Annual Report 2008

The Telecoms sector: a key driver for economic recovery

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European Telecommunications Network Operators' Association

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The Director's word

The year 2008 will be mainly remembered for the financial crisis which suddenly hit the world and Europe. However, the economic downturn may have had at least one positive effect. It helped policy makers focus on the key role that high speed broadband networks can play to accelerate Europe's recovery.

How to encourage the roll out of next generation access networks and adapt the existing rules to new risky investments were the underlying themes of ETNO activities and events throughout the EU.

Throughout 2008, next generation access networks were central to the Review of the EU Telecoms Package, the key priority for the entire sector. This debate has contributed to supporting ETNO's position and image as the voice of Europe's leading investors and innovators in e-communications.

ETNO's membership extended further in 2008 with two new full members, Albetelecom of Albania and Telecom Lichtenstein and AT&T of the USA as an observer member. ETNO also strengthened its international dimension and continued to work in close cooperation with other trade associations active in the e-communications sector such as US Telecom.

ETNO has been instrumental in putting next generation access networks at the top of the political debates in the European Parliament and the Council on the ongoing review of the EU telecoms package. NGA's have also been recognised by EU Commission President Jose Barroso as one of the key priorities of the EU Recovery Plan.

New high speed broadband networks were the main topic of discussion at a flagship event for ETNO, the ICT Global CEO Summit, hosted in Venice this past fall by Telecom Italia. For the first time ever, ETNO brought together chief executive officers of about twenty key players from the telecoms and ICT equipment industry from Europe, the US and emerging markets.

This unprecedented event prompted a debate between industry representatives, the European Commission, Members of the European Parliament, EU member states and with the Chairman of the US Federal Communications Commission.

The Review debate mobilised many stakeholders, also beyond traditional telecoms players, confirming the multi-faceted nature of today's e-communications sector. The emergence of new issues in the discussions, such as network management, illustrates how far the e-communications sector evolved since the current legislation entered into force.

The telecoms sector has gone one step further on the path of convergence. The iPhone is only one illustration of this phenomenon. During 2008, we also witnessed further radical evolutions in consumers demand and Internet usage. Social networking sites and other interactive applications generated more and more data traffic. Consumers are increasingly accessing broadband through multiple platforms and devices, including mobile and wireless platforms. Competition on markets is lively for the benefit of consumers.

The e-Communications society is a reality in Europe. ETNO members are playing a leading role to make it happen through their investment and innovation efforts. As markets and technologies lead to new possibilities and paradigms, rules have to adapt accordingly. Policies defined in a totally different environment may prove totally ineffective to tackle new challenges.

In this rapidly changing world, it is essential that ETNO evolves as well. This is why the General Assembly in Venice decided to create a strategic review task force to adapt our goals and priorities to the challenges and opportunities driven by convergence.

Building on these achievements, ETNO is looking forward to continue cooperating with the newly elected European Parliament and the next Commission to create the best conditions for Europe to create a truly knowledge-based society.

Michael Bartholomew
ETNO Director

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Message from the Chair of the General Assembly

It is an honour for me to chair the ETNO General Assembly in 2009 and Telefonica is delighted to welcome the ETNO family in Seville in October.

A combination of factors makes this year's General Assembly a crucial event for us. Surrounded by an unparallel economic crisis, facing a new European Parliament and a renewed Commission, immersed in an internal strategic review of the Association and in front of the enormous challenges NGN and convergence will offer us, I am convinced that this General Assembly will give us the best opportunity to discuss the way forward for ETNO.

Seventeen years after organizing its Constituent General Assembly which took place in May 1992 in Madrid, Telefónica will host such a key event. This time, following previous years' experiences, we will offer ETNO Members the opportunity to discuss in depth issues at stake both in internal and external terms.

To this end, on Friday 30 October we have envisaged a second CEO Summit which will count on the presence of the highest representatives from the European Institutions together with a large number of CEOs and decision makers from other geographical areas. We hope that this event might create a forum for an improved exchange of views between all stakeholders and for strategic guidance from the highest business level.

From left to right: Carlos Lopez Blanco, ETNO's 2009 General Assembly Chairman; Luigi Gambardella, Telecom italia, GA Chairman 2008

European Telecommunications Network Operators' Association

The renewal of the European political institutions offers a good opportunity for reviewing ETNO and its activities with the objective of creating a new atmosphere of trust and cooperation with its stakeholders. This reinforced engagement will help the European telecommunications industry further develop and grow.

In Telefónica, we are convinced that the economic troubles our world is facing will bring us new business opportunities if we are able to show concrete results of our industry's potential as a tool to overcome the current crisis. As in the market place, if from the supply side we can bring a new paradigm of healthy and productive growth to society, we demand a fair and predictable regulatory scenario for our industry. Only under these conditions society will reap the full benefits of NGN and convergence in terms of economic growth, employment and cohesion.

As Chairman of the General Assembly I will try to encourage this constructive engagement for the benefit of society and a promising future for ETNO Members.

Finally, I would like to express my personal gratitude to the ETNO Office, the Executive Board and to the rest of the ETNO community for their work and efforts to build year after year a more respected and representative association.

Carlos López Blanco,
International Office Director at Telefónica, S.A.
ETNO's 2009 General Assembly Chairman

Message from the Executive Board Chair

In 2008, broadband take up continued to increase in Europe, reaching on average a penetration of almost 22%. Consumers' interest for new Internet applications such as VoIP, social networking, online content and entertainment grew further, generating more and more data traffic. In the midst of an overall economic downturn, prices for telecoms services continued to fall.

Thanks to massive infrastructure investment and innovation efforts, Europe's telecoms industry has created a connected society. New infrastructure investment is now of the essence to meet rapidly increasing demand and drive Europe's economic growth.

On the regulatory side- beyond the review of the EU Regulatory Framework - the key priority for ETNO and the entire telecoms industry - the sector has been marked by new short term regulatory initiatives which could seriously hinder the industry's capacity to invest and innovate.

New proposals such as the new roaming regulation and a recommendation on mobile termination rates, despite advertised potential benefits for consumers, will in the long run, contribute to further reduce the sector's revenue growth – already at its lowest level since 2003.

In the current climate of economic downturn, what Europe needs is a long term vision. More than ever in these difficult times, a strong telecoms sector is essential for Europe's economic welfare and competitiveness.

The telecoms sector should be at the basis of a new model for economic growth in Europe. Innovation in new broadband-based services and applications will increase Europe's productivity and growth, leading consequently to more jobs and consumer welfare.

However, for Europe to benefit from broadband-based innovation, infrastructure investment is key if we are to face the challenges to come. Investment in ultra high speed broadband networks will generate further innovation in new networks, applications, services and devices.

A forward looking strategy is needed for Europe to fully embrace this telecoms momentum. Investment needed to deploy high-speed networks is estimated at up to € 300 billion in Europe alone. At current investment rates, it will take Europe more than 20 years to achieve this goal. This unprecedented scale of the investment challenge calls, now more than ever, for bold visions, clear strategies and investment friendly regulatory environments.

By narrowly focusing on possible access obligations to new networks the current debate shows a severe lack of ambition. This is not the only issue that needs to be solved to make the NGA deployment a reality. How to encourage the deployment of high-speed broadband networks, applications and services? How to allow new business models to emerge? How to ensure that key areas of our society such as education or healthcare fully embrace the benefits of NGA? What kind of competition needs to be promoted?

The future broadband strategy must lead change in fostering an investment friendly environment, promoting sustainable competition and enabling fair and efficient network management. NGA policies must not be complacent in preserving status quo, but motivate change in arguably the most dynamic sector of our economy. It must be directed at encouraging all players to invest for a fair return and not at protecting particular business models.

Throughout the Review debate, ETNO has been advocating for more targeted and proportionate regulation rather than more regulation. Regulators should make it possible for different platforms, technologies and services to flourish based on competitive market dynamics.

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

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Regulation needs to focus on areas where competition among networks is unlikely to emerge, and remove regulatory pressure in competitive areas. Should access regulation be imposed, a gradual approach to remedies - targeting first passive infrastructure - is necessary to reward investment putting in place new mechanisms needed to fully reflect the risk incurred by investing undertakings.

With the transition towards next generation access networks, Europe's telecoms sector enters a new era which requires new rules. New networks will carry next generation services in the fields of e-health, e-learning, e-government or environmental protection. Operators must be able to manage their networks in order to ensure the efficiency and resilience of key services for citizens. Flexibility is needed for new business models and new forms of competition to emerge.

