



# Annual Report 2005

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## Introduction



## Introduction by the ETNO 2006 General Assembly Chair

It is an honour for Slovak Telekom to chair ETNO's General Assembly in 2006.

ETNO has a long experience as an opinion maker, compromise seeker and influence group on the European and international arena. The Association of which we are proud to be a member since its creation successfully built its reputation as the representative body of the telecoms operators in the EU and beyond. ETNO is effectively supporting its members and contributes to the development of an appropriate regulatory, economical and legal environment for our business by voicing our views to key EU decision makers. We very much value our participation in this process.

This is the first time that the ETNO General Assembly is taking place in a newly integrated member state after the 2004 enlargement of the European Union. In this context, beyond chairing the general assembly, our mission will also be more symbolic. This will be an opportunity to highlight the need for pursuing efforts to bridge the digital gap.

The enlargement process impacted on newcomers as well as «old» members and those who are next in line to join the EU in the coming years. All citizens throughout Europe should benefit from ICT and convergence in terms of growth, jobs and better quality of life, whatever their geographical location, age or social condition.

The economic, technological and demographic situations were reflected in benchmarks referring to new member states throughout the adhesion process. In this context, the discussion on the potential impact of regulation on business approaches and investment strategies is essential.

ETNO represents major investors in the sector. Especially in Central and Eastern Europe, the need for high investment is urgent. The investment rate of Slovak Telekom represented 25 per cent of revenues in 2005 and almost 40% in 2004. Such a high share is unique compared to the average industry rate of 15 per cent. However, this pace cannot be maintained without an adequate legal environment.

A reasonable economic recovery of investments and a stable legal and regulatory environment are crucial. EU decision makers must ensure the right balance between achieving competition on the markets and at the same time providing incentives for investment. The continuous extension of regulatory intervention is not in line with the objectives of the EU jobs and growth strategy.

The well-being of citizens should be the main objective of any regulatory intervention. The common denominator for all the involved parties should be the customer who expects no gaps and barriers, but new technologies available at any location, at an affordable price and with useful content and applications.

There are many sources of exclusion – regional, economical, social, etc. – , which we need to overcome in order to reach the desired level of information accessibility for all citizens living in the knowledge economy.

Through their huge investments in new networks and services and their efforts to make the information society as accessible as possible, ETNO members are playing an essential role in bridging the digital divide. They now count on decision makers to provide them with the right environment to continue doing so.

Holding ETNO's General Assembly Chairmanship would not be possible without a firm support from the ETNO Office, the Director and Executive Board, to whom I express my sincere respect and many thanks.



Pavol Kukura, Chief Strategy and Regulatory Officer,  
Slovak Telekom  
ETNO's 2006 General Assembly Chair

## Introduction by Chair of ETNO Executive Board

It has been an honour for me to take over the Executive Board chairmanship from Michel Huet of France Telecom who significantly contributed to ETNO's reinforced visibility.

Throughout 2005, the priority was to ensure that the Association was well-armed to deal with forthcoming challenges through an internal reorganisation of the working groups and an enhanced presence in public debates.

Consumers have never benefited from such a large range of telecommunications services than today. The dynamism of the telecommunications sector, in particular the mobile industry, is one of Europe's strongest success stories. With its enormous wealth of content and cultural diversity, Europe is well placed to meet the challenges of convergence.

The positive impact that a wider take up of Information and Communications Technologies could have on the EU economy has been fully recognised by the European Commission in its i2010 initiative.

ETNO members are making considerable investment in tomorrow's networks and services, to enable consumers to benefit from innovative services and allow citizens with special needs to live in a more inclusive and accessible society.

So far however, Europe continues to underinvest in ICTs. EU decision makers must urgently focus on creating incentives to encourage business to invest. Otherwise, the competitiveness gap with Europe's main trading partners will deepen further.

Regulation initially aimed at accelerating the transition from a monopolistic to an open and competitive telecommunications sector. Since then, Europe's telecoms world has gone through radical changes. Today's consumers can choose from a variety of platforms (mobile, wireline, wireless), technologies (cable, fiber, ...) and innovative services. New players are entering the market from totally separated and less regulated sectors. Traditional operators are diversifying services and products.

Globalisation and the emergence of new business models (such as Internet-based players) is placing more pressure on players to invest and innovate in order to be able to compete in a sector in which Europe has always been a leader.

Against this background, the question is whether the existing rules are adapted to these realities and are creating the right incentives to invest. With the i2010 initiative, the EU has fixed itself the objective of allowing Europe to get the best out of this convergence revolution.

With the review of major legislative instruments, such as the regulatory framework and the Television without Frontiers Directive, EU decision makers have the unique opportunity to give Europe the right policy tools to achieve these objectives.

It is important that the transition towards a sector driven by market forces under traditional EU competition law is accelerated. Such a move would lead to increased investment and to the emergence of truly sustainable and facilities-based competition, for the benefit of consumers. They are demanding not only healthy competition in products and services but also choice in access platforms.

It is a proven fact that ICT investment is the most important driver of productivity growth in developed economies. In turn, productivity growth is the key variable to watch when trying to promote economic growth and employment generation in our economies. A flexible framework which favours a balanced risk/return relationship and investment in new access platforms and networks, will deliver much needed productivity growth rates and ensure enhanced competitiveness for European economies. Such a move would directly support the objectives outlined in the European Commission strategy for growth and jobs and in the i2010 policy initiative.

I strongly believe that ETNO, as the voice of European telecoms network operators, has a key role to play, together with all stakeholders, in shaping tomorrow's European telecommunications policy and hence, in building the European Information Society our citizens deserve.



Alfredo Acebal  
Director EU and International Regulatory Affairs,  
Telefonica  
ETNO Executive Board Chair

# Highlights of the year

## EU Regulatory Framework:

### • Monitoring the implementation...

Throughout the year, ETNO has continued to closely monitor the implementation of the regulatory framework. ETNO brought together Chief Executive Officers (CEOs) of 16 companies from new and future member states for meetings with Mrs Viviane Reding, Commissioner for Information Society and Media and Mrs Danuta Hübner, Commissioner for Regional Policy. This meeting was the opportunity for the CEOs to draw the commissioners' attention to the digital divide between the old and new member states and the importance for the implementation of the framework to reflect the need for infrastructure investment. On 28 November, ETNO gathered experts from its member companies as well as representatives from national regulators and the Commission for a workshop on the lessons to be drawn from two years of implementation (see page 19).

### • ... And preparing for the review

The forthcoming review of the EU regulatory framework and the recommendation on relevant markets has been the main focus of ETNO regulatory activities. On 20 February, ahead of the unveiling of the new Lisbon strategy, ETNO presented to the EU decision makers and the media its manifesto 'ETNO vision for the future', setting out a series of recommendations on how to enable Europe to fully benefit from Information and Communications Technologies. Preparation for the review has included a reorganisation of ETNO working

groups dealing with regulatory affairs. The Association also organised a workshop on regulatory economics, with the participation of representatives from academic world in order to discuss possible options for the review.

### • Next Generation Networks

ETNO paid particular attention to the regulatory challenges facing next generation networks. NGNs and the remaining barriers to their deployment were the main themes of the third ETNO annual conference on 31 May in the presence of Mrs Viviane Reding, EU Commissioner for Information Society and Media and CEOs of leading European telecoms operators. It was also the subject of several ETNO interventions at external conferences and meetings (see page 30).

Any content, any platform,

any time anywhere

In the light of convergence, ETNO put content issues at the centre of its priorities. A new expert group was created to deal with access to content issues. On 3 March, the Association organised its first joint industry workshop with the participation of senior executives from e-communications and content providers to discuss obstacles for the distribution of content over new media (see page 30). ETNO also took an active stance in the public debate on the revision of the Television without Frontiers Directive (see page 22).

