CONTENT

1. IN SUMMARY: BETWEEN TELECOM REFORMS AND THOUGHT-LEADERSHIP EFFORTS

2017 has been a challenging, yet extremely interesting year for the telecoms policy and regulation. First of all, the industry and the stakeholders' community had to cope with a power-vacuum on the EU executive side in the first part of the year, with crucial telecoms reform facing public scrutiny at the European Parliament. The position of European Commissioner in charge of digital remained vacant until July, at the same time as key parts of the Parliamentary process on the European Electronic Communications Code.

Secondly, a series of crucial policy debates on the future of digital sectors started brewing, with discussions on Artificial Intelligence, Cybersecurity and Blockchain, among others.

ETNO's strategy has therefore focussed on two main aspects. On the one hand, a sharp and targeted action plan to address major telecom reforms such as the Code and the ePrivacy Regulation. In both cases, we stepped up parliamentary engagement and dedicated increasing resources to outreach with co-legislators at large, including the Council.

On the other hand, we also heavily invested in raising the thought-leadership profile of the Association and the industry. This was executed mostly through CEO initiatives, our top-level events calendar, communication plans as well as the "Lead or Lose Report" prepared by Accenture for ETNO – which provided a ground-breaking insight into the future of the EU telecoms industry.

2. ETNO EVENTS AND NETWORKING OPPORTUNITIES

a) 11 January Digital4Smarties 2nd Workshop

Following the 1st workshop of the Digital4Smarties series, ETNO partnered with EU40 to co-organise the 2nd workshop, in the format of an exclusive stakeholder consultation.

The breakfast debate took place at the European Parliament. Exclusive guests included:
- Members of the European Parliament;
- Main policy advisors to political groups;
- ITRE and IMCO Secretariat;
- Parliamentary assistants working on the telecoms reform package

More information:
hashtag: #EUtelcoR
A selection of pictures is available by accessing the following links: http://bit.ly/2ijQHNa/ http://bit.ly/2jIiirI.
Link to the event: https://etno.eu/events/2017/685

b) 25 January - ETNO-MLex Regulatory Summit 2017

ETNO once again partnered with MLex, the leading provider of insight, analysis and commentary to regulation and competition specialists in Europe, the US, Brazil and China.

Now in its sixth successful year, the Summit created a platform for up to 250 high-level delegates, representing telecom operators, the EU institutions, regulators, academics, investors and other industry stakeholders, to discuss key EU regulatory issues.

The 6th MLex Regulatory Summit had a several high level panels focusing on the following aspects:

- Market realities and technological choices
- Tomorrow's telecom laws: towards a new access doctrine
- Strategic Directions for a Gigabit Europe
- Investment for the Gigabit Society
- Europe's role in the services and data world
- Spectrum and Europe's 5G ambition

Speakers:

- Sebastien Soriano, 2017 Chair, BEREC and President, ARCEP
- Miapetra Kumpula-Natri, Member of the European Parliament, S&D, Finland
- Gunnar Hökmark, Member of the European Parliament, EPP, Sweden
- Pilar del Castillo, Rapporteur for the Electronic Communications Code, Member of the European Parliament, EPP, Spain
- Anthony Whelan, Director of Directorate B, Electronic Communications Networks & Services in DG Connect, European Commission
- Vesa Terävä, Head of Unit Regulatory Coordination & Users, DG Connect, European Commission
- Andreas Geiss, Head of Unit for Spectrum Policy, DG Connect, European Commission
- Rosa Barcelo, Deputy Head of Unit, DG Connect, European Commission
- Luukas Ilves, Counsellor for Digital Affairs, Permanent Representation of Estonia to the EU
- Ursula Pachl, Deputy Director-General, BEUC
- Matthias Kurth, Executive Chairman, Cable Europe
- Wolfgang Kopf, Senior Vice President Public & Regulatory Affairs, Deutsche Telekom
- Eric Debroeck, Director Regulatory Affairs, Orange
- Larry Stone, President, Group Public & Government affairs, BT Group
- Michaela Angonius, Head of Group Regulatory Affairs, TeliaCompany
- Jos Huigen, Director Regulatory and European Affairs, KPN
- Enrique Medina Malo, Chief Policy Officer, Telefonica
- Cristoforo Morandini, Chief of Regulatory Affairs and Equivalence, TIM
- Brian Williamson, Partner, Communications Chambers
- Joost Vantomme, Director of Smart Mobility, European Automobile Manufacturers' Association (ACEA)
- Tiziana Talevi, Director Regulatory Affairs, Fastweb
- Justin Funnel, Analyst, Credit Suisse
- Steven Tas, Executive Board Chairman, ETNO

More information:

hashtag #ETNOMlex

Link to the event: https://etno.eu/events/2017/682

c) 26 April Digital4Smarties: The Age of the Digital Consumer

The event took place in the context of the European Parliament stepping-up its efforts on crucial reforms in the field of digital, telecoms and privacy. The European Electronic Communications Code and the e-Privacy Regulation will re-shape Europe's digital markets for the decade to come. In this context, EU40, the network of young MEPs, and ETNO organised a debate on this timely topic.

As policymakers craft regulation, the topics discussed regarded the priorities of the European citizens when it comes to their digital consumption habits. What are they favourite communications channels today? How do they see the use of their personal data? What do they value the most when using digital networks? Are they the beneficiaries of enough innovative services? How can we spur choice and innovation in EU markets?

The breakfast debate took place at the European Parliament and also unveiled the Consumer Survey prepared by IPSOS for ETNO. More details on the report in section 5 titled "Studies and Reports".

The speakers included:

- Dita Charanzová, Rapporteur, Electronic Communications Code, IMCO Committee (Host);
- Vicky Ford, Chairwoman, IMCO Committee (Host);
- Marju Lauristin, Rapporteur, e-Privacy Regulation, LIBE Committee;
- Gerd Callewaert, Managing Director, IPSOS, President, Belgian Federation of Market Intelligence;
- Guillermo Beltra, Head of Legal and Economic Department, BEUC;
- Steven Tas, Chairman, ETNO;
- Philippe Defraigne, Founding Director, Cullen International (moderator).

More information:

hashtag: #EUtelcoR

Link to the event: https://etno.eu/events/2017/691

d) 10 May Digital Innovation Night – ETNO's 25th Anniversary

Has the European digital revolution started in 1992? It is at that time that some crucial trends began, with early signals of the mobile and connectivity boom coming together at the same time.

