



ANNUAL REPORT | 2014

**THINK DIGITAL**

**REFORM**

**PROSPER**

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An exciting year of change for the association

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## 01 INTRODUCTION

The big word of 2014 for the European telecom industry was change.

EU societies and markets continued to evolve, triggering an even bigger need for new business models and for a wave of investment in the telecom industry to meet demand in a data-hungry world.

The sector also witnessed a shift in the approach to regulation. The new EU leadership appointed in Q4 of 2014, saw the reality of an exciting digital future with huge opportunities and challenges ahead and understood that modern digital policies would allow it to flourish.

ETNO companies are leading telecom operators in the EU and represent the backbone of Europe's digital progress. Through ETNO, they maintained a strong collaborative presence in the European policy debate in 2014, providing a platform for dialogue during ETNO's events – including the FT-ETNO Conference and the ETNO-Mlex Regulatory Summit – and providing reliable input to the EU Digital Agenda in the form of papers, reports and studies.

ETNO also acted as a constructive player at a global policy level, taking part in the transatlantic debate during the first FCC "Open Internet Roundtable", advocating a level-headed and fact-based global dialogue with all stakeholders.

In keeping with the symbol of change, the ETNO office took the chance, in 2014, to create a new and more visible image for the Association. Throughout the year, ETNO changed logo, created a new website, launched a new CEO Committee and finalised the re-organisation of ETNO's working groups to better match the new EU landscape in 2015. ETNO also moved to a new office at the heart of the EU district, providing a platform for ETNO companies to become even more involved and play a pivotal role in the Digital Future of Europe. As a result of these changes, ETNO was selected as a best practice case study for European Associations in Brussels at the European Association Summit 2015.

ETNO would like to thank its valued Members for their help and assistance throughout 2014.

### More information

*"ETNO launches the "Think Digital" Agenda, a CEO Committee and elects a new Chairman" 16 October 2014 :*

<https://etno.eu/home/press-corner/etno-press-releases/2014/311>



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### a) 28 April 2014: Internal Workshop on ETNO's priorities for the Next Term, Brussels

On 28th April 2014, ETNO organised an Internal Workshop to discuss the main priorities for the Next EU Term. Participants had the opportunity to exchange views with the ETNO Board and Members, in particular – Jos Huigen (KPN), Marc Lebourges (Orange), Mustafa Aykut (Türk Telekom) and Carlos Cocina (Telefonica). The workshop was divided into four core sections during which the following topics were introduced and evaluated: the legislative and institutional framework, competition policies, privacy, trust and security related issues and a new agenda for the EU Digital economy. The main goals of the digital agenda were highlighted – fostering the growth of the sector through investment and innovation, ensuring increased social welfare, achieving greater openness and interoperability in the ICT system and establishing a secure cyberspace.



#### Welcome speech:

Luigi Gambardella, ETNO Executive Board Chairman

#### Opening and closing speech:

Daniel Pataki

#### Speakers:

Jos Huigen, KPN  
Marc Lebourges, Orange  
Mustafa Aykut, Türk Telekom  
Carlos Rodriguez Cocina, Telefonica

Each panel included a discussion with ETNO members on the following topics:

- Competition Policy
- Privacy, Trust & Security
- A new Agenda for the EU Digital Economy

## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### b) 30 April 2014: A New Digital Agenda for Europe. Multi-stakeholder workshop in view of the Italian Presidency of the European Union, Brussels

As the profile of the digital citizen changed dramatically since the conception of the Digital Agenda for Europe, ETNO together with Telecom Italia co-organised a workshop dedicated to the Italian Presidency and a New Digital Agenda for Europe emphasising the importance of the new digital consumer - a content-enthusiast and data-hungry consumer – who is re-shaping the digital market and hence the telecommunication sector. In the face of a dynamic and fast-changing environment driven by innovation and new, disruptive services, there arises a strong need for policy-makers to reconsider their activity.

The workshop included two panels – “*Policy and Regulatory Agenda*”, and “*Privacy, Net Neutrality and Competition Policies: in search of a new policy approach*”, in which various representatives from the European Commission, regulatory bodies and the telecommunication sector took part.

Topics under discussion attempted to answer the following questions:

- How should the Digital agenda objectives be rethought to take stock of the latest competitive and technological developments of the telecommunications and ICT sector?
- How could the current European regulatory framework be reviewed in order to support investments and international competitiveness in ICT?
- Which should the new priorities be? Which infrastructures, services and innovations goals (e.g. number of start-up) would allow Europe to re-gain a top spot in the global ICT arena?
- Which actions and policies interventions would be needed to reach this new set of goals?
- Should privacy safeguards, quality of service enhancements and improvements in the security of internet transactions be a part of the new digital agenda goals?
- How consumer and data protection policies should be implemented to increase consumer welfare while promoting investments, innovation and a level playing field among different players of the broadband/internet value chain? What indicators are best suited to gauge the value for consumers of a specific policy?
- The intensity of debate on Net Neutrality has lately reached new heights. What are the expectations of consumers in terms of enhanced quality of service, reliability and “fit for purpose” broadband services? Do other Internet neutralities (such as Search Neutrality, Applications Neutrality or Device neutrality) matter more for consumers?
- What are the implications of the pervasive consumer demand for OTT services on the EU telcos’ market power? How privacy safeguards impact the competitive situation? How should factors other than price be taken into account when framing antitrust policies?

#### Keynote addresses:

Marco Patuano, CEO, Telecom Italia  
Ambassador Marco Peronaci, Italian Deputy Permanent Representative

#### Speakers:

Robert Madelin, Director-General, DG Connect, European Commission  
Goran Marby, Chairman of BEREC and Director-General of the Swedish Post and Telecom Agency

#### Moderators:

Frances Robinson, Telecoms Correspondent at the Wall Street Journal  
James Fontanella-Khan, Brussels correspondent at The Financial Times

#### Panellists:

Robin Bienenstock, Senior Analyst European & Latin America Telecommunications, **Sanford C Bernstein**; David Cantor, **Telecommunications Law & Strategy**; Roland Doll, Vice President Europe Affairs, **Deutsche Telekom**; Andrea Faggiano, **Arthur D Little**; Grant Forsyth, ECTA Board Member and Head of Regulatory Policy, **NGN at BskyB**; Vianney Hennes, Director, European Public Affairs, **Orange**; Stephen Howard, Head of Global Telecoms, Media and Technology Research, **HSBC**; Carlos Lopez Blanco, Public and Corporate Affairs Global Head, **Telefonica**; Scott Marcus, Director, **WIK-Consult**; Pearse O’Donohue, Deputy Head of Cabinet of VP Neelie Kroes, **European Commission**; John Strand, **Strand Consult**; Giovanni Amendola, Vice-President, **Telecom Italia**; Julian Ashworth, Group Industry Policy Director, **BT Group**; Wolfgang D. Bock, Senior Partner and Managing Director, **The Boston Consulting Group**; Peter Hustinx, **European Data Protection Supervisor**; Karim Lesina, Vice President, **AT&T International External Affairs**; Danielle Jacobs, Chairman of the Board, **INTUG**; Eduardo Martinez Rivero, Head of Unit, DG Competition, **European Commission**; Peter Olson, President, **DIGITALEUROPE**; Pastora Valero, Director EU Public Policy, **CISCO**; Despina Spanou, Director DG for Health and Consumers, **European Commission**; Anthony Whelan, Director, DG Connect, **European Commission**; Matt Yardley, Partner, **Analysys Mason**.

#### Press release:

<https://etno.eu/news/etno/2014/241>

#### ETNO Executive Board

#### Chairman’s Speech:

<https://etno.eu/news/etno/2014/242>



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### c) 25 June 2014: ETNO - MLex Regulatory Summit, Brussels

The ETNO - Mlex Regulatory Summit gathered high-level delegates from the European Commission, Regulatory bodies, Telecom Operators, Think Tanks, Investors and other industry stakeholders to discuss key telecom regulatory issues including Net Neutrality, innovation in the Internet value chain and the future of regulation in Europe.

On the occasion, ETNO together with the consultancy IDATE, released interim data which gave an overview of the telecom industry performance in the period 2009 – 2013 and forecasts for 2014. The data showed that despite a challenging environment, telecom operators continued to make sustained investment efforts, devoting a higher share of their revenues to investment.

#### Opening and closing speech:

Daniel Pataki, ETNO Director

#### Keynote addresses:

Luigi Gambardella, ETNO Executive Board Chairman  
Anthony Whelan, DG CONNECT, European Commission

**Panel 1:** "Net Neutrality and innovation in the Internet value chain"

#### Introductory speaker:

Andrea Renda, Senior Research Fellow, CEPS

#### Panellists:

Freenasp Mobedjina, Vice President, Group Strategy & Business Development, TeliaSonera; Vesa Terava, Head of Unit, DG CONNECT, European Commission; Félix Tréguer, Co-founder, La Quadrature du Net; Enrique Medina, Chief Policy Officer, Telefónica; David Cantor, Attorney & Advisor, Telecommunications Law & Strategy; Ola Bergström, Director for International Affairs, Swedish Post and Telecom Authority (PTS)  
Panel 2: "The Future of Regulation in Europe"

#### Introductory speaker:

J. Scott Marcus, Director, Department Manager and Senior Consultant, WIK Consult



#### Panellists:

Eric Debroeck, Senior Vice President of Regulatory Affairs, Orange; Grant Forsyth, Vice-Chairman, ECTA; Matthias Kurth, Executive Chair, Cable Europe; Wolfgang Kopf, Senior Vice President for Public and Regulatory Affairs, Deutsche Telekom AG; Hannes Wittig, Telecoms Analyst, JP Morgan

#### Closing remarks:

Roberto Viola, Deputy Director General, DG CONNECT, European Commission

#### Event moderator:

Magnus Franklin, Chief Telecoms Correspondent, Mlex

#### Press release:

"ETNO releases interim Annual Economic Report results at the ETNO-MLex Regulatory Summit." 25 June 2014  
<https://etno.eu/home/press-corner/etno-press-releases/2014/291>



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### d) 21 July 2014: From Sao Paulo to Istanbul: Towards Better Internet Governance

On 21 July, ETNO, in partnership with the Italian Government, Puntoit, Key4biz, Open Network, Ego and competere.eu, ETNO hosted a half-day event in the Italian Parliament.

The debate began with perspectives from the Italian Presidency and several Italian politicians, and then moved on to two high-level panel discussions. The first panel discussed the progress made on Internet governance since Sao Paulo, the outcomes of NetMundial and the remaining challenges to be addressed, with a view to the IGF in Istanbul and beyond. The second panel specifically addressed the topic of Open Internet in the context of NetMundial and how the debate was expected to move forward.

#### Keynote addresses:

*Italy in the Modern Digital Age: Opportunities and Challenges:*  
Laura Boldrini, President Chamber of Deputies

*Italian Presidency Priorities and the view of the European industry:*  
Antonello Giacomelli, Undersecretary for Telecommunications Ministry of Economic Development  
Luigi Gambardella, ETNO Executive Board Chairman  
Antonio Nicita, Commissioner AGCOM

*Internet Governance: The Italian Perspective:*  
Sergio Boccadutri, Member of the Italian Parliament  
Giovanni Pitruzzella, Chairman of the Italian Antitrust Authority

**Panel 1.** NetMundial in Brazil was a critical step on the Internet governance path and set the stage for the Internet governance debate in the following months. The IGF in Istanbul was to be the next occasion for the international community to gather and review progress. This panel attempted to answer the following questions:

- What are the expectations as a result of the Sao Paulo debate?
- What concrete steps have been taken since NetMundial and what are the remaining challenges to be addressed?

#### Panellists

Roberto Viola, Deputy Director-General, DG Connect, **European Commission**; Paolo Gentiloni, **Member of the Italian Parliament**; Erika Mann, Head of Facebook Brussels, **Facebook**; Jean-Jacques Sahel, Vice President for Europe, **ICANN**; Konstantinos Komaitis, policy advisor, **ISOC**; Enrique Medina, Director of Public Policies & Regulation, **Telefónica**

#### Moderator

Raffaele Barberio, Editor in Chief Key4biz

**Panel 2.** Several issues were left unresolved in Sao Paulo and were identified as topics to be discussed at future fora, and in particular at the IGF. Among them was the issue of Open Internet. This panel attempted to answer the following questions:

- How can we expect this issue to be addressed in an international context?
- What will be the impact on the debate within Europe and the US?

#### Panellists

David Sassoli, Vice President, **European Parliament**; Larry Stone, President, Group Public and Government Affairs, **BT**; Karim Lesina, Vice President for International External Affairs, **AT&T**; Joseph Alhadeff, Vice President of Global Public Policy, **Oracle**; Patrick Ryan, Policy Counsel, Open Internet, **Google**; Thomas Grob, Senior Expert Regulatory Strategy, **Deutsche Telekom**

#### Moderator

Pietro Paganini, Presidente Competere.eu

#### Closing remarks

Benedetto Della Vedova, Under-Secretary for Foreign Affairs Italy

ETNO Executive Board Chairman's  
speech:  
<https://etno.eu/news/etno/2014/256>

### In collaboration with



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### e) 1 October 2014: FT-ETNO Summit, Brussels

With the launch of the Digital Agenda for Europe, the telecoms sector experienced change beyond any expectation. The paradigm shift was clear: ICT is not only about communicating, rather it is the main driver of life-improving services. Consumers, businesses and organisations are demanding such services to add value to their lives. Meanwhile, the technological revolution and the convergence of different platforms also means comprehensive discussion about the future of ICT policies is a must.

Moving towards the new term of the European Commission (January 2015), the FT-ETNO Summit 2014 brought together Europe's political and business leaders to provide timely input into the Commission's next wave of digital policies.

Topics under discussion included the following questions:

- What trends will create market disruption in the coming years?
- What can be done to boost Europe's investments and commitment to innovation?
- How can infrastructure deployment be properly incentivised?
- How do competition rules relate to such challenges? What are the implications for consumers?
- Should rules on privacy and security be made clearer?
- How can we ensure that measures do not inhibit innovation or services to the consumer?

During the event, ETNO presented its Agenda for Europe :

<https://etno.eu/etno-agenda-for-europe>

For a summary of this publication, go to section 5.ii. of this report.

To obtain a printed copy of the Agenda for Europe, please write to [info@etno.eu](mailto:info@etno.eu)

#### Welcome speeches:

Daniel Pataki, Director, ETNO

Daniel Thomas, Telecoms Editor, Financial Times

#### Keynote addresses:

*"Digital Policies for Europe – The Next Wave"*

Luigi Gambardella, Executive Board Chairman, ETNO

Fátima Barros, Incoming Chair 2015, BEREC & Chair, ANACOM, Portugal



#### Keynote address:

Lowell C. McAdam, Chairman and CEO, Verizon Communications

**Panel.** *"Digital Policies for Growth: Towards a Telecoms Reform"*

#### Panellists:

Michel Combes, CEO, Alcatel Lucent

Claudia Nemat, CEO for Europe & Technology, Deutsche Telekom

Dominique Leroy, CEO, Belgacom Proximus

Giuseppe Recchi, Chairman, Telecom Italia

Pierre Louette, Deputy CEO, Orange

Hans Vestberg, President and CEO, Ericsson

Daniel Bailey, Global Head of TMT, HSBC

Moderator: Daniel Thomas, Telecoms Editor, Financial Times

#### The investors' panel:

Xavier LeFranc, Senior Investment Analyst, UBS

Henrik Nyblom, Equity Analyst, Schroders

Roger Wilkinson, Investment Leader, Global Research, Newton

Moderator: Stephen Howard, Head, Global TMT Research, HSBC

#### Keynote address:

*"Netflix view on Net Neutrality"*

Reed Hastings, CEO, Netflix

**Panel.** *"An Open Digital Agenda for Growth and Innovation"*

#### Panellists:

César Alierta, Executive Chairman and CEO, Telefónica

Rami Aslan, CEO, Türk Telekom Group

Jon Fredrik Baksaas, President and CEO, Telenor Group

Vittorio Colao, CEO, Vodafone Group

Johan Dannelind, President and CEO, TeliaSonera

Michel de Rosen, Chairman and CEO, Eutelsat

Chris Dediccoat, President, EMEAR, CISCO

Moderator: Daniel Thomas, Telecoms Editor, Financial Times

#### Closing keynote:

*"The Digital Agenda and Next Steps"*

Neelie Kroes, Vice President of the European Commission and Commissioner for Digital Agenda

#### Closing remarks:

Daniel Thomas, Telecoms Editor, Financial Times



**Press Release** announcing the event: *"FT-ETNO Summit 2014: Towards a Digital Renaissance."*  
25 September 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/299>

**ETNO Executive Board Chairman's Speech :**  
at the FT-ETNO Conference. 1 October 2014  
<https://etno.eu/home/press-corner/etno-press-releases/2014/302>

**Press release announcing the publication of ETNO's Agenda For Europe:**  
*"FT-ETNO Summit 2014: EU telcos presented today their 'Agenda for Europe.'" 1 October 2014*  
<https://etno.eu/home/press-corner/etno-press-releases/2014/303>



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### f) 28 November 2014: ICT Skills Workshop. Filling the ICT skills gap in the Telecommunications Sector of the future - Identifying and spreading best practice (FITS), Brussels

Skills requirements in the ICT industry are rapidly changing due to constant technological innovation and market developments. For this reason, the European social partners in the telecom sector - the European trade unions federation UNI Europa and ETNO - jointly launched the European project "Filling the ICT skills gap in the Telecommunications Sector of the future – identifying and spreading best practice". The project's objective was to identify the main drivers of change and the impact on skills needs in the telecommunications sector, as well as to identify and share best practices regarding effective solutions to fill the ICT skills gap. Based on the findings of the project research, the European telecom social partners identified five key recommendations to efficiently address the ICT skills needs of the future:

- Multi-stakeholder engagement and cooperation should continue and be expanded at European and national levels to maximise the use of shared resources and knowledge bringing benefit to all parties involved.
- Social Dialogue and cooperation are vital when it comes to skills development initiatives.

- Companies should engage young talent and women in leadership positions.
- Considering the mutual benefits of organisations working together and sharing knowledge and skills, it is strongly recommended to establish a formal cross-company association or committee dedicated to the development of telecommunication professional skills development across Europe.
- A specific skills management structure and a shared definition of relevant telecommunication role profiles should be created.

UNI Europa and ETNO are convinced that the European telecommunications industry as a whole could benefit by following these recommendations.

A **Joint Declaration** on ICT skills was signed during the event by Torben Andresen Lindhardt from Dansk Metal, President of the European telecom Social Dialogue Committee and Nathalie Delacotte, Head of ETNO delegation to the Social Dialogue Committee.

#### Welcoming speeches:

Daniel Pataki, Director-General, ETNO  
Andy Kerr, Vice-President, UNI Europa ICTS - CWU UK

#### Keynote addresses:

*EU social dialogue: does it FIT(S)?*

Sigfried Caspar, Team leader for Sectoral Social Dialogue, DG EMPL - Employment, Social Affairs and Inclusion

*e-Skills: Fostering Competitiveness, Growth and Jobs*

André Richier, Principal Administrator, Key Enabling Technologies and Digital Economy Unit, DG ENTR - Enterprise and Industry

#### Main Session

*Introduction to the FITS project by Workshop co-Chairs*

Nathalie Delacotte, Head of international employee relations, Orange  
Birte Dedden, ICTS Policy Officer, UNI Europa

*Filling the ICT skills gap in the Telecommunications sector of the future - main findings of the Consultancy Report*

Jutta Breyer, Director BREYER PUBLICO, Germany  
Terry Hook, Director clock-IT-skills, UK

#### Testimonials from Company Best Practices

*Multi-stakeholder collaboration: Trainee program*

Nils-Erik Nobrand, Union Official, SEKO Stockholm  
Calle Nilsson, CSR Advisor, Empower - Telecom Network Division

*Virtual expert forum: Orange Expert*

Elisabeth Belois-Fonteix, Senior Vice President Human Resources, Innovation, Marketing & Technologies, Orange

*Gender Ambition for 2020: Global mentor program*

Karin Åberg, Union officer, Ericsson

*Supporting a diverse employee structure: Open Mind*

Pia Torstensson, Sustainability, Open Mind Manager, Telenor Sweden

#### Presentation of 5 Recommendations from Consultancy Report

Jens Boutrup, Program Manager, Group Performance Development, Deutsche Telekom

Markus Lecke, System Engineer, NetDesign/TDC

Two parallel workshops were held to answer the following questions:

- Can we agree on the Recommendations?
- How would you implement this in your organisation?
- Would this lead to success – meaningful improvement re the ICT Skills gap?
- What could governments do – what are the keys to success at EU level?

#### Joint UNI Europa – ETNO declaration on future skills needs:

[https://etno.eu/datas/ETNO%20Documents/20141126\\_Joint%20declaration\\_EN\\_final.pdf](https://etno.eu/datas/ETNO%20Documents/20141126_Joint%20declaration_EN_final.pdf)

#### Press release:

"Unions and telecom companies launch recommendations on future skills requirements." 28 November 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/319>

#### Opening Speech Daniel Pataki, ETNO Director-General:

[https://etno.eu/datas/press\\_corner/Speeches/DP\\_Welcome%20speech\\_FITS ICTskills\\_workshopNov14.pdf](https://etno.eu/datas/press_corner/Speeches/DP_Welcome%20speech_FITS ICTskills_workshopNov14.pdf)



## 02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

### g) 11 December 2014: VIP Presentation of the ETNO Annual Economic Report 2014, Brussels

On 11 December ETNO presented its Annual Economic Report, prepared by the digital economy think-tank IDATE. With the launch of the Digital Agenda for Europe, the telecoms sector experienced change beyond any expectation and the digital future of Europe was duly placed as a top priority for the new European Commission. Through figures, the Annual Economic Report 2014 took a look at the evolution of the European telecom markets in 2013, helping to understand the digital world at the time and the role ETNO members played in the markets.

The report was presented by Luigi Gambardella (ETNO Chairman), Daniel Pataki (ETNO Director) and Didier Pouillot (Head of Telecom Economics and Business Modelling Practice, IDATE).

#### Press release:

*"Return to growth in sight, reform is needed to support investments."* 11 December 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/320>

#### ETNO's Annual Economic Report 2014:

[https://www.etno.eu/datas/publications/economic-reports/ETNO\\_Annual\\_Economic\\_Report\\_2014\\_FINAL\\_21012015.pdf](https://www.etno.eu/datas/publications/economic-reports/ETNO_Annual_Economic_Report_2014_FINAL_21012015.pdf)



## 03 ETNO INTERVENTIONS IN EXTERNAL CONFERENCES

### a) 5G Europe Summit. 10 February 2014, Munich

Luigi Gambardella, ETNO's Executive Board Chairman spoke at the 5G Europe Summit, which brought together experts from industry and policy to discuss the main challenges and the business aspects of 5G, the next generation of mobile networks and services. ETNO's Executive Board Chairman opened the panel highlighting the 'opportunities of 5G', emphasising where technology had brought citizens and the changes people had faced due to the mobile revolution – *"I believe that 5G will be part of an exciting picture, in which we build a truly convergent environment, where ultra-fast broadband connectivity is ensured across one integrated fixed-mobile network. Content and other demand-drivers will be a pivotal part of this picture. People will be able to seamlessly access content from wherever they are, from different handsets and access points. On the one hand, this will make it even more convenient for people and businesses to get access to what they need and want. On the other hand, it will create more opportunities for businesses, both in terms of how they distribute and make content available and in terms of how they deliver services, organize work flows and internal processes."*

At the same time Mr Gambardella highlighted the importance of understanding the 'nearness' of the future: *"But all these talks about the future might lead you to think that 5G is still very far from becoming a reality. On the contrary, there are already numbers, commitments and objectives that help us see how this near future is being built today."* In order to achieve the desired future, clear objectives should be set ahead: *"The objective is to achieve a service that is quick enough to download full-length films in a second. Their science ministry said it aims to implement the technology - about 1,000 times faster than the 4G services currently available - within six years."*

The Chairman noted the huge potential of 5G and how it will change lives: *"It will be about those people enjoying new services and starting new businesses thanks to this technology. It will be about the people who will make it happen in our companies, by innovating and working hard on bringing new services to consumers. It will be about us, and our debate in this room today, because we are discussing how to turn a concrete vision into reality."*

**Full Speech:**  
[https://etno.eu/datas/press\\_corner/Speeches/ETNO%E2%80%99S%20CHAIRMAN%20SPEECH%20AT%205G%20EUROPE%20SUMMIT.pdf](https://etno.eu/datas/press_corner/Speeches/ETNO%E2%80%99S%20CHAIRMAN%20SPEECH%20AT%205G%20EUROPE%20SUMMIT.pdf)

### b) The FCC Open Internet Roundtable. 16 September 2014, Washington

On 16 September 2014 ETNO participated in the FCC Open Internet Roundtable to represent European telcos and discuss the scope of US legislation. The very presence of a European trade association at the table reflected the nature of the Open Internet debate, which is global.

The panel discussion on Open Internet Rules gathered the following representatives from different areas of the industry - Jeff Campbell (Vice President, The Americas, Cisco Systems, Inc), Daniel Pataki (Executive Director, European Telecommunications Network Operators' Association), Jon M. Peha (Professor, Engineering & Public Policy, Carnegie Mellon Univ.), Matt Wood (Policy Director, Free Press), Corie Wright (Director of Global Public Policy, Netflix, Inc.), Christopher Yoo (John H. Chestnut Professor of Law, Communication, and Computer & Information Science, Univ. of Pennsylvania Law School).

Mr Pataki made introductory remarks in which he discussed the scope of US legislation stressing the importance of strong commercial ties and regulatory convergence between the two sides of the Atlantic who share a common political objective.

He underlined the high-level principles that ETNO believes should form part of any policy approach to the Open Internet.

The Director underlined the importance of traffic management for the proper, secure and reliable functioning of networks. He explained that specialised services *"are and should remain a key part of the Internet and broadband ecosystem, which has created so much choice and opportunities for all. They should remain outside the scope of the open Internet rules. Any restrictive measures would risk hampering the enriching potential of current and future specialised services."*

**ETNO Director's introductory remarks at the FCC Open Internet Roundtable:**  
[https://etno.eu/datas/press\\_corner/Speeches/ETNO%20Director%E2%80%99s%20Introductory%20Remarks%20-%20The%20FCC%20Open%20Internet%20Roundtable.pdf](https://etno.eu/datas/press_corner/Speeches/ETNO%20Director%E2%80%99s%20Introductory%20Remarks%20-%20The%20FCC%20Open%20Internet%20Roundtable.pdf)

## 03 ETNO INTERVENTIONS IN EXTERNAL CONFERENCES

### c) EU Chamber of Commerce in China, ICT Working Group. 3 November 2014, Beijing

An ETNO delegation, representing the leading telecom operators of Europe, visited China, an important player in the digital economy arena. During the visit, ETNO's Chairman Luigi Gambardella delivered a speech on the "Current Challenges for European telecom operators in a changing market environment", which took place at the EU Chamber of Commerce. The event provided the opportunity to discuss the EU Chamber's Business Report for 2014/15 and specifically its work on ICT.

The Chairman started with by noting the interdependence of Europe and China in the Internet value chain, and the exciting opportunities that could arise through a cooperation of both sides. Mr Gambardella brought the perspectives of European telecoms and shared ETNO's views on how new the European leadership would tackle opportunities and challenges in the field of digital policies. He said "Europe is an exciting market with 500 million citizens, a high average revenue per user and - while some segments are mature already - there is a huge potential for take-up of innovative services and ultrafast broadband networks."

Mr Gambardella mentioned the bold vision European political and business leaders have for the next term to complete the EU internal market for digital networks and services. "This should be of high relevance to all the international players who are looking for investment and growth opportunities in other areas of the world. This vision means that, very soon, you might have one single digital market instead of 28 national ones", - added Gambardella.

The Chairman pointed out that "ETNO has been very supportive of a more streamlined and synchronised

*approach to digital issues. In this context, we also welcomed the clear objective to promote policies that are pro-growth and that are openly streamlined towards achieving greater investments in infrastructures."* Therefore, the main message of ETNO's proposed policy agenda for the next policy term in the EU is the following: The telecom industry can serve as a catalyst for a period of transformation in Europe with landmark projects and substantial investment power: an estimated € 250 billion investment is foreseen over the next five years. Such investments have a multiplying factor of up to 13x and represent a substantial opportunity for Europe that cannot be missed.

The Chairman of ETNO's Executive Board concluded with the following words "ETNO believes that, as the Internet value chain is global, then also the debate about the policies and dynamics that influence such value chain should be global. We are for an open, thriving and diverse Internet, where all voices, all economic actors and all social forces contribute to what has nowadays become the biggest digital platform for prosperity."

**Speech of Luigi Gambardella, ETNO Chairman.** "Current Challenges for European telecoms operators in a changing market environment":  
[https://etno.eu/datas/press\\_corner/Speeches/Current%20Challenges%20for%20European%20telecoms%20operators%20in%20a%20changing%20market%20environment.pdf](https://etno.eu/datas/press_corner/Speeches/Current%20Challenges%20for%20European%20telecoms%20operators%20in%20a%20changing%20market%20environment.pdf)

### d) ECTA Regulatory Conference 2014. 20 November 2014, Brussels

Within the scope of the ECTA Regulatory Conference, ETNO Director General Daniel Pataki gave a speech on "Reforming legacy rules and building a digital EU". He took part in a panel on the revision of the telecom sectorial rules alongside the following speakers - the Chair - Philippe Defraigne (Founding Director, Cullen International), Erzsébet Fitori (Director, ECTA (European Competitive Telecommunications Association), Danielle Jacobs (Chairman, INTUG (the International Telecommunications Users Group), Guillermo Beltrà (Senior Policy Officer, BEUC (the European Consumer Association) and Peter Alexiadis (Partner, Gibson Dunn & Crutcher). Mr Pataki presented ETNO's view on steps that should be taken to promote innovation and investment in infrastructure and services such as speeding up fibre-to-copper transition, achieving stronger & more efficient operators, better reflecting the new competitive environment and achieving a real Telecoms Single Market. Mr Pataki also emphasised the importance of five areas of main focus of current policy framework which would create Europe's Digital Society – powerful infrastructure, a globally competitive EU Industry, digitally enabled companies, end-user benefits and enriched citizenship and welfare.

#### Presentation

"Reforming legacy rules, building a digital EU"

by ETNO DG Daniel Pataki

[https://etno.eu/datas/press\\_corner/Speeches/ETNO\\_Pataki\\_Presentation\\_20112014.pdf](https://etno.eu/datas/press_corner/Speeches/ETNO_Pataki_Presentation_20112014.pdf)

## 04 'THINK DIGITAL' INTERVIEWS

The new and ongoing series of #ThinkDigital interviews launched in 2014, gives ETNO the opportunity to speak to a few essential stakeholders from across the digital value chain. The aim of this series is to gather views from all players on a wide range of topics related to the creation of a modern, smart Digital society capable of competing at a global level and delivering top-notch services to citizens, consumers, governments and businesses alike.

The 2014 #ThinkDigital interviews included opinions on the Connected Continent package, the review of the Telecom Framework, competition, jobs, copyright, demand-side policies, Internet Governance and many others.

All interviews are available on the ETNO #ThinkDigital Blog [www.think-digital.eu](http://www.think-digital.eu)



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

### a) Old world policies must evolve: We need a new approach to the digital era:

Interview with MEP Catherine Trautmann – January 2014

<http://www.think-digital.eu/?n=2014/239>

Leading MEP Catherine Trautmann tells ETNO about her vision for the Next Term. A 360° interview on regulation, competition, Connected Continent and the review of the Framework.

### b) Invest in the jobs of the future, drive demand for ICT:

Interview with Rene Summer, Director of Government & Industry Relations, Ericsson – February 2014

<http://www.think-digital.eu/?n=2014/240>

Rene Summer, tells ETNO about his "Networked Society" vision, and why the debates on jobs, copyright and demand-side policies are all linked.

### c) Adapting to the fast changing environment of digital markets:

Interview with Christoph Steck, Director of Public Policy & Internet, Telefónica – April 2014

<http://www.think-digital.eu/?n=2014/252>

Read what Christoph Steck has to say about the main challenges facing policymakers in today's Digital World and about the debate on Internet Governance.

### d) Let's create regulatory space for innovation and for the evolution of businesses:

Interview with Hélène Barnekow, Senior Vice President and Chief Commercial Officer, TeliaSonera – November 2014

<http://www.think-digital.eu/?n=2014/272>

Hélène Barnekow shares her vision of future market trends and how telcos and policymakers should adapt in a fast-changing environment.

### e) Welcome to the data-hungry world:

A policy-focused read of the Ericsson Mobility