ETNO calls on policymakers to build on the strengths of the telecoms sector to accelerate the recovery and create a strong and competitive Europe and reiterates its ability and willingness to contribute to the debate. ETNO, as the voice of the main innovators and investors in Europe's telecoms sector, will continue to play its key role in shaping tomorrow's forward looking vision that Europe needs.

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

Main Topics of 2008

1. Regulatory environment

1.1. Review of the EU regulatory Framework

Background

Following the adoption in 2007 of the Commission proposals for the Review of the EU Regulatory framework, 2008 was marked by the first reading process with political debates both in the European Parliament and the Council. The package was divided into four parts: Better Regulation, the Authority, Citizens Rights and Digital Dividend. The main EP rapporteurs were already nominated early January, paving the way towards the start of the political debates. The EP Industry, Research and Energy (ITRE) Committee was given the lead on the framework, access and authorisation directive (Better Regulation) with Catherine Trautmann MEP as rapporteur. ITRE also lead on the European Electronic Communications Market Authority (EECMA) with Pilar Del Castillo MEP as rapporteur and on Digital Dividend with Patrizia Toia MEP as rapporteur. Finally, the EP Internal Market and Consumer Protection (IMCO) Committee took the lead on the Universal Service and the Privacy Directive (Citizens Rights) with Malcolm Harbour MEP as rapporteur.

Since the beginning of the process, the EP has paid particular attention to next generation access networks and possible ways to encourage risky investment while guaranteeing strong competition (see chapter on next generation networks). Besides the issue of investment in new networks, the debates in the EP focused primarily on spectrum issues and institutional topics.

Although the Slovenian Presidency of the EU already started analysing the Commission proposals during the first half of the year, intense work started at the Council level under the French Presidency. Following a vote in the ITRE and IMCO committees on 7 July, the EP adopted its first reading report end of September. The EU Council came to a common position at the Telecoms Council on 27 November, despite strong divergences among member states.

Activities

Since the early days of the process, ETNO actively voiced its position on the various aspects of the package, to key MEPs and Council representatives. ETNO priorities for the review were summarised in a booklet entitled 'Finding the right balance for competition, investment and consumer benefits', widely disseminated at an ETNO event in Strasbourg early January. ETNO also shared its position at many external conferences and fora. The Association's position was also highly reflected in the EU and international press. The key focus for ETNO during the Review was the next generation access networks.

The review was at the centre of several internal and external events organised by ETNO, including for instance a meeting of ETNO's Heads of Regulatory Affairs hosted in Ljubljana by Bojan Dremelj, CEO of Telekom Slovenije, in February. The Review was the main theme of the ETNO General Assembly and Annual Conference (see Events section). ETNO closely followed the work of the various opinion and lead committees. ETNO has also been in close contacts with the European Commission and the other EU institutions who also actively contributed to the Review, such as the Committee of the Regions and the Economic and Social Committee.

ETNO welcomed the outcome of the EP first reading plenary vote on 24 September as a positive step forward for the deployment of the next generation networks. ETNO welcomed the attention paid by the rapporteurs to find appropriate solutions and set the right conditions for investments in next generation access networks.

"The inclusion of balanced measures to encourage investment by all operators and allow a fair risk sharing between investors and access seekers is a positive signal given the currently deteriorating investment performance in the EU telecoms sector", said Michael Bartholomew, ETNO Director.

ETNO raised however concerns about other provisions, such as joint dominance, leveraging and retail regulation. These could lead to extensive access obligations to fibre networks or allow imposing regulation on an operator without having a significant market power, bypassing one of the basic principles of the EU Regulatory Framework.

ETNO also regretted that the remedy of functional separation was maintained (although with added conditions for its application) and expressed concerns about the impact of such a far reaching and costly remedy on risky investment in next generation access networks.

Read ETNO reaction to the EP committees and plenary vote:
http://www.etno.be/Default.aspx?tabid=2072
http://www.etno.be/Default.aspx?tabid=2093

ETNO closely followed the efforts of the French Presidency to reach a political agreement by the EU Telecoms Council on 27 November. The Council had to face strong divergences mainly on institutional issues. ETNO regretted that the latter overshadowed the key topic of next generation network investment. Even though the majority of EU Member States at the EU Telecoms Council insisted on the need to encourage risky investment in NGN access networks, these have not sufficiently been addressed by the final Council political agreement.

Read the ETNO reaction following the adoption of the Council political agreement:
http://www.etno.be/Default.aspx?tabid=2119

Besides the core topics of the review and in particular the next generation networks, ETNO also closely followed other issues heavily discussed during the debates on the Review in the European Parliament and the Council:

Spectrum:

There has been an intense debate in the Parliament and the Council on the challenges related to spectrum policy. ETNO regrets however that the full potential of the digital dividend has not been embraced in order to bridge the digital divide by boosting the development of mobile and wireless services. Harmonisation of the use of the frequency bands freed up as a result of the digital switchover is essential for pan-European services.

Content-related issues:

Several secondary topics entered the Review debate at the last minute. Content online and copyright were one of them, with attempts to include provisions in the framework which could have forced operators to take measures against consumers suspected of illegal file-sharing outside of a legal order. Echoing the views of many players in the market and consumer organisations, ETNO insisted that content-related provisions do not fall within the scope of the regulatory framework and should not be included in the revised rules. Although this issue has been clarified in the EP first reading report, it remained a major stumbling block towards an agreement between the EP and the Council in the final second reading negotiations.

'Net neutrality'/quality of service:

Net neutrality is another key issue that arose in the political debate at the Parliament. Jointly with other associations such as Cable Europe, GSMA and key players in the telecoms services and equipment sectors such as Ericsson, Cisco, AT&T, Verizon, ETNO raised concerns about new net neutrality amendments adopted by the EP. The new set of rules would limit operators' ability to manage their networks to cope with increasing data traffic and to offer diversified levels of quality tailored to customers' demands, while guaranteeing transparency and a minimum quality of service.

ETNO echoed the views widely supported by various players in the market that an additional layer of Internet regulation was not necessary as Europe was already subject to EU sector-specific rules and general competition law.

ETNO also closely followed the discussions on the proposals in the Review related to security and consumer rights.

EU Regulatory Framework Review: key milestones

Sept-Oct 2009 .... Conciliation process?
5-6 May 2009 .... EP Plenary second reading vote
21 April 2009 .... EP ITRE Committee second reading vote
2 April 2009 .... EP IMCO Committee second reading vote
27 November 2008 .... EU Telecoms Council: first reading political agreement
24 September 2008 ...... EP plenary first reading vote
7 July 2008 .... EP Committees first reading vote
13 November 2007 .... Commission adopts its proposals

1.2 Next Generation Access Networks

Background

In its recent economic recovery plan in November 2008, the Commission highlighted next generation access networks as one of the key drivers for Europe to overcome the crisis. NGA are essential for consumers and businesses to fully enjoy tomorrow's broadband services. They also represent a key opportunity for the development of a truly sustainable infrastructure-based competition as consumers will increasingly be able to access high speed broadband services through multiple platforms and technologies. Mainly due to the uncertainty of demand, next generation access networks entail very risky investment estimated at up to € 300 billion. Before the financial crisis, Europe was already lagging behind the US and Asia in the roll out of NGA.

Activities

Next generation access networks are a key priority and policy focus for ETNO. It was a very positive sign that NGA have been placed so high, in particular by the EP, on the agenda of the Review, although they were not addressed in the initial Commission proposals.

ETNO put on the table several proposals for a more targeted regulatory approach for NGA and devoted to this topic several events and activities. ETNO held an NGA workshop in May 2008 with the participation of representatives from the Commission, the regulators and Catherine Trautmann MEP. In view of the preparation to the telecoms council, ETNO also organised a technical briefing for council representatives on how to promote investment in NGA. Finally, next generation access networks were at the centre of ETNO's new communications and media campaign entitled "Think Further… Everything is a question of balance".

ETNO closely followed the publication by the Commission in September 2008 of a first draft recommendation on NGA regulation. ETNO considered however that guidance to regulators should above all be enshrined in the directives. ETNO welcomed the declared objective of the Commission to encourage end-to-end infrastructure competition as the most appropriate goal but regretted that the concrete proposals made by the EP Industry Committee in July 2008 to improve conditions for investment were not taken into consideration in the draft.

