

# Annual Report | 2011



**DRIVING THE DIGITAL FUTURE**



PUBLICATION JULY 2012

European Telecommunications Network Operators' Association

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## ETNO Director's introduction to 2011 Annual Report

It is an honour for me to introduce this ETNO Annual Report 2011, in my capacity as ETNO Director.

I joined ETNO in early 2012 and would like to share my vision for the year ahead as I see that the telecoms sector, both from an economic and a policy point of view, is at crossroads.

Firstly on the economic side, although our sector is considered as one of the main drivers of economic growth in the EU, it is losing revenue and there is a lack of new business models emerging that would help reverse this trend. This is happening despite an unprecedented growth in data traffic and Internet usage by consumers.

On the policy side, although the EU Regulatory Framework has brought about better quality for consumers and has contributed to a certain dynamism in the sector, the majority of capital investors tend to see regulation as a deterrent to investment in new high speed networks. They call for more flexibility for operators to develop innovative business models and to generate new revenue streams.

We have two challenges ahead of us: first there is a need to reconcile regulation and investors by moving to a new regulatory paradigm. Secondly, the traditional business models of the telecoms operator, be it a new entrant or an incumbent, need to evolve in order to capitalize on the increase in traffic.

All players in the EU telecoms sector are equally concerned and have to tackle these challenges and find common solutions.

The European Commission has recently sent an encouraging signal to investors. The forthcoming mid-term review of the Digital Agenda will provide an opportunity to further adapt policies to the challenges ahead and contribute to a long term vision on the role of this sector for the economy.

ETNO, with all its members throughout Europe and beyond, will bring its constructive contribution to the debate.

*Dániel Pataki*  
ETNO Director



## Introduction by the ETNO 2012 General Assembly Chair

I am honored on behalf of Orange Polska to chair the 42nd ETNO General Assembly, which is taking place in Kraków from 25 to 26 October 2012. The European telecommunications market is facing an enormous challenge to implement the Digital Agenda - there is still much to do, especially in Poland.

Achieving the Digital Agenda goals is also a key preoccupation for governments – in Poland the government is conducting broad consultations aimed at identifying impediments to the deployment of NGA. It seems obvious to say that what is crucial for achieving the objectives of the Digital Agenda is to set up the appropriate regulatory conditions to create incentives for investment. The experience of Orange Polska, which in 2009 signed Memorandum of Understanding with the NRA, under which we have already built over 950 000 lines, shows that cooperation with the incumbent and National Regulatory Authority gives measurable results.

Furthermore, Orange Polska and the Regulator agreed on a modification to our investment obligations. The aim is to allow for the development of VDSL access technology and Orange Polska committed to deliver 220 000 broadband access lines in VDSL technology with a bandwidth of at least 30 Mb/s.

Despite the positive experience in recent years, we know that individual agreements will not solve the problem. Therefore, we should work together (and will do) with the European Commission and BEREC on the creation of regulatory principles that will balance the protection of competition with investment incentives, taking into account the situation in the national markets.

Our goal is not a quest for a monopoly, but for equal opportunities in investments, in which alternative operators are often the leaders.

Recent developments such as a possible change to the NGA regulation and the consultation on lowering the cost of infrastructure are welcomed as steps in the right direction. We should go a step further and try to implement geographical segmentation broadly, so that the regulation will indeed be appropriate and proportionate. In our opinion, joint investment is another effective solution but which is underestimated by the policy makers.

We should promote joint investments and treat them as an opportunity for sustainable access. I hope that the future of NGA deployment looks brighter than few years ago and that policy makers and regulators recognise the ETNO members as a real driving force of new access technologies.

*Marta Brzoza  
Orange Polska*



## EB Chair introduction to ETNO Annual Report 2011

Despite a timid recovery of the economy in 2011 and a drastic increase in data traffic, the telecoms sector's overall revenue continued to decline, putting at risk operators' ability to invest in new high bandwidth network infrastructures.

In this context, the need for a new sustainable development model for the sector has been the underlying motto of ETNO activities and many new initiatives throughout the year.

ETNO launched a strategic partnership with the London School of Economics to gain additional expertise on the developments and trends of the sector.

ETNO gathered Innovation and Strategy experts from its companies on the occasion of a workshop in Trento, Italy, to discuss new business models and innovation over telecom networks.

The new development model for the Internet was at the centre of the debate of the second ETNO-Financial Times Summit opened by Vice President Kroes in October 2011. The Summit gathered about 30 CEOs around a lively discussion on what policy scenario should allow regulatory stability as well as European market growth.

Finally ETNO has begun to strengthen its cooperation with GSMA and Digital Europe in order to build common understanding on several policy areas.

The year 2011 has been dominated by numerous debates, both at member states and at EU level, on how to best implement the Digital Agenda for Europe. How to accelerate private investment in next generation access networks has been at centre of several initiatives organized by ETNO.

On the policy side, ETNO took an active part in the debate on costing methodologies, net neutrality, the review of universal service and the use of state aid for broadband. ETNO members participated in the two CEO Round Tables launched by Vice-President Kroes on how to accelerate NGA deployment.

These issues remain key priorities for ETNO in 2012, together with a commitment to work on the sustainability of the internet development model. With the further deepening of the crisis and growing economic uncertainty for Europe, it is more important than ever to get the conditions right for the sector to fully play its role as a driver.

Building on the initiatives launched in 2011, ETNO will continue to play its role as a constructive interlocutor, contributing to shaping the appropriate environment for its members to drive growth and innovation, and hence ensuring the success of the Digital Agenda.

*Luigi Gambardella  
ETNO Executive Board Chair  
Telecom Italia*



# ETNO 2011 HIGHLIGHTS

## 12 JANUARY 2011

### ETNO meets with Hungarian Presidency of the EU

ETNO urged the Hungarian Presidency to focus on improving conditions for private sector investment in high speed broadband networks, in line with the Digital Agenda objectives.



ETNO called on the Hungarian Presidency to work towards a timely adoption of the Radio Spectrum Policy Programme (RSPP) Decision in order to achieve a swift opening up of the 'digital dividend' spectrum band to mobile broadband services throughout the EU. ETNO also reiterated its strong concerns as regards the recently adopted Hungarian law imposing a tax on key industry sectors, including telecommunications.



## 25 JANUARY 2011

### ETNO Innovation Day on e-Health

About 200 representatives from the EU institutions, national and regional authorities, medical and patient organisations, telecoms operators and vendors gathered for ETNO's Innovation Day on e-Health opened by Vice-President Neelie Kroes.

In the ETNO exhibition, leading telecoms operators involved in e-health, including Belgacom, Deutsche Telekom, KPN, Orange, Portugal Telecom, Telecom Italia and Telefonica, gave interactive demonstrations of innovative applications which are already used by the medical community and patients.