Europe was changing and so were markets, technology, policy and regulation. May 10, 1992 was a sunny day in Madrid, when a group of European telecom entrepreneurs gathered to found ETNO. It was the first association ever representing European Telecommunication Network Operators. On that lovely day of May, the hopes were high for technological progress and the very first foundations of the Digital Single Market were being laid out at the political level. The digital revolution, though, was yet to come: it was in their hearts, in their vision, in the networks that their companies were building and developing.

1992 is the year in which momentous events happened. Europe, first. On February 7, heads of state and government signed the Maastricht Treaty, effectively creating the European Union and laying the foundations for deeper political and economic integration, for a single market and for one currency.

At the same time, technology was booming. Dial-up internet, around since the '80s, was first commercially offered that year. At the same time, Nokia, one of the drivers of the mobile revolution, took the strategic decision to concentrate solely on telecommunications. In the same months, the very first digital hand-size mobile telephone was launched (Motorola International 3200). The first SMS was sent in UK, just one year after the first ever GSM call, which was made by the Finnish Prime Minister, then in Helsinki, to the Mayor of Tampere, a good 170 km away.

Today, European citizens are citizens of the world also thanks to powerful telecommunication services and networks. A wealth of new digital services has been developed on top of broadband connectivity. Consumer expectations and needs, industrial sectors, public administration and the society as a whole are being re-shaped by the power of communicating.

With networks becoming smarter and smarter, new opportunities are opening up. The Internet of Things is happening and it is expected to boom in the coming years. 5G is already being tested and EU operators plan to be available commercially already in 2020, with some pioneers expecting to launch already next year. As networks and services evolve, data analytics and artificial intelligence, promise to empower citizens with ever evolving standards of quality, increased choice and innovative applications.

The history of telecommunications is also the history of how humankind communicates. Join us to discuss how our digital future will look like and how innovative networks and services can help Europe build a new digital Union.

Keynote speeches were delivered by industry leaders. They shared insights on how the future of interpersonal communications and digital services looks like. The speakers were:

- Dominique Leroy, CEO, Proximus Group
- John Foster, Director of Strategy, CDO, Telefónica Digital

More information:

hashtag: #ETNO25

Link to the event: https://etno.eu/events/2017/689

e) ETNO Board Delegation to Washington DC & Transatlantic Week, July 2017

A delegation from the ETNO Board and Office visited key institutional stakeholders in Washington DC, for a series of bilateral meetings. These included FCC, FTC, NTIA as well as the Department of State.

f) 22 June, ETNO – Politico Breakfast with Jüri Ratas, Prime Minister of Estonia

ETNO partnered with POLITICO for the Brussels Playbook Breakfast with Jüri Ratas, Prime Minister of Estonia. This invitation-only event, presented by ETNO, took place on June 22 in Brussels. Lise Fuhr, Director-General, opened the event with a speech on the importance of digital reform.

Ryan Heath, POLITICO's Senior EU Correspondent, author of Brussels Playbook, had a frank conversation with Jüri Ratas about the incoming Estonian Presidency's priorities related to the economy, digitalization and sustainability. Europe's future in the time of Brexit, Trump's Presidency and other pressing European and global issues was also addressed.

More information:

Hashtag: #PlaybookBreakfast

Link to the event: https://politi.co/2JRWjrk

g) 6 September Digital4Smarties, EU40 event - Regulating Privacy in Digital Times

ETNO together with EU40 organised an exclusive dialogue between those who make the rules and those who develop products and services on September 6th at the Members Salon of the European Parliament.

The expert panel was co-hosted by the following MEPs:

- Marju Lauristin (S&D)
- Peter Kouroumbashev (S&D)
- Daniel Dalton (ECR)

The event brought together data protection officers, product and service developers and lawmakers for an open discussion on values, technology, growth and innovation. We have debated, among others, the new e-Privacy Regulation and its interplay with existing law, including the General Data Protection Regulation.

Presentations were made by:

- Claus Ulmer, Global Data Privacy Officer, Deutsche Telekom
- Stefano Fratta, Legal Director Consumer Big Data, Telefónica

The following contributed to the discussion:

- Despina Spanou, Director, Directorate H – Digital Society, Trust and Cybersecurity, DG Connect, European Commission
- Rosa Barcelo, Deputy Head of Unit, Cybersecurity and Digital Privacy, DG Connect, European Commission
- Shadow Rapporteurs
- Permanent Representations
- European Commission experts
- Lise Fuhr, Director General, ETNO

The discussion was moderated by Magnus Franklin, Chief Correspondent, Telecoms, MLex.

More information:

hashtag #ePrivacy

Link to the event: https://etno.eu/events/2017/693

h) 27 September, FT-ETNO Summit 2017, Digital Rulemaking in Times of Change

The FT-ETNO Summit gathered leading policymakers, regulators, industry executives and investors from Europe and beyond to discuss and debate the speed of technological change - and how global lawmakers and industry can harness it to benefit society and the economy.

Major topics discussed were: What should be left to competition, and what should be regulated? Digital technology: how to create more opportunities for humans? The longer view: growth now vs future problems and opportunities? Can industry unite to lead reforms from within? As well as 5G, Broadband targets, and cybersecurity.

Speakers involved:

- Jeremy Rifkin, Sustainability Adviser to Presidents
- Mariya Gabriel, Commissioner, Digital Economy and Society, European Commission
- Timotheus Höttges, CEO, Deutsche Telekom
- Stéphane Richard, Chairman and CEO, Orange
- Cristiano Amon, President, Qualcomm QCT Division
- Atanas Dobrev, CEO, Vivacom
- Johan Dennelind, CEO, Telia Company
- Berit Svendsen, CEO, Telenor Norway
- Sébastien Soriano, Chairman, Berec, and Chairman, Arcep
- Roberto Viola, Director General, DG Connect, European Commission
- Marju Lauristin, MEP, European Parliament
- Andrus Ansip, Vice-President for the Digital Single Market, European Commission

i) 26-27 October, 54th ETNO General Assembly & Smart-Cities Workshop, Dubrovnik, Croatia

The 54th General Assembly of ETNO was held the 26-27 October in Dubrovnik and hosted by Hrvatski Telekom. The GA involved a Smart Cities Workshop.

At the coinciding ETNO Board Meeting, Phillip Malloch, Telia Company was elected to replace Steven Tas as Chairman of ETNO.

More information:

Link to the event: https://bit.ly/2HOHdlV

j) 7 December, Lunch Debate on the State of EU telecoms

2017 was quite a ride for the telecoms industry, with digital transformation, 5G development, fibre and G.Fast deployment picking-up across markets. Will the telecom sector go back to growth? How is network investment doing across Europe? Is telecom-media convergence happening? Are bundles creating value for consumers and telcos? How is 5G deployment doing? What about revenues?

