirveli – GEL 2,500.

### The Plan for 2026

*Given that the Communications Commission places equal importance on protecting the rights of viewers and the interests of broadcasters, it will continue to monitor the TV advertising communications and responding to cases of non-compliance with the law.*

## Pre-Election Media Monitoring

The Communications Commission carried out media monitoring during the pre-election period of the 2025 municipal elections, covering the period from 4 August through 4 October and observing a total of 49 broadcasters. The monitoring focused on: pre-election advertising; election debates; news and socio-political programmes; campaign activities; and public opinion polls and surveys.

Quantitative monitoring included measuring the airtime allocated to subjects, direct and indirect coverage, as well as gender distribution. Direct airtime referred to instances where an electoral subject or candidate spoke or participated directly in a programme. Indirect airtime referred to the time broadcasters spent discussing electoral subjects, candidates, or their supporters. The monitoring results were also broken down by gender, specifically reflecting the total airtime allocated to female and male politicians on the news programmes of each broadcaster.

Additionally, the monitoring reports included an assessment of the tone of coverage on the following seven broadcasters: Georgian Public Broadcaster, Adjara TV of the Georgian Public Broadcaster, Rustavi 2, Teleimedi, POSTV, TV Pirveli, and Formula. The tone of coverage was evaluated across three categories: positive, neutral, and negative. The seven channels were monitored during the prime time of 19:00 to 24:00.

It is worth noting that within the framework of pre-election media monitoring, the Communications Commission drew up only one administrative offense report (against POSTV) for violating the rules on publishing the results of public opinion polls related to the elections.

Media monitoring reports for the 2025 municipal elections, conducted in accordance with international standards, have been published on the official website of the Communications Commission.

In 2025, the Communications Commission updated its guidelines for broadcasters on the regulation of electoral matters. The guidelines were revised based on the practices accumulated during the 2024 parliamentary elections, and in line with the amendments introduced after the elections to the Election Code of Georgia and other applicable legislation.

## Analysis of Paid and Free Political Advertising

The Communications Commission conducted an analysis of paid and free political advertising during the pre-election period of the 2025 local self-government elections in Georgia. The findings showed that TV and radio broadcasters allocated more than 15,000 minutes in total to free political advertising, with television accounting for 83% of the airtime, and radio accounting for 17%.

The 12,632 minutes of free political advertising on television were distributed among the broadcasters as follows: Georgian Public Broadcaster – 14.7%, Adjara TV – 12.5%, Formula – 8.5%, POSTV – 8.4%, Rustavi 2 – 8.3%, Teleimedi – 7.7%, and TV Pirveli – 7.7%.

The Georgian Public Broadcaster allocated 1,852 minutes of free political advertising to 11 political parties as follows: Girchi – 32.1%, Georgian Dream – 30.7%, Free Georgia – 8.3%, Alliance of Patriots of Georgia – 6.3%, Conservatives for Georgia – 5.4%, For Georgia – 4.9%, Green Party – 4.5%, Strong Georgia – 3.5%, Our United Georgia – 2.4%, Homeland, Language, Faith – 1.5%, and People's Power – 0.4%.

Adjara TV allocated 1,574 minutes of free political advertising to 8 political parties as follows: Girchi – 35.1%, Georgian Dream – 30.6%, Free Georgia – 10.2%, Alliance of Patriots of Georgia – 7.6%, Conservatives for Georgia – 6.1%, For Georgia – 6.1%, Strong Georgia – 3.6%, and People's Power – 0.8%.

Formula allocated 1,076 minutes of free political advertising to 2 political parties as follows: Georgian Dream – 51.7% and Girchi – 48.3%.

POSTV allocated 1,060 minutes of free political advertising to 2 political parties as follows: Georgian Dream – 53.8% and Girchi – 46.2%.

Rustavi 2 allocated 1,049 minutes of free political advertising to 2 political parties as follows: Georgian Dream – 53.2% and Girchi – 46.8%.

Teleimedi allocated 979 minutes of free political advertising to 2 political parties as follows: Georgian Dream – 56.5% and Girchi – 43.5%.

TV Pirveli allocated 968 minutes of free political advertising to 2 political parties as follows: Georgian Dream – 53.8% and Girchi – 46.2%.

As for paid political advertising, according to the information submitted to the Communications Commission by broadcasters, only the political unions Strong Georgia and Free Georgia purchased paid political ads on national channels, spending a total of GEL 3,004,713. A total of 936 minutes of paid political advertising were placed. Strong Georgia – Lelo accounted for nearly all of this spending, with GEL 3,004,437 spent on paid ads placed on three television channels: TV Pirveli – 59%, Formula – 31%, and Rustavi 2 – 10%. The largest revenue from paid political advertising was collected by TV Pirveli (GEL 1,757,795), followed by Formula (GEL 944,652) and Rustavi 2 (GEL 301,990).

The analysis of paid and free political advertising, published on the website of the Communications Commission, covers the period from August to October and is based on the data provided by broadcasters, including both national and regional television and radio outlets.

## New Plan for the Development of Radio Broadcasting

In 2025, the Communications Commission developed a new plan to simplify the licensing process for private radio broadcasting, aimed at fostering the development of the radio communications sector. The initiative was presented to representatives of the leading private FM radio broadcasters.

The Commission's new initiative seeks to create more flexible conditions for radio broadcasters and reduce investment costs.

In particular, it involves increasing the number of broadcasting zones from 15 to 32, including dividing the regions of Kakheti, Adjara and Samtskhe-Javakheti into three zones each, and Imereti into five zones. This change will reduce the size of each zone and help broadcasters lower their investment expenditures.

In addition, the Communications Commission plans to make the requirements related to the number, location and technical parameters of transmitters more flexible. This will allow radio broadcasters to choose optimal options for purchasing and placing transmitters.

It is worth noting that in order to improve the quality of radio broadcasting, the Communications Commission significantly revised the licensing rules for private FM radio broadcasters in 2021. A strategy for conducting licensing contests was developed, and fifteen geographic broadcasting zones were defined. For each zone, the Commission established technical requirements, including the number, location and parameters of transmitters, which the broadcasters were required to comply with.

However, an assessment of the broadcasting market showed that most radio broadcasters would face difficulties in meeting the mandatory investment requirements set by the licensing conditions, which could lead to the suspension of broadcasting due to non-compliance.