**eHealth**  
an answer to  
EU healthcare  
& demographic  
challenges

**ETNO 3<sup>rd</sup> INNOVATION DAY**

**25 January 2011**  
Brussels, Sofitel Europe, 14.30-18.30

**Keynote Speaker: Neelie Kroes,**  
European Commission Vice-President for the Digital Agenda

- Presentation of latest innovations in e-health by ETNO member companies including Belgacom, Deutsche Telekom, KPN, Orange, Portugal Telecom, Telecom Italia and Telefonica.
- How to ensure a better integration of ICT-enabled solutions by medical community and users? Debate to be moderated by Constanijn van Oranje, Commissioner Kroes Cabinet member.
- Interactive exhibition with services including telemedicine, diagnosis, m-health solutions and independent living applications.
- Concluding remarks by Gabriella Galatari, Chairman, Telecom Italia.

The ETNO Innovation Day is open to representatives from ICT industry, EU institutions, academia, medical community, patient organisations, national and regional public health authorities and citizens.  
For more information about the programme or to register, please visit [www.etno.eu](http://www.etno.eu)

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# ETNO 2011 HIGHLIGHTS



## 8 FEBRUARY 2011

### Safer Internet Day

To mark Safer Internet Day 2011, ETNO launched a new web page which gives an overview of ETNO members' services and awareness campaigns aimed at a safer use of ICT services by young users. ETNO companies include features in their broadband, mobile or IPTV packages that allow parents to control the content and services that their children access and also limit their consumption and the time they spend online. The ETNO child protection web site also gives examples of educational and awareness raising campaigns throughout Europe.

## 9-10 FEBRUARY 2011

### ETNO/EABC Digital Economy workshop

Ensuring that ICT policies reflect the increasingly global environment was the main theme of a Digital Economy Workshop hosted on 9-10 February jointly by ETNO and the European-American Business Council (EABC) in the context of the EU-US Information Society Dialogue. ETNO and EABC called for a closer relationship and cooperation between EU and US authorities and between private telecoms and ICT players on both sides of the Atlantic, as many issues such as cyber security have a global character and need therefore a global response.

# ETNO 2011 HIGHLIGHTS

4 APRIL 2011

## ETNO Expert workshop on Costing



More than 80 senior representatives of the European Commission, national regulators and industry took part in the expert workshop held by ETNO on price regulation and costing methodology in the transition from copper to next generation access. On this occasion, Brian Williamson, Director, Plum Consulting, presented the

new report "Costing methodology and the transition to next generation access". The aim of the workshop was to raise awareness of the impact on the NGA business case of copper wholesale access pricing and inform the debate in view of a forthcoming EC guidance on this issue.

24-27 MAY 2011

## ETNO demonstrates the role of ICT in resource efficiency at EU GREEN WEEK

ETNO used the opportunity of the 2011 edition of EU Green Week devoted to resource efficiency to launch a street advertising campaign under the motto 'Every challenge has its solution'. The aim was to raise awareness about the role of broadband-enabled solutions and more energy-efficient broadband equipment in helping businesses and citizens to save energy and resources.

With its stand at the Green Week exhibition, ETNO demonstrated measures taken by its companies to reduce their carbon footprint and optimise their energy consumption, including full free air cooling of data centres, telematics systems of fleet management and increased use of teleworking and video conferencing facilities.

⇒ Every challenge has its appropriate solution

ICT SERVICES CAN REDUCE CO<sub>2</sub> EMISSIONS BY UP TO 15% WORLDWIDE

- Smart grids
- Videoconferencing
- Teleworking
- Smart buildings
- eGovernment
- Virtual hosting
- Smart logistics
- eHealth

etno

DRIVING THE DIGITAL FUTURE

European Telecommunications Network Operators → committed to energy efficiency

www.etno.eu

Visit ETNO @ GREEN Week 2011 / 24-27 May / Stand 43



# ETNO 2011 HIGHLIGHTS

ISTANBUL, 9 JUNE 2011

## SAMENA – ETNO Joint CEO Leadership Event to Address the Need for Developing Sustainable Business Models for the Internet



The future of the economic model for the Internet was one of the main topics of discussion in the joint ETNO-SAMENA CEO Leadership Event, hosted by Turk Telekom with the participation of more than 20 CEOs of leading telecoms operators from Middle East, North Africa and Europe. This event was the result of a new partnership between ETNO and SAMENA - the South Asia – Middle East – North Africa region's telecom operators' representative body - launched end 2010.

In his opening remarks, Franco Bernabè, Chairman and CEO of Telecom Italia, noted that to capitalise on business opportunities the telecom industry "shall turn to other services which fit well with our infrastructure business that is network enabled services. We shall look at market niches where Over The Top players have so far failed to deliver value". Moreover, Franco Bernabè noted that: "To face the new challenges of the new communications industry era and to strengthen their position within the Internet value chain, telecommunications operators shall put the needs of their customer first and pay much more attention to what their customers really want".

24 JUNE 2011

## ETNO Trento Innovation Workshop

The ETNO Trento Innovation Workshop, "Driving the Digital Future - What Innovation for Telecom Operators" was held in Trento, Italy. The conference gathered about 100 executives and experts from the telecommunications operator community, equipment manufacturers, consultants and academia. The event was hosted by Telecom Italia and the Autonomous Province of Trento, with the support of Informatica Trentina SpA and the Financial Times.



Other keynote speakers included Luigi Gambardella, Chairman of the ETNO Executive Board; Gianni Pittella, Vice President European Parliament; Roberto Viola, Vice-Chairman of the Radio Spectrum Policy Group; and Detlef Eckert, Director of Policy Coordination and Strategy, Directorate C, Directorate-General Information Society & Media (DG INFSO), European Commission.

# ETNO 2011 HIGHLIGHTS

1<sup>ST</sup> JULY 2011

## EU Polish Presidency

In a manifesto to the incoming Polish Presidency, ETNO outlined its key priorities for boosting the Digital Agenda, insisting on the need to accelerate the adoption of the Radio Spectrum Policy Programme in order to bridge the digital divide and provide all Europeans with broadband access.



ETNO Manifesto - in English  
ETNO Manifesto - in Polish

3<sup>RD</sup> OCTOBER 2011

## ETNO-Financial Times 2011 CEO Summit

More than 30 Chief Executive Officers of the leading telecoms operators and ICT equipment manufacturers from Europe and beyond, took part in the second Digital Agenda Summit hosted by ETNO and the Financial Times, with Commissioner Kroes as a keynote speaker.



The CEOs reiterated the key importance of the sector to drive growth and jobs as Europe is faced with one of the most serious financial and economic crises of

the recent decades. The CEOs underlined the crucial role of an investment-friendly policy framework for the sector to play its role as an engine for economic recovery. Other key highlights included a keynote from Mr Paulo Bernardo Silva, Brazilian Communications Minister, from William E. Kennard, US Ambassador to the EU and the presentation of a new white paper by the London School of Economics.