## Data retention

The tragic attacks of London in July 2005 illustrated that the existing cooperation between law enforcement authorities and e-communications providers was effective. Throughout the year, ETNO, together with the other e-communications trade associations, actively called for more dialogue on the proposals tabled first by the Council and then the Commission, which raised serious feasibility concerns. On 8 September, Michael Bartholomew, ETNO Director, and Michael Rotert, President of EuroISPA, were invited by the UK Presidency, to raise the industry's concerns on the data retention proposal, at the informal council meeting of EU Justice and Home Affairs Ministers. Industry's concerns were largely echoed in the media (see chapter on data retention, page 23).

## Sustainability: a new dimension

### in ETNO commitment

In 2005, ETNO published its last report on the environmental performance of the signatories of its Environmental Charter, which is replaced by the ETNO Sustainability Charter. Beyond reporting on their own progress, ETNO members started actively promoting the positive impact of a wider use of new technologies on the society as a whole. At the occasion of the 2005 edition of «Green Week», ETNO and WWF launched a joint programme raising awareness of the significant reductions in CO2 emissions to be achieved through the use of information and communications technologies (ICT).



ETNO Environmental Report.

From left to right:

February: CEOs from new and future member states meet with Mrs Reding, EU Commissioner for Information Society and Media.

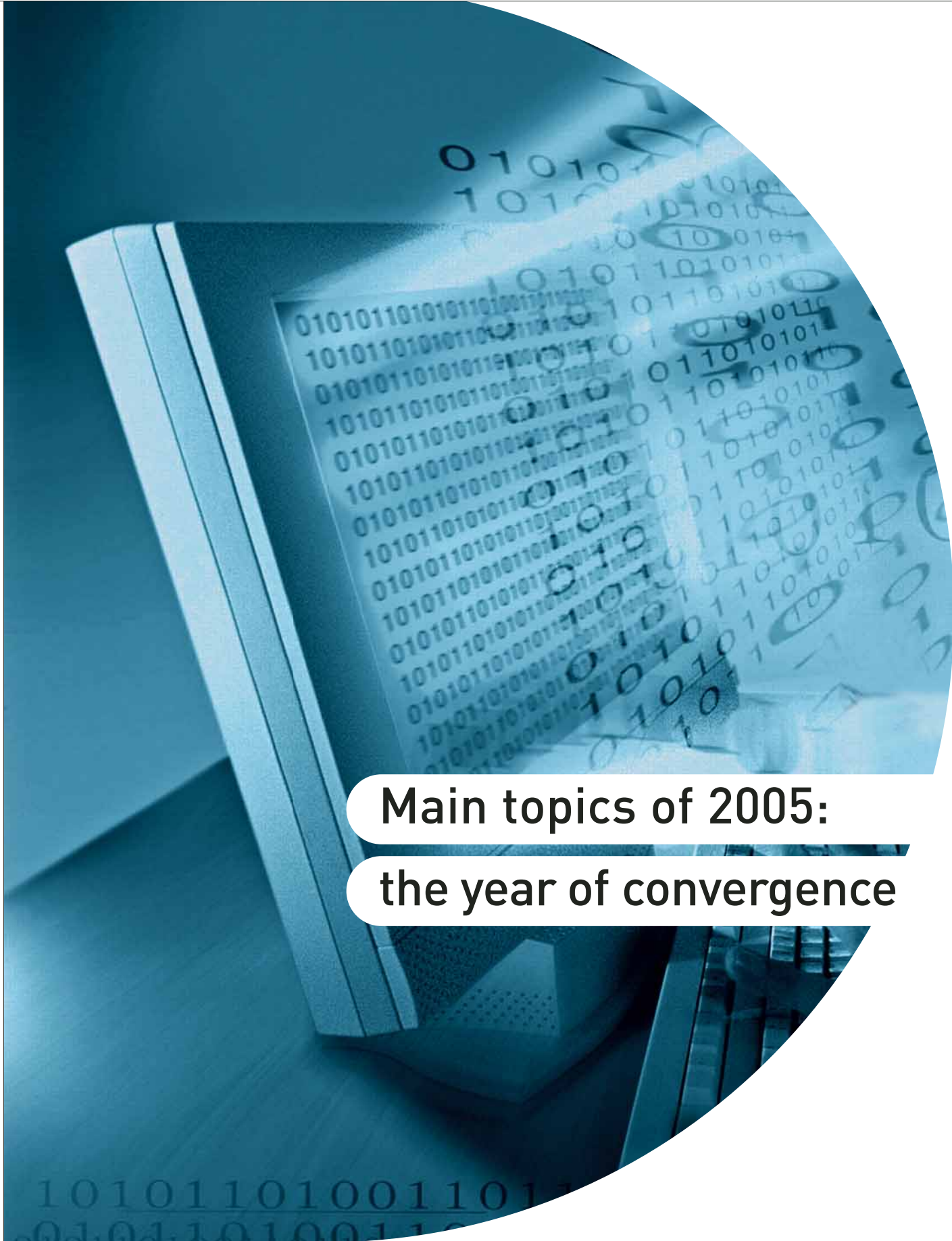
March: ETNO first content workshop.

October: ETNO regulatory economics workshop.

May: ETNO Annual Conference.







**Main topics of 2005:  
the year of convergence**



## ETNO Director Introduction

### The year 2005

The year 2005 can easily be qualified as the year of convergence or the next telecoms revolution.

For some time already, we have been drawing EU policy makers' attention to the increasing convergence of technologies and platforms. Convergence is no longer just a trend, today it is a reality!

In this new context, boundaries between the consumer equipment industry, content providers and telecommunications operators have become blurred. New players, from once totally separate and less regulated industries, are entering the telecoms markets thanks to technological developments. Convergence also enables e-communications providers to respond to consumers' increasing demand for access to any content, any time, anywhere from any device.



The reality of convergence and the timeliness of changes in the regulatory environment are recognised by the EU i2010 initiative. This new Commission programme to boost the ICT sector was adopted in June 2005 under the leadership of Mrs Viviane Reding, Commissioner for Information Society and Media.

Convergence also implies challenges for ETNO, as the voice of the European telecommunications network operators.

ETNO reorganised its working groups to better deal with new regulatory policy challenges. The Association reinforced its presence in new policy debates. A task force on access to content was created. In the same vein, ETNO initiated an unprecedented dialogue at the European level with leading content providers and their trade associations. ETNO also worked on the regulatory implications of the migration of its members to all-IP convergent networks.

Early in the year, in view of the adoption of a new Lisbon strategy, ETNO published a manifesto entitled 'ETNO's vision for the future – Towards a new revolution'. It highlighted the key conditions to be met in order for ETNO members to fully contribute to the EU's renewed jobs and growth strategy.

ETNO continued to have a close relationship with the Commission and enhanced its visibility within the European Parliament and the Council. ETNO was particularly active with the European Regulators' Group, continuing to advocate for more transparency.

More than ever, ETNO took the lead on key issues for the entire e-communications industry. For example on the data retention proposal, ETNO worked together with other associations involved – ECCA, ECTA, EuroISPA and GSM-Europe – to convey industry's concerns about the technical, social and economic implications of the proposed measures.

The advent of convergence has coincided with the launch in 2005 of two major legislative initiatives: the review of the regulatory framework for e-communications services and the revision of the Television without Frontiers Directive.

The review of the regulatory framework is crucial as it will have an immense impact on the future development of the European ICT sector and, most importantly, on its capacity to meet the combined challenges of convergence and globalisation. Whatever changes will be proposed by the Commission to the telecoms directives end of 2006, they will not enter into force before 2010. It is essential for the new framework to be future-proof and not to be based on yesterday's realities. Regulators and policy makers must be careful not to pre-empt the market developments and stifle innovation efforts. This could not only endanger EU's competitiveness but ultimately deprive society as a whole from the benefits of ICT.

Michael Bartholomew  
ETNO Director

# New European Policies

## New Lisbon agenda – ETNO Manifesto

### Background

On 2 February, ahead of the EU Spring Council, the European Commission adopted its new Lisbon strategy for growth and jobs. This new plan defines responsibilities for the delivery of objectives at both EU and national levels and invites member states to report on progress made.

### Achievements

ETNO welcomed the new approach based on better regulation and more systematic impact assessment. In view of the Competitiveness Council in March during which EU member states endorsed the new Lisbon Strategy, ETNO issued a manifesto 'Vision for the Future'. It sets out a series of recommendations on how to enable Europe to fully benefit from Information and Communications Technologies.

ETNO member companies invest more than €30 billion annually in tomorrow's networks and infrastructure. They are also developing and marketing products and solutions in areas of e-health, e-learning and e-government and play therefore a key role in achieving the objectives of the new Commission strategy for jobs and

growth. For the sector to continue playing this role, the ETNO manifesto called for:

- The creation of an innovation and investment friendly environment;
- A strategy to ensure the widespread availability of European high-quality legitimate digital content;
- An update of the EU regulatory framework in line with changing market realities and a progressive move towards a sector primarily driven by market forces.

The manifesto was widely distributed to the Commission, to members of Parliament and to Member States. The ETNO Director officially presented it to the media at the occasion of a press conference in Brussels.



## i2010 initiative

### Background

The i2010 initiative was adopted on 1 June, as one of the first thematic strategies under the new Lisbon programme. i2010 aims to create the appropriate conditions for the ICT sector to flourish and for Europe to benefit in terms of jobs and growth.

### Achievements

The initiative is based on three major pillars: modernising regulatory instruments governing ICT, reinforcing Europe's leadership in R&D and promoting an inclusive information society. ETNO members are committed to play their part in order to ensure the success of the initiative. ETNO participated in the high level UK Presidency conference on i2010 held in London in Sep-

tember 2005. The Association insisted on the importance for the Commission to take full responsibility for the implementation, carrying out the coordination between different services and involving all concerned stakeholders.

### Challenges

One of the main challenges of the initiative will be to develop a set of policies that continue to foster competition whilst at the same time create incentives to innovate in the networks and technologies underpinning tomorrow's services. The success of the initiative will depend to a large extent on its capacity to provide an enabling framework for a comprehensive review of the current sector specific rules in order to reflect recent and prospective market realities.

# Regulatory environment

## Implementation of the regulatory framework

### Background

The pace for implementation of the regulatory framework accelerated in 2005. National Regulatory Authorities (NRAs) pursued their market analysis. The Commission received more than two thirds of the notifications. Generally, NRAs applied the regulatory framework in a mechanical way and only a few NRAs made a comprehensive economic analysis, taking into account all the criteria that determine the degree of competition. The key objectives of the 2003 regulatory framework were the reduction of administrative burdens; ensuring proportionate regulation and the evolution towards competition law by insisting on the transitory character of regulation; technological neutrality and the creation of an EU single market for e-communications services. ETNO members' experience so far as well as analysis by a number of independent observers show that the regulatory framework did not achieve its objectives yet. The lack of progress towards deregulation is linked to the way the framework is implemented and its inherent contradictions and ambiguities.

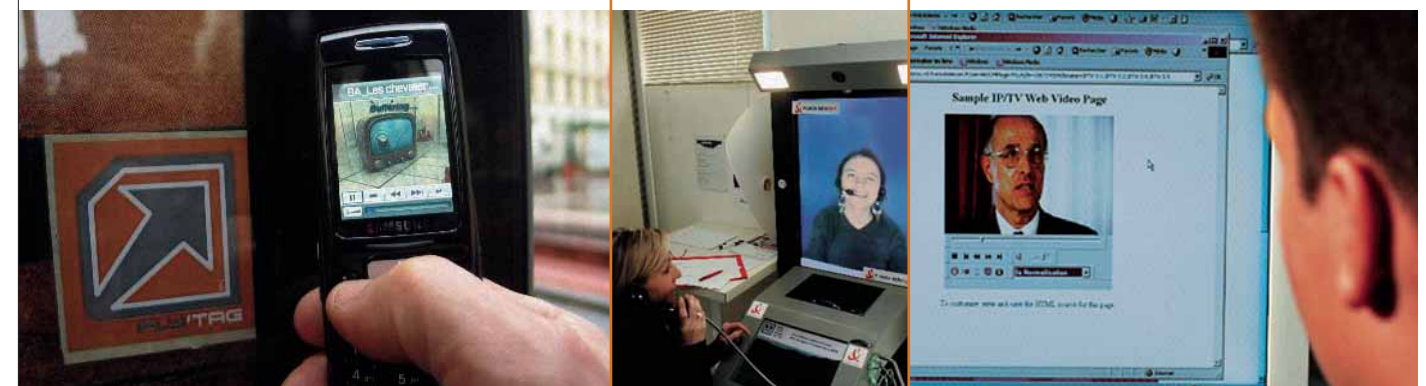
### Achievements

- **Implementation:** Through its Implementation Task Force, ETNO continued to monitor the implementation of the 2003 regulatory framework across the EU. To date, in most markets the level of regulation has sharply increased, especially in the wholesale broadband access and mobile markets. The NRF has not led to more coherence or harmonisation. The findings of the task force were presented at a workshop held in Brussels on 28 November.

It concluded that progress in the market analyses varies hugely from one member state to the other, failing to achieve a real pan-European level playing field. The event brought together a large number of specialists from member companies, the European Commission, national regulators and academics. The conclusions were included into ETNO's contribution to the Commission's call for input on the review of the regulatory framework and in the revision of the recommendation on relevant markets.



Implementation Workshop, November 2005 with the participation of Peter Scott, DG Information Society and Media (top).





– **New member states:** As ETNO members since the creation of the association, operators from new and future member states have always been actively involved in its work, making ETNO a key interlocutor on issues pertaining to enlargement. After the accession of 10 new member states became a reality, ETNO continued to closely monitor the implementation of the regulatory framework in these countries. In February 2005, ETNO brought together the CEOs of 16 leading fixed and mobile operators from new and future member states to meet with Mrs Viviane Reding, Commissioner for Information Society and Media and Mrs Danuta Hübner, Commissioner for Regional Policy. The CEOs called on the Commission to help bridge the digital divide and encourage long-term investment in the region. «Short-term policy based on disciplinary methods to enforce competition needs to be replaced by a long-term approach providing incentives for further investment in infrastructure and new services. Such an evolution would contribute to bridge the digital divide and serve the objectives of the Commission's new i2010 initiative», the chief executives told the Commissioners.

– **Small member states:** ETNO presented a study carried out by its member companies in Cyprus (CYTA), Luxembourg (EPT) and Malta (Maltacom) to high level officials of the Commission's DG Information Society

and Media and DG Competition. The study demonstrates that regulatory interventions have a proportionally stronger and more negative impact on companies and economies in small member states such as Luxembourg, Malta and Cyprus. The study recommended that market scale is taken into consideration while monitoring the implementation of the regulatory framework in the smallest EU member states and in developing future regulatory policy.

– **Dialogue between industry and regulators:** Throughout the year, ETNO continued to insist on the need for transparent and open relations with the European Regulators Group (ERG). Harmonisation and coherence between NRAs in implementation of the regulatory framework and in the application of remedies are essential to ensure legal certainty. ETNO participated in the public workshop organised by the ERG in January 2005 on its work programme and SMP guidelines. ETNO closely followed the work done by ERG on international roaming tariffs and on the regulatory treatment for VoIP. On the latter however, the ERG common position does not clarify the regulatory status of VoIP services. Inconsistencies can be observed between member states regarding the way VoIP services are treated by regulators. The ETNO Director multiplied bilateral contacts with Jorgen Andersen and Kip Meek, respectively 2005 and 2006 ERG Chairs.

## Regulatory challenges

### Background

Rapid technological developments, driven by convergence, have led to increasing competition from new players, who are not covered by regulation. New emerging business models call for a clear deregulatory agenda.

16 February 2005: CEOs from ETNO companies in new and future member states met with Mrs Hübner, Commissioner for Regional Policy and Mrs Reding, Commissioner for Information Society and Media.



### Achievements

Does the current regulatory framework, and the way it is implemented, encourage investment in new networks and infrastructures? This question has been at the centre of the debate throughout 2005. The regulatory implications of the move towards all-IP platforms

(Next Generation Networks), were the main theme of ETNO's third Annual Conference «New Generation Networks: the Next Telecoms Revolution» which brought together over 300 experts from the industry, the European institutions and member states (see Events section on page 30). In June, ETNO participated in an open workshop organised by DG Information Society on policy and regulatory issues related to NGNs. ETNO insisted on the technological break represented by the migration towards NGNs characterised by a high level of uncertainty. ETNO called on policy makers to adopt a careful approach to NGNs in order to pre-

serve investment incentives. Decision makers should also look at emerging regulatory approaches outside the European Union in order to boost investment and encourage sustainable competition between competing infrastructures.

VoIP is another major development that is considerably changing market structures. VoIP was not fully anticipated when the regulatory framework was designed. The increasing use of VoIP services and the growing fixed-mobile substitution call for an in-depth reassessment of the current regulatory provisions.

## The Review of the regulatory framework

### Background

End of November 2005, the European Commission launched a call for input on the review of the regulatory framework and the recommendation on relevant markets. The Review will concern each of the six directives that form the EU regulatory package. This process will be a major priority for ETNO member companies. Any revision to the directives will need to be adopted by the European Parliament and the Council under the co-decision procedure and will not enter into force before 2010. By contrast, the new recommendation on relevant markets will be adopted through comitology and will be already applicable early 2007.

### Achievements

The forthcoming review was the underlying theme for most of ETNO's activities in 2005, ahead of the actual political debate. Active work on alternative regulatory models has been carried out by the relevant ETNO working groups, in particular the regulatory policy, the long term review and the market and technology trends working groups. ETNO participated in many external events and conferences where the initial priorities of the review were outlined, such as next generation regulation conference held by Ofcom in Edinburgh in November 2005. ETNO also joined the task force created by the Brussels-based think-tank CEPS (Centre of European Public Studies) that brought together experts from industry, academics and regulators in order to prepare a joint report to be delivered to the European Commission.

ETNO already expressed its initial position on a series of concepts that will be at the centre of the review debate:

• **Ladder of investment:** Following a report from the European Regulators' Group on the regulatory approach to broadband, ETNO produced a reflection document assessing the suitability of the 'ladder of investment concept' to encourage investment in alternative infrastructure. ETNO concluded that systematically submitting operators to potential access obligations did not create incentives for building new or upgrading existing access network or for the build-out of alternative infrastructure by new entrants.

• **Universal service:** ETNO responded to the open consultation launched by the Commission on the Review of the Scope of Universal Service. The Association supported the Commission proposal not to extend the scope of universal service obligations to broadband and mobile services. In view of a more profound reflection on the Universal Service concept in the context of the review, ETNO insisted on the need for universal service to evolve in line with the rapidly changing market realities and growing competition on the markets. Universal service is not designed to promote specific technologies or economic policy goals such as a larger broadband coverage in the EU. Other instruments, such as structural funds, should preferably be used to extend broadband deployment in under-served areas. Similarly, a tax-based funding of the universal service obligations would be more appropriate than a financing from inside the sector, which inevitably leads to market distortions and conflicts between operators.

### Challenges

The real challenge for the review of the regulatory framework is not the extent of the review but whether the changes will enable the framework to achieve its deregulatory agenda and encourage long term investment.



# Innovation

ETNO continued to closely follow the preparation of the European Union 7<sup>th</sup> Framework Programme (FP7) for 2007-2012. ETNO supported the separation of objectives between cooperation, ideas, people and capacities. The Association welcomed the considerable increase in resources allocated to the Information Society Technologies programme, in line with the high priority given to the ICT sector in the new strategy for jobs and growth. ETNO, through its working group on research and development, insisted on the need to ensure that funding

is distributed to projects directly responding to the needs of the market place. Priority should be given to key areas for the industry such as broadband, mobile and wireless technologies beyond 3G and networked audiovisual systems and home platforms. ETNO welcomed the creation of the European Technology Platforms (ETPs) as the most efficient instrument to ensure research transition to industry. The Association will ensure an appropriate involvement of Telecommunications Network Operators in the ETPs.

## Content as main driver of growth in ICT sector

### Background

In a convergent environment, any content can be technically accessed through any platform and any device. Content is becoming a key driver for the take up of new technologies by consumers. New convergent networks also offer innovative and unlimited resources for the distribution of legitimate diversified quality content. Availability of content is generating conditions for market players to keep investing in the roll out of new technologies and services.

### Achievements

- **Cross-industry dialogue on content related issues**

ETNO initiated an unprecedented dialogue with content providers at EU level. More than 100 senior executives from telecoms operators and content providers took part in the first cross industry conference on issues related to content distribution over new media platforms. In order to stimulate the development and the distribution of legitimate digital content, participants agreed on the importance of strong protection and enforcement of intellectual property rights and of the compatibility of devices and platforms (interoperability) throughout the value chain (content, service, aggregation, software, network, device providers and vendors).

As a follow-up, on 29 November, ETNO organised a workshop on interactive digital television, hosted by Belgacom. The workshop provided a platform for a dialogue on the benefits of IP Television and the potential impact of the revised Television without Frontiers Directive on its further development (see events section p. 30).

- **Revision of television without Frontiers Directive**

ETNO took part in the open consultation launched by the Commission in July, prior to the adoption of the proposal for a revised directive in December 2005.

The Association expressed concerns about the legal uncertainty that could result from the debate on the revision at a crucial time when e-communications providers are planning major investments in new online audiovisual services. ETNO pointed out that most of the obligations currently found in the Directive were linked to the lack of user's control. Revised rules, in the spirit of the technological neutrality, should therefore apply only to services characterised by a similar lack of user control (linear services), irrespective of the technology that carries them. On-demand

ETNO first joint industry workshop on content issues.



services (non-linear services) are already adequately covered by existing EU and national legislations, in particular the eCommerce Directive.

ETNO reiterated these concerns at the occasion of the high level UK Presidency conference in Liverpool, on 20 September 2005. When the Commission adopted its proposal in December 2005, ETNO pointed out that the proposal as drafted risks leading to the overregulation of markets that are still at an embryo phase.

## Security and privacy

### Data retention

### Background

Following the draft Council framework decision on data retention tabled by four member states in April 2004, the European Commission issued its own proposal for a Directive in September 2005, implying a co-decision adoption procedure involving both the Parliament and the Council.

### Achievements

Throughout the debate on data retention, ETNO established a strong coalition with all associations representing e-communications service providers. During the year, ETNO continued to voice its members' concerns to the three institutions. Major events were organised to raise technical feasibility issues about the proposed measures, including an industry intervention at the EU informal Council of Justice and Home Affairs ministers in Newcastle in September 2005 and events in the

### Challenges

The development of online content-based services is essential to encourage the take up by consumers of new technologies and stimulate further investments in new high speed networks. Any extension of the traditional audiovisual rules to new innovative online services risks slowing down investment and hence, limiting the broadband penetration. ETNO is actively working with trade associations representing e-communications providers in order to raise these concerns, common to the entire sector.

European Parliament. The final text agreed by the Council and adopted by the EP in December presented some improvements as far as traditional fixed and mobile telephony was concerned (in particular for unsuccessful calls and mobile location data) but still failed to reflect the specificities and complexities of the online world. IP requirements, including e-mails and voice over broadband, raised major issues of proportionality and feasibility.

### Challenges

The final text provided little harmonisation as member states have the flexibility to go far beyond the Directive's requirements in terms of types of data to be retained, retention periods and cost reimbursement. After the rapid adoption of the proposed Directive, the key challenge will be to ensure that the implementation is as coherent as possible.



## Spam

User confidence is essential for the further take up of information and communications technologies and is therefore a major priority for ETNO member companies. Through its experts group, ETNO established close contacts with all European and international fora actively involved in the fight against spam. In this context, ETNO contributed to a report prepared by the International Telecoms Union (ITU) on actions developed to counter unsolicited mails. The Association made a series of recommendations to the European Commission in view of an anti-spam communications to be adopted in 2006. ETNO outlined measures developed by telecoms operators to fight spam throughout the EU:

- Security concerns are taken into consideration at the earliest stages of design and development of services and networks;
- Technical solutions are developed;
- Procedures have been established to deal with customers' claims;
- Public/private cooperation is essential to reduce spam;
- Education and information campaigns are key to raise awareness of users.

Spam is often linked to criminal activities (dissemination of spy ware, phishing, identity theft) and represents a major security issue. Given the global dimension of spam, a regulatory framework imposed only at the EU level does not provide enough security. Cooperation at the global level is essential.

## Taxation

In the context of convergence, traditional e-communications operators are becoming increasingly active in new areas and provide a wide range of broadband based services. ETNO closely follows legislative developments impacting on e-Commerce activities.

Through its tax working group, the association monitored the implementation of the EU VAT e-invoicing Directive and of the EU VAT e-commerce Directive. ETNO paid attention to the revision of the EU 6<sup>th</sup> VAT Directive, in particular regarding the business-to-business supply of services. ETNO continued to pay a particular attention to the VAT treatment of cards providing access to services. One of the priorities of the working group has been the

monitoring of the tax situation in new EU member states. It aimed to assist ETNO member companies in these countries to understand and comply with the EU tax legislation in respect to VAT.

In the coming months, the European Court of Justice will render its final decision on the British and Austrian cases on the recuperation of the VAT included in the fees paid for the acquisition of UMTS licenses. The ruling of the Court is expected in July 2006.

Without any doubt this decision, whatever direction it will take, will have a major impact on the e-communications sector.

## Resource Management

### Frequencies Management

#### Background

A fair and equitable management of radio spectrum is crucial for the roll-out of ETNO member companies innovative, high-quality, mobile and broadcast services. ETNO has closely followed the development of a new spectrum policy in Europe.

#### Achievements

- **New Radio Spectrum Strategy:** The European Commission presented in September 2005 a strategy to further stimulate growth and competition by introducing more flexibility in spectrum management and to ensure more harmonisation and coherence in

the use of radio spectrum throughout Europe. ETNO insisted that any reform of spectrum policy should be balanced and progressive in order to protect investment. In the context of the review of the framework, ETNO reiterated its view that the spectrum decisions should allow for a smooth transition from existing national regimes towards more flexibility, based on the needs of the market, without major changes to the current legislative instrument. ETNO pursued its close work with the Radio Spectrum Committee (RSC) and the Radio Spectrum Policy Group (RSPG) and asked for a deeper involvement of stakeholders in order for the decision making process to reflect the market needs.

- **WAPECS:** ETNO closely followed the work on the wireless access platforms for e-communications services and participated in the consultation held on that subject by the Radio Spectrum Policy Group.
- **Future use of 2010-2020 MHz band:** ETNO supported the views of the Radio Spectrum Committee that there is no market demand for self-provided applications and that therefore the band 2010-2020 MHz should be allocated to licensed applications.

- **Use of 2.6 GHz band:** ETNO supported the Commission decision to designate the 2.6 GHz band to IMT-2000/UMTS as it would have a positive impact on competition within the EU, encourage innovation and ultimately benefit consumers. A European regulation guaranteeing sufficient and timely availability of radio spectrum for IMT2000/UMTS would further stimulate Research and Development in a field where Europe is already leading.



## Numbering, Internet Naming and Addressing

Through its Naming, Addressing and Numbering Working Group, ETNO voiced its members' views and concerns with the EU, ITU (International Telecommunications Union), RIPE (*Réseaux IP européens*) and ICANN (Internet Corporation for Assigned Names and Numbers). ETNO continued to follow the issue of cross border access to non-geographic shared cost numbers. Another main issue ETNO has been following is the European Commission proposal to reserve the

116 number range for pan-European services of public interest. As the year drew to a close, the Commission finalised its decision in which many industry concerns were reflected, in particular as regards the type of services that could be eligible and the technical problems linked to the assignment of these numbers. In the years to come, the migration to all-IP networks and the increasing demand for mobility will raise new challenges to the current approach for numbering.

## Digital Divide

ETNO is closely following initiatives at the EU and national levels aiming at bridging the digital divide. Throughout the year and especially in the context of the newly adopted i2010 initiative, ETNO reiterated that investment in new broadband networks should be market driven. Public support, such as Structural Funds, may be used in those areas of the European Union where the necessary investment cannot be delivered by the market forces. The use of public funds

should remain fair and transparent and should not duplicate already available commercial offers. ETNO also believes that further broadband roll out and penetration can be achieved through the creation of an investment friendly environment and through the development of varied broadband-based attractive services, rather than through regulation. Therefore, broadband should not be included in universal service obligations.



## International cooperation

### WTO / International trade

As in previous years, ETNO, through its external trade issues working group, continued to follow the WTO negotiations despite the slow progress in 2005 of the Doha Round. ETNO kept contact with DG Trade and DG Information Society at all levels to provide informal feedback and facilitate the dialogue between the European Commission and ETNO members. At the WTO Ministerial Conference in Hong-Kong in December 2005, trade negotiators decided to develop a new approach for the services negotiations with a particular focus on eight sectors, including telecommunications services. ETNO also voiced its opinion on the European

Commission's proposal for a new classification of telecommunications services under GATS. As far as bilateral commercial issues are concerned, ETNO responded in February 2005 to the consultation organised by the US Federal Communications Commission's (FCC) concerning foreign mobile termination rates. ETNO is of the opinion that there is no rationale for a FCC intervention. «The FCC must rely on existing national regulatory frameworks, such as those in force in the European Union, which are best suited to address the issue and ensure a sustainable competition in their mobile market», said the Association.

### WSIS

#### Background

The second and final phase of the WSIS process initiated in Geneva in 2003 was completed in Tunis in November 2005 with the adoption of the Tunis Commitment and the Tunis Agenda for the Information Society. The main outcome of this phase of the WSIS consists of a commitment to deal with the digital divide through the creation of the voluntary Digital Solidarity Fund (DSF) and of a global agreement on Internet Governance.

#### Achievements

The ultimate goal of the WSIS was not about controlling the Internet but about enabling and facilitating development and accelerating the availability and affordability of the Internet in the developing world. Throughout the whole WSIS process, from Geneva to Tunis, ETNO stressed the importance for the actions on digital divide to build upon existing programmes and instruments. ETNO took part in the preparatory work for the final agreement in Tunis and called for an agreement on Internet Governance ensuring that:

- The current stability and well-functioning of the Internet is guaranteed.
- The full and effective involvement of all stakeholders is secured.
- The private sector leadership in the day to day technical management of the Internet is preserved.
- Reinforced cooperation does not focus on issues already treated elsewhere but on essential public pol-

icy issues such as spam, cyber crime or cyber security that may benefit from further international dialogue.

ETNO expressed its satisfaction that the two processes that resulted from the Tunis agreement on Internet Governance, namely the Internet Governance Forum (IGF) and the 'enhanced cooperation' reflect these principles. ETNO will pursue its close contacts with the other business partners and the Commission and will take an active participation in the implementation of the Tunis agreement.

#### Challenges

The key challenges of the post-WSIS implementation process will be to ensure a truly multistakeholder implementation of the processes agreed in Tunis. ETNO strongly believes that no stakeholder group should be excluded from the IGF. It is also essential that the «enhanced cooperation» process does not lead to the establishment of a separate intergovernmental body but rather to a reinforced cooperation between all relevant existing organisations.

From left to right:  
Alfredo Acebal, Chairman of ETNO's Executive Board  
and Michael Bartholomew, ETNO Director at the World  
Summit on the Information Society.

ETNO exhibits at the 2005 Green Week.

ETNO-WWF leaflet on climate change.

## Sustainability and corporate social responsibility

### Sustainability Working Group

ETNO members' sustainability commitment took a new dimension with the extension of the Environmental Charter into a Sustainability Charter, through which signatories commit to a wider range of principles including business ethics, employee relations, human rights and environmental management.

ETNO published its Environmental Report, entitled «Accountability in Connectivity» prepared by the Sustainability Working Group at the end of 2005. ETNO's Environmental Report, published every two years, monitors the evolution of the collective performance of the 25 signatories of ETNO's Environmental Charter, launched in 1996.

This report shows continuously improving performance by its signatories in reducing their consumption of gas, heating fuels and electricity. Despite economic difficulties and important reorganisations operators went through, there has been an increasing commitment to integrate environmental protection within the business strategy.

Beyond their own efforts to reduce energy consumption, ETNO members are promoting the positive role that a larger use of ICT solutions by all segments of the economy can play to achieve a more sustainable society. Such an exercise can only be successful through a close relationship with all stakeholders involved, both private and public.

At the occasion of the 2005 edition of the Green Week, mainly devoted to climate change, ETNO and WWF launched a joint programme aimed at raising awareness amongst policy-makers of the role larger use of information and communications technologies (ICT) throughout society and business could play in reducing CO2 emissions. The ultimate goal is to ensure a more systematic inclusion of ICT into European strategies to combat climate change. ETNO-WWF initiative has been highlighted in a large number of environmental and sustainability conferences throughout the world and has been welcomed by the European Commission as a positive example of partnership.

### Social Dialogue

The European Telecom Social Partners, UNI-Europa Telecom and ETNO continued their active cooperation throughout the year. One of the main achievements was the development of «Good Practice Guidelines for the Prevention of Musculo-Skeletal Disorders within the Telecommunications Sector» presented at the Health & Safety Conference on Musculo-Skeletal Disorders in Lisbon on 20-21 October. Over 130 delegates from

over 20 EU countries participated in the conference where experts in the field of MSD presented their findings from a year-long research programme funded by the European Commission.

The social partners launched a website at [www.msdonline.org](http://www.msdonline.org) where all the research and good practice guidelines are available.





# Public Profile

## ETNO – Key interlocutor of EU institutions on ICT-related issues



ETNO lunch debates. From top: Mr Gregory Paulger, DG INFSO Director for Audiovisual Media and Internet policies and Mr Philip. Lowe, Director General, DG Competition.

The year 2005 was the real start for the new European Commission. ETNO continued to have a close relationship with DG Information Society and increasingly with other directorates of the European Commission on a wide range of issues pertaining to the sector, especially with DG Competition, and DG Justice and Home Affairs in the context of the data retention debate.

Several lunch-debates were organised, with senior officials of the Commission.

ETNO continued close contacts with the member states representatives, in particular those of the countries holding the EU Presidency. ETNO participated in high level conferences organised by the Luxembourg and UK Presidencies of the EU.

Finally, ETNO had multiple contacts in Strasbourg and Brussels with Members of the European Parliament. The Association reinforced its visibility and presence within the European Parliament by sharing its technical expertise on ICT issues, at public hearings and during bilateral meetings.

## Communications

External communications and relations with the media have always been a priority for the Association. ETNO has considerably reinforced its day to day contacts with the Brussels-based press corps on the many issues related to the telecoms sector. «Telecoms operators want a change in Brussels policy» titled newspapers following a press briefing early 2005 on the publication of ETNO manifesto 'Vision for the future'.

ETNO has been in the headlines of the main international newspapers and press agencies. ETNO has been notably active with the written and audiovisual media

on the issue of data retention. ETNO's concerns about the EU proposed data retention measures were reported in about 50 different online, audiovisual and printed media.

ETNO also reinforced its communications efforts through the creation of a working group gathering communications experts from its member companies. The role of this newly created group is to assist the ETNO office in collecting facts and figures but also to promote the views of ETNO in member states.

## ETNO on the net

Electronic means of communications are vital for reaching key audiences in EU policy circles in Brussels. ETNO's external web site has undergone a complete revamping! The navigation has been reorganised around key themes (regulatory environment, innovation and information society) in order to ease users' access to position papers and other technical documents prepared by ETNO's working groups. The section on sustainability has been reinforced to better highlight the activities of ETNO members in this field.



## Participation in external conferences

Throughout the year ETNO participated in multiple conferences on various aspects related to the telecommunications markets and services in Europe and beyond:

- February 21, Saint-Petersburg: ETNO presented the EU regulatory model and its impact on investment at international conference «Infocommunications – possibilities and development».
- April 7, Barcelona: «Fixed-Mobile Convergence – Making it happen!»
- April, 28, Brussels: ETNO made a presentation on the challenges of enlargement for associations at the EuroConference 2005 «The New European Agenda for EU Business Associations».
- May 9, Berlin: UNI-Europa Telecom Conference.
- May 31-June 3, Brussels: ETNO participates in Green Week 2005.

- 16-17 June, Brussels: ETNO chairs session at ETIS Annual Conference «Aligning IT and corporate goals in the face of convergence».

- 27-28 June, Berlin: WIK Conference on the impact of regulation on carriers.
- September 6: UK Presidency conference on i2010.
- September 20-22, Liverpool: UK Presidency conference on broadcasting industry.
- October 3: ETNO was one of the judges for 2005 edition of the World Communications Award which rewards since 1999 outstanding achievement among telecom service operators.
- October 5-6, Madrid: ETNO Director chaired a session entitled 'Broadband Content: Regulatory Trends and Imperatives' at the Broadband World Forum Europe.





## Main events of the year

### 3 March 2005, Brussels: First ETNO cross industry workshop

#### 'Any content, any platform, any time, anywhere'

More than one hundred senior executives from telecoms operators and content providers took part in the first cross industry conference on issues related to content distribution over new media platforms. The event was organised by ETNO in cooperation with European and international content providers' associations: ACT (Association of Commercial Television in Europe), ECCA (European Cable Communications Association), EFCA (European Film Companies Alliance), Eurocinema, IFPI (International Federation of the Phonographic Industry), IMPALA (Independent Music Companies Association), ISFE (Interactive Software Federation of Europe), MPA (Motion Picture Association).

All participants agreed that access to legitimate content was critical for the further development of new e-communications services (3G mobile, broadband, digital

TV, ...) and that new distribution channels over digital platforms are becoming increasingly important for content providers. The online content market is still in its infancy compared to traditional distribution channels – online music represents only 1% of total distribution –, and new business models need to be developed. In order to stimulate the development and the distribution of digital content, participants agreed on the importance of strong protection and enforcement of intellectual property rights. They also called for the compatibility of devices and platforms (interoperability) at various levels of the value chain (content, service, aggregation, software network, device providers and vendors). They agreed that solutions in these areas should be achieved through industry-led initiatives rather than regulatory intervention.

### 31 May 2005, Brussels – ETNO Annual Conference:

#### «New Generation Networks: The Next Telecoms Revolution»

ETNO's annual conference has become a landmark in the telecommunications community in Brussels and beyond. Next generation networks (NGNs) and the remaining obstacles to their deployment were the main themes of the third ETNO annual conference. The event gathered about 300 delegates, from the e-communications industry, the European Commission, permanent representations, national regulators and the media.

Mrs **Viviane Reding**, European Commissioner for Information Society and Media shared her vision for the ICT sector, on the eve of the official adoption by the Commission of her i2010 initiative. Other keynote speakers included **Didier Bellens**, CEO of Belgacom, **Marek Jozefiak**, CEO of Telekomunikacja Polska and **Ad Scheepbouwer**, CEO of KPN. They gave an overview of the opportunities and challenges of convergence and

ETNO's Annual Conference, May 2005.



next generation networks both for users and telecom operators. They also highlighted the obstacles that needed to be removed to enable Europeans to fully benefit from next generation networks.

These topics were also debated by experts from the telecoms industry, EU institutions, academic world during three main conference sessions moderated respectively by **Mark Frequin**, Director for Post and Telecommunications at the Dutch Ministry of Economic Affairs, **Paul Rübzig**, Member of the European Parliament and **Philippe Defraigne**, Director Cullen International:

- «Setting the scene: new converged networks and services»
- «Regulatory policy challenges»

- «New services and consumer benefits perspective: bundled services, VoIP, access to content, interactive services»

Industry speakers highlighted the high level of uncertainty linked to the move to the next generation networks. Evolution towards NGNs represents a technological break involving new architectures, new protocols and new types of access. These uncertainties make investment in NGNs highly risky. ETNO members called upon regulators and policy makers to further encourage investment by moving towards to a sector primarily driven by market dynamics. They also insisted that regulatory intervention should not pre-empt how the market will develop.

### 27-28 October 2005, Bucharest: ETNO 27<sup>th</sup> General Assembly

ETNO's 27<sup>th</sup> General Assembly, hosted by Romtelecom in Bucharest, was opened by Harm Aben, 2005 GA Chair, Michael Bartholomew, ETNO Director and Alfredo Acebal, Chair of ETNO Executive Board. Dan Georgescu, President of the Romanian regulatory Authority, ANRC, and James Hubley, CEO of Romtelecom gave an overview of the situation in the telecoms markets in Romania. The review of the framework and the regulatory approach to high-speed broadband access were the main themes of the «ETNO Forum» held on the second day of the General Assembly. This forum was the occasion of a debate on how the current regulatory environment affects new technological developments such as fibre and WiMax. The GA re-elected

Alfredo Acebal, Telefonica, Chairman of ETNO Board since May 2005, replacing Michel Huet, France Telecom, for a new mandate. Representatives from British Telecom, Deutsche Telekom, Eircom and Telecom Italia were re-elected to the Board as well. The GA also officially endorsed the admission of a new ETNO member, TDF from France. At the end of the GA, ETNO members adopted a joint statement calling for the regulatory framework to reflect fast changing market trends. They urged EU decision to already move now towards a sector mainly driven by market dynamics as European operators are currently deciding on the scope and pace of their investment in tomorrow's networks.

ETNO's General Assembly, Bucharest, October 2005.





## 28 November 2005, Brussels – ETNO workshop:

### Two years of implementation of the NRF, lessons to be learned

Has the New Regulatory Framework led to less regulatory intervention? Does the current regulatory approach encourage investment? To what extent should the regulatory framework be reviewed? In which direction should the recommendation on relevant markets be changed? Those were the main topics of discussion at the ETNO implementation workshop, driven

by ETNO's Implementation Task Force. ETNO presented its initial findings of the monitoring exercise of the regulatory framework throughout the EU. Conclusions from the workshop contributed to ETNO's submission to the Commission call for input on the review of the regulatory framework and the revision of the recommendation on the relevant markets.

## 29 November 2005, Brussels:

### ETNO workshop on Interactive Digital Television



ETNO Workshop on Interactive Digital Television – Demonstration of Belgacom TV.

The roll out of interactive television services over broadband has been one of the major new trends in the European telecoms sectors, where several ETNO members are pioneering. More than 70 people from the telecoms sector, content providers and the EU institutions attended an ETNO's workshop on interactive digital television hosted by Belgacom. The event aimed at outlining the key challenges of ID-TV roll out and its importance in current business strategies of European telcos. Welcoming the event, Didier Bellens, CEO of Belgacom, pointed out that digital television is a clear illustration of convergence between media and telecoms sector and that it is becoming one of the key drivers to accelerate the broadband take-up. Several ETNO member companies gave a presentation on their existing or planned television services. They insisted on multiple functionalities of the services, enabling the consumer to be in charge of the content and creating new possibilities for the protection of children, for instance.

## 7 December: ETNO holds its annual reception

The ETNO Christmas event in the Bellevue Museum gathered more than 200 people from the telecoms sector, including representatives of Brussels-based telecoms trade associations, the Commission, the Parliament, as well as permanent representations, national regulators and the press. ETNO guests had the chance to visit the archaeological vestiges of the

former medieval palace under the Royal square in Brussels. Fabio Colasanti, Information Society Director General, Kip Meek, 2006 Chair of the European Regulators' Group; and Alfredo Acebal, ETNO Executive Board Chairman, addressed the audience explaining their expectations for the forthcoming review of the regulatory framework.



ETNO annual reception.





More about ETNO...

## ETNO position papers

### Common positions

- CP078 ETNO Common Position on Freephone services in Europe – follow up (CoCom05-23) August 2005
- CP077 ETNO Common Position on the draft Commission Decision on reserving the 116 number range – August 2005
- CP076 ETNO Common Position on misuse of E.212 – June 2005
- CP075 ETNO Common Position on ITU-TSB proposal for the future administration of IPv6 addresses – January 2005

### Reflection documents

- RD231 ETNO Reflection Document in response to the ERO Questionnaire on the use of the former TFTS bands in Europe – December 2005
- RD230 ETNO Reflection Document on the draft Directive on criminal measures aimed at ensuring the enforcement of intellectual property rights and the draft Decision to strengthen the criminal law framework to combat intellectual property offences December 2005
- RD229 ETNO Reflection Document on Best Common Practice for Numbering Misuse Protection – November 2005
- RD228 ETNO Reflection Document on the draft ERG 2006 Work Programme – October 2005
- RD227 ETNO Reflection Document on re-assessing the «ladder of investment» in the context of broadband access regulation – September 2005
- RD226 ETNO Reflection Document on the report of the Working Group on Internet Governance – September 2005
- RD225 ETNO Reflection Document on the European Commission's Public Consultation on the Digital Divide – September 2005
- RD224 ETNO Reflection Document on the European Commission's Communication «i2010 – A European Information Society for growth and employment» – September 2005
- RD223 ETNO Reflection Document on the impact of a Commission Decision for the 2.6 GHz band – September 2005
- RD222 ETNO Reflection Document in response to the public consultation on Wireless Access Platforms for Electronic Communications Services (WAPECS) – September 2005
- RD221 ETNO Reflection Document summarising ETNO's views on the 7<sup>th</sup> Framework Programme proposals – September 2005
- RD220 ETNO Reflection Document on the Communication on Global Partnership in the Information Society: EU Contribution to second Phase of WSIS – August 2005
- RD219 ETNO Reflection Document on the Commission Communication on the review of the Scope of Universal Service – July 2005
- RD218 ETNO Reflection Document on principles for the 11th Implementation Report – June 2005
- RD217 ETNO Reflection Document on the revision of the Television without Frontiers Directive June 2005
- RD216 ETNO Reflection Document on the future use of the band 2010-2020 MHz – May 2005

## ETNO Working Groups

ETNO's working groups – a key strength of the Association – cover a broad range of topics directly relevant to the business of telecoms operators.

Linked to one another by an Intranet for rapid consultation, each group draws on specialists from ETNO companies who examine a particular subject and reach a convergence of views. In most cases, the outcome is a Common Position or a Reflection Document, which is presented to decision-makers and the public to help shape debate on telecoms policy, rules, standards and regulations.

### Working Groups and Task Forces (as of June 2006)

- **Regulatory Policy [WG]**  
CHAIR: Mr R. Nigge – Deutsche Telekom
- **Regulatory Economics [TF]**  
CHAIR: Mr P. Richards – BT
- **Long-term review of Regulatory Framework [WG]**  
CHAIR: Mr A. Bartroff – TDC
- **European Information Society [WG]**  
CHAIR: Mr P. Pfost – Telefonica
- **e-Inclusion and digital divide [TF]**  
CHAIR: Mr H. Mannekens – BT and Ms P. Sunjic – Croatian Telecom
- **Internet Governance [TF]**  
CHAIR: TBC
- **Access to Content [WG]**  
CHAIR: Mr A. Grillo – Telecom Italia
- **Content Liability in the Information Society [WG]**  
CHAIR: Mr N. Gibbs – BT
- **Data Protection & Information Security [WG]**  
CHAIR: Ms C. Vela – Telefonica
- **External Trade Issues WG**  
CHAIR: Mr T. Kupfer – BT
- **Tax Issues Related to Telecom Services [WG]**  
CHAIR: Mr D. Taylor – BT
- **Employment, Health & Safety [WG]**  
CHAIR: Mr L. Zylberberg – France Telecom
- **Sustainability [WG]**  
CHAIR: Mr D. Riva – Telecom Italia
- **Fraud Control [WG]**  
CHAIR: Ms L. Sousa Cardoso (Portugal Telecom)
- **Joint Task Force on Security Issues**  
CHAIR: Ms C. Vela and Ms L. Sousa Cardoso
- **Frequency Management [WG]**  
CHAIR: Mr T. Rosowski – Deutsche Telekom
- **Benchmarking [WG]**  
CHAIR: Mr J. Tamisier – France Telecom
- **Naming, Addressing and Numbering Issues [WG]**  
CHAIR: Ms C. Kelaidi – OTE
- **Research & Development [WG]**  
CHAIR: Mr G. Scott – BT
- **ITU [WG]**  
CHAIR: Mr D. Würges – France Telekom

- RD215 ETNO Reflection Document on EC consultation: VAT – The place of supply of services to non-taxable persons – March 2005
- RD214 ETNO Reflection Document on the ERG consultation on Wholesale Broadband Access via Cable – March 2005
- RD213 ETNO RD on article 29 WG working document on data protection issues relating to IPR March 2005
- RD212 ETNO Reflection Document on the development of the «ALL-DIGITAL FREQUENCY PLAN» for terrestrial TV broadcasting – February 2005
- RD211 ETNO Reflection Document on the FCC Notice of Inquiry on Mobile Termination Charges (FCC 04-247, IB Docket No. 04-398 in the Matter of the Effect of Foreign Mobile Termination Rates On U.S. Customers) – February 2005
- RD210 ETNO Reflection Document commenting on the ERG Working Paper on the SMP concept January 2005
- RD209 ETNO Reflection Document on the proposed European Regulators Group Work Programme 2005 January 2005
- RD208 ETNO Reflection Document on the European Commission Document on the draft Directive on the New Legal Framework for Payments in the Internal Market Version 5.0 (26/11/04) January 2005
- RD207 ETNO Reflection Document on the European Commission Communication on Challenges for the European Information Society beyond 2005 – January 2005

### Expert contributions

- EC077 ETNO Expert Contribution on GSM onboard aircraft (GSMOB aircraft) – December 2005
- EC076 ETNO Expert Contribution in response to the public consultation on draft ECC Report 80 - Enhancing harmonisation and introducing flexibility in the spectrum regulatory framework – December 2005
- EC075 ETNO Expert Contribution on Data retention in e-communications – Council's Draft Framework Decision, Commission's Proposal for a Directive – October 2005
- EC074 ETNO Expert Contribution commenting on Commission Issue Papers in preparation of the review of the TWFF Directive – September 2005
- EC073 ETNO Expert Contribution on Cross-border access to non-geographic shared cost numbers (CoCom05-24) – August 2005
- EC072 ETNO Expert Contribution on CEPT/ECC report 70 on Services based on HESC – August 2005
- EC071 ETNO Expert Contribution on 116 and Freephone Services – May 2005
- EC070 ETNO Expert Contribution on Harmonisation and Flexibility in the context of radio spectrum management – May 2005
- EC069 ETNO Expert Contribution – Response to Questions asked by EEC NNA PT HESC – April 2005
- EC068 ETNO Expert Contribution on emission masks for generic Ultra-Wide Band (UWB) applications – March 2005
- EC067 ETNO Expert Contribution commenting on the Commission's initial criteria for revising the list of standards – March 2005
- EC066 ETNO Expert Contribution on the ECC PT7 proposal for categorisation of frequency bands January 2005



# ETNO Organisation

## General Assembly

CHAIR: Pavol Kukura, Slovak Telecom  
VICE-CHAIR: Jens Hauge, TDC

## Executive Board

CHAIR: Alfredo Acebal, Telefonica ⑤

Stephen Crisp, BT ⑩  
Roland Doll, Deutsche Telekom ④  
Patrick Galvin, Eircom ⑦  
Bernard Bresson, France Telecom ③  
Francisco da Silva, Portugal Telecom ①  
Thomas Müller, Swisscom ⑪  
Allan Bartroff, TDC ⑧  
Michele Bellavite, Telecom Italia ⑥ alternate for Luigi Gambardella, Telecom Italia  
Grazyna Piotrowska-Oliwa, Telekomunikacja Polska ⑨  
Gunnar Forsgren, Telia Sonera ②

ETNO Director ⑫



## Administrative Committee

CHAIR: Thomas Müller, Swisscom  
MEMBERS: Stephen Crisp, BT – Gunnar Forsgren, TeliaSonera  
OBSERVER: Alfredo Acebal, Telefonica

## Working Groups, Task Forces and Special Rapporteurs

## ETNO Staff



Michael Bartholomew, Director ⑤

Leo Debecker, Executive Manager, Operations ②

Thierry Dieu, Communications Manager ⑧

Fiona Taylor, Public Affairs Manager ⑥

Bernardo Herman, Regulatory Affairs Manager ①

Anne Vallès, HR & Financial Officer ③

Isabelle Claeys, Assistant to the Director ④

Maria Rodriguez-Dhénin, Secretary ⑦





















## ETNO Networks





















ETNO has a long record of cooperation and synergies with organisations, associations and fora involved in various aspects related to the e-communications sector in Europe. In the context of convergence, ETNO is working with other Brussels-based associations on topics relevant for the whole e-communications industry in the EU, such as data retention. ETNO also initiated an unprecedented dialogue with content providers.

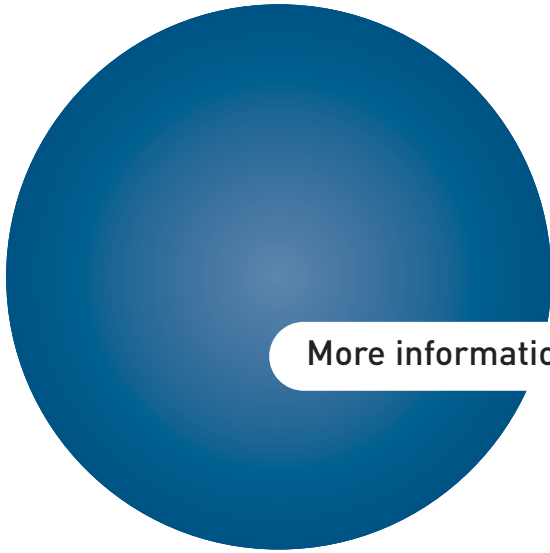




## ETNO Members

	Belgacom (Belgium)
	BH Telecom (Bosnia and Herzegovina)
	BT (British Telecom)
	BTC (Bulgarian Telecommunications Company)
	Telefonica O2 (Czech Republic)
	Croatian Telecom (Croatia)
	Cyprus Telecommunications Authority (Cyprus)
	Deutsche Telekom (Germany)
	Entreprise des Postes et Télécommunications (Luxembourg)
	Eircom (Ireland)
	Elisa Corporation (Finland)
	Elion Enterprises Ltd. (Estonia)
	Finnet Group (Finland)
	France Telecom (France)
	Invitel (Hungary)
	Koninklijke KPN (The Netherlands)
	Lattelecom (Latvia)
	AD Makedonski Telekomunikacii (F.Y.R. of Macedonia)
	Maltacom (Malta)
	Magyar Telekom (Hungary)

	Netia Holdings (Poland)
	Ono Telecomunicaciones (Spain)
	OTE (Greece)
	Portugal Telecom (Portugal)
	Romtelecom (Romania)
	Síminn (Iceland)
	Slovak Telekom (Slovakia)
	Societatea Nationala de Radiocomunicatii (SNR) (Romania)
	Swisscom (Switzerland)
	TDC (Denmark)
	TDF (France)
	Telecom Italia (Italy)
	Telefónica (Spain)
	Telekom Austria (Austria)
	Telekom Slovenije (Slovenia)
	Telekomunikacja Polska (Poland)
	Telenor (Norway)
	TeliaSonera (Sweden-Finland)
	Türk Telekomünikasyon (Turkey)
	VIPNet (Croatia)



More information on [www.etno.eu](http://www.etno.eu)