### The Plan for 2026

*After completing the consultations with radio broadcasters and reviewing their feedback, the Communications Commission will initiate formal procedures to simplify the licensing process.*

## Development of Media Literacy

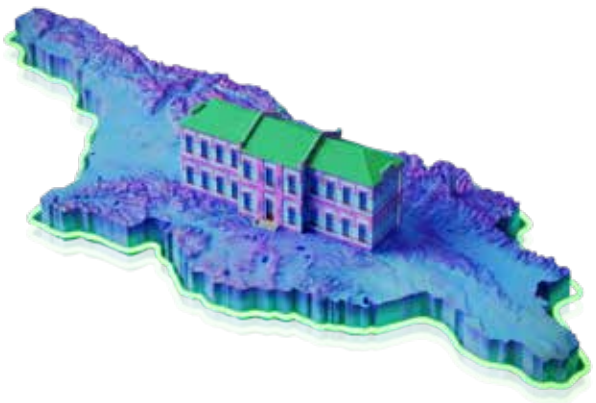
According to the study assessing media and information literacy in Georgia, “51% of the population possesses a medium or higher level of these skills.” Additionally, the study sought to identify existing needs and challenges, and develop recommendations for advancing the media literacy education policy.

This 51% benchmark is largely the result of targeted initiatives and strategic efforts implemented by the Communications Commission since 2018. As the national institution responsible for promoting media literacy, the Commission has set a strategic objective of integrating media literacy across all tiers of the education system. To this end, a series of significant projects and activities were carried out in 2025, spanning both school-level and higher education institutions.

## Integration of Media Literacy into General Education

Media literacy, as a cross-cutting competence, has been integrated into various subjects since 2018 under the third-generation national curriculum. In addition, the introduction of media literacy as a standalone elective subject has significantly expanded the scope of teaching. In 2025, media literacy was taught in 300 public and private schools across Georgia, more than 90% of which are in the regions.

Around 10,000 students studied the subject. The Ministry of Education, Science and Youth of Georgia has identified media literacy as one of the elective subjects with growing interest in schools. This upward trend is driven primarily by the “Integration of Media Literacy into Formal Education” project – a collaborative initiative launched in 2022 by the Communications Commission, the Ministry of Education, and UNICEF. Within the framework of the project, media literacy was integrated into formal education in 2023, and school participation in the project increased significantly each year – from 6 public schools in 2023 to 227 schools in 2024.



The Integration of Media Literacy into Formal Education project involves the introduction of media literacy as an elective subject for 10th–11th grade students. It aims to teach key principles of media literacy and raise awareness on issues such as cyberbullying, the language of media and information, processing of information, and disinformation. Based on an initial needs assessment, the Commission developed a media literacy educational standard, curriculum module, and the teacher’s guide Media Literacy Lessons. The project also focuses on systematically strengthening teachers’ competencies in media literacy. To this end, in cooperation with the National Center for Teacher Professional Development (TPDC) and UNICEF, the Communications Commission has trained 2,600 teachers across the country in various subjects as of 2025. This ensures the sustainable integration of media literacy and its effective implementation in school practice.

To support integration into formal education and facilitate the sharing of experience among schools, a conference titled “Integration of Media Literacy into Formal Education – The Role of Teachers and Practical Approaches” was held in Tbilisi and Kutaisi in 2025. Organised by the Communications Commission with the support of the Ministry of Education and UNICEF, the event brought together teachers, school principals and students to discuss project outcomes, practical approaches, and effective teaching methods. Panel discussions focused on increasing student engagement, lesson planning, and additional activities such as school clubs and project-based learning.

To facilitate the implementation and teaching of media literacy in general education, an awareness campaign was carried out, focusing on raising awareness about media literacy teachers and sharing their experiences.

Integrating media literacy into formal education and growing the interest from schools remain key priorities for the Communications Commission, which will help develop a media-literate and critically thinking society.

### The Plan for 2026

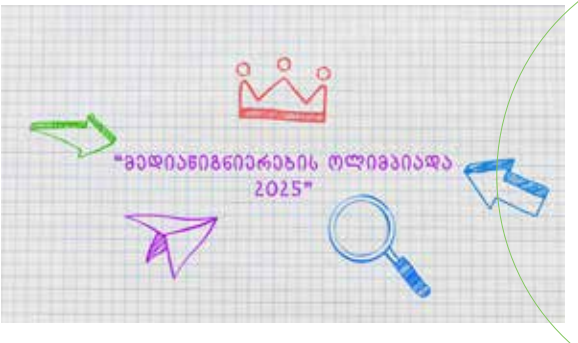
*The Communications Commission will continue to support the integration of media literacy into formal education. Efforts will include ongoing informational meetings with school principals and the development of teacher support mechanisms, such as professional development opportunities, updates to educational resources, and strengthening the practical components of media literacy within school environments, particularly in the regions.*

## Media Literacy Olympiad

In 2025, the Communications Commission held the Media Literacy Olympiad for the second time as part of the UNESCO Global Media and Information Literacy Week. The aim of the Olympiad is to raise awareness about media literacy within the school community, and to promote creative and critical thinking.

In 2025, around 320 schools from various regions of Georgia took part in the Olympiad. Approximately 2,200 students and more than 300 teachers were involved, and nearly 350 works were submitted. Student teams, guided by teachers, created creative and informational materials on the topic: “Artificial Intelligence and Disinformation – Challenge or Opportunity?”

Based on the submitted works, the jury selected two winning schools across different age categories. The winners of the 2025 competition were the public school of Lakhamula village in the municipality of Mestia and Batumi Public School No.1. The Communications Commission awarded the winning schools with modern media labs and high-tech equipment, enabling students to continue producing high-quality media content and further develop their practical skills.




### The Plan for 2026

*The Media Literacy Olympiad is a project that unites schools, teachers and students around the active learning and practical application of media literacy. For the Communications Commission, this initiative is an important tool for fostering critical thinking, fact-checking skills and responsible digital competencies among young people. Therefore, the Olympiad will be held again for the school community in 2026.*

## “Truth or Fiction?!“

In 2025, the Communications Commission held the media literacy competition “Truth or Fiction?!” for the twelfth time, demonstrating both the sustainability of the initiative and the growing interest among the participants. A total of 215 students from 8th-11th grades across various regions of Georgia took part, submitting 215 entries-one of the highest participation rates in the history of the contest.

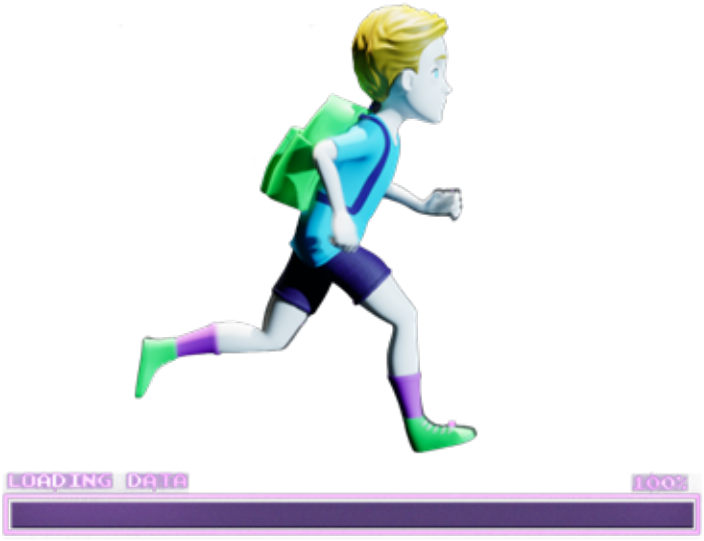
As part of the competition, participants identified unverified information disseminated in the media, fact-checked it using reliable sources, and analysed the process of detecting disinformation. From the submitted works, the Commission selected three winners and awarded them high-tech prizes. In addition, the authors of the top 20 entries received gift vouchers.