# ETNO 2011 HIGHLIGHTS

20 OCTOBER 2011

## ETNO 40<sup>th</sup> General Assembly



Thierry Dieu, Director for Communications and Public Policy, Acting Director 2011

Gathered for their 40<sup>th</sup> General Assembly hosted by Telekom Slovenije in Ljubljana, ETNO members and observers, who together account for a global turnover of €600 billion and 1.6 million employees, called on the Commission to deliver a long term strategic vision to achieve the Digital Agenda goals.

ETNO members approved the 2012 budget and work programme and they re-elected Belgacom, Deutsche Telekom and Telecom Italia as members of the ETNO Executive Board and elected Turk Telekom as a new Board member. Four new observer members were officially welcomed in ETNO including CISCO, Huawei, RIM and Saudi Telecom Corporation (STC), extending ETNO's outreach and expertise in new areas and markets.



Luigi Gambardella, ETNO Executive Board Chair

The ETNO GA has re-appointed Luigi Gambardella, Vice President of Relations with International Institutions and Organizations, Telecom Italia, as Chairman of the ETNO Board for 2012. The General Assembly Chairmanship has been handed over to Marta Brzoza, Director Regulatory Affairs, Telekomunikacja Polska, who will host the next ETNO's General Assembly in Poland in October 2012.

23 NOVEMBER 2011

## ETNO Smart Grids Workshop

More than 100 stakeholders from the telecoms and energy utility sectors as well as the EU institutions and national regulatory authorities gathered for the first ETNO workshop on broadband networks and smart grids hosted by Belgacom.

The event was opened by Philippe Lowe, Director General of DG Energy; Paul Timmers, Director, DG Information Society; Malcolm Johnson, Director ITU-T, Telecommunications Standardisation Bureau (TSB); Bart Van Den Meersche, EVP Enterprise Business Unit, Belgacom and Mario Costamagna, Director Marketing Green Solutions, Telecom Italia.

8 DECEMBER 2011

## Joint Industry Christmas Reception



From left to right: Anne Bouverot, Director General GSMA; Luigi Gambardella, ETNO Executive Board Chairman; Vice-President Kroes; John Higgins, Director General Digital Europe.

For the first time ever, the three associations, Digital-Europe, ETNO and GSMA, organised a joint reception which attracted more than 300 key stakeholders.

At the event which was opened by Vice-President Kroes, the three associations released a joint industry statement to the heads of State and Government ahead of the 9 December European Council and calling for a digitally driven growth.



# Main activities of the year

## 1. DIGITAL AGENDA



### BACKGROUND:

In June 2011, on the occasion of its first Digital Agenda Assembly, the European Commission published its first assessment of the progress made towards achieving the Digital Agenda goals. While the European Commission estimated to be well on track to achieve the 2013 broadband objectives, concerns were raised about the 2020 objectives of providing all households with a 30 Mb/s and half of them with at least a subscription of 100 Mb/s.

### ACTIVITIES:

To mark the first Digital Agenda Assembly, ETNO and Digital Europe, who together represent the ICT manufacturing and consumer electronics sectors and telecommunications network industries, i.e. the main pillars of the Digital Agenda, issued a joint statement calling on European decision makers to accelerate on delivering the European Digital single market and develop an investment-conducive environment for fast and ultra-fast broadband infrastructure.

The lack of a harmonised approach to spectrum and the fragmentation of copyright and content licensing systems were highlighted as key obstacles to the Digital Single Market. Both ETNO and Digital Europe called for an environment conducive to investment by all players in a mix of technologies and platforms.



# Main activities of the year

## 2. REGULATORY ENVIRONMENT

### 2.1 Next Generation Access Networks

Increasing investment in high speed broadband networks, in line with the Digital Agenda goals, has been a key priority for the European Commission and an underlying theme of ETNO activities.

How to foster private NGA investment was the key goal of the CEO Round Table process initiated by Commissioner Kroes in early 2011 in which several ETNO members and observers actively participated. The industry presented a set of concrete recommendations for an open market, better conditions for private investment and a true level playing field. ETNO supported the proposed approach to the Internet built on service differentiation and innovation, co-existing with a vibrant best effort Internet, to meet consumer demand for different levels of quality. Industry leaders reiterated the achievement of the Digital Agenda 2020 broadband

targets should be primarily driven by private investment and recalled the key importance of public authorities improving general conditions for NGA deployment by eliminating barriers to investment and taking measures to stimulate demand and reduce roll out costs.

In the same vein, the European Commission adopted in October 2011 its Connecting Europe Facility as part of its Multiannual Financial Framework 2014-2020 making 9.2€ billion available to complement high speed broadband deployment. ETNO, while welcoming the new facility, insisted that public funding should only help to complement large scale network deployment if appropriate regulatory conditions are developed for private investment.



# Main activities of the year

## 2.2 Costing

### BACKGROUND:

In the context of its Digital Agenda activities, the Commission announced its intention to produce a new Recommendation on methodologies to define wholesale access tariffs to copper networks. On October 3, 2011, on the occasion of the ETNO/Financial Times CEO Summit, the European Commission launched a consultation on costing methodologies with a response deadline of 28 November.

### ACTIVITIES:

ETNO has provided expert advice and advocacy in preparation for the Commission consultation and in the course of the subsequent public debate. The impact of copper-based wholesale access products pricing on the business case for NGA, was the main topic of an expert workshop organised by ETNO on April 4, 2011. On this occasion, Plum Consulting presented its report for ETNO entitled "Costing methodology and the transition to next generation access".

As highlighted in the Plum report, driving down copper prices would discourage NGA investment, firstly, by encouraging customers to stay on copper. Secondly it would negatively impact on fibre and other NGA platform business cases, by lowering the retail price levels for ultra-fast broadband products in a distortive manner.

In its response to the European Commission consultation on costing, ETNO raised its concerns that the proposed measures could be detrimental to the EU's ambition to provide high-speed connectivity to citizens and businesses by 2020.



On this occasion a second report by Plum Consulting on costing, based both on a quantitative and qualitative analysis of the proposals included in the Commission consultation questionnaire, measured the impact of a lower copper prices on investment decisions both of the well established operator and of a fibre/NGA entrant. The report, presented to European Commission decision makers, BEREC and other stakeholders, shows that some of the proposals brought forward in the consultation would have a negative impact on investment not only by well established operators but also by alternative platform operators and entrants, lowering the prospect for infrastructure-based competition and reducing consumer choice.

ETNO also contributed to the Commission's deliberations and the subsequent consultation on a planned Commission Recommendation on non-discrimination and functional separation under the EU electronic communications framework.

# Main activities of the year

## 2.3 Net neutrality

### BACKGROUND:

Following the launch end of 2010 of a public consultation to better understand potential risks for the openness of the Internet and assess the need for additional actions, the European Commission adopted in April 2011 a Communication on the Open Internet and Net Neutrality. The European Commission concluded that the new provisions on transparency introduced by the revised EU Regulatory Framework were sufficient to ensure an open Internet and tasked BEREC to produce a fact-based report on traffic management.