ETNO vision for next generation access networks:

- Target regulatory intervention on areas where competition between networks is not likely to emerge, through a geographical segmentation of national markets and remedies;
- Lower costs of deploying new networks through symmetric obligations to open up all ducts capable of carrying e-communications networks in order to stimulate all players to invest;
- Reduce the investment risk when access regulation applies by allowing fair risk sharing between the investor and access seekers.

RD295 - ETNO Reflection Document in response to the Commission Recommendation
on regulated access to Next Generation Access Networks (NGA)
http://www.etno.be/Default.aspx?tabid=2108

1.3 Regulation of mobile markets

In parallel to the proposals to review the EU Regulatory Framework, the European Commission launched a proposal in September 2008 to extend the voice roaming regulation and include in its scope SMS and data roaming.

ETNO also closely followed the initiatives by the Commission and the European Regulators' Group on fixed and mobile termination rates.

ETNO raised strong concerns about the Commission draft recommendation on the regulatory treatment of fixed and mobile termination rates in the EU. ETNO warned against any disruptive change to the current practices and costing principles on which business models are based. ETNO noted that termination rates are already consistently reducing for the full benefit of consumers according to the glidepaths put in place by regulators. A drastic diminution of the termination rates as proposed by the Commission could seriously hinder the operators' ability to invest and offer affordable services in particular to lower revenue customers.

ETNO welcomed however the phasing out as soon as possible of asymmetry of termination rates within a given market.

RD292 - ETNO Reflection Document on EC consultation on the draft Recommendation on
"The Regulatory Treatment of Fixed and Mobile Termination Rates in the EU"
http://www.etno.be/Default.aspx?tabid=2090

2- An Information Society for All: Consumer issues

2.1 Universal service

A reinforcement of some aspects of the universal service (number portability, access to numbers and services, European access codes, emergency services, special measures for disabled users) was proposed through the Review of the EU Regulatory Framework.

A more in-depth review of the universal service obligations' scope and funding was announced by the European Commission. This process has been initiated with the publication of an EC communication on the future scope of universal service. The in-depth review of the Universal Service Directive has however been postponed until 2009.

Today consumers have increasingly access to a wide range of quality service adapted to their needs. For ETNO, the scope and principles of the universal services obligations should be revised in line with the technological developments and increased competitiveness on the markets.

Before considering any extension of the scope of universal service obligations, it should be considered whether this is the best instrument to encourage consumers to embrace broadband or whether other public policies need to be activated.

2.2 Privacy, cyber-crime and network security

Background

Guaranteeing online security and privacy is an essential prerequisite for consumers to embrace new broadband based services. ETNO members are continuously working to improve security in their networks and services, beyond existing regulatory obligations. ETNO members pay particular attention to measures to protect minors and also develop educational and awareness raising initiatives.

Activities

New provisions for network integrity and obligations to notify security breaches were included in the European Commission proposals for the Review of the EU Regulatory Framework. Taking an active stance in this debate, ETNO underlined that industry-lead self regulatory initiatives proved to be more effective to tackle security issues, considering the rapidly evolving technological developments. ETNO also insisted that in today's complex world, security should not be seen as the sole responsibility of the network providers. All players of the value chain should be involved. ETNO also raised concerns that systematic notification of all security failures and not only the risks, could lead to more confusion instead of increased confidence.

2.3 Data retention

Background

Following its adoption in March 2006, the Data Retention Directive entered into force in national member states as of September 2007. In accordance with the Directive, 18 member states have taken an additional delay until March 2009 for IP data. Although the Directive aims to harmonise data retention obligations in Europe, key issues were left open, such as the type of data to be retained and the storage period, which can vary from six to 24 months. Other important issues need to be decided at the national level, such as cost reimbursement, definition of serious crime, technology used to retain the data, the right to access and use data by national authorities, etc.

Activities

ETNO's data protection and information security working group closely monitored the transposition at national levels of the data retention directive, paying particular attention to possible new barriers to the provision of pan-European services, given the wide flexibility left to member states to go beyond the directive's requirements. A table was put together in order to monitor the implementation and compare the different regimes.

It is still too early to draw clear lessons from the implementation of the directive. Several member states have experienced delays in the adoption of national laws and infringement procedures were launched. Most of the member states have postponed the adoption of measures related to Internet data.

ETNO, together with other trade associations involved in the e-communications sector, actively participates in the expert group set up by the Commission on the implementation of the directive. So far, this group mostly focused on issues related to IP-data, such as the treatment of webmail services, spam, transit providers and VoIP services. Other special issues also addressed by the expert group and that require further guidance include unsuccessful calls and prepaid cards.

2.4 Digital Divide

Bridging both the social and geographical digital divide continued to be a key EU policy priority.

Although market-driven investment has led to a wide deployment of broadband networks throughout most of European territory, discrepancies persist, especially between rural and urban areas. ETNO supported the European Commission proposals to boost mobile and wireless broadband access through an opening up of the spectrum freed up as a result of the digital switchover. ETNO also closely monitored the use of public funds to finance network development. ETNO reiterated its position that the use of public funds should be primarily aimed at those areas where private investment is not economically viable. Public authorities should rather focus on stimulating demand, increasing digital literacy and creating adequate conditions for private investment.

Bridging the social digital divide implies that e-communications services are accessible to all. ETNO member companies devote significant innovation efforts to develop services adapted to people with special needs. ETNO continued to follow EU policy activities related to e-accessibility, mainly by actively participating in the INCOM sub-committee and maintaining a close dialogue with other industry associations and user groups.

3. Distribution and production of online content services

Background

Stimulating the growth of content online markets is one of the main priorities of the European Commission's i2010 initiative. E-communications operators and content providers need each other. Content is essential for customers to take up new technologies and services. New media platforms also represent tremendous opportunities for the distribution of content.

New content-based services depend on new business models for which demand is uncertain. Rules defined for traditional content in the off-line world should not be extended automatically to new services, thereby discouraging risky investment.

Activities

3.1 Online content

ETNO actively participated in the open consultation that followed the publication of the European Commission communication on 'Creative Content Online in Europe's single market'. The communication identifies four main horizontal challenges: availability of creative content, interoperability and transparency of Digital Rights Management systems and piracy. The Commission also set up a 'Content Online Platform' with the participation of stakeholders to discuss issues related to online distribution of online content.

ETNO insisted that there was no specific need for regulatory intervention at a stage when business models are still developing and markets evolving fast. However, the lack of access to creative content and of active licensing of rights on new platforms remain major obstacles for the development of online content services. ETNO also called on the EU to ease content licensing for example by ensuring more transparency in collecting society operators and allowing multi-territorial licences.

Content issues have been a key priority for ETNO throughout the year. The ETNO Director reiterated ETNO's position, shared by most eCommunications providers, at several events and fora, including at the Wild West Web conference hosted in Brussels with the participation of Commissioner Reding.

3.2 Copyright

Content online, in particular the issue of copyright enforcement, also arose in the debate on the review of the EU regulatory framework with attempts to introduce the so-called "three strikes approach". Several amendments were proposed without any proper debate by members of the European Parliament to tackle illegal file sharing. Echoing strong concerns of the eCommunications sector as a whole, ETNO reiterated the views that operators, in line with the existing legal framework, should not be asked to take any measure against consumers outside of a court order or to judge on the validity of a complaint.

For ETNO, the best way to fight against illegal file sharing is to raise awareness and enable the wide availability of accessible, secure and price-worthy legitimate content. Against this background, ETNO launched a communication and education campaign through a new section on its web site, to promote the legitimate content offers developed by ETNO members throughout Europe.

Read ETNO's contribution to the Creative Content Online consultation:
http://www.etno.be/Default.aspx?tabid=2040

ETNO new online content web site:
http://www.etno.be/Default.aspx?tabid=2086

3.3 Levies

ETNO participated in a Commission's Stakeholder Consultation on Fair Compensation for Acts of Private Copying. ETNO reiterated its position that the system of copyright levies is outdated and not suited to the European Information Society. Copyright levies were introduced in Europe on analogue media, and in some countries also on reproduction equipment, during the 1980's to compensate rightholders for certain excessive copying that was done for private use. Remuneration should be, as far as possible, directed towards the usage and the relevant users rather than on all users through levies.