The winning submissions stood out for verifying the information across multiple official and credible sources, including international media outlets, and for presenting well-argued analyses. The results clearly demonstrated the growing ability of the participants to identify false information, verify facts, and apply critical thinking in practice.

The media literacy contest “Truth or Fiction?!” is one of the longest-running and most in-demand educational initiatives of the Communications Commission. Over the years, it has consistently contributed to the development of young people’s skills in information analysis, fact-checking and critical thinking. The competition has been held eight times for school pupils and four times for university students, with the total number of participants exceeding 1,000.

### The Plan for 2026

*The Communications Commission will continue organising the contest “Truth or Fiction?!” for school pupils. Special emphasis will be placed on strengthening practical fact-checking skills, promoting responsible use of digital platforms, and introducing new formats to further enhance critical thinking among young people.*



## Hello Ruby – Programming book

Hello Ruby is a Finnish educational book series designed to introduce students from 2nd through 6th grades to the fundamentals of programming and computer science, while simultaneously developing critical thinking and analytical skills. The license to publish the books in Georgian was obtained by the Communications Commission in 2019. Since then, the series has become one of the key educational resources in media literacy and digital education.

The Commission arranged visits by the author of the series, Linda Liukas, to Georgia in 2019 and 2023, when she personally trained Georgian teachers the unique teaching methodology of Hello Ruby. Since 2024, with the support of the Ministry of Education, Science and Youth of Georgia, the Commission has made both the teaching materials and teacher training accessible to all schools across the country.

In 2025, the project continued with professional training programmes for teachers specialising in computer technologies. In cooperation with the Ministry of Education, the Commission organised a series of webinars and seminars, where technology trainers previously trained by Linda Liukas prepared around 400 teachers in using the Hello Ruby methodology for teaching information technologies. These training activities were conducted across 21 regions nationwide, demonstrating broad geographic coverage.

The teachers and schools participating in the programme were provided with Hello Ruby textbooks and supporting materials, which are now being integrated into classroom teaching. Additionally, technology trainers continue to support the educators to ensure effective implementation of the materials.

As of 2025, the Communications Commission has published 20,000 Hello Ruby textbooks for schools across Georgia. The resource is currently used by approximately 1,300 schools nationwide. By the end of 2025, it had been integrated into around 60% of public schools, significantly contributing to the development of programming and digital skills among the pupils.

## Integration of Media Literacy into Higher Education

As the Communications Commission prioritises the development of media literacy among young people, it continues to expand cooperation with universities across multiple fields. ComCom envisages that integrating media literacy into formal education will play a critical role in developing analytical thinking, fostering informed consumption and dissemination of information, and building resilience to disinformation. Within this framework, the Commission is collaborating with seven public and private universities in Georgia. This collaboration involves delivering systematic informational meetings, seminars, thematic conferences and competitions for students focused on media literacy and related topics, as well as strengthening the competencies of the academic staff to support the teaching and institutional integration of media literacy into higher education. In 2025, the Commission conducted an in-depth study with representatives of the partner universities to identify their specific needs, assess institutional contexts, and further enhance the existing cooperation. Based on these findings, the Commission was able to design a more targeted and tailored engagement strategy.

As in the year before, in 2025 the Commission also offered a specialised professional development programme for academic personnel from partner universities, covering key areas such as: academic concepts of media and information literacy, their historical evolution, the characteristics of social media and digital platforms, safe usage practices, and methods for analysing sources and media influence. In addition to theoretical components, the training included practical exercises, enabling participants to develop individual models for creating standalone media literacy courses or integrating the relevant components into existing curricula. As a result of this initiative, starting from 2026, four thematic media literacy courses will be introduced at Batumi Shota Rustaveli State University and one course at Samtskhe-Javakheti State University, to be taught by trained lecturers and professors.

Furthermore, under the terms of the memoranda of cooperation with partner universities, the Commission organised media literacy seminars for students from five universities. These sessions addressed the importance of media literacy in the modern environment, characteristics of disinformation and misinformation, as well as their creation and dissemination mechanisms. Participants also explored the techniques of manipulative communication, propaganda, and conspiracy theories, including their defining features. The sessions incorporated content on the role of artificial intelligence and deepfake technologies in producing false information. Alongside theoretical discussions, the students engaged in team-based practical exercises focussed on fact-checking, enabling them to apply acquired knowledge in real-world scenarios.

## “Become a Media Literacy Researcher”

In 2025, the Communications Commission held the first edition of the analytical contest “Become a Media Literacy Researcher,” aimed at strengthening the research dimension of media literacy in higher education. The competition was designed for undergraduate and graduate students and sought to promote academic research, critical analysis, and the preparation of independent research papers on media literacy-related issues.

Participants were invited to submit analytical papers on contemporary topics such as media and artificial intelligence, disinformation and misinformation, as well as hate speech and online discrimination within the context of media literacy. The submissions were evaluated according to academic standards, with emphasis placed on research depth, analytical reasoning, and the ability to present new perspectives.

More than 180 analytical papers were submitted to the Communications Commission by students representing nearly 30 public and private universities across Georgia. Following the evaluation process, three winners were selected and awarded cash prizes by the Commission. First place went to a student from Ivane Javakhishvili Tbilisi State University for the paper The Evolution of Algorithmic Models and Their Psychological Impact on the Spread of Disinformation. Second place went to a student from Ilia State University for the paper White Lies in the Rabbit Maze – The Discourse of Disinformation in the Era of Scrolling Culture. Third place was awarded to a student from Batumi Shota Rustaveli State University for the paper The Role of Artificial Intelligence in Media: Opportunities, Challenges, and Dual Nature. The three winners received prizes of GEL 5,000, GEL 3,000 and GEL 1,500 respectively. All three winning papers were published on the international platform Media and Learning Association. In addition, authors of the ten outstanding works received collections of professional literature, while all participants were awarded certificates of participation.

### The Plan for 2026

*The Communications Commission will continue cooperating with partner universities and offering projects and initiatives tailored to their needs. To further support the integration of media literacy into formal education, the Commission plans to strengthen and expand its existing university network, with the broader objective of improving media literacy competencies among both students and academic staff and promoting deeper integration of media literacy into university education. It is also worth noting that ComCom has begun work on a comprehensive and up-to-date resource on media literacy and media education in Georgian language, which is expected to significantly support both the integration process and the effective teaching of media literacy.*

## Media and Information Literacy Week

The Communications Commission marked the UNESCO Global Media and Information Literacy Week in Georgia for the fifth time. As part of the initiative, the Commission organised a conference centred around UNESCO's global theme: "The Superiority of Human Thinking over Artificial Intelligence: Media Literacy in the Digital World." During the conference, industry experts discussed the opportunities and risks associated with artificial intelligence, the interaction between human cognition and AI systems, as well as the importance of critical thinking and responsible use of technology in the digital environment.