### ACTIVITIES:

ETNO reiterated the commitment of its members to the open Internet and to the importance of transparency for consumers. ETNO fully shared the EU Commission's view that "any additional regulation should avoid deterring investment, or innovative business models, lead to a more efficient use of the networks and to creating new business opportunities".

ETNO closely cooperated with BEREC in its work on transparency, organising two joint ETNO-GSMA workshops with the relevant BEREC Expert Working Group and responded to the consultation on draft guidelines for transparency and net neutrality.

## 2.4 BEREC

ETNO closely worked with the newly established BEREC, contributing to its various work streams.

ETNO participated in the inauguration of the BEREC office in Riga in November 2011.

An informal dinner debate was organised with BEREC 2011 Chair, Chris Fonteijn and members of the ETNO Executive Board.

ETNO responses to BEREC consultations:



- **RD340** - ETNO Reflection Document to BEREC Consultation on Cross-border Issues under Article 28 of Universal Service Directive
- **RD359** - ETNO Reflection Document - Response to BEREC call for contributions on cross border accessibility of numbers
- **RD360** - ETNO Reflection Document - Response to the BEREC Consultation on Draft Guidelines for Transparency and Net Neutrality
- **RD361** - ETNO Reflection Document on BEREC 2012 WP

# Main activities of the year

## 3. BROADBAND FOR ALL

### BACKGROUND:

Providing universal coverage of basic broadband to all Europeans by 2013 is one of the key targets of the Digital Agenda for Europe. ETNO members have significantly contributed to broadband roll-out in Europe and are actively involved in public-private partnerships to bring high speed connectivity to non-densely populated areas, through a mix of fixed and mobile technologies and platforms.

Following its consultation on the review of Universal Service, the European Commission issued a Communication in November 2011 which stated that while further guidance in specific areas may be warranted, the Commission does not at this stage see any justification to change or extend the scope of Universal Service to include broadband and mobile, either at national or EU level.

Earlier in the year (May 2011), the European Parliament had issued an 'own initiative' report on "Universal Service and the 112 emergency number", calling on the Commission to issue Guidelines on how best to implement and enforce the revised Universal Service Directive.

### ACTIVITIES:

ETNO closely monitored the report on Universal Service from Parliament, contributing to the drafting process and participating in a hearing. ETNO also provided advice and information to the Commission to assist in its deliberations on the Universal Service dossier and collaborated with a coalition group of industry players to develop a common position paper.



ETNO contributed to the Commission's consultation on a review of the State Aid / Broadband Guidelines, flagging that in order for the EU2020 Strategy and the Digital Agenda targets to be fully reached, further funds should be made available for the rollout of NGA networks

### CONSULTATIONS:

- **RD355** - ETNO Reflection Document - Reply to the public consultation on the Revision of the Community Guidelines for the application of State aid rules in relation to rapid deployment of broadband networks.



# Main activities of the year

## 4. PRIVACY, CYBER-CRIME AND NETWORK SECURITY

ETNO shares the Commission objective of increasing trust and confidence as one of the key conditions for users to embrace high speed broadband and hence, to achieve the targets of the Digital Agenda.

### 4.1 Data Protection

#### BACKGROUND:

The Commission started the process of reviewing the general EU legal framework on the protection of personal data and issued its impact assessment in October 2011. The main policy objectives for the Commission are to modernise the EU legal system to meet the challenges resulting from globalisation and the use of new technologies, and to strengthen individuals' rights while at the same time reducing the administrative burden on businesses. In particular, the Commission seeks to achieve better harmonisation of legislation, to ensure a consistent user experience across the EU, and seeks to introduce a level playing field for all players in the ICT value chain targeting EU citizens with their services.

#### ACTIVITIES:

The review of the data protection legal framework has been the main focus of the ETNO Data Protection, Trust and Security Working Group, who have initiated and participated in a number of meetings with EU policy makers during 2011, including with Commissioner Viviane Reding. ETNO members have reiterated their commitment to Europe's high standards for privacy and data protection and have asked that any new provisions do not hamper innovation and the development of new products/services (eg Cloud Computing).



Members have called on the European Commission to seize the opportunity of the review to ensure a global level playing field for all actors processing personal data of EU citizens, regardless of their geographic location. ETNO has also asked that any new framework takes into consideration existing sector-specific legislation (ePrivacy Directive), to ensure that telco players are not subject to over-regulation. ETNO continued to work closely with an industry coalition made up of other trade associations of e-communications providers in order to offer a joint industry vision on this issue.

#### CONSULTATIONS RESPONSES:

##### SEPTEMBER 2011

- [RD358](#) - ETNO Reflection Document - Response to the public consultation on the ePrivacy Directive: circumstances, procedures and formats for personal data breach notifications

##### AUGUST 2011

- [RD356](#) - ETNO Reflection Document replying to the public consultation on Cloud Computing

##### JANUARY 2011

- [RD342](#) - ETNO Reflection Document on the EC Public Consultation on the Communication on a comprehensive approach on personal data protection in the European Union

# Main activities of the year

## 4.2 Data Retention

### BACKGROUND:

The Commission is continuing its review of the EU Data Retention Directive. In April 2011, it issued its Evaluation Report on the Directive and noted its intention to propose amendments to the Directive (expected second half of 2012).

### ACTIVITIES:

ETNO has been closely monitoring the evaluation process of the Directive and has participated actively in the Data Retention Experts Group established by the Commission. Together with other industry associations including EuroISPA, GSMA, ECTA and Cable Europe, ETNO has raised concerns to the European Commission about the lack of EU harmonisation as regards implementation of the existing Directive and has asked for a reduction of the minimum storage period and clarification of the conditions for access and use of retained data.

ETNO has also flagged the costs borne by industry in fulfilling the data retention obligations and has proposed various models of cost reimbursement.



## 4.3 Fraud Control and Network Security

### BACKGROUND:

The primary aim of the Working Group is to provide a framework for exchange of experience and development of industry best practices in the domain of fraud prevention and control, network and service security for converging networks and protection against cybercrime. It is a platform to exchange views, experiences and know-how amongst members.

### ACTIVITIES:

During 2011, the WG:

- continued to exchange information related to fraud and security incidents,
- Discussed a new ToR that highlights the importance of managing the security of both network & services to combat fraud and cybercrime. This is being clearly reflected in changing the name of the WG from "Fraud Control & Network Security" to "Network and services Security, Fraud & Cybercrime".
- Held its physical meeting in Liechtenstein where the new ToR was finalized and a new chairman was elected. Several presentations covering fraud, network & services security were given.
- Maintained a list of hot numbers in use to commit fraud. The list is being shared among the WG's members.
- Maintained its cooperation with ITU, ETSI, FIINA and GSMA.