From 12.00 to 14.00h, we presented the ETNO-IDATE Annual Economic Report 2017 and discussed the new customer and market trends emerged throughout 2017.

Speakers:

- Wolf-Dietrich Grussmann, Head of Unit B.2 (Implementation of the Regulatory Framework), European Commission
- Maurice Patrick, Managing Director, Telecoms Equity Research, Barclays Capital
- Lise Fuhr, Director General, ETNO
- Jean-Luc Lemmens, Director Telecoms, IDATE DigiWorld
- Phillip Malloch, incoming Executive Board Chairman 2018, ETNO and Vice President and Head of Group Public Affairs, Telia Company

More information:

Link to the event: https://etno.eu/_mailing/mail/1627/edit

a. 14-16 February: FTTH Conference 2017, Marseille

The FTTH Conference 2017 was held in Marseille from 14 to 16 February. Organised by the FTTH Council Europe, the annual edition involved a Workshop Day as well as Conference sessions and an Exhibition. It is the largest FTTH event in the world providing a unique networking opportunity with over 3,000 participants from 85 countries.

Francesco Versace represented ETNO on a panel.

More information:

Link to the event: https://bit.ly/2m9XE1D

b. 4-5 April Gigabit Access, Brussels

Total Telecom organised the conference Gigabit Access on the 4-5 April in Brussels. Avoiding being too technical, the conference instead was an opportunity for those tasked with monetising superfast broadband access to come together to explore opportunities, meet potential partners and learn from global best practice.

Gigabit Access is a strategic two-day conference attracting more than 200 of the most senior and strategic executives in the field to learn, share and network.

Lise Fuhr participated as a speaker at the event.

More information:

Link to the event: https://bit.ly/2IfySeu

c. 28 November, Think Digital Conference - How Can We Shape the Digital Future Of Europe?

The Think Digital Conference took place on 28 November and was sponsored by ETNO. The topics discussed involved how existing e-barriers begin to disappear and the EU is moving towards a new digital future. Questions addressed were: How can policy-makers work with companies to connect EU citizens, sectors and industries? How to ensure maximum connectivity and new innovative services whilst guaranteeing data protection and online privacy? What role will SMEs play in the digital transformation?

The panels included topics ranging from Data Protection & Privacy of the European Digital Future, SMEs in the Digital Single Market, and Digital Infrastructure - Towards Maximum Connectivity.

Speakers:

- Pierre Louette, Orange
- Michal Boni, MEP
- Despina Spanou, DG CNCT
- Thomas Myrup Kristensen, Facebook
- Katarzyna Jakimowicz, Lisbon Council

- Miapetra Kumpula-Natri, MEP
- Vesa Terävä, Head of Unit, Electronic Communications Policy, DG CNCT
- Lise Fuhr, ETNO

More information:

Link to the event: http://thinkdigital.eu/ and https://bit.ly/2HOICgA

d. 28 November, The Economist event – Digital Openness in Europe, Brussels

The Economist organised an event on open digital market. Questions for this panel included: What are the economic benefits of openness, especially in terms of the internet and digital openness? Is Europe on the road to becoming a unified digital market? What have been its achievements to date, and what should be its priorities moving forwards? How do digital companies go about opening up new markets, either in terms of locations, or sectors, currently being underserved? What can the EU do to ensure that Europe is at the forefront of the global digital economy?

Lise Fuhr participated as one of the panellists.

More information:

Hashtag #OpenDigital

Link to the event: https://bit.ly/2JUxOKu

e. 29 November, Ericsson event First 5G NOW! Industry Summit, Brussels

Ericsson launched a new event series in London and Brussels to increase business readiness for 5G with insights drawn from 15 industry pilots and 45 university collaborations showcase massive potential of 5G. The event also involved exclusive demonstrations of use cases including robotic assistants, VR gaming and haptic simulation.

Via a mix of plenary presentations and extensive demonstrations, including live 5G-NR radio, Ericsson shared the 5G experience. Business consultants and technical experts were on hand to discuss the latest insights on how to move into new markets and build new revenue streams with radically changed business models and use cases, including Internet of Things (IoT) applications.

Lise Fuhr participated in a panel discussion on regulatory environment for stimulating 5G.

More information:

Link to event: https://bit.ly/2JTwur3

The series of #ThinkDigital interviews and blog posts gives ETNO the opportunity to speak to a few essential stakeholders from across the digital value chain. This year, the interviews with key stakeholders continued to focus on videos as this approach has proven to be more popular as compared to the written blog interviews.

The aim of this series is to gather views from all players on a wide range of topics related to the creation of a modern, smart digital society capable of competing at a global level and delivering top-notch services to citizens, consumers, governments and businesses alike.

All material is available on the ETNO #ThinkDigital Blog www.think-digital.eu

'THINK DIGITAL' VIDEOS

The 2017 #ThinkDigital posts included opinions on broadband investment, spectrum policy, the Digital Single Market, IoT and trust, as well as digital skills and many more.

For direct access to each interview, please click on the links below:

1. **Gigabit Society, 3 Digital Leaders Advocate For An Innovation-Ready Continent**

https://bit.ly/2FGaMnZ

As European ministers gear up for the Telecoms Council on December 6, the three women leading Brussels' main telecom and tech associations, jointly expressed their vision and concerns in a #ThinkDigital interview. The video featured Lise Fuhr, Director General of ETNO, Afke Schaart, VP and Head of Europe at the GSMA and Cecilia Bonefeld-Dahl, Director General of DIGITALEUROPE.

In the interview, they discussed 5G, the Gigabit Society ambition, Europe's innovation scene as well as the corresponding policy and regulatory enablers required for their implementation and development.

2. **Sébastien Soriano, Chairman ARCEP and Vice-Chair BEREC**

https://bit.ly/2HSgola

In this ETNO #ThinkDigital interview, Sébastien Soriano, Chairman ARCEP and Vice-Chair BEREC, discusses the objectives of EU institutions. Soriano states that the first thing for regulators, is to make sure that, at political level, the right objectives have been defined, to know where to go as regulators.

3. **Anthony Whelan, Director for Electronic Communications Networks & Services, DG CONNECT, European Commission**

https://bit.ly/2HO6AlO

In this ETNO #ThinkDigital interview, Anthony Whelan, DG CNCT, discusses the rapidly changing rules for citizens protecting their interests, which are clear and common to all the types of communication services that they increasingly use interchangeably. In addition, Whelan noted that they will see rules which are adapted to new ways of mixing products and services like content and communications.