With the initiative and support of the Communications Commission, Media Literacy Day is also celebrated annually in schools as part of the broader Media Literacy Week activities. The schools organise informational meetings and thematic events for students, including seminars focused on critical source evaluation through practical exercises, discussions on digital ethics and responsible online media consumption, and presentations of student-created media literacy projects.

As part of the week-long activities, the Commission also implemented an innovative social media awareness campaign aimed at increasing public understanding of media literacy. ComCom created an artificial intelligence character named Kai, which provided the public with information about the opportunities and risks of artificial intelligence through various communication products on social media platforms. Through this campaign, the Commission sought to draw attention to the challenges of the digital era and the growing importance of media literacy in navigating them.

### The Plan for 2026

*The Media and Information Literacy Week is being held in accordance with the resolution adopted by the United Nations in 2021 and serves to raise awareness among the public about media literacy and its importance. In line with its annual observance alongside UN Member States, the Communications Commission will continue to implement tailored projects and events across Georgia.*

## “Global Media Literacy Hackathon”

Within the framework of the 2025 UNESCO Global Media and Information Literacy Week, the Communications Commission and Media Lab held the third edition of the Global Media Literacy Hackathon for young people. The event focused on topics such as artificial intelligence, disinformation, digital literacy and cybersecurity. Its primary objective was to foster media literacy, innovative thinking and practical digital skills among young people.

Ten teams took part in the competition and completed a two-day training programme with mentors. The participants worked on generating, developing and refining project ideas, while also attending thematic workshops on idea validation and prototype development. The submitted projects were evaluated based on the relevance of the problem addressed, the effectiveness of the proposed solution, and sustainability criteria.

A jury panel selected the three winning teams, which received cash prizes from the Communications Commission and Media Lab. First place went to the team “Lianebi”, which developed a project designed for parents of children on the autism spectrum. The team received a prize of GEL 5,000. Second place went to the team “Metamorphosis”, which presented an educational computer game focussed on media literacy. The team received 3,000 GEL. Third place was awarded to “404 Crew”, whose project aimed to support lecturers and students in academic environments through the use of artificial intelligence. The team received a prize of GEL 1,000.

The Global Media Literacy Hackathon serves as a youth-oriented platform that promotes awareness of the importance of media literacy, encourages the development of innovative ideas, and supports the creation of practical digital solutions.

### The Plan for 2026

*To increase youth engagement and participation, the Communications Commission and Media Lab will continue organising the Media Literacy Hackathon, helping young people develop innovative ideas and transform them into projects.*

## National Media Literacy Platform

The national media literacy platform www.mediatsigniereba.ge is an online space created by the Communications Commission. It has been operating since 2021. The platform offers the public a wide range of educational resources aimed at developing media literacy, critically evaluating information, and improving digital literacy. Its main objective is to raise awareness about media literacy and provide reliable academic materials for its key target audiences of students, teachers and parents.

The platform hosts around 200 analytical and educational articles covering core media literacy concepts, the language of media and information, fact-checking mechanisms, identifying disinformation, rules of conduct in digital environments, and the impact of the rapidly evolving digital world on society. Special attention is given to protecting children and adolescents from harmful information and digital threats, including the identification of online risks and the creation of a safe digital environment. The materials are prepared in an easy-to-understand format and include practical examples, helping users apply and share the acquired knowledge in everyday life.

According to 2025 data, www.mediatsigniereba.ge had a total of 140,000 visitors, while the number of subscribers reached 1,300.

The national media literacy platform also serves as a hub for various initiatives, research projects and educational resources in the field of media literacy. The platform brings together more than 30 partners working and interested in media literacy, and shares both local experience and international best practices.

### The Plan for 2026

*The Communications Commission will continue developing the national media literacy platform to ensure access to updated information on ongoing trends, sectoral research and innovative approaches in the field of media literacy.*

Within the framework of the media literacy projects implemented from 2019 through 2025, the Communications Commission has trained 16,300 pupils, 5,500 teachers and 1,900 university students to develop media literacy skills, as well as critical and logical thinking. In total, nearly 1,500 conferences, seminars and informational meetings have been conducted, while the Digital Inclusion Programme has more than 10,000 beneficiaries.

The total number of beneficiaries of the media literacy projects implemented since 2019 has reached 33,700.

# MEDIA ACADEMY

*The Media Academy works to enhance the quality and professional standards of the media and serves to develop the knowledge and practical skills of people interested in the field of media.*

*The activities of the Media Academy combine educational formats such as short and long-term courses, masterclasses, seminars and mentorships with critical and analytical activities.*

*In 2025, the Media School Studio admitted the third cohort to its long-term courses. The four-month practical course is free of charge and gives students the opportunity to fully master journalism in a real newsroom environment.*

*The course includes both theoretical and practical media-related work, after which the graduates are able to independently create high-quality media products.*

The Media School launched the long-term courses in 2024, and the Media School Studio has produced a total of 29 graduates, most of whom are employed in various media organisations. The Media School Studio is equipped with all the necessary inventory and technical equipment. Students receive practical training in news production; hosting programmes for television, radio broadcasts and online platforms; audio editing and sound directing; production of non-news television reports and programmes; video editing; interview preparation; and producing. The programme also includes preparation of radio news bulletins, reports and podcasts, camera operation, speech training, television scheduling and formatting, production, and social media skills.

The courses were taught by experienced professionals, including: Head of the News Service and talk show host at Rustavi 2, Nino Shubladze; Rustavi 2 presenter David Kakulia; chief producer of morning and afternoon shows at Teleimedi, Sopo Nikolaishvili; journalist, reporter and director of documentary films at Teleimedi, Mariam Bakuradze; sports commentator Dimitri Oboladze; theatre scholar and TV presenter Nikoloz Tsulukidze; Media Director at the Georgian Public Broadcaster (GPB), Rusudan Manjgaladze; producer Ekaterine Talakhadze; GPB journalist Teona Managadze; GPB camera operators Giorgi Kasrashvili and Vazha Makarashvili; Head of the Sound Department at GPB, Maka Kuchaidze; verbal and non-verbal communications trainer Tamta Tsintsadze; and Digital Marketing Manager at the Media Academy, Lasha Darbaiseli.


For the past five years, the Media School has been offering people interested in journalism free online masterclasses led by professional authors, covering the knowledge and skills required for media work, creating high-quality media products, and becoming a professional journalist.

The project consists of a series of online lectures in which TV managers, producers, presenters, camera operators and professionals from various media-related fields share their experience with the audience.

Three new authors joined the Masterclass project in 2025, including military reporter Koba Liklikadze, sports journalist and TV presenter Dimitri Oboladze, and psychologist Zurab Mkheidze.