# Main activities of the year

## 5. DIGITAL SINGLE MARKET/ ONLINE CONTENT

### BACKGROUND:

Ensuring a truly single market for legitimate online content as a key driver for broadband take up has been highlighted as one of the key priorities of the Digital Agenda. There has been increasing pressure applied upon intermediaries to assess and act upon illegal content on networks and to proactively address online piracy. This debate has triggered a number of initiatives at EU level and beyond. The Commission is currently considering possible changes to the Intellectual Property Rights Enforcement Directive and has been engaging in ongoing stakeholder consultations throughout 2011, to which ETNO has actively participated.



### ACTIVITIES:

Whilst consumer demand for online content is growing, there are still obstacles preventing the development of the European online content market, such as the lack of multi-territory licensing arrangements, the complex EU copyright regime, the low availability of legitimate content offers and restrictive "release windows" for new content. ETNO has continued to underline the importance of a simplified regime for online content (including rights clearance) and has stressed that the best way to tackle online piracy is to make legal content easily accessible for consumers.

ETNO became a member of the European Observatory on Counterfeiting and Piracy, a body established by the European Commission, and has continued to engage with the relevant policy makers (DG Markt and DG CONNECT) to stress the importance of striking the right balance between the interests of all stakeholders and to highlight that the intermediary liability regime as provided for by the eCommerce Directive has facilitated the growth of eCommerce and, as such, should remain intact.

ETNO, together with other e-communications industry trade associations that together form a 'content coalition', also closely followed the negotiations of an Anti-Counterfeiting Trade Agreement (ACTA) between the European Commission and other negotiating parties, to ensure that any agreement would not hinder the development of new, innovative e-services and limit European citizens' rights to privacy.

### CONSULTATIONS RESPONSES:

#### NOVEMBER 2011

- [RD362](#) - ETNO Reflection Document - Response to the European Commission's Green Paper on the Online Distribution of Audiovisual Works in the European Union

#### MARCH 2011

- [RD347](#) - ETNO Reflection Document on the Application of Directive 2004/48/EC on the Enforcement of Intellectual Property Rights

# Main activities of the year

## 6. TAX ISSUES



ETNO continued to closely follow the implementation of the new EU Value Added Tax (VAT) package which finally entered into force on January 1, 2010 and in particular as regards the new B2C 2015 place of supply rules for telecommunications services. ETNO worked closely with the European Commission in order to find a practical solution as the new rules would have a big impact on telcos' businesses, resulting in important costs and administrative burdens. For instance, mobile SIM cards would be subject to VAT in the country of the user's residence instead of the SIM's country code, creating an unworkable situation and/or irresolvable problems in relation to a non-domestic customer base and the small amount of revenue from individuals resident in another Member State (much less than 1%).

- [RD363](#) - ETNO Reflection Document - on new Business to Consumers 2015 place-of-supply VAT rules for telecommunications services

Another key issue of concern for ETNO has been the introduction by some Member States of additional taxes on the telecoms sector to compensate for the suppression or reduction of advertising on national broadcasting networks or to address budget deficit. ETNO expressed strong concern that such industry taxes would discourage further deployment of services and networks in a key sector for the economic growth and recovery.

The European Commission has launched some infringement procedures reiterating that in line with the EU Regulatory Framework, taxes can be imposed on the telecoms sector only to cover the costs of regulating the sector.



# Main activities of the year

## 7. FAIR MANAGEMENT OF RESOURCES

ETNO shares the Commission objective of increasing trust and confidence as one of the key conditions for users to embrace high speed broadband and hence, to achieve the targets of the Digital Agenda.

### 7.1 Spectrum

Following the adoption by the European Commission of a proposal for a first Radio Spectrum Policy Programme (RSPP) on 20 September 2010, ETNO closely followed the debate in the European Parliament and the Council.

In March 2011, ETNO jointly with ECTA held an industry workshop hosted by MEP Gunnar Hökmark (EPP, SE), rapporteur for the Radio Spectrum Policy Programme (RSPP) Decision in the Industry, Trade and Research Committee. The workshop aimed at highlighting the benefits of spectrum for the deployment of broadband networks in rural and remote areas at a lower cost.

In December 2011, ETNO, together with GSMA welcomed the adoption by the EU's Council of Telecoms Ministers of the first Radio Spectrum Policy Programme for 2012-2015 (RSPP). The compromise text reached in trilogue between the Polish Presidency, the European Parliament and the European Commission sets clear policy orientations on the use of radio spectrum in Europe, which will help reap the benefits of the Digital Agenda and boost EU competitiveness.

The proposal to harmonise the release of the 800 MHz band (the Digital Dividend) for electronic communications services by 1 January 2013 across the EU will help to provide broadband and social inclusion in all European Member States and stimulate economic growth and competitiveness within the EU.

The RSPP also includes more harmonisation efforts in the medium term and that the European Commission will assess by January 2015 the need for additional frequency bands suitable for electronic communication services. This could further help to provide lower-cost broadband coverage in remote and rural areas, as well as in indoor environments.



In December 2011, ETNO also finalised its positioning on the World Radiocommunications Conference 2012 (WRC-12) that has been held in Geneva during Jan/ Feb 2012. In its positioning paper ETNO stated the need for new frequency bands to be looked for in the next years and to be confirmed by the next WRC-15, in 2015. The growth of mobile broadband connections will even increase in the near-term and the risk of spectrum congestion can be only avoided with new frequency bands identified for IMT and better spectral efficiency provided by the new technologies (LTE).

# Main activities of the year

## 7.2 Naming, Addressing and Numbering

ETNO provided representation and input in international bodies dealing with Internet naming and addressing issues, like ICANN and RIPE. The exhaustion of IPv4 addresses and the new gTLDs extension program remained as key issues for ETNO's Naming, Addressing and Numbering working group. ETNO followed closely a number of numbering aspects deriving from the revision of the EU Regulatory Framework, such as number portability, location information for emergency services, ETNS. ETNO also followed closely issues being dealt with by ITU-T SG2 and CEPT ECC WG NaN.

Regarding number portability, ETNO reiterated that this is a fundamental element for consolidation of competition in the market. ETNO urged, however, that Member States to take a very cautious approach when transposing the Directives into national legislation in order to avoid too far-reaching requirements which could be unrealistic for operators and unreliable for customers.

Through its Naming, Addressing and Numbering working group, ETNO also participated in public consultations on geographical numbering plans, machine to machine communications, cross border accessibility of numbers, Calling Line Identification (CLI) and Originating Identification (OI).