RD283 - ETNO Reflection Document in reply to European Commission stakeholder consultation on Levies
http://www.etno.be/Default.aspx?tabid=2056

4- Tax issues

Through its taxation issues working group, ETNO is closely following the tax policies affecting the provision of telecoms and e-commerce services. One of the key topics for ETNO has been the new B2B Place of Supply Rules applicable from 2010, following the adoption by the European Council of the VAT package early 2008. ETNO developed a position on the practical application of the rule. The main change is that B2B supplies will be taxed under a general reverse charge so that when services are supplied cross border, and when supplier and recipient are in business, the VAT will be taxed according to where the recipient (customer) is established. ETNO welcomed the change to the general reverse charge principle but considers that some increased compliance issues arise as a result of this, which will add to the cost burden for businesses and which also requires further guidance from the Commission to ensure a smooth and harmonised implementation of the new rules.

Read RD291 - ETNO Reflection Document on the Practical Application
            of the New B2B Place of Supply Rules applicable from 2010:
            http://www.etno.be/Default.aspx?tabid=2081

Another key development was the proposal by the Commission to address payment for premium rate services and mobile phone content services. ETNO warned against the extension of the scope of e-money regulations to new innovative mobile payment services. Otherwise the development of these services, still in their embryonic phase, could be seriously hindered.

The ETNO Tax working group, in close cooperation with the Sustainability WG, also took the view that telecoms is essentially seen as a 'green' activity so should be recognised as such through the taxation system. Reducing the VAT rate would encourage consumption of telecoms against other means of communication. The WG thus made its views known to the Commission. The Tax WG, along with the External Trade Issues WG, also raised concerns regarding the level of customs duty planned by the Commission to be increased on some mobile phones, because they were no longer being seen as essentially mobile phones, but as 'entertainment' devices holding camera, music player or GPS functions. The WG considers that this is a damaging move which would have an unwarranted effect on the consumer market and also failed to take into account the fact that the essential nature of the devices remains a mobile phone.

5 - Fair Management of Resources

Rapid technological and market developments driven by convergence are increasingly impacting on scarce resources such as radio frequencies but also on addressing and numbering mechanisms. Through its relevant working groups, ETNO has continued to closely monitor policy developments regarding spectrum management, number and address allocation and domain names. The association maintained its successful cooperation with all actors involved, including the European Commission, the ITU (International Telecommunications Union), RIPE (Réseaux IP européens), ICANN (Internet, Corporation for Assigned Names and Numbers) as well as CEPT's (European Conference of Postal and Telecommunications Administrations) ECC.

Main Topics of 2008

5.1 Frequency Management

Background

Broadband wireless access is essential to achieve broadband for all and bridge the digital divide. In this context, the switchover from analogue to digital television is a unique opportunity as it will make a substantial amount of additional spectrum available for these new services.

Activities

The digital dividend was one of the top priorities of the Review debate on spectrum. ETNO supported the opening of the spectrum bands freed up as a result of the switchover to wireless and mobile applications. ETNO also welcomed the proposed reservation of an harmonised sub-band of the 470-862 MHz for bi-directional broadband usage. As part of the Review debate, ETNO took part in a hearing hosted by the EP rapporteur on Digital Dividend Patrizia Toia.

ETNO also started preparing for the World Radio Conference 2011 and actively participated in the work of the CEPT related to WAPECS.

More information:
RD285 -   ETNO Reflection Document on the Digital Dividend in Europe
          http://www.etno.be/Default.aspx?tabid=2066

RD279 -   ETNO Reflection Document in response to the public consultation
          on the CEPT Report 019
          http://www.etno.be/Default.aspx?tabid=2037

European Telecommunications Network Operators' Association

5.2 Naming, Addressing and Numbering

A key topic for ETNO regarding naming and addressing issues concerned the upcoming exhaustion of IPv4 addresses – one of the main forthcoming challenges for the future of Internet.

IPv6 is the only long-term solution but there are still issues that inhibit the transition from IPv4 to IPv6, such as cost which is currently considered very high. The European Commission is aiming for 25% of European internet users to connect to the internet using IPv6 by 2010. ETNO closely monitors any policy development in the context of IPv4 exhaustion and transition to IPv6 to ensure that IP resources are available in the future in a fair and equitable manner, both IPv4 and IPv6.

Through its Naming, Addressing and Numbering Working Group, ETNO followed the progress of allocation of pan-European numbers within the 116 number range and in particular the introduction of the 116 000 pan-European missing children hotline. Moreover ETNO followed the activities related to the European Telephone Numbering Space (ETNS), International Call Line Identification and International Numbering resources that are available for use by generic help lines, issues that are under debate at a European level and in the ITU.

Moreover ETNO followed ICANN activities, in particular the policy for expansion of the generic Top Level Domain names and the Internationalization of Domain Names, while the evolution of ICANN institutional status, and ICANN improvements were also closely monitored. ETNO also contributed to a consultation organised by the ECC/ CEPT on the impact of fixed mobile convergence on numbering related issues.

Main Topics of 2008

More information:

RD278 -   ETNO Reflection Document in Response to the Notice of Inquiry from the
            United States Department of Commerce on the Midterm Review of the Joint Project
            Agreement with ICANN
            http://www.etno.be/Default.aspx?tabid=2036

RD290 -   ETNO Reflection Document in response to ECC/ CEPT consultation on Fixed-Mobile
            Convergence with Survey of Numbering Related Issues
            http://www.etno.be/Default.aspx?tabid=2078

EC097 -   ETNO Expert Contribution on IP Addressing in a post IPv4 World - Principles
            http://www.etno.be/Default.aspx?tabid=2058

EC098 -   ETNO Expert Contribution on IP Addressing in a Post IPv4 World Reallocation
            of resources
            http://www.etno.be/Default.aspx?tabid=2058

Together with Internet Governance WG:

RD293 -   ETNO Reflection Document in response to the 2nd round of consultation
            "Improving Institutional Confidence" launched by ICANN
            http://www.etno.be/Default.aspx?tabid=2111

RD287 -   ETNO Reflection Document in response to the consultation
            "Improving Institutional Confidence" launched by ICANN
            http://www.etno.be/Default.aspx?tabid=2075

6- Research and Development

In 2008, the organisation of the European Research Area was one of the major topics of interest for ETNO's R&D working group. To ensure that the needs of the market will be reflected trough the different instruments (7th EU Framework Programme for Research and Development , Eureka clusters, EIT..), ETNO has elaborated a strategic document "ETNO research priorities 2009–2011" that was presented during ICT Summit 2008 in Lyon (25 - 27 November 2008).

The Working Group also followed the development of the European technology Platforms and the emergence of a Public Private Partnership on Future Internet.

7- Global Dimension

7.1 World trade issues

In 2008 the Doha Round failed once again the possibility to reach a conclusion due to ongoing disagreement to settle a compromise on market access for agriculture and goods. This caused no further progress on on the telecommunications chapter. In parallel however, ETNO closely monitored the negotiations for bilateral and regional Free Trade Agreements and has been in contact with relevant officials from DG Trade and DG INFSO. Particular progress took place in the FTA talks with South Korea which have come close to an agreement as well as in the negotiations with Central America. The FTA negotiations with India also advanced and ETNO kept stressing the importance of further market access in telecoms in this important emerging market.

Main Topics of 2008

ETNO also supported through its Trade Issues working group, the mobile manufacturing industry and raised strong concerns about the proposed reclassification of more sophisticated mobile phones, which would make them subject to same customs duties as for GPS-units, TVs and video cameras and thus more expensive. ETNO urged the European Commission to promote free and fair trade and avoid obstructing the advance of the IT industry through the envisaged reclassification.

On a more general note ETNO stressed that in a world of increasing convergence, the problem of how to classify for the purpose of custom duties multipurpose ICT devices does not only relate to mobile phones, but to an ever growing broad variety of products offered by ETNO Members to their customers. ETNO believes that the focus for the classification should be on the "essential character" of the device in question.

More information:
RD297 - ETNO Reflection Document on the Customs classification of Mobile Phones
http://www.etno.be/Default.aspx?tabid=2131

7.2 The ITU

2008 has been a major year for ITU, characterised by the end of a four-year study period, and the WTSA (World Telecom Standardisation Assembly) held in Johannesburg.

The work of the ETNO's ITU WG focused therefore on the preparation of the WTSA, with meetings during TSAG (Telecommunications Standardisation Advisory Groups), and WTSA and also an informal meeting during ETSI General Assembly. During these meetings, ETNO members also had an exchange of views with Mr Malcolm Johnson, Director of ITU-T, on various issues such as his aim to provide value for money for ITU-T membership and his interest to make industry more attractive to develop standards. Members also met with Mr Anders Jonnson, chairman of CEPT ITU WG, who gave a presentation of new CEPT organisation and responsibilities of each Project Team, and invited ETNO to participate in the elaboration of European Common Proposals.