The Masterclass video lectures are freely available on Media Academy's YouTube channel, and have already accumulated more than 4 million views in total.

The Masterclass project includes video lectures by another 20 authors, which are also available on the YouTube channel of Media Academy.

## Seminars for Media Representatives and Students

For more than six years, the Media School has been conducting free seminars for working journalists and students in order to establish high media standards and improve professional qualifications. In 2025, the Media Academy held nine public training sessions attended by more than 160 participants in total. The seminar topics included the use of artificial intelligence in the media and the identification of fake news, led by data analyst and AI specialist Irakli Gogatishvili, who holds a PhD in Economics from the University of Turin and has many years of experience in developing AI systems. Participants also had the opportunity to attend a training session by psychologist Zurab Mkheidze, who discussed the influence of media on audiences and the processes of information perception. Diplomat Kakha Sikharulidze, Director General of the Global Issues Directorate at the Ministry of Foreign Affairs of Georgia, led a training session on the "Coverage of Diplomacy and International Politics," while the seminar on economics was conducted by Doctor of Economics and Dean of the Business and Management School at Grigol Robakidze University, Vakhtang Charaia.

Media School participants also had the opportunity to meet with the Public Defender of Georgia, Levan Ioseliani, and attend a lecture on human rights. Students additionally met with psychologist Rusudan Gorgiladze, director Giorgi Ebralidze, and Ketevan Sadgobelashvili, who conducted training sessions on documentary filmmaking. Playwright Basa Janikashvili led a seminar on storytelling, while actress Ia Sukhitashvili spoke with future journalists about camera techniques and expressive arts.

The online Media Criticism platform www.mediacritic.ge is an online resource offering publications on media regulation and international experience in this field. The platform also shares information about the current developments, trends, and social media updates in global media. In addition, the Media Criticism platform publishes materials aimed at preserving the norms of the Georgian language and promoting proper language usage.

Before the amendments to the Georgian Law on Broadcasting entered into force, Media Criticism published dozens of critical articles mainly related to daily news coverage. These articles focussed on violations of journalistic standards in news reporting, including the separation of facts from opinions and the dissemination of information by media outlets without proper context. After the law came into force, Media Criticism devoted greater attention to issues of media regulation.

In 2025, the Media Criticism platform had 125,000 visitors. Since its establishment, more than one million users have viewed the materials published on www.mediacritic.ge, while the website has recorded more than three million page views.

The Media Lab aims to strengthen the digital media ecosystem. The Media Lab accelerator supports the startups through consultations, training sessions and expert advice. It also provides access to resources, including modern technologies, free workspace, various tools and software.

The Media Lab conducts training sessions and seminars for different audiences. In addition, it implements projects and events that bring together professionals with diverse experience backgrounds.

## Media Lab Trainings and Seminars

The digital environment is evolving and improving on a daily basis. Through meetings and educational formats, the Media Lab provides people with the knowledge necessary to adapt to the changing digital environment. To this end, its trainings and seminars incorporate topical practical subjects, as well as the core competencies that enable participants to keep pace with the continuously developing digital world.

In 2025, the Media Lab conducted 15 meetings and training sessions for startuppers. The total number of beneficiaries trained by the Media Lab exceeded 500.

## Cyber Security Forum – Tech Trek

The Media Lab, in cooperation with the Scientific Cyber Security Association, held the cyber security forum Tech Trek.

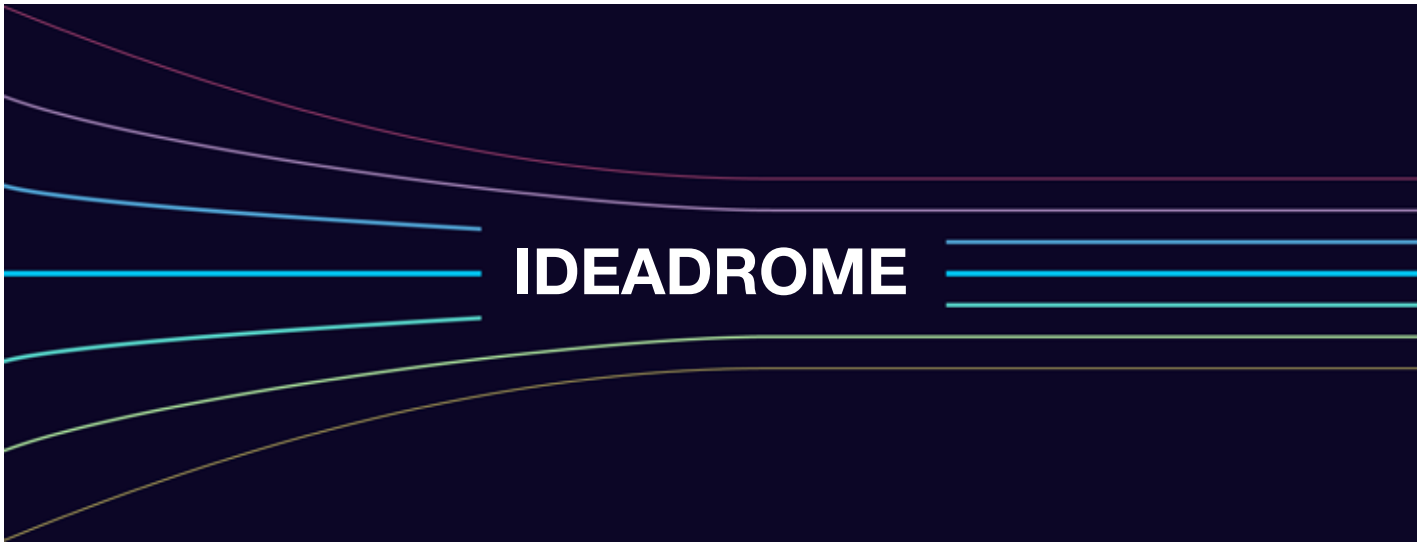
The main theme of the event was artificial intelligence, and it was attended by around 200 beneficiaries, including startup founders, digital product creators, programmers, cybersecurity specialists, IT experts and AI engineers. Participants explored issues related to the reliability and security of the AI ecosystem. Specifically, the discussions focussed on the risks associated with data sharing for technologies, how artificial intelligence models can become targets of cyberattacks, and the threats posed by generative AI.

## Ideadrome

In 2025, the Media Lab held two editions of the startup idea competition Ideadrome. The aim of the competition was to identify potential startups and startup ideas in the field of digital media, and support their transformation into real projects. The startups participating in the competition underwent a week of intensive training. As part of the programme, they received assistance from specialists. The teams were supported by experienced startuppers and commercialisation experts, lawyers, financiers, marketers, as well as personal and organisational development specialists. Participants received 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 presented their ideas to a jury panel, which selected the winners. The prize fund of Ideadrome was GEL 10,000.

Ideadrome has been held 11 times. The majority of participating teams continue to operate their projects and businesses.