- **RD353** - ETNO Response to the Draft ECC Decision ECC/DEC(11)FF on the "Withdrawal of ECTRA/DEC(96)01 regarding ETNS, ECTRA/DEC(96)48 regarding ETNS, ECC/DEC(04)07 on ETNS Conventions"
- **RD352** - ETNO Reflection Document - Draft ECC Recommendation (11)07 on "Usage and Reservation of National Short Numbers Beginning with 11X"
- **RD351** - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA) Functions
- **RD348** - ETNO Reflection Document - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA)
- **RD346** - ETNO Reflection Document - Comments on draft ECC Recommendation (11)02 "Calling Line Identification and Originating Identification"
- **RD345** - ETNO Reflection Document - Comments on draft ECC Recommendations (11)03 "Numbering and addressing for Machine-to-Machine Communication"
- **RD343** - ETNO Reflection Document - Response to the European Commission questionnaire on the future harmonisation of numbering resources for the provision of business services
- **RD340** - ETNO Reflection Document to BEREC Consultation on Cross-border Issues under Article 28 of Universal Service Directive
- **RD359** - ETNO Reflection Document - Response to BEREC call for contributions on cross border accessibility of numbers
- **RD354** - ETNO Reflection Document - Response to Draft ECC Decision ECC/DEC(11)EE on "Reserving the National Number Range 111 for Long Term European Harmonisation Purposes"

# Main activities of the year

## 8. RESEARCH AND INNOVATION

The European Commission agenda on R&I was very full in 2011. The Commission launched the debate related to Horizon 2020 as well as a call for projects under FP7 Call 8. The ETNO Working group has been very active in relation to these different matters.

The WG developed contributions on WP 2013 and Horizon 2020 to ensure that the topics essential to TNOs are included in those programmes.

- ETNO R&I WG responded to the consultation on "Online questionnaire for the Green Paper on a common strategic framework for EU research and innovation funding" (20 May 2011).
- ETNO R&I WG chair was invited to the "Workshop on European Industrial Leadership in ICT - 29 June 2011" chaired by Z. Stancic (Deputy Director General DG INFSO)
- ETNO R&I contributed to the ETNO's response to the Commission's consultation on Cloud Computing (August 2011)
- The WG monitored also the kick-off of PPP FI selected projects (April 2011) and the TNO proposals in FP7 call-8 (January 2012).

## 9. BENCHMARKING

In accordance with ETNO's reform project, the chairman issued a survey about the continuity of the BEN WG. As a consequence, the Chairman launched an initiative to enlarge the WG and recruit new participants.

In 2011 the position of WG secretary was handed over to Bob Koch, Deutsche Telekom. During the last period the BEN WG addressed a wide scope of benchmark topics based on the initiative of its most active WG members.

All studies are about non competitive content. If required the benchmark data collection is performed in a "blinded" mode in order to cover source and origin. During 2011 a new process is being put in place, by which the study proposals are validated by a core team before distribution in order to make sure that they abide by the benchmarking mandate. Benchmark results are shared among the study participants. A Special Interest Group (SIG) is covering the exchange of access network best practice information.

### OVERVIEW OF MOST RECENT STUDIES:

1. Business planning tools & process
2. Tests & diagnostics for access network
3. Initiative on how to improve quality and relevance of the Oliver Wyman benchmark





# Main activities of the year

## 10. GLOBAL DIMENSION

### 10.1 World trade issues

ETNO has been closely monitoring the European Commission continued negotiations on bilateral Free Trade Agreements – which all include chapters on telecoms and aim at opening up markets beyond what is foreseen in WTO telecoms agreements.

ETNO took part in the negotiations between the EU and the US that ended-up with an agreement on Principles for the ICT sector. ETNO shared with EC officials its views on several important issues of the agreement, which was finally welcomed by all parties

ETNO participated in a Consultation of the US Administration, on a proposal for revision of the rules that are applied to foreign ownership in the telecom sector, submitting the following position paper: RD366 - ETNO Reflection Document - ETI ETNO comments FCC on Foreign ownership.





# Main activities of the year

## 10.2 The ITU

ITU related activities within ETNO, led by a Special Rapporteur for ITU, were in 2011 focused on the preparation of two of the World Conferences to be organised in 2012: the World Telecommunication Standardisation Assembly (WTSA-12) and the World Conference on International Telecommunications (WCIT-12). ETNO is associated in the preparation of these two conferences within CEPT COM ITU, and several ETNO members companies participate actively in the preparatory process.

2011 activities were focused on the preparation of the International Telecommunications rules (ITRS): an official process to revise the old 1988 Treaty which has been launched by the ITU Plenipotentiary Conference at the end of 2010, and several proposals related to international services and networks have been published. ETNO members made an analysis of all the proposals impacting operators activities (e.g. roaming, taxation, security, quality of service, misuse and/or misappropriation of numbering resources, e.g. spam, phishing and malware) and elaborated some common principles for the new ITRs to be adopted at the next WCIT. ETNO Members participate in the work of the ITU dedicated working group, preparing a compilation of proposed revisions to the ITRs, and in the European preparation process.

Regarding standardisation activities and WTSA preparation, ETNO members views are focused on specific ITU-T activities, with proposals related to the restructuring of the study groups, handling of the Internet related issues, the assessment of some ITU-T programs (Conformance, Interoperability, Testing), and, as usual the improvement of ITU-T working methods. In the course of 2011, ETNO members hold also several meetings in conjunction with ITU meetings, such as TSAG, dedicated to standardisation issues.

## 10.3 Internet Governance

ETNO has continued to actively monitor developments in the Internet Governance world, tracking ICANN, WSIS (World Summit on Information Society), EuroDIG (European Dialogue on Internet Governance) and IGF (Internet Governance Forum) / IGF-related activities and events. ETNO also participated in ad-hoc meetings such as the OECD High Level Meeting on the Internet Economy in June 2011 and the London Cyber Conference in November 2011.

### CONSULTATIONS:

#### AUGUST 2011

- **RD357** - ETNO Reflection document - Response to next Phases of the UNGIS Open Consultations on the Overall Review of the Implementation of the WSIS Outcomes (WSIS+10)

#### JULY 2011

- **RD351** - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA) Functions

#### MARCH 2011

- **RD348** - ETNO Reflection Document - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA)

# Main activities of the year

## 11. SOCIALLY RESPONSIBLE MANAGEMENT

### 11.1 Environment & Sustainability

In 2011, in line with the Digital Agenda objectives, the European Commission priority has been to facilitate the definition of common methodologies for all players of the ICT value chain to measure the footprint of their services and equipment. Achieving these common methodologies is a key condition for the European Commission to fully consider the enabling effect of the ICT sector on other industries in terms of energy efficiency and CO2 emission reduction.

Exploitation of the potential of ICT to address climate change and optimize energy consumption has been a key priority for ETNO throughout the year. In response to the Commission's roadmap towards a low carbon economy which ETNO broadly welcomed, the Association called on the European Commission to ensure that sector-specific roadmaps and national low carbon plans should include concrete incentives for other sectors of the economy to embrace low-carbon solutions.

This message was also broadly communicated on the occasion of the 2011 edition of EU Green Week on Resource Efficiency through ETNO stand at the Green Week exhibition and a street advertising campaign.

To illustrate the enabling effect and the need for more cross sector cooperation, ETNO organised a workshop hosted by Belgacom entitled "Broadband Networks and Smart Grids: the intersection between ICT and Energy".