4. **Luukas Ilves, former Counsellor for Digital Affairs, Permanent Representation of Estonia to the EU**

https://bit.ly/2rjhxl4

In this ETNO #ThinkDigital Luukas Ilves gives his view on the Digital Single Market legislative files. *"It is clear, first of all, that we have a lot of work to do on the Digital Single Market legislative files. And, along with our trio partners, Bulgaria and Austria, we want to complete negotiations on all of the DSM files something that the heads of states and governments have promised for 2018. And we will definitely make that target"*.

5. Brian Williamsson, Partner, Communications Chambers

https://bit.ly/2FEKWR7

In this ETNO #ThinkDigital interview Brian Williamsson, Partner, Communications Chambers, gives his view on 5G as a better wireless. He says *"…it is to be defined but also not only is it a higher-performance capability, I think more ubiquitous will be part of the story, but also tailoring connectivity to particular requirements. So for some of the Internet-of-Things applications, they are quite low speed, hundreds of Kbps. For a fixed-wireless link to a mobile-base station, you might want 10 Gbps. It will not wait until 2022: it is happening now. Operators are investing in networks now, in the sense of getting them ready for 5G by making them denser, and so on. So it is a continuous process, it is not a step change into 2022"*.

6. Michaela Angonius, Head of Group Regulatory Affairs, Telia Company

https://bit.ly/2Id54iE

In this ETNO #ThinkDigital video interview, Michaela Angonious, shares her view on the revision of the telecoms framework: *"What we need is to ensure that we have allocation and assignment of spectrum that is taking place in a timely manner and which is taking place in a transparent and really foreseeable manner. Concretely, we believe that the peer review proposal is not going to solve all our problems, but it is a step in the right direction, where it, hopefully, will lead to more transparency."*

7. Magnus Franklin, Former Chief Correspondent, Telecoms, MLex

https://bit.ly/2HMOXcq

In this ETNO #ThinkDigital interview Magnus Franklin, MLex, discusses the digital future of Europe. The telecoms sector is in transformation and the policy makers involved are trying to come to terms with this, using the code, maybe, as an opportunity to create a new vision for Europe, because the future is digital, and how do you create a rulebook for that? Franklin also addresses changing investment models, business models and ecosystems, not just for telecoms, but across digital are changing, with issues like privacy coming into play, and so on. Franklin thinks there is an opportunity for policy makers to also go through a learning experience along with the sector and create a rule-set for the future.

8. Joost Vantomme, Smart Mobility Director, ACEA

https://bit.ly/2wb2V25

In this ETNO #ThinkDigital interview, Joost Vantomme, ACEA discussed the need for connectivity. In order to have a good deployment of these things in the future, Vantomme argues for the need of a very low latency. Vantomme stressed that they count on the ETNO members to provide a very ubiquitous network, not only in the urban areas, as the 5G – Gigabit plan is promoting, but also along the highways and along the remote areas. There is a need for cross-border coverage, and that is something both industries should work on jointly.

9. Marju Lauristin, MEP

https://bit.ly/2jtRTvI

In this ETNO #ThinkDigital interview, Marju Lauristin, MEP, discusses the data protection framework in Europe. Lauristin notes that the GDPR already, is well known to people from all kinds of companies. They come and say that they start to implement and really, for them, now, it is very inspiring. Lauristin noted that they are not complaining anymore that it is too complicated, that it is too difficult. In opposite, they find new ways for how to provide better services, what to do to have innovative technologies. Therefore, she supposes that always the clear rules really are for people who are creative and innovative; the better environment, the indefinite rule.

10. John Foster, Telefonica

https://bit.ly/2FG5Lf6

In this ETNO #ThinkDigital interview, John Foster, Telefonica is asked about his view on the digital future: shall we be scared or enthusiastic about it? Foster answered that "clearly, the right answer is enthusiastic because technology has tremendous potential to make life better for customers, businesses and society. Naturally, there are some risks along the way and we need to be mind for all those and how we approach this, but overwhelmingly positive about the future".

Moreover, Foster shared 3 major risks when looking ahead and described what Telefónica is offering to its customers to handle their digital future.

11. Sigve Brekke, President and CEO of Telenor Group

https://bit.ly/2HOHSDV

In this ETNO #ThinkDigital interview, Sigve Brekke, President and CEO of Telenor Group, provides his 3 key messages for European regulators: *"We need spectrum policies across Europe, which are harmonised, such that we both know how to plan but we also know what the road-map is for the years to come. The second one would be allowing us to use your data in an efficient way, within the privacy laws,that we can use data to personalise offers, with the benefit for our own customers. And the third one would be: you have to allow us to do what is best for the industry structure. So when you now have three operators in China, four operators in the US, coming down to three operators in China, and you have more than one hundred operators in Europe, that is not sustainable. And I do not want Europe to be left behind all of those big countries. Europe should be, as we have been, in the front run of technology innovation and in the digital innovation, as well."*

12. Phillip Malloch, ETNO Chair 2018

https://bit.ly/2waka3H

In this ETNO #ThinkDigital interview, Phillip Malloch, Telia Company, shares his views on the ambition that policy makers should have in telecoms regulation. Malloch notes, that from a Telia Company perspective, they have been talking to a lot of policy-makers and regulators about what they entitle a "Gigabit Society" with terabyte territories. They believe that by 2025 we should have a really high level of aspiration and work collectively together. Malloch´s overall message to regulators is: regulation is one thing; regulation is driven by policy, and policy is a really important part of setting the right goals for us all, as an industry and as a society.

13. Guillermo Beltra, BEUC

https://bit.ly/2fRnych

In this ETNO #ThinkDigital interview Guillermo Beltra was asked about the priorities of BEUC on the ePrivacy Regulation. Beltra answered that he believes that *"There are 3 key things that the ePrivacy Regulation needs to deliver: First of all, it has to make sure that the confidentiality of communications is ensured for all types of communication services, regardless of the technology, regardless of the service provider. Secondly, it has to make sure that the security of such communications is also ensured. And third - very important priority - is that we need to address the problem of tracking. And by that, we need to go back and look into the super important principle of privacy by default."*

14. Dominique Leroy, CEO of Proximus Group

https://bit.ly/2rk9uK6

In this ETNO #ThinkDigital interview Dominique Leroy, CEO of Proximus Group addresses the question: Is regulation an obstacle or an enabler for innovation? Leroy noted that it depends on the sector in which you innovate, but it is true that today, if you look, for instance, at the privacy regulation, there are different rules for different providers. Leroy added that the OTTs are currently not regulated, but telco operators are and still have the ePrivacy Regulation, which is more restrictive. That is why they are pledging level-playing field and that we are able to compete with those big OTT guys, with the same weapons as they have and then, I think, we can innovate.