## International Telecommunication Union (ITU)

The close cooperation between the Communications Commission and the International Telecommunication Union continued throughout 2025.

• *Commissioner Ekaterine Imedadze took part in a session of the ITU Council. The Council is the governing body of the ITU between Plenipotentiary Conferences (PP), and is responsible for ensuring the ITU's day-to-day operations, coordinating work programmes, approving the budget, and overseeing finances and expenditures. The Council consists of representatives from 48 ITU member states.*

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• *Commissioner Ekaterine Imedadze and Head of the International Relations Office Nino Grdzelishvili took part in the high-level event dedicated to the 20th anniversary of the World Summit on the Information Society (WSIS+20), and the global summit "AI for Good." Ekaterine Imedadze presented ComCom's projects aimed at implementing 5G in Georgia and encouraging market competition. Furthermore, she took part in the LeadersTalk, where she discussed the implementation of transparent and competitive policies by the telecom regulatory authorities to support sustainable digital development. In addition, Ekaterine Imedadze served as a speaker at a joint session organised by the International Labour Organisation and the ITU, which focused on digital skills and labour market transformation. She also took part in a session bringing together women ministers and female leaders in the ICT sector, where discussions focussed on reducing gender inequality and increasing women's participation in digital governance. Furthermore, Ekaterine Imedadze delivered a presentation on digital transformation at the GovStack Digital Leaders Forum, organised by Germany, Estonia and the ITU.*

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• *Commissioner Ekaterine Imedadze and a representative of the International Relations Office took part in the 25th Global Symposium for Regulators (GSR-25). The symposium adopted the GSR Best Practice Guidelines, outlining a future vision for the regulation of global digital markets. The Communications Commission was actively involved in the consultation process and presented its own perspectives. Speaking at the roundtable session of the heads of regulatory authorities, Ekaterine Imedadze highlighted the projects and successful experiences of the Communications Commission, including the first holistic study of telecommunications markets, the strategy for market liberalisation and promotion of innovative business models, price benchmarking, accessibility studies of services, and the internet quality monitoring programme. Within the framework of the symposium, Ekaterine Imedadze moderated a thematic session titled "From Earth to Space: Promoting Trust and Innovation." The discussion focused on how regulatory frameworks can balance innovation and security in order to create a low-risk and open telecommunications ecosystem. As part of the symposium and in support of inclusive governance initiatives, Ekaterine Imedadze also took part in an interactive session of the ITU Development Bureau's Network of Women (NoW). The thematic discussions focussed on the sharing of expertise, visions and challenges for female leaders in the field of technology.*

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• *Commissioner Ekaterine Imedadze and the Head of ComCom's International Relations Office, Nino Grdzelishvili, took part in the World Telecommunication Development Conference (WTDC-25), organised by the International Telecommunication Union and the Ministry of Digital Development and Transport of Azerbaijan (Mincom). The main theme of the conference was "Universal, meaningful, and affordable connectivity for an inclusive and sustainable digital future." Ekaterine Imedadze took part in the ITU-D Network of Women (NoW) workshop, where female delegates discussed ways to strengthen the role of women in telecommunications, promote gender balance, and emphasise the importance of developing digital and leadership skills. In addition, WTDC-25 included working meetings of ITU committees that discussed organisational matters related to the International Telecommunication Union.*

## Digital Regulation Network (DRN) Governing Board

In 2025, Commissioner Ekaterine Imedadze took part in the meetings of the Governing Board of the Digital Regulation Network on behalf of the Eastern Partnership Electronic Communications Regulators Network (EaPeReg).

- *The main topics discussed during the DRN Governing Board session held within the framework of the ITU Council included the key trends in digital regulation, strategic priorities, and ways to deepen DRN's international cooperation.*

- *Within the framework of WSIS+20, at a special DRN session focussed on establishing cooperation frameworks among the regulators for sustainable digital development and the use of artificial intelligence and innovative technologies to address challenges in the digital sphere, Ekaterine Imedadze spoke on behalf of EaPeReg about the current situation in the region and the future prospects.*

- *During a special DRN session held within the framework of GSR-25, Ekaterine Imedadze emphasised the importance of regional cooperation, highlighted EaPeReg's successful experiences and ongoing projects, and placed particular focus on the need for regional harmonisation and future-proof regulatory tools.*

## Eastern Partnership Electronic Communications Regulators Network (EaPeReg)

Throughout 2025, the Eastern Partnership Electronic Communications Regulators Network successfully continued supporting the process of bringing partner countries closer to the EU Digital Single Market. This was demonstrated by the projects implemented by the network's expert working groups with the support of EU4Digital, as well as by the network's expanded international cooperation.

ComCom actively contributed to this process. The ITU and EaPeReg have been closely cooperating with each other since signing a memorandum in 2016. Commissioner Ekaterine Imedadze represents EaPeReg on the ITU Digital Regulation Network's Governing Board. In addition, she serves as EaPeReg's permanent contact point within the ITU and coordinates cooperation between EaPeReg and the ITU.

The Regional Development Forum for Europe and the WTDC Preparatory Meeting for the Europe Region were organised by the National Media and Infocommunications Authority of Hungary (NMHH) and the ITU Office for Europe. Ekaterine Imedadze took part on behalf of EaPeReg in a session dedicated to the strengthening of partnerships in the field of infrastructure development. Particular attention was paid to the importance of trilateral cooperation between ITU, EMERG and EaPeReg.

- *An international conference of regulators was organised by the Agency for Electronic Communications (AEC) and the ITU, where the ComCom representative spoke about the importance of the ITU, and about EaPeReg's contribution.*

- *The 2025 Regional Forum of European Regulators was organised by the Agency for Electronic Communications and Postal Services of Montenegro (EKIP) and the ITU Office for Europe. The ComCom representative took part in the session "Public Warning Systems in the Digital Era," where she discussed the dynamics of implementing cell broadcast technology in the region.*

- *The ITU Office for Europe and the Digital Security Authority of Cyprus (DSA) organised a capacity-building seminar on quality-of-service issues related to mobile infrastructure. The ComCom representative discussed the importance of cooperation with the ITU and EMERG in promoting digital transformation and the development of inclusive digital ecosystems.*

Communications Commission staff members who are part of EaPeReg expert working groups (IRB EWG, REWG, SEWG) took part in working meetings. With their involvement, EU4Digital telecom experts finalized the work on the following documents:

- *Regional report on voice call termination market analysis (REWG);*
- *Regional market analysis report (IRB EWG);*
- *Regional and partner-country individual reports on broadband service market monitoring (IRB EWG).*

## Meetings of the Council of Europe Steering Committee on Media and Information Society (CDMSI)

*The Steering Committee on Media and Information Society is a committee operating under the umbrella of the Council of Europe, working on issues related to media freedom, pluralism, access to information, internet governance, and the protection of human rights in the digital environment. Georgia's representative on the CDMSI Steering Committee is Commissioner Ivane Makharadze.*

Ivane Makharadze and Head of the International Relations Office of the Communications Commission, Nino Grdzelishvili, took part in the 28th Plenary Meeting of CDMSI.

The meeting focused on defining CDMSI's priorities for 2026, combating disinformation, and discussing national strategies for the development of media and information literacy. In addition, participants discussed the activities of two new expert committees: one on protecting media pluralism in the online environment, and another on the role of media regulators in platform-based environments.

## European Platform of Regulatory Authorities

The European Platform of Regulatory Authorities (EPRA) is a network of broadcasting regulators founded in 1995, bringing together 56 regulatory authorities from 47 countries. Georgia joined the EPRA network in 2013 and is represented in the organisation by the Communications Commission.

Commissioner Ivane Makharadze and Head of the Media Services Regulation Department, Konstantine Koridze, took part in the 61st meeting of EPRA, which focussed on electing EPRA's new leadership and discussing ways to address challenges in the field of media regulation.

Current issues related to media regulation were discussed during the meeting. One session focused on the protection of children's rights on video-sharing platforms and social media, as well as ensuring the proper conduct of electoral processes. Within this framework, participants reviewed examples from different countries and discussed regulatory tools and updated educational approaches. The meeting also addressed media regulation approaches that define healthy regulatory policies in different countries.

Elections for the Executive Board were also held during the event.

Commissioner Ivane Makharadze, Head of the Media Services Regulation Department Konstantine Koridze, and Head of the International Relations Office Nino Grdzelishvili took part in the 62nd meeting of EPRA, hosted by the Television and Radio Commission of Armenia. The main topics of the event included the protection, promotion and development of media pluralism in the digital era, as well as the development and enforcement of strategies needed by regulators in a rapidly evolving environment.

Within the framework of the event, ComCom representatives discussed opportunities for bilateral cooperation with representatives of the regulatory authorities of United Kingdom, Ireland, Lithuania, Italy, North Macedonia, Bulgaria and Spain.

The meeting also included thematic sessions, where representatives of the Global Online Safety Regulators Network (GOSRN) and the Global Media Registry presented their current priorities and activities. The 62nd EPRA meeting also focussed on important topics such as the available approaches and tools for promoting a diverse and healthy media environment.

## European Audiovisual Observatory

The European Audiovisual Observatory is an organisation operating under the umbrella of the Council of Europe since 1992, analysing facts and data related to the film, broadcasting and audiovisual industries in Europe. The organisation currently has 41 member states. Georgia became a member of the organisation in 2016 and served as its chair country in 2024. Georgia is represented in the EAO by the Communications Commission, while Georgia's representative on the Executive Council of the organisation is ComCom member Ivane Makharadze.

Commissioner Ivane Makharadze took part in the 73rd meeting of the Executive Council of the European Audiovisual Observatory held in Vienna, as well as in the conference organised by the chair country, dedicated to the revision of the Audiovisual Media Services Directive (AVMSD).

The meeting discussed important issues such as the development of a legal framework for the new Audiovisual Media Services Directive, the role and influence of influencers in the audiovisual sector, the protection of minors' rights in the field of media, and strengthening cooperation between EAO and the European Commission.

Head of the International Relations Office of the Communications Commission, Nino Grdzelishvili, took part in the 74th meeting of the Executive Council of the European Audiovisual Observatory, which focussed on approving EAO's 2026 action plan and budget.

## BRAF

The Black Sea Broadcasting Regulatory Authorities Forum (BRAF) was established in 2009 and operates through annual meetings. Member countries of the organisation include Georgia, Turkey, Albania, Bulgaria, Azerbaijan, Armenia, Romania, Russia, Moldova, Greece, Ukraine and Serbia.

Representatives of the ComCom Media Services Regulation Department and International Relations Office took part in the 11th and 12th annual meetings of BRAF.

The events included a panel discussion on the subject of "Protecting Children's Rights in Media Services." During the discussion, ComCom representatives introduced BRAF member states to the recent developments and challenges in the field of broadcasting and media services in Georgia, as well as ComCom's efforts and progress in protecting children's rights in the online environment.

## Meeting of the Global Network for AI Supervisory Authorities

Head of the International Relations Office of the Communications Commission, Nino Grdzelishvili, took part in the first meeting of the Global Network for AI Supervisory Authorities.

During the visit, Nino Grdzelishvili also attended a roundtable-format meeting dedicated to strengthening the capacities of institutions responsible for AI-related issues. The meeting discussed important matters such as the key challenges and strategies for the effective supervision and regulation of AI systems, the skills and tools required by regulatory authorities for AI oversight, and related issues.

The Global Network for AI Supervisory Authorities is an informal platform that brings together regulatory and policymaking bodies. The Communications Commission joined the platform in 2025.

# International Events

## World Summit on the Information Society (WSIS+20)

Commissioner Ekaterine Imedadze and Head of International Relations Office Nino Grdzelishvili took part in the high-level event dedicated to the 20th anniversary of the World Summit on the Information Society (WSIS+20), and the global summit "AI for Good."

Within the framework of the event, the Communications Commission organised a session entitled "Leveraging Innovation and Balancing Risks and Opportunities in the Digital Space: Georgia's Experience." The session focussed on Georgia's potential to become a digital hub and on the country's efforts and achievements in promoting inclusive digital transformation. During the event, Commissioner Ekaterine Imedadze delivered a presentation on the initiatives implemented by the Commission to position Georgia as a regional digital leader, while Nino Grdzelishvili moderated the session. During the discussion, it was pointed out that Georgia has the advantage of becoming a key link in the region and a reliable partner between Europe and Asia, particularly due to the unique opportunity provided by Georgia's direct submarine connection with the European Union. Georgia's geographical location, secure and resilient infrastructure, and a strong legal and institutional framework contribute to the development of innovation and international cooperation, while the favourable regulatory environment creates a real foundation for Georgia's transformation into a regional digital hub.

## GSMA Forum

Commissioner Ekaterine Imedadze and Head of the International Relations Office Nino Grdzelishvili took part in the GSMA event titled M360 Eurasia Forum 2025.

During a session at the GSMA Eurasia Forum dedicated to encouraging mobile investment, Ekaterine Imedadze delivered a presentation highlighting Georgia's potential to become a digital hub, ComCom's efforts in this direction, and decisions aimed at liberalising the telecom market and strengthening competition.

The GSMA Eurasia Forum also focussed on important issues such as the development of artificial intelligence and 5G technologies; encouraging innovation, economic potential, and investment in the region; as well as promoting economic sustainability and creating the framework necessary to reduce digital inequality.

The event hosted more than 3,500 participants from around 100 countries.

## 2025 Leaders' Summit

Commissioner Ekaterine Imedadze attended the 2025 Leaders' Summit, where she took part in a G20-format discussion focussed on increasing monetisation opportunities through the use of artificial intelligence and 5G technology, creating an inclusive telecommunications environment, and discussing innovative business models based on digital services. During the meeting, Ekaterine Imedadze reviewed the current developments in the Georgian telecom sector and highlighted ComCom's efforts and achievements regarding the implementation of 5G and digital transformation.

In addition, Ekaterine Imedadze took part in roundtable discussions addressing important topics such as the supportive role of regulatory authorities in the development of telecommunications infrastructure and innovative telecom services; strategies for the development of 5G; and preparations for the emerging 6G technologies.

The summit, attended by the representatives of 20 regulatory authorities and various sectors, was organised by the SAMENA Telecommunications Council and the Telecommunications and Digital Government Regulatory Authority of the United Arab Emirates (TDRA).

## 20th European Spectrum Management Conference

Head of the Spectrum and Technology Department of the Communications Commission, Sandro Karumidze, and Head of the Spectrum Management Group Giorgi Papava took part in the 20th European Spectrum Management Conference (ESMC).

Within the framework of the conference, discussions focussed on issues such as the European Digital Networks Act initiative; the coexistence of GSO/NGSO satellite systems; future use of the 7.125–8.5 GHz frequency range; maximising the value of the 6 GHz and sub-700 MHz mid-band spectrum for mobile networks; and defining common European positions and priorities for the World Radiocommunication Conference (WRC-27), among other topics.

## Capacity Eurasia 2025

Commissioner Ekaterine Imedadze and Head of the Market Regulation Department Ekaterine Sichinava attended the international conference Capacity Eurasia 2025, which was organised by Capacity Media.

During the event, Ekaterine Imedadze took part in a panel discussion entitled "New Digital Hubs Connecting Two Continents," where she spoke about Georgia's advantages as a regional digital connectivity hub.

During the session, which discussed how countries located at the crossroads of two continents can develop into digital hubs, Ekaterine Imedadze stated that Georgia is the only country in the Caucasus with a direct submarine connection to the European Union, enabling it to become a neutral, stable, and secure platform for data exchange. She also discussed ComCom's initiatives aimed at promoting the development of high-quality and sustainable infrastructure, open access and digital inclusion in Georgia.

The purpose of the Capacity Eurasia 2025 conference is to bring together telecom operators, industry representatives, institutions working on telecommunications and digital transformation issues, and regulatory authorities from Eurasia, the Caucasus, Central Asia and Eastern Europe, in order to discuss opportunities related to digital transformation in Eurasia.

## UNESCO and CLEMI Conference

Commissioner Natia Kukuladze and Head of the Media Literacy Department Mariam Dakhundaridze took part in the conference "To Educate or to Ban: Breaking the Impasse," organised by UNESCO and the French Centre for Media and Information Literacy (CLEMI).

The conference was dedicated to UNESCO and CLEMI developing a guide for parents and families on addressing the challenges of the digital world. Within the framework of the visit, ComCom representatives also held working meetings with the Head of UNESCO's Media and Information Literacy and Digital Competencies Service, as well as with the Programme Manager of UNESCO's Media Literacy Alliance.

# Bilateral Cooperation

## Cooperation with Regulatory Authorities

- In 2025, the Communications Commission signed memoranda of understanding with the National Telecom Regulatory Authority of Egypt and the National Authority for Management and Regulation in Communications of Romania. The cooperation envisages the exchange of experience in the fields of electronic communications, consumer rights protection, satellite systems, and the development of 5G networks.

- Commissioner Natia Kukuladze and Head of the Media Literacy Department Mariam Dakhundaridze held a working meeting with the Director of International Cooperation and the Head of the Media Literacy Service of the French regulatory authority ARCOM. During the meeting, ComCom representatives received information about the French media literacy policy and various educational projects. The Communications Commission representatives also shared information with their French counterparts about ComCom's achievements and successful projects in the field of media literacy development.

## Cooperation with Finland in the Field of Media Literacy

Commissioner Natia Kukuladze, Head of the Media Literacy Department Mariam Dakhundaridze, and Head of the International Relations Office Nino Grdzelishvili held working meetings with their Finnish colleagues to share the best practices in media literacy and deepen their cooperation in this area.

Participants in the meetings included representatives of the Finnish National Audiovisual Institute (KAVI), the Programme Director of the Finnish Safer Internet Centre, the Executive Director of the Finnish Society on Media Education, and representatives of the Finnish National Agency for Education (EDUFI).

Representatives of the Communications Commission introduced their Finnish counterparts to ComCom's approaches, projects and achievements in the fields of media literacy and digital literacy.

## Cooperation with the Ministry of Digital Development and Transport of the Republic of Azerbaijan

Representatives of the Communications Commission held a working meeting with employees of the Ministry of Digital Development and Transport of the Azerbaijan to coordinate broadcasting and mobile services. The meeting addressed the issues related to digital television, VHF/FM and digital radio broadcasting, as well as terrestrial mobile services. The parties agreed on the allocation of frequencies for FM radio and television broadcasting stations.

The meeting also involved exchanging the results of joint mobile network testing and discussing the implementation of the Technical Agreement Document (TAD) for IMT systems coordination. Discussions focussed on mobile network optimisation and ensuring the use of frequency channels, NCC, SC, and PCI parameters in accordance with the TAD document. Within the framework of the meeting, the parties also reviewed the possibilities for joint use of the 174–230 MHz band and optimisation for T-DAB services and agreed to prepare a frequency block allocation plan for this range.

## Cooperation with PSRC

Head of the Spectrum and Technology Department of the Communications Commission, Sandro Karumidze, and the department's other representatives held a working meeting with the representatives of the Public Services Regulatory Commission of Armenia. The meeting served to coordinate the uninterrupted operation of existing and prospective FM radio stations in the border regions between Armenia and Georgia.

## Joint Platform of Regulatory Authorities

Commissioner Vakhtang Abashidze, together with the heads of fellow regulatory authorities, opened the 3rd International Consumer Protection Conference and the 4th International Competition and Consumer Protection Conference. Within the framework of the events, Vakhtang Abashidze reviewed the projects being implemented in Georgia to ensure high-quality service delivery for consumers in the telecommunications sector and to promote media literacy development. He also discussed the holistic study of the telecommunications sector, the implementation of 5G in Georgia, and the country's internetization project. With regards to consumer rights protection, Vakhtang Abashidze summarised the activities of the Commission by referring to the approval of audiovisual accessibility standards for persons with disabilities, which was assigned to ComCom under the amendments to the Law of Georgia on Broadcasting for the purpose of aligning with the European Audiovisual Media Services Directive.

The head of Competition and Market Regulation Department of the Communications Commission, Ekaterine Sichinava, also participated in the above events and reviewed the trends in the telecommunications market, discussed ComCom's holistic study of the mobile and fixed service markets, and highlighted a possible violation of the Law of Georgia on Competition by one of the telecom operators. In addition, ComCom Ombudsman Gvantsa Chkheidze introduced the audience to the activities of the Public Defender of Consumer Interests Service, the statistics on customer complaints, and the latest results.

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