The workshop which attracted more than 100 stakeholders from telecoms and energy utility sectors as well as the EU institutions and national regulatory authorities aimed at identifying new business models, highlighting regulatory obstacles and the necessary policy measures to accelerate the deployment of the smart grids, as well as ways to foster cooperation between telecoms and utility sectors.

The Energy Task Force has been investigating solutions and best practices to decrease further the energy consumption of the ICT sector by pushing engineering excellence for more efficient networks, data centres and end user equipment. Several benchmarks were carried out in this field, including access gateways, IPTV set-top boxes, data centres efficiency, implementation of energy management systems as well as the identification of suitable KPIs to account for energy consumption and efficiency. A benchmark on the implementation of smart grid technologies - internal and available on the market - was also carried out in 2011 which allowed the identification and the comparison of the progress that participating companies made in this area.

The other key priority for ETNO's Corporate Responsibility Working Group has been the protection of minors online. To mark the Safer Internet Day, ETNO launched a new web site demonstrating the ETNO members' voluntary commitment to minors' protection, through the inclusion of security features in broadband, mobile and IPTV services, the offering of services and products especially designed for youngsters and notably through awareness raising activities. ETNO also actively participated in the definition of the High-Level joint industry Principles for the Safer Use of Connected Devices and Online Services by Children and Young People in the EU, to be endorsed by individual companies.



# Main activities of the year

## 11.2 Social Dialogue

One of the initiatives of the Europe 2020 strategy is an agenda for new skills and jobs which aims at equipping people with the right skills for the jobs of today and tomorrow.



During 2011, ETNO's Employment Health & Safety Working Group worked on this issue with UNI to define the content for a possible new project dealing with skills & training. The project's objective would be to map the ICT qualification landscape and identify the main opportunities linked to the evolution of the ICT sector in order to assess the need and possibility of a future ICT skills council. The project should lead to the provision of high quality labour market information and enable the project partners to create a network with the relevant stakeholders, such as education and training providers, national and regional observatories and public authorities at national, regional or local level.

The exchange with these stakeholders should aim at developing effective solutions for filling the skills gap in the future.

ETNO's Employment Health & Safety Working Group jointly with UNI has organised a survey of ETNO members concerning the GWGH impact assessment, one year after the successful conference of October 2010. A report of this impact assessment will be sent to the EC in 2012, analysing the impact of the GWGH project and dissemination of the best practice guidelines.

# ETNO interventions in external conferences

- Business International  
"State of the Telecom and Digital Media in Europe" Rome, 12 December 2011
- "Telecoms Loyalty and Churn" - International Forum Moscow, 6 December 2011
- ECTA conference Brussels, 29 November -> 1 December 2011
- EABC WDC Forum  
"EU Telecom Operators' Views on EU Sector Policy" Washington 3 November 2011
- Polish Presidency Conference - "Perspectives for the development  
of the electronic communications market in the EU" Warsaw 19 October 2011
- FITCE 2011 Palermo, 1 September 2011
- LSE Network Economy Forum London, 13 June 2011
- EETT's 6<sup>th</sup> International Conference "Advanced Communication  
infrastructures as a cornerstone for Europe's Digital Agenda" Athens, June 2 - 3 June 2011
- eG8 Forum Paris, 24 -> 25 May 2011
- "Broadband Policy and NGA Regulation"  
Florence School of Regulation, Communications and Media Florence, 1<sup>st</sup> April 2011
- European Parliament  
"Internet for all" - Delivering broadband to the EU regions Brussels, 23 March 2011
- FTTH Europe Conference Milan, 9 - 10 February 2011



# ETNO Positions

## NOVEMBER 2011

- **RD365** - ETNO Reflection Document - ETNO Response to the EU Consultation on Costing

## NOVEMBER 2011

- **RD364** - ETNO Reflection Document - ETNO answer to EU-consultation on Non Discrimination

## NOVEMBER 2011

- **RD363** - ETNO Reflection Document - on new Business to Consumers 2015 place-of-supply VAT rules for telecommunications services

## NOVEMBER 2011

- **CP085** - ETNO Common Position on WRC-12

## NOVEMBER 2011

- **RD362** - ETNO Reflection Document - Reponse to the European Commission's Green Paper on the Online Distribution of Audiovisual Works in the European Union

## NOVEMBER 2011

- **RD361** - ETNO Reflection Document on BEREC 2012 WP

## NOVEMBER 2011

- **RD360** - ETNO Reflection Document - Response to the BEREC Consultation on Draft Guidelines for Transparency and Net Neutrality

## SEPTEMBER 2011

- **RD359** - ETNO Reflection Document - Response to BEREC call for contributions on cross border accessibility of numbers

## SEPTEMBER 2011

- **RD358** - ETNO Reflection Document - Response to the public consultation on the ePrivacy Directive: circumstances, procedures and formats for personal data breach notifications

## AUGUST 2011

- **RD357** - ETNO Reflection document - Response to next Phases of the UNGIS Open Consultations on the Overall Review of the Implementation of the WSIS Outcomes (WSIS+10)

## AUGUST 2011

- **RD356** - ETNO Reflection Document replying to the public consultation on Cloud Computing

## AUGUST 2011

- **RD355** - ETNO Reflection Document - Reply to the public consultation on the Revision of the Community Guidelines for the application of State aid rules in relation to rapid deployment of broadband networks.

## AUGUST 2011

- **RD354** - ETNO Reflection Document - Response to Draft ECC Decision ECC/DEC(11)EE on "Reserving the National Number Range 111 for Long Term European Harmonisation Purposes"

## AUGUST 2011

- **RD353** - ETNO Response to the Draft ECC Decision ECC/DEC(11)FF on the "Withdrawal of ECTRA/DEC(96)01 regarding ETNS, ECTRA/DEC(96)48 regarding ETNS, ECC/DEC(04)07 on ETNS Conventions"

## AUGUST 2011

- **RD352** - ETNO Reflection Document - Draft ECC Recommendation (11)07 on "Usage and Reservation of National Short Numbers Beginning with 11X"

## JULY 2011

- **RD351** - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA) Functions

## MAY 2011

- **RD350** - ETNO Reflection Document on the EU Green Paper on the future of VAT

# ETNO Positions

## MAY 2011

- **RD349** - ETNO Reflection Document commenting on the Roadmap for moving to a competitive low carbon economy in 2050

## MARCH 2011

- **RD348** - ETNO Reflection Document - Response to the National Telecommunications and Information Administration of the US Department of Commerce on the Internet Assigned Numbers Authority (IANA)

## MARCH 2011

- **RD347** - ETNO Reflection Document on the Application of Directive 2004/48/EC on the Enforcement of Intellectual Property Rights

## MARCH 2011

- **RD346** - ETNO Reflection Document - Comments on draft ECC Recommendation (11)02 "Calling Line Identification and Originating Identification"