15. Michal Boni, MEP

https://bit.ly/2HPh9ap

In this ETNO #ThinkDigital interview, MEP Boni reflects on the work of the European Parliament on 5G. Boni states that it is very important to understand that due to 5G networks, some reactions and transmissions of data will be possible in milliseconds. Further he adds that Gigabit Society means that as consumers, as citizens, as patients, as people, as parents in our families, we will have some new possibilities to change our lives. MEP Boni also reflects on what is important and notes that this is to have decisions that ensure that are going in the direction of 5G, to have some timely decisions done by Members States, related to the spectrum allocation spectrum and harmonisation on decisions, and also to be open to using new technologies in our companies and in our lives.

16. Enrique Medina Malo, Chief Policy Officer, Telefonica

https://bit.ly/2HT7UGn

In this ETNO #ThinkDigital interview, Enrique Medina Malo, Telefonica addresses the question of What will enable the future of telcos? And whether Telefónica has the same weapons to innovate as OTTs and other players? In the view Medina Malo, says that *"the main enabler of the digital future is to establish a new relationship with our customers; a relation based on – what we call "The Digital Confidence". We need to let them see the advantages and all the benefits that come from the digital life."*

1. **Lead or Lose, A vision for Europe's Digital Future – Accenture for ETNO**

Europe stands at a crossroads regarding its digital future. The road we choose today will have a significant impact on the lives of European citizens in 2030.

Europe has lost as much as €100m in earnings (EBIT) each day to digital disruptors and telcos in other regions for the past 10 years, which has impoverished the bloc's digital economy. But this can be changed if industry and regulators embrace transformation. The Accenture Strategy research for ETNO finds that Europe can gain up to €4bn a day by being at the centre of the digital ecosystem.

However, we need a digital overhaul of Europe's industrial fabric and institutions. And this should be supported by urgent policy action that aims to promote equal competitive digital advantage across the region, as well as enable telcos to collaborate across an open ecosystem. Three areas of digital value creation have the potential to steer Europe onto the path into a successful digital future: an ecosystem around the Internet of Everything (IoE), pervasive low-latency networks and institutions that are recreated for the digital world.

Download the report here:

https://etno.eu/datas/digital-age/leadorlose.pdf
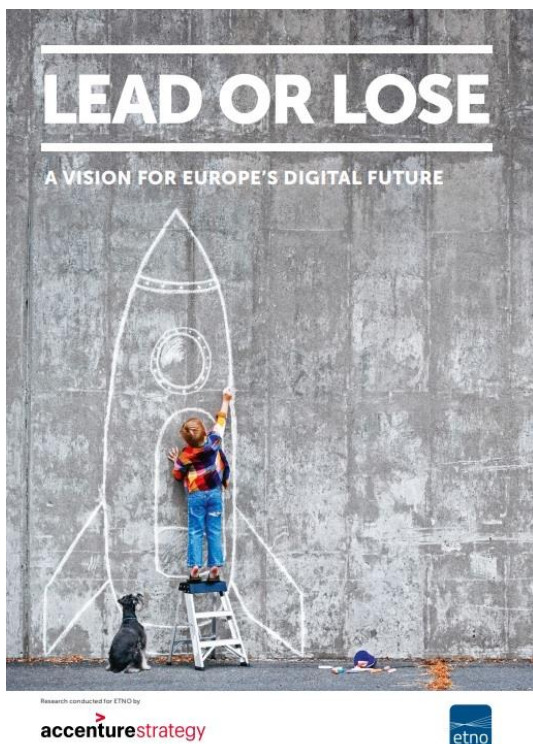
2. **Consumer Survey 2017 prepared by IPSOS for ETNO, April 2017**

ETNO and IPSOS, the global market research leader, have presented a new consumer survey on the digital habits and expectations of Europeans in ten major EU markets.

IPSOS found that consumption patterns have significantly changed, with Europeans increasingly taking-up internet services and young generations re-shaping preferences. Telecom services will continue playing a crucial role in citizens' life and surveyed consumers feel that choice, offers and prices are largely satisfactory.

The survey comes as the European Parliament and Member States discuss an historic reform of Europe's telecom laws, with the Electronic Communications Code and the e-Privacy Regulation currently being reviewed.

A new landscape: digital service is king, international calls go online

Europeans consumers believe that telecommunication services are crucial to their daily lives (65%), with all generations being increasingly enthusiastic about the value added of services such as social media, digital TV and e-commerce. Making online purchases and browsing with smartphones will increasingly gain importance in the daily life of more than half of those surveyed. Already today, more than one in three Europeans (36%) streams music or videos, with over 20% of them expecting to increase their uptake of these services in the future.

When it comes to calling abroad from their country, 45% of the respondents say they expect to use online services more and more, as opposed to other means. 34% of them already use online today for calling abroad.

Drivers of consumer choice: quality is more important than price for mobile and broadband internet

When it comes to mobile and broadband internet markets, the main drivers of consumer choice are respectively mobile network coverage (82%) and internet connection quality (86%). Price is second to both. Among those Europeans who change their broadband internet provider (61%), most of them were driven by a richer offer (46%) rather than better price for the same offer (31%). Better quality also appears a top reason for favouring the use of telecom services as opposed to online communication services.

Telecom services: consumers feel there is a good level of choice, fair prices and changing provider is easy

The survey shows that EU citizens believe that enough broadband providers are available, with 8 out of 10 Europeans convinced that choice is at least similar or greater than in other service sectors. Prices do not appear to be a major issue, with 66% of those surveyed saying that current prices are either "fair" (58%) or "rather cheap" (8%). Results are rather homogenous across generations (15 to 60+ y.o.) and across consumption patterns (bundle users vs. non-bundle users).

When it comes to choice, Europeans are free to vote with their feet, with 61% of the people saying that they have already changed broadband internet provider in the past.

Consumer awareness: low understanding of technicalities

Most consumers surveyed have little awareness of technical aspects behind their internet connection. The survey shows that few know what the following features are: latency (11%), packet loss (12%) and jitter (8%).

Download the report here: https://goo.gl/g5oBE8

3. December 2017: ETNO Annual Economic Report 2017

For more than a decade, ETNO's Annual Economic Report provided a wealth of data on the state of the European electronic communications market across a broad range of indicators. IDATE is proud of being a long-standing support to ETNO in this exercise. This year's edition puts forward both some of the traditional figures and some qualitative insights on how the industry is evolving. The aim is to provide inputs for a fact-based analysis and informed discussion available to the community of stakeholders in Europe and beyond. Here we identify the 4 key trends of this year's Report.

Operators investing heavily to sustain super-fast broadband momentum

5G is approaching the starting blocks and ETNO members have launched Europe's first real-life trials in the course of this year. The migration to fibre networks is gaining momentum, with almost a third of households in the ETNO perimeter subscribing to a high-capacity broadband connection and 4G take-up surpassing 3G. The companies represented by ETNO remain the investment leaders in Europe, with almost 70% of the sector investment in EU5 and similar figures in EU28. Rolling out these networks to the largest number of European households and businesses requires massive investments, though. Data show that telcos are ready to make significant efforts by devoting a rising share of their revenues to capital expenditures. However, in order sustain these efforts, further improvements of the market environment will be necessary.

Growing demand and improving economics

Demand for connectivity over both mobile and fixed broadband networks is on the rise across Europe and users are keenly adopting the services provided over these infrastructures. Increasing demand for their services is not a fundamental change for telecom operators, though. In an environment with intense pressure on prices induced by extremely competitive markets and strong regulatory measures, operators were facing a situation in which rising demand used to be accompanied by falling revenues and shrinking profit margins.

Operators have made significant efforts to alleviate this situation by launching richer bundles, innovative services and improving customer satisfaction. Operational efficiencies, for instance through the move to all-IP networks, are counterbalancing some of the pressure on the margins. The data for this year seem to confirm that the industry is indeed emerging from the economic downturn that has lasted for almost a decade. The growth remains shy with slightly positive levels so far, but the industry should continue gathering steam over the next years.

Consumers like the different flavours of convergence

Convergence has become a reality in European communications markets. Bundling fixed and mobile services as well as connectivity and content is a convenient value proposition and it appeals to a growing number of users. For operators, too, convergence is a winning move, despite the fact that bundles typically come with a discount compared to standalone

offers. Converged bundles increase the stickiness, reduce churn and thus increase customer lifetime value. They also open opportunities for further cross- and upselling, thereby potentially increasing ARPU rather than lowering it.

M2M and IoT

Human communication is not the only element driving demand, but also communication between machines. Communications revenues from M2M services represent 4% of all mobile revenues in 2017, a share that will increase to 8% by the end of the decade. IoT revenues will grow by as much as 11% per year between 2017 and 2025. While verticals

in the private sector are currently still honing business models and sorting out technologies, much of the growth at this moment is induced by public initiatives such as e-call services in the automotive sector or smart metering. The launch of 5G will provide a real boost to IoT by enabling operators to further upgrade their portfolio to offer an array of solutions tailored to the needs of a broad range of verticals.

In such a fast-paced and ever evolving environment, there is a clear need for a regulatory approach providing operators with certainty and economic incentives to invest. Decision-makers need to be aware that these infrastructures will not only benefit telcos, but are the pre-requisite to improving the competitiveness of the European economy as a whole.

ANNUAL ECONOMIC REPORT | **2017**

Download the report here:

https://bit.ly/2ronHGa

6. PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)

1. REGULATORY REFORM, INNOVATION AND INVESTMENT

10 January – Press Release
ETNO on European Data Economy

25 January- Position Paper
ETNO Position Paper on the European Electronic Communications Code

03 March – Press Release by Orange
The European Electronic Communications Code

21 March – Press Release
ETNO comment on the draft parliamentary report on the Electronic Communications Code

11 April – Press Release
IPSOS survey for ETNO unveils change in digital consumers' habits across the EU

3 May – Press Release
Lack of ambition on EU spectrum reform will slow down the 5G ambition - Joint Statement by ETNO and the GSMA

11 May – Press release
Press Release: DSM review: an opportunity to re-launch Europe's digital ecosystem

29 May – CEO Statement
CEO Statement

07 June – Joint Statement
Joint Statement on saving Europe's 5G ambition

15 June – Joint Statement
Unions, telcos release joint position on the EECC

18 July – Press Release
EU telcos call for ambition on 5G and the data economy

18 July – Press Release
EU telcos call for ambition on 5G and the data economy

19 July – Joint Statement
Joint Declaration by Industry and RTOs: An Ambitious FP9 Strengthening Europe's Industrial Leadership

21 July – Press Release
ETNO meets with US regulators and stakeholders

25 September – Press Release
Joint Industry Letter Tallinn Digital Summit 25 September 2017

27 September – Press Release
Lead or Lose: Europe is at digital crossroads, telcos can make the difference

02 October – Press Release
Electronic Communications Code: ETNO calls for urgent realignment with original objectives

19 October – Press Release
ETNO Press Release: Note of Europe's leading CEOs on the Electronic Communications Code

04 December – Press Release
ETNO statement ahead of today's Telecommunications Council

07 December – Press Release
European telecoms: 5G and fibre efforts grow, but the EU investment boom is still to come

2. OPEN INTERNET AND LEVEL PLAYING FIELD

08 November – Joint Position Paper
GSMA-ETNO response to BEREC Consultation on Monitoring Mobile Coverage

3. COMPETITION AND TAX ISSUES

18 January - Position Paper
ETNO response to the consultation of the European Commission on "Evaluation of procedural and jurisdictional aspects of EU merger control"

20 December – Position Paper
ETNO-GSMA Tax Policy Committee Response to European Commission Public Consultation on fair taxation of the digital economy

4. PRIVACY, TRUST AND NETWORK SECURITY

10 January – Press Release
Press Release: New e-Privacy Regulation: Telcos call for a customer-friendly and innovation-ready approach

16 February – ETNO memo
170131 ETNO Data Portability Memo

20 March - Press Release
ETNO's views on the Proposal for an ePrivacy Regulation

21 June – Joint Statement
ETNO - GSMA Joint Statement: Protecting consumers while supporting innovation under the ePR

26 June – Position Paper
ETNO RD 441 on Data Flows in Trade Agreements

4 July – Joint Statement
GSMA and ETNO Joint Position: The Proposed European ePrivacy Regulation

13 September – Press Release
ETNO welcomes the new EU cybersecurity strategy

19 October – Press Release
ETNO Press Release: EU telcos issue warning on innovation, call for aligning the ePrivacy with the GDPR

27 October – Position Paper
ETNO response to the European Commission public consultation on improving cross-border access to electronic evidence in criminal matters

28 November – Press Release
ETNO comments on the Working Party 29 draft guidelines on data breach notification and profiling

29 November – Press Release
ETNO Press Release: EU telcos welcome the IP package, support guidance and self-regulation in the digital age

30 November – Press Release
ETNOs Views on the Proposed Regulation on a Framework for the Free Flow of Non-Personal Data in the European Union

5. SPECTRUM MANAGEMENT, IOT, 5G AND CONNECTED DRIVING

27 February – Press Release
Press Release: Connected and automated driving EATA presents deployment roadmap, submits proposal for EU-wide project

15 September – Press Release
EU automotive and telecoms sectors shore up connected and automated driving strategy

6. HUMAN RIGHTS, ENVIRONMENT, ANTI CORRUPTION

08 November – Press Release
ETNO Press Release: ETNO joins the Council of Europe Partnership on promoting an open and safe internet

7. OTHERS

28 August – Press Release
Paolo Grassia joins the ETNO Team

18 October – Press Release
ETNO note on the absence of key stakeholders from BEREC's 5th Forum

10. ETNO WORKING GROUPS 2017

ETNO's Working Groups (WGs) - a key strength of the Association - cover a broad range of topics directly relevant to the business of telecom operators. The WGs are the engine of the Association and the bottom-up approach when formulating ETNO position papers ensures that all ETNO member interests are captured.

Increasingly, as issues, technologies and conversations converge, ETNO's working groups are working closer together, often within clusters, to ensure a good spread of knowledge and competency and allowing for more robust ETNO positions.

As from 2015, Working Groups operate in 4 main clusters: the digital infrastructure cluster, the digital confidence cluster, the digital economy cluster and the international strategy cluster.

Such structure ensures an interactive exchange between working groups, promotes a holistic approach to ETNO's policy positioning and it better reflects the current market and technology dynamics.

Note to designer: Create a graphic with the below diagram:
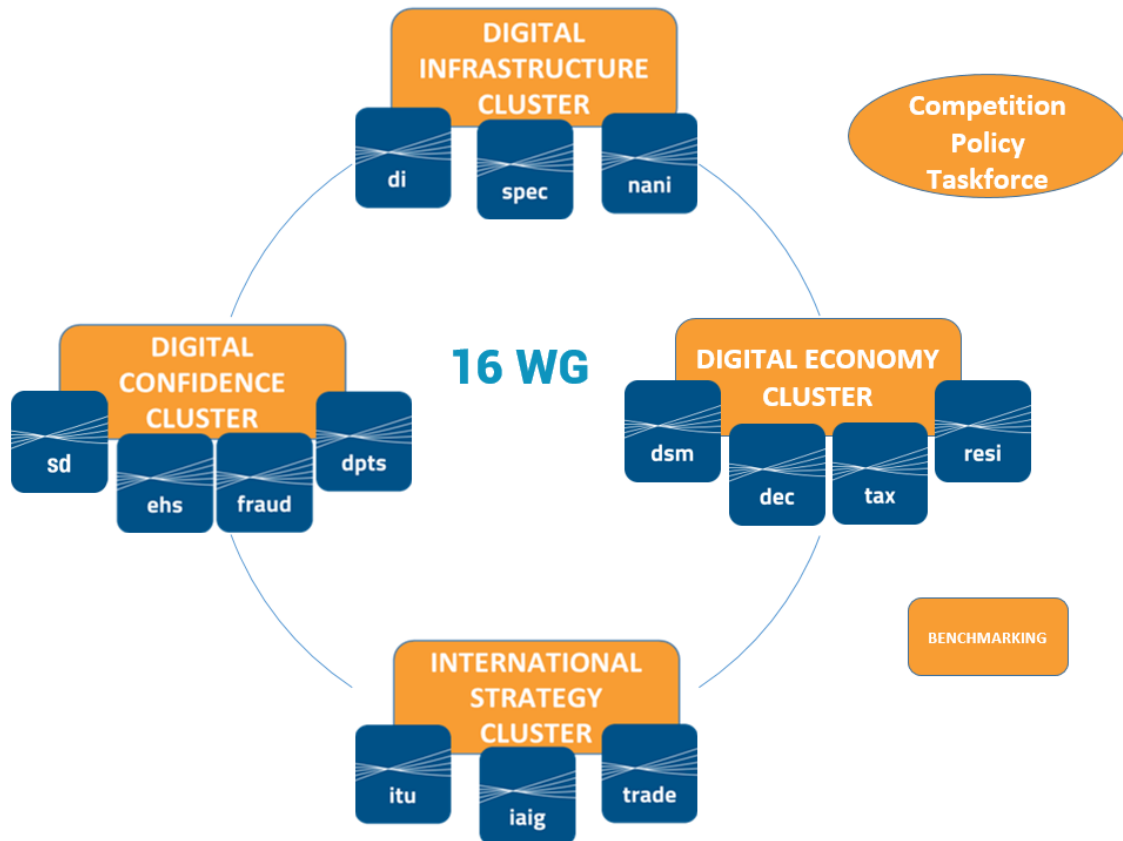
In 2017, the working groups contributed to all the main aspects of the Digital Single Market debate and to the Electronic Communications Code specifically, developing a comprehensive policy paper outlining the Association's priorities. They also worked proactively to develop concrete policy asks for the forthcoming review of the telecoms framework, including both access and services regulation, and competition policy.

The full list of ETNO Working Groups can be found online: https://etno.eu/home/working-groups/overview

ETNO WG Chairs in 2017

 Benchmarking

Chair: Thierry Denant (Orange), thierry.denant@orange.com

https://www.etno.eu/home/working-groups/benchmarking

 Competition Policy Task Force

Chair: Marc Lebourges (Orange), marc.lebourges@orange.com

Vice-Chairs: Grania Holzwarth (Deutsche Telekom), g.holzwarth@telekom.de

https://www.etno.eu/home/working-groups/competition-policy-task-force

 Sustainable Development

Chair: Danilo Riva (TIM), danilo.riva@telecomitalia.it (until August 2017)

Heinz-Gerd Peters (DT), Heinz-Gerd.Peters@telekom.de (official appointment September 2017)

https://www.etno.eu/home/working-groups/corporate-responsibility

⇨ Energy   Task   Force
   Chair: Alena Trifirò (TIM), alena.trifiro@telecomitalia.it.
⇨ Child   Protection   Task   Force
   Chair: Pedro de Vasconcelos Gonçalves (Portugal Telecom), pedro.v.goncalves@telecom.pt
   https://www.etno.eu/home/topics/corporate-responsibility/child-protection

 Data Protection, Trust and Security

Chair: Cristina Vela Marimon (Telefonica), cristina.velamarimon@telefonica.com

https://www.etno.eu/home/working-groups/data-protection-trust-security

dec

Digital Economy and Consumers

Chair: Malte Firlus (Deutsche Telekom), malte.firlus@telekom.de

Vice-Chair: Luisa Rossi (Orange), luisa.rossi@orange.com

di

Digital Infrastructure

Chair: : Wim De Rynck (Proximus), wim.de.rynck@proximus.com

Vice-Chairs: Manuel Braga, Deutsche Telekom Manuel.Braga-Monteiro@telekom.de

Volcy Lesca (Orange) volcy.lesca@orange.com

dsm

Digital Single Market

Chair: Caterina Bortolini (TIM) caterina.bortolini@telecomitalia.it

Vice Chairs: Henk Mannekens (BT), henk.mannekens@bt.com (official appointment September 2017)

Thedora Stamos (Proximus), theodora.stamos@proximus.com (official appointment September 2017

https://www.etno.eu/home/working-groups/digital-single-market

ehs

Employment, Health and Safety

Chair: Jean-Luc Godard (Orange): jeanluc2.godard@orange.com

https://www.etno.eu/home/working-groups/employment-health-safety

International Affairs and Internet Governance

Chair: Christoph Steck (Telefonica): christoph.steck@telefonica.com

https://etno.eu/home/working-groups/international-affairs-and-internet-governance

 International Telecommunication Union

Chair: Dominique Würges (Orange), dominique.wurges@orange.com

https://www.etno.eu/home/working-groups/International-Telecommunication-Union

 Naming, Addressing and Numbering

Chair: Donatella Chiara (TIM), donatella.chiara@telecomitalia.it

Vice-Chair: Hervé Clement (Orange), herve.clement@orange.com (official appointment December 2017)

https://www.etno.eu/home/working-groups/naming-addressing-and-numbering

 Network and Services Security, Fraud and Cybercrime

Chair: Samir Albadine (Orange): samir.albadine@orange.com

https://etno.eu/home/working-groups/network-and-services-security-fraud-and-cybercrime

 Research and Innovation

Chair: Pierre-Yves Danet (Orange): pierreyves.danet@orange.com

https://www.etno.eu/home/working-groups/research-innovation

 Spectrum

Chair: Anna Matsouka (OTE): amatsouka@ote.gr

https://www.etno.eu/home/working-groups/spectrum

 Tax

Chair: Costanzo Perona (TIM), costanzo.perona@telecomitalia.it

https://www.etno.eu/home/working-groups/tax

 Trade

Chair: David Frautschy Heredia (Telefónica), david.frautschy@telefonica.com.

https://www.etno.eu/home/working-groups/trade

General Assembly

At the 54 ETNO General Assembly chaired by Croatia's leading telecom operator Hrvatski Telekom in Dubrovnik (Croatia), Telia Company's Phillip Malloch was elected as the new Chair of the ETNO Executive Board.

- GA Chair: Mr. Siniša Đuranović, SVP and general counsel, HT
- GA Vice-chair: Andreas Theodorou, Head of Regulatory Affairs / Strategy, CYTA

Executive Board
- Chair: Steven Tas, Director Regulatory (PROXIMUS)
- Phillip Malloch, Vice President, Head of Group Public Affairs; TELIA COMPANY; incoming ETNO Chairman 2018
- Ivo Ivanovski, Director International Regulatory & European Affairs; A1 TELEKOM AUSTRIA GROUP
- Adrian Whitchurch, Vice President European Affairs; BT
- Roland Doll, Executive Vice President International Government Relations; DEUTSCHE TELEKOM
- Jos Huigen, Director Regulatory and European Affairs; KPN
- Vianney Hennes, Head of Brussels Office, Director; ORANGE
- Pedro Gonçalves, Regulatory and Competition Direction / International Relations; PORTUGAL TELECOM

- Paolo Di Bartolomei, Public Affairs Responsible, Relation with National and International Institutions; TIM
- Carlos Rodriguez Cocina, Director, Head of Brussels Office; TELEFONICA
- Nicolas Gyss, Director EU Affairs ; Telenor/ Krisztina Baracsi, Vice President EU Affairs, TELENOR GROUP
- Şükrü Kutlu, Human Resources, Regulation and Support Assistant General Manager; TÜRK TELEKOM
- Janet Zaharieva, Chief Regulatory Adviser to the Managing Board; VIVACOM

As from January 1st 2018, Swisscom Group also joined the Executive Board. Swisscom's representative in the Executive Board is Thomas Müller, Senior Advisor Corporate Affairs.

Administrative Committee

- Chair: Thomas Müller, SWISSCOM
- Members: Roland Doll, DEUTSCHE TELEKOM; Vianney Hennes, ORANGE;
- Permanent Observer: Steven Tas, PROXIMUS

12. ETNO STAFF

Lise Fuhr, Director General, fuhr@etno.eu

Marta Capelo, Director of Public Policy, capelo@etno.eu

Francesco Versace, Head of Competition and Regulatory Affairs (until May 2017)

Paolo Grassia, Head of Regulatory Affairs, grassia@etno.eu (as from August 2017)

Natalia Vicente, Public and Regulatory Affairs Officer (until March 2017)

Kristina Olausson, Policy Officer, Olausson@etno.eu (as from March 2017)

Sara Ghazanfari, Policy Officer, ghazanfari@etno.eu (as from April 2017)

Alessandro Gropelli, Director of Communications, gropelli@etno.eu (twitter: @agropelli)

Gabriel Daia, Digital Communications Officer, daia@etno.eu

Anne Vallès, HR, Finance and Corporate Events Manager, valles@etno.eu

Isabelle Claeys, Events and Operations: claeys@etno.eu

13. ETNO MEMBERS AND OBSERVERS

Full ETNO Members

1. ALBtelecom (Albania)
2. Telekom Austria Group (Austria)
3. Proximus (Belgium)
4. BH Telecom (Bosnia and Herzegovina)
5. Vivacom (Bulgaria)
6. T-Hrvatski Telekom (Croatia)
7. Cyta (Cyprus)
8. TDC (Denmark)
9. Elisa (Finland)
10. TDF Group (France)
11. Orange (France)
12. Deutsche Telekom (Germany)
13. OTE (Greece)
14. Magyar Telekom Group (Hungary)
15. Siminn (Iceland)
16. Eir (Ireland)
17. TIM (Italy)
18. Lattelecom (Latvia)
19. POST Group Luxembourg (Luxembourg)
20. Makedonski Telekom (Macedonia)
21. GO (Malta)

22. Telenor (Norway)
23. Orange Polska (Poland)
24. Portugal Telecom (Portugal)
25. Telekom Romania (Romania)
26. Slovak Telekom (Slovakia)
27. Telekom Slovenije (Slovenia)
28. Telefonica (Spain)
29. Telia Company (Sweden)
30. Swisscom (Switzerland)
31. KPN (The Netherlands)
32. BT Group (The United Kingdom)
33. Türk Telekom (Turkey)

ETNO Observers

1. Huawei (China)
2. Nokia (Finland)
3. Ericsson (Sweden)
4. Cisco (USA)
5. AT&T (USA)
6. Verizon (USA)
7. Qualcomm (USA)