The ETNO's ITU WG elaborated common positions for TSAG and WTSA on the restructuration of study groups, network externalities and the ITU-T Mark project. ETNO also supported the establishment of a new focus group on ICT and climate change and a WTSA Resolution on this subject.

The ETNO 's ITU WG also adopted an Expert Contribution on the Future of CEPT in liaison with ETNO's working groups dealing with Frequency management, Numbering, Naming and Addressing and Internet Governance. A presentation to ERO's Director was given by the ETNO's Director.

7.3 Internet Governance

The launch of the Internet Governance Forum was one of the main outcomes of the World Summit on Information Society held in Tunis in 2005. ETNO actively participated in the preparation for the third Internet Governance Forum meeting held in Hyderabad (India) in December 2008. The overall theme for the Hyderabad IGF was "Internet for all" and the cross-cutting themes were "human and institutional capacity building" as well as "development".

As the preparations start for the next IGF to be hosted in Sharm EL Sheik in 2009, the review of the IGF is already on the top of the agenda. The formal consultation on the review will end with a specific session on the last day of the Sharm El Sheik meeting, devoted to the IGF Review. In an initial position, ETNO underlined that it would be worth continuing the IGF beyond 2010. The IGF must continue to promote the dialogue on Internet Governance, as well as the understanding of all the complex issues behind. For ETNO, it is essential that its truly multistakeholder nature is maintained and reinforced.

ETNO also actively followed the transition of ICANN to a fully independent organisation as the Joint Project Agreement (JPA) expires. ETNO participated in the consultation organised by ICANN on 'Improving Institutional Confidence'. ETNO reiterated its support to multi-stakeholder and private sector driven functioning of ICANN as a guarantee for the stability and further development of the Internet.

Main Topics of 2008

More information:

RD299 -   ETNO Reflection Document on Taking stock of the Hyderabad meeting
          and the way forward, as well as on the Review of the IGF
          http://www.etno.be/Default.aspx?tabid=2135

RD289 -   ETNO Reflection Document on the Programme, Agenda and Format of the
          Hyderabad Meeting, ahead of the 3rd open consultation
          (Geneva, 16 September 2008)
          http://www.etno.be/Default.aspx?tabid=2077

RD284 -   ETNO Reflection Document on the draft programme outline and schedule of the
          3rd IGF meeting, ahead of the 2nd open consultation (Geneva, 13 May 2008)
          http://www.etno.be/Default.aspx?tabid=2057

RD276 -   ETNO Reflection Document on the IGF Advisory Group
          http://www.etno.be/Default.aspx?tabid=2025

RD275 -   ETNO Reflection Document in reply to the IGF Questionnaire
          "Taking stock and the way forward"
          http://www.etno.be/Default.aspx?tabid=2024

RD293 -   ETNO Reflection Document in response to the 2nd round of consultation
          "Improving Institutional Confidence" launched by ICANN
          http://www.etno.be/Default.aspx?tabid=2111

RD287 -   ETNO Reflection Document in response to the consultation
          "Improving Institutional Confidence" launched by ICANN
          http://www.etno.be/Default.aspx?tabid=2075

8 - Socially Responsible Management

8.1 Environment and Sustainability

ETNO Sustainability Charter continued to gain visibility and recognition in the sector, illustrating ETNO members' continuous commitment to improve their performance in sustainable development. With Telekom Slovenije joining in 2008, the ETNO Sustainability Charter counts now 21 signatories.

Beyond monitoring progress of the charter signatories, the ETNO Sustainability Working Group has been increasingly drawing policy makers' attention to the positive role that e-communications services can play to solve key societal, socio-economical and environmental challenges.

ETNO continued to advocate for EU climate change strategies to fully exploit the potential of a larger usage of e-communications services for CO_2 emissions reductions.

ETNO has been invited to participate in the Ad Hoc Advisory Group to DG Information Society and Media on ICT & Energy Efficiency, alongside with EICTA, AeA Europe, GeSI, , The Climate Group, ERISA, The Centre "Business Partnership for a Low-Carbon Economy", Eurocities, WWF, UK CEED, EMPA – Technology and Society Lab, RWTH Aachen University, European Climate Forum, McKinsey. In 2008, the ETNO Energy Task Team produced its first activity report, collecting best practices put in place by ETNO members to optimise energy production and consumption.

More information:
www.etno.be/Default.aspx?tabid=1925

Main Topics of 2008

The use of creosote for impregnation of telephone poles remained a living issue for the ETNO's Sustainbility Working Group. ETNO considers that a controlled, continued use of creosote for the impregnation of telephone poles should be permitted. A ban would result in very high costs and radically increased carbon dioxide emissions as currently there is no sustainable alternative.

More information:
CP083 – ETNO Common Position on the use of creosote for impregnation of telephone poles.
        http://www.etno.be/Default.aspx?tabid=2060

In the context of the European Commission online consultation on the review of the existing legislation on VAT reduced rates, ETNO launched an internal reflection on possible reduction of VAT rates for certain telecommunication services based on their potential to reduced green-house gas emissions.

More information:
ETNO sustainability web site:
http://www.etno.be/Default.aspx?tabid=1925

8.2 Social Dialogue

During 2008, the activities of the telecoms social dialogue between ETNO and UNI have been centered around customer contact centres, skills & training, CSR and 'Good Work Good Health'.

Customer Contact Centres
The purpose has been to see how the guidelines for Customer Contact Centres, which were issued in 2006-2007, have been implemented. To this purpose, a questionnaire was set up in cooperation between ETNO and UNI and was sent to ETNO companies. After discussion of the responses in the Social Dialogue Committee, the next steps are now to be agreed.

The Good Work Good Health project
The purpose of this project is to improve the mental wellbeing of workers in the telecommunications sector by defining good practice in the workplace. Recognising that mental health disorders are rising across Europe, the social partners wish to pro-actively deliver a contribution by looking at those aspects of work which positively impact mental health.

A full project application (with ETNO being the project sponsor) has been submitted to the European Commission in March 2009. The deliverables of this project will include (over 2009-2010) the production of a booklet with good practice guidelines, the launch of a dedicated website and the organisation of the conference on the subject.

Communications

Next generation access networks and the risky investment they entail were the key theme of ETNO communications and media campaigns throughout 2008. Building on the "Think again … Things have changed" campaign initiated in 2007, ETNO launched the "Think Further… Everything is a question of balance" theme widely advertised through printed and online media. With the support of the Communications working group, which brings together Communications Directors from member companies, and the Executive Board, ETNO launched a new graphic identity.

ETNO further reinforced its presence on online media and started increasingly using audio visual tools.

ETNO published in September 2008 its third Facts and Figures report, produced with IDATE. The report highlighted the new services developed by ETNO members in particular in the field of Web 2.0 applications and social networking sites. The Facts and Figures report was presented at the first ETNO Innovation Day (see event section).

During 2008, ETNO has continued to increase its visibility in the press and organised regular press briefings on the various aspects of the review of the EU regulatory framework. ETNO's call on EU decision makers to adapt the existing rules in order to encourage NGA investment was widely echoed in online EU media and specialised press but also by large press agencies and in the leading international newspapers such as Financial Times, French newspaper Les Echos, International Herald Tribune and the Wall Street Journal.

ETNO – At the forefront of convergence

In 2008, ETNO has taken an active role in many policy debates pertaining to the information society. ETNO has continued to increasingly cooperate on many topics with other trade associations active in the e-communications and the ICT sector.

Besides regular bilateral meetings, ETNO also held regular lunch debates for its members with key personalities from the European Commission and the EU Presidency. ETNO also constructively contributed to the EP debates on the Review. ETNO actively participated in key hearings organised by Committees and political groups of the Parliament. Several technical workshops were organised on various topics of the review, including a workshop on the various regulatory approaches to NGA in May and a seminar in October for EU permanent representatives on incentives for investment in high speed broadband access networks.

Main events of the year

ETNO Fact finding mission to Washington, USA

17-19 March 2008 – A delegation of ETNO Board members led by Michael Bartholomew, ETNO Director, met with US senior officials and industry representatives to gain insight on US policies to encourage high-speed broadband networks.

Referring to the current debate on the review of the EU regulatory framework, FCC Chairman Kevin Martin highlighted the US policy of deregulating broadband markets in order to spur investment in next generation networks. FCC Commissioner, Deborah Tate added that "Deregulation results in massive investment. Massive regulation results in low investment."

Coinciding with the closure of a spectrum auction in the US, discussions also focused on spectrum management and digital dividend. ETNO reiterated its support for the European Commission proposals for the digital dividend, which represents a unique opportunity to bridge the digital divide between rural and urban areas of Europe and boost broadband take up.

During its visit to the US, the ETNO delegation also met with the acting Director of the National Telecommunication and Information Administration (NTIA), the House Committee on Energy and Commerce, as well as the EU Delegation. ETNO also held a debate with stakeholders hosted by the European-American Business Chamber. Meetings with industry representatives included AT&T, Verizon, Walt Disney and the US Telecom Association. The two trade associations agreed to foster closer cooperation on regulatory issues. AT&T also took the decision to adhere to the association as a non-European Observer.

The ETNO delegation also met with Ambassador David Gross, US Coordinator for International Communications and Information Policy. Wide ranging discussions covered internet governance issues and ICANN reform.

More information:
http://www.etno.be/Default.aspx?tabid=2047

ETNO Workshop on the Regulatory Environment for NGA

Brussels, 7 May - How to adapt rules to the next generation access networks and spur investment in new networks was the main theme of an ETNO workshop attended by more than 70 experts from the EC, national regulators and telecoms operators, with the participation of Catherine Trautmann, MEP. ETNO insisted that any regulatory approach to the next generation access networks should stimulate the emergence of competition between networks wherever possible. Regulation should be strictly targeted to those areas where infrastructure based competition is not feasible and based on a fair risk sharing between the investor and the access seeker.

During a session devoted to national scenarios for enhancing infrastructure based NGA competition, Mr Joaquin Osa, Director of the Spanish Regulator CMT focused on geographical segmentation of markets as a key element of regulating the next generation access networks. Mr Sébastien Soriano, from the French regulator ARCEP insisted on the opening of ducts in order to encourage investment in alternative infrastructure. The industry views were presented by Jacques Champeaux, Corporate Senior Vice-President, Regulatory Affairs France Telecom, Jos Huigen, Director European Affairs KPN, Caroline Van Weede, Cable Europe, Managing Director and Alfredo Acebal, Director EU & International Regulatory Affairs, Telefonica, Chairman ETNO Executive Board.

On this occasion, ETNO also presented to the press its vision on the regulatory approach for NGA.

More information:
http://www.etno.be/Default.aspx?tabid=2061

Economic tools to assess the outcome of regulation:
an ETNO discussion workshop

Brussels, 30 April - More than 60 representatives from industry and regulators attended the ETNO first interactive workshop on economic tools to assess the outcome of regulation. This discussion workshop aimed at providing expert practitioners from various organisations with economic tools that are quantitative and objective, to help assess the impact of regulatory measures.

The workshop had two main sessions. The first one chaired by Dr. Andreas Fier, Senior Economist at Deutsche Telekom, reviewed the existing instruments used to measure the regulatory impact on the telecoms sector, and in particular the Regulation Intensity Index proposed by Polynomics. The second session, moderated by Dr. Bruno Soria, Regulatory Studies Director, Telefónica and Chairman of ETNO Regulatory Economics TF, focused on the economic and social impact of telecoms and ICT and analysed the effect of regulation on investment, service penetration and coverage and hence, on productivity, growth and employment. Participating academics included Patrick Zenhaüsern. Professor Dr. Hans W. Friederiszick, from the European School of Management and Technology (Berlin), Professor Raul L. Katz from Columbian Institute for Tele-Information (New-York, USA) and Kalyan Dasgupta, LECG London.

More information:
http://www.etno.be/Default.aspx?tabid=2070

ETNO 1st Innovation Day

18 September – To mark the launch of its third annual Facts and Figures report, ETNO hosted its first Innovation Day, which attracted experts from the Commission, telecoms industry and press. Data presented by IDATE (European Institute of Telecommunications and Media), illustrated that revenue and investment are slowing down in the EU telecoms sector and in particular in the five main EU markets. For the first time the launch of the Facts and Figure brochure was combined with an interactive event during which six ETNO member companies demonstrated new broadband-based services, illustrating the need for increased bandwidth and download/upload capacity.

The interactive demonstrations included Belgacom TV; Deutsche Telekom's new TV product provided over high speed VDSL and ADSL2+ networks T-Home Entertain; France Telecom/ Orange's Pangoo M2M disaster management system; Telefonica's new e-health application Colabor@ and NGN-based system using videotelephony for people with hearing impairment; Portugal Telecom's Meo 3play offer, consisting of IPTV, fixed voice and broadband; TeliaSonera's high definition video conference system.

More information:
http://www.etno.be/Default.aspx?tabid=2096

Communication & events

ETNO Global ICT CEO SUMMIT and General Assembly

25 Oct. Venice: Chief Executive Officers of 23 leading ICT players from Europe, United States, and emerging markets gathered for the first ETNO global ICT CEO Summit "Beyond Broadband" organised in parallel to the ETNO 33rd General Assembly.

Discussions mainly focused on how to foster NGN investment in the context of the current financial crisis. The event was opened by Telecom Italia Chairman Gabriele Galateri di Genola, Viviane Reding, EU Commissioner for Information Society and Media; Kevin Martin, FCC Chairman and Corrado Calabrò, President of AGCOM (Italian Regulator). The Italian Secretary of State for Communications Paolo Romani and the French Secretary of State, Luc Chatel gave concluding remarks.

The ETNO CEO Summit included the following companies: Alcatel-Lucent, AT&T Global Network Services, BH Telecom, BT, Croatian Telecom, Deutsche Telekom, Elion Enterprises, EPT Luxemburg, Ericsson, France Telecom, Magyar Telekom, Nokia Siemens Networks, Orascom, RomTelecom, Slovak Telekom, TDC, Telecom Italia, Telefonica, Telekom Austria, Telekomunikacja Polska, Türk Telekom, Verizon and Vodafone Group Services.

In the joint Venice declaration, 22 ETNO member companies CEOs called on policy makers to create the right conditions for NGN investment in order not only to boost growth but to help Europe overcoming the crisis.

The ETNO General Assembly hosted by Telecom Italia on 23 October was marked by the signature of a letter of understanding on cooperation between ETNO and USTelecom, in the presence of Walter McCormick, President and CEO of USTelecom, putting ETNO on the international scene.

The GA approved the admission of Telecom Liechtenstein and Albtelecom as Full Members of ETNO. The other main highlight of the GA was the re-election of Deutsche Telekom, Eircom and Telecom Italia to the EB and the election of Belgacom as a new board member. The GA unanimously re-appointed Alfredo Acebal, Telefonica, as Chairman of the Executive Board for 2009. The GA Chairmanship for next year was handed over to Carlos Lopez Blanco, Director of the International Office, Telefonica, and the 35th GA will be hosted on 29 October 2009 in Seville. The second ETNO CEO Summit will take place on 30 October. Telefonica O2 Czech Republic confirmed holding the Vice-Chairmanship in 2009 and Telekom Slovenije for 2010.

The on going review of the EU telecoms rules and forthcoming negotiations between the three Institutions were the underlying themes of the ETNO Forum on 24 October in Venice which attracted 200 participants. Keynote speakers included Fabio Colasanti, Director General, EC DG Information Society & Media; MEPs Pilar Del Castillo, Malcolm Harbour and Gianni de Michelis and European Regulators' Group (ERG) Chairman Daniel Pataki.

ETNO General Assembly web site:
http://www.etno.be/Default.aspx?tabid=2082

Read the CEO joint declaration:
http://www.etno.be/Default.aspx?tabid=2103

PRINT

Looking Ahead: ETNO Annual Conference

12 November, Brussels: More than 250 experts from the e-communications industry, EU institutions, national regulators and member states gathered for ETNO's 6th annual conference entitled "Looking Ahead: Achieving long term sustainable competition in the EU telecoms sector".

On the eve of the adoption of the Council common position on the EU Review, ETNO's 6th conference was the occasion of a lively debate between all stakeholders on key market and technological developments and main issues at stake in the review process.

Main highlights:

Michael Bartholomew, ETNO Director: This event has become a landmark over the years on the telecoms scene in Brussels, offering a major opportunity for debate between all stakeholders at a key time for our sector.

Manuel Kohnstamm, President Cable Europe: Cable networks play a key role in the NGN environment. We should not assume that there will be only one next generation access network, next generation networks are replicable.

Carlos Lopez Blanco, Director of International Office Telefonica: Telecoms will be at the front of a new economic model. Next generation infrastructure is essential to keep Europe in the path of competitiveness. New networks are essential to deliver the new services that European consumers demand and deserve.

Fabio Colasanti, Director General DG INFSO & MEDIA: Some governments may decide to support economic activity. If any part of this money would be devoted to NGNs, it would be a good decision. NGNs should not focus only on fibre. Other technologies should also be taken into consideration

Emmanuel Gabla, Director, French Ministry of Economy, Industry and Employment: It is clear that the old solutions designed to address the legacy aspects of the networks are no longer adapted to NGNs. He underlined that incumbents did not have such a big advantage for building NGN, except for existing ducts. Current access obligations should be used cautiously and evolve towards more symmetric obligations.

Catherine Trautmann, Member of the European Parliament: Regulation is a tool for industrial policy. The EP fears that the position of the Council is not ambitious enough. Infrastructure based competition should be encouraged whenever possible and service competition wherever necessary. Ms Trautmann insisted on the need to keep a multi-stakeholders approach, involving the industry and consumers.

Matthias Kurth, President BNetzA, 2009 ERG Chair: We all know the problems but cannot find the solution. Not everybody will win. Are we prepared to take a decision which is suitable for Europe? We can either kill the industry or do good to the industry but it is impossible to guarantee that everybody will win.

Eric Debroeck, France Telecom: Europe experiences NGA roll out using different architectures and faces different regulatory initiatives. FTTH is a unique opportunity to overcome the monopoly of copper if any. The role of regulators is changing. They should create the conditions for competitive investment in new networks.

Jos Huigen, KPN: The state is now coming back to compensate for private investment that did not take place. Regulation is a means to an end. State intervention can be good but it also presents dangers. Policy makers should focus on agenda setting.

Michael McKeehan, Verizon: FTTH will be a future proof technology. The telecoms sector is part of a much larger sector which depends on infrastructure. Policy makers should refrain from intervening in NGN as it is an emerging market.

Alfredo Acebal, Telefonica, ETNO Board Chair: We are not advocating for no regulation in Europe but demanding a framework which takes uncertainty into account and reduces the regulatory risk.

Jan Duben, Director, Czech Ministry of industry and Trade: NGN deployment is one of the key priorities for the Czech Presidency. It will require massive investment and new investment models that can support it. Functional separation is not the right solution to encourage investment.

More information:
http://www.etno.be/Default.aspx?tabid=2122

ETNO interventions at external conferences and events

28 January 2008 - Amsterdam
IIR Conference on Telecoms Regulation
Understanding how to ensure competition and optimise innovation in the evolution towards an NGN and Next Generation Access (NGA) Environment

16 April 2008 – Strasbourg
14th CEPT Conference
Session: Regulated Technology

20 May – 2008 Copenhagen
Evolving Telecoms Access Networks Conference

5 June 2008 – Lisbon
ARDC conference "Next Generation Networks Regulation and the New Broadband Wave"

6 June 2008 – Athens
3rd International Conference on Broadband Internet

18 September 2008 – Lisbon
ANACOM Conference "The Universal Service and the New Generation Networks"

30 September – Brussels
Broadband World Forum Europe: Enhancing a Broadband-Enabled Economy

1 October 2008 – Luxembourg
UNI European Telecom Workshop on the Review of the Telecom Package

8 October 2008 – Brussels
Wild West Web Conference

15 October 2008 – Brussels
The next Generation Telecommunications Conference 2008
High Level Round Table Discussion: Promoting Investment in NGN

20 October 2008 – Brussels
Communication and Competition Law conference

28-29 October 2008 – Brussels
Telecoms Regulation and Competition Law 2008 Conference

28 November 2008 – Brussels
ECTA Annual Conference

25 November 2008 – London
8th Annual BusinessWeek European Leadership Forum

3 December 2008 – Brussels
European Agenda Summit

9 December 2008 – Barcelona
CMT conference : '10 years of liberalisation'

ETNO Position Papers

December 2008

RD297 - ETNO Reflection Document on the Customs classification of Mobile Phones

November 2008

RD296 - ETNO Reflection Document in reply to the EC consultation on
"Future networks and the Internet" – early challenges regarding the Internet of things

RD295 - ETNO Reflection Document in response to the Commission Recommendation
on regulated access to Next Generation Access Networks (NGA)

RD294 - ETNO Reflection Document on the draft ERG 2009 Work Programme

October 2008

RD293 - ETNO Reflection Document in response to the 2nd round of consultation
"Improving Institutional Confidence" launched by ICANN

EC098 - ETNO Expert Contribution on IP Addressing in a Post IPv4
World Reallocation of resources

September 2008

RD292 - ETNO Reflection Document on EC consultation on the draft Recommendation
on "The Regulatory Treatment of Fixed and Mobile Termination Rates in the EU"

August 2008

RD291 - ETNO Reflection Document on the Practical Application
of the New B2B Place of Supply Rules applicable from 2010

RD290 - ETNO Reflection Document in response to ECC/ CEPT consultation
on Fixed-Mobile Convergence with Survey of Numbering Related Issues

RD289 - ETNO Reflection Document on the Programme, Agenda and Format
of the Hyderabad Meeting, ahead of the 3rd open consultation

RD288 - ETNO comments on the ERG draft common position
on geographic aspects of market analysis

July 2008

RD287 - ETNO Reflection Document in response to the consultation
"Improving Institutional Confidence" launched by ICANN

RD286 - ETNO Reflection Document in response to ERG consultation
on Regulatory Principles of IP-IC/NGN Core

June 2008

RD285 - ETNO Reflection Document on the Digital Dividend in Europe

May 2008

CP083 - ETNO Common Position on the use of creosote for impregnation of telephone poles

EC097 - ETNO Expert Contribution on IP Addressing in a post IPv4 World - Principles

April 2008

RD284 - ETNO Reflection Document on the draft programme outline and schedule of the 3rd IGF meeting, ahead of the 2nd open consultation

RD283 - ETNO Reflection Document in reply to European Commission stakeholder consultation on Levies

RD282 - ETNO Reflection Document in reply to the European Commission consultation on "Creative Conditional Access"

RD281 - ETNO Reflection Document on Termination Rates

EC096 - ETNO Expert Contribution in reply to the consultation on "the Future Role of CEPT"

February 2008

RD280 - ETNO Reflection Document in reply to the Creative Content Online consultation

RD279 - ETNO Reflection Document in response to the public consultation on the CEPT Report 019

RD278 - ETNO Reflection Document in Response to the Notice of Inquiry from the United States Department of Commerce on the Midterm Review of the Joint Project Agreement with ICANN

RD277 - ETNO Reflection Document in response to the ERG consultation on best practices in wholesale unbundled access (ULL) and bitstream access (BSA)

RD276 - ETNO Reflection Document on the IGF Advisory Group

RD275 - ETNO Reflection Document in reply to the IGF Questionnaire "Taking stock and the way forward"

January 2008

EC095 - ETNO Expert Contribution commenting on EGEA Committee "Operational Needs for Access to Emergency Services"

RD274 - ETNO Reflection Document on the ERG draft Common Position on symmetry of mobile/fixed call termination rates

ETNO Working Groups and Task Forces
as of June 2009

Regulatory Policy WG .... Chair: Ralf Nigge (Deutsche Telekom)
Regulatory Economics TF .... Chair: Bruno Soria (Telefonica)
European Information Society WG .... Chair: Michele Bellavite (Telecom Italia)
e-Inclusion WG .... Chair: Henk Mannekens (BT)
Internet Governance WG .... Chair: Konstantin Kladouras (OTE)
Content Issues WG .... Chair: Patrik Hiselius (TeliaSonera)
Data Protection & Information Security WG .... Chair: Cristina Vela (Telefonica)
External Trade Issues WG .... Chair: Tilmann Kupfer (BT)
Tax Issues Related to Telecom Services WG .... Chair: Dave Taylor (BT)
Employment, Health & Safety WG .... Chair: Laurent Zylberberg (France Telecom)
Sustainability WG .... Chair: Danilo Riva (Telecom Italia)
Energy TF .... Chair: Lorenzo Radice (Telecom Italia)
Fraud, Cybercrime and Network Security WG .... Chair: Luis Sousa Cardoso (Portugal Telecom)
Frequency Management WG .... Chair: Massimiliano Simoni (Telecom Italia)
Benchmarking WG .... Chair: Jacques Tamisier (France Telecom)
Naming, Addressing and Numbering Issues WG ... Chair: Christina Kelaidi (OTE)
Research & Development .... Chair: Brigitte Cardinael (France Telecom)
ITU WG .... Chair: Dominique Würges (France Telecom)
Communications Managers WG

ETNO Organisation & Staff

ETNO Organisation & staff

| General Assembly: | Chair: | Carlos Lopez Blanco | Telefonica |
| | Vice-Chair: | David Sita | Telefonica O2 |

Executive Board:			
	Chair:	Alfredo Acebal	Telefonica
		Steven Tas	Belgacom
		Roland Doll	Deutsche Telekom
		Patrick Galvin	Eircom
		Vianney Hennes	France Telecom
		Antonio Robalo de Almeida	Portugal Telecom
		Thomas Müller	Swisscom
		Luigi Gambardella	Telecom Italia
		Lotte Abildgaard	Telenor
		Kaisu Karvala	TeliaSonera
		Wilfried Stratil	Telekom Austria

Administrative Committee:	Chair:	Thomas Müller	Swisscom
	Members:	Antonio Robalo de Almeida	Portugal Telecom
		Luigi Gambardella	Telecom Italia
	Observer:	Alfredo Acebal	Telefonica

The ETNO Office:	Michael Bartholomew	Director
	Josef Leonard Debecker	Executive Manager Operations
	Thierry Dieu	Communications Manager
	Fiona Taylor	Senior Adviser, Public Affairs
	Victoria Gerus	Regulatory Affairs Manager
	Anne Vallès	HR & Financial Officer
	Isabelle Claeys	Assistant to the Director
	Joanna Fliszewska	Secretary

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ETNO Members

ALBtelecom
(Albania)

Deutsche Telekom
(Germany)

GO
(Malta)

Belgacom
(Belgium)

Eircom
(Ireland)

Invitel
(Hungary)

BH Telecom
(Bosnia and Herzegovina)

Elisa Corporation
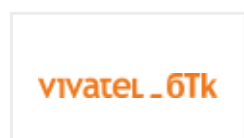(Finland)

Koninklijke KPN
(The Netherlands)

BT
(UK)

Elion Enterprises Ltd.
(Estonia)

Lattelecom
(Latvia)

Vivatel BTC
(Bulgaria)

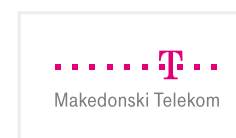Entreprise des Postes et Télécommunications
(Luxembourg)

Magyar Telekom
(Hungary)

Croatian Telecom
(Croatia)

Finnet Group
(Finland)

Makedonski Telekom
(F.Y.R. of Macedonia)

Cyprus Telecommunications Authority
(Cyprus)

France Telecom
(France)

Netia Holdings
(Poland)

European Telecommunications Network Operators' Association

OTE
(Greece)

TDC
(Denmark)

Telekom Slovenije
(Slovenia)

Portugal Telecom
(Portugal)

TDF
(France)

Telekomunikacja Polska
(Poland)

Societatea Nationala de
Radiocomunicatii (Romania)

Telecom Italia
(Italy)

Telenor
(Norway)

RomTelecom
(Romania)

telecom Lichtenstein
(Lichtenstein)

TeliaSonera
(Sweden-Finland)

Síminn
(Iceland Telecom Ltd.)

Telefónica
(Spain)

Teo
(Lithuania)

Slovak Telecom
(Slovakia)

Telefónica O$_2$
(Czech Republic)

Türk Telekomünikasyon
(Turkey)

Swisscom
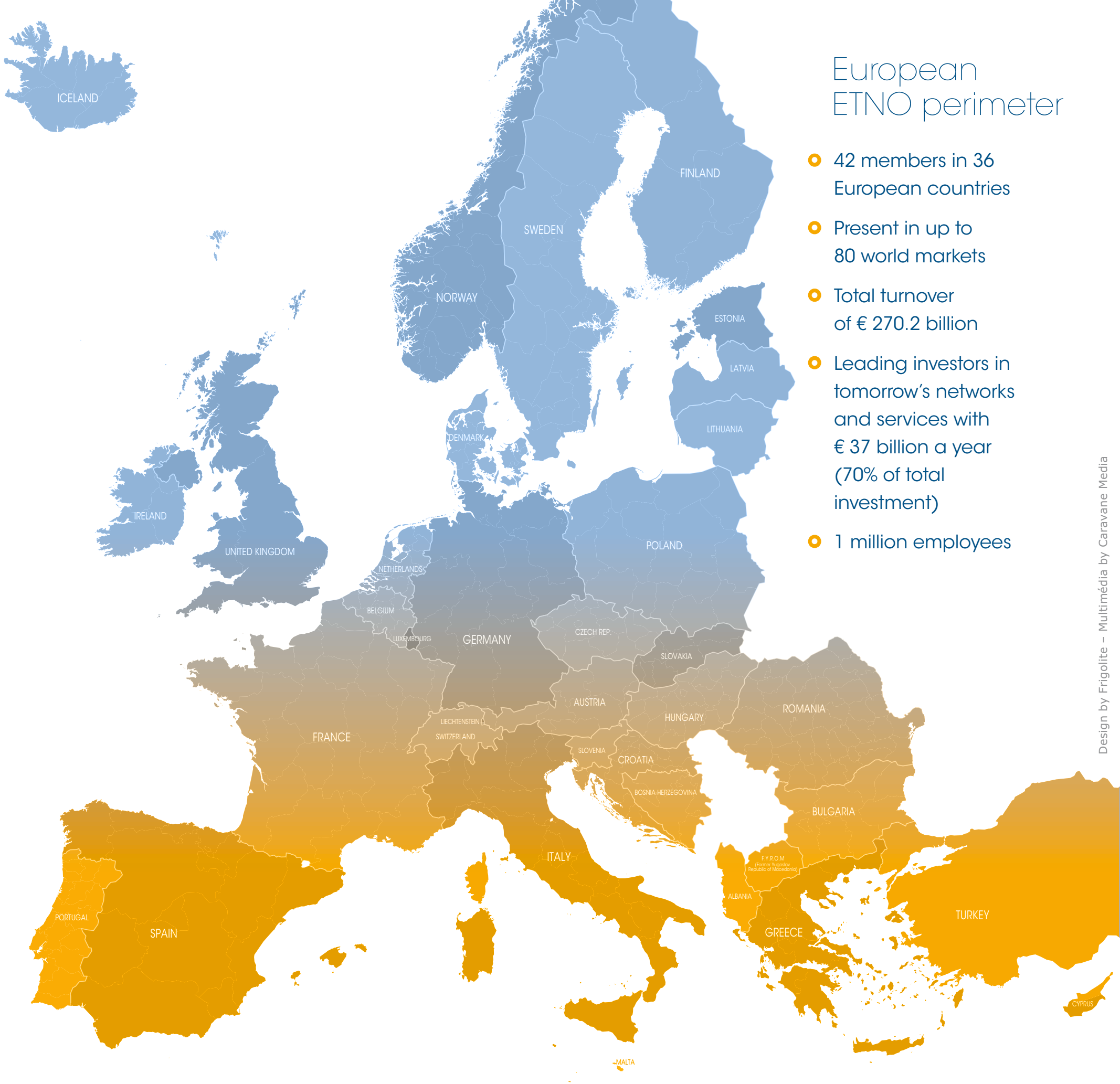(Switzerland)
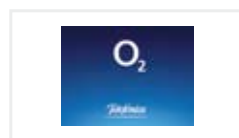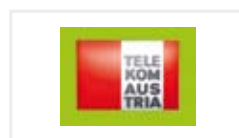
Telekom Austria
(Austria)

VIPNet
(Croatia)

European ETNO perimeter

- 42 members in 36 European countries
- Present in up to 80 world markets
- Total turnover of € 270.2 billion
- Leading investors in tomorrow's networks and services with € 37 billion a year (70% of total investment)
- 1 million employees

ICELAND

FINLAND

SWEDEN

NORWAY

ESTONIA

LATVIA

LITHUANIA

DENMARK

IRELAND

UNITED KINGDOM

POLAND

NETHERLANDS

BELGIUM

LUXEMBOURG

GERMANY

CZECH REP.

SLOVAKIA

AUSTRIA

HUNGARY

ROMANIA

LIECHTENSTEIN

SWITZERLAND

FRANCE

SLOVENIA

CROATIA

BOSNIA-HERZEGOVINA

BULGARIA

ITALY

F.Y.R.O.M (Former Yugoslav Republic of Macedonia)

ALBANIA

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MALTA

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