## MARCH 2011

- **RD345** - ETNO Reflection Document - Comments on draft ECC Recommendations (11)03 "Numbering and addressing for Machine-to-Machine Communication"

## FEBRUARY 2011

- **RD344** - ETNO Response to the Public Consultation on the Review of the Functioning of Regulation (EC) No 544/2009 (the "Roaming Regulation")

## FEBRUARY 2011

- **RD343** - ETNO Reflection Document - Response to the European Commission questionnaire on the future harmonisation of numbering resources for the provision of business services

## JANUARY 2011

- **RD342** - ETNO Reflection Document on the EC Public Consultation on the Communication on a comprehensive approach on personal data protection in the European Union

## JANUARY 2011

- **RD341** - ETNO Reflection Document in reply to the public consultation on the Draft RSPG opinion on Common Policy Objectives for WRC-12

## JANUARY 2011

- **RD340** - ETNO Reflection Document to BEREC Consultation on Cross-border Issues under Article 28 of Universal Service Directive

# ETNO Working groups

JULY 2012

Competitive Markets WG	<i>Chair: Ralf Nigge, Deutsche Telekom</i>
Digital Society WG	<i>Chair: Michele Bellavite, Telecom Italia</i>
Research & Innovation WG	<i>Chair : Brigitte Cardinaël, Orange</i>
Corporate Responsibility WG	<i>Chair: Danilo Riva, Telecom Italia</i>
Digital Single Market WG	<i>Chair: Caterina Bortolini, Telecom Italia</i>
Data Protection, Trust & Security WG	<i>Chair: Cristina Vela, Telefonica</i>
Spectrum Policies WG	<i>Chair: Massimiliano Simoni, Telecom Italia</i>
ITU WG	<i>Chair: Dominique Würges, Orange</i>
Network and Services Security, Fraud and Cybercrime WG	<i>Chair : Samir Albadine, Orange</i>
Employment, Health & Safety WG	<i>Chair: Nathalie Delacotte, Orange</i>
Internet Governance WG	<i>Chair: Christoph Steck, Telefonica</i>
Naming, Addressing and Numbering Issues WG	<i>Chair: Yusuf Kirac, Turk Telekom</i>
Tax Issues WG	<i>Chair: Costanzo Perona, Telecom Italia</i>
Benchmarking WG	<i>Chair: Thierry Denant, Orange</i>
External Trade Issues	<i>Special Rapporteur: David Frautschy, Telefonica</i>

# ETNO Organisation

## GENERAL ASSEMBLY

### CHAIR:

- **Ms Marta Brzoza**  
Director of Analyses and Regulatory Affairs  
Department, Telekomunikacja Polska

### VICE-CHAIR:

- **Mr Harald Krohg**  
Vice President, Head of Wholesale  
and Regulatory, Telenor



From left to right. First row: Phillip Malloch, European Affairs Manager, TeliaSonera (alternate for Kaisu Karvala); Lotte Abildgaard; Luigi Gambardella; Jos Huigen. Second row: Mustapha Aykut; Vianney Hennes; Antonio Robalo de Almeida; Alfredo Acebal; Roland Doll.

## ADMINISTRATIVE COMMITTEE

### CHAIR:

**Thomas Müller** – Swisscom

### MEMBERS:

- **Alfredo Acebal** – Telefonica;
- **Roland Doll** – Deutsche Telekom
- **Vianney Hennes** – France Telecom/Orange

### OBSERVER:

- **Luigi Gambardella** – Telecom Italia

## EXECUTIVE BOARD

### CHAIR:

- **Luigi Gambardella**,  
Vice-President, Relations with  
International Institutions and  
Organisations, Telecom Italia

### MEMBERS

- **Alfredo Acebal**,  
Director EU & International Regulatory  
Affairs and Permanent Representative  
in Brussels; Telefonica
- **Antonio Robalo de Almeida**,  
Inspector General; Portugal Telecom
- **Steven Tas**,  
Vice President Regulatory; Belgacom
- **Roland Doll**,  
Executive Vice President International  
Government Relations; Deutsche  
Telekom
- **Vianney Hennes**,  
Head of Brussels Office; France  
Telecom / Orange
- **Jos Huigen**,  
Director Regulatory and European  
Affairs; KPN
- **Lotte Abildgaard**,  
Vice President, Head of Office; Telenor
- **Philipp Wolfram**,  
Group Regulatory & European Affairs  
Head of Brussels Office  
Telekom Austria Group
- **Kaisu Karvala**,  
VP, European Affairs, TeliaSonera
- **Mustafa Aykut**,  
Group Representative, International  
Institutions for Policy, Standards &  
Regulations; Türk Telekom



# ETNO Staff



**DÁNIEL PATAKI**

Director



**THIERRY DIEU**

Director for Communications  
& Public Policy



**CAROLINE GREER**

Regulatory Affairs Manager



**ISABELLE CLAEYS**

Events & Operations Coordinator



**ANNE VALLES**

HR & Financial Officer

# ETNO Members



ALBtelecom  
(Albania)



Elion Enterprises Ltd.  
(Estonia)



OTE  
(Greece)



TDF  
(France)



Telenor  
(Norway)



Belgacom  
(Belgium)



Entreprise des Postes  
et Télécommunications  
(Luxembourg)



Portugal Telecom  
(Portugal)



Telecom Italia  
(Italy)



Telekom Slovenije  
(Slovenia)



BH Telecom  
(Bosnia and Herzegovina)



Finnet Group  
(Finland)



Societatea Nationala de  
Radiocomunicatii (Romania)



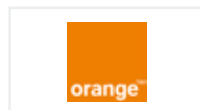
Telecom Liechtenstein  
(Liechtenstein)



TeliaSonera  
(Sweden-Finland)



Cyprus Telecommunications  
Authority (Cyprus)



Orange  
(France)



RomTelecom  
(Romania)



Telefónica  
(Spain)



Teo  
(Lithuania)



T-Group\*



GO  
(Malta)



Síminn  
(Iceland Telecom Ltd.)



Telefónica O<sub>2</sub>  
(Czech Republic)



Türk Telekomünikasyon  
(Turkey)



eircom  
(Ireland)



Koninklijke KPN  
(The Netherlands)



Swisscom  
(Switzerland)



Telekom Austria  
(Austria)



VIVACOM  
(Bulgaria)



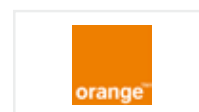
Elisa Corporation  
(Finland)



Latticelecom  
(Latvia)



TDC  
(Denmark)



Orange Polska  
(Poland)

\* T-Group companies who are members of ETNO: Deutsche Telekom, Hrvatski Telekom, Magyar Telekom, Makedonski Telekom and Slovak Telekom,

# ETNO Observers

Alcatel-Lucent 

  
HUAWEI

 at&t

Nokia Siemens  
Networks 

  
CISCO



NTT  
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ERICSSON 

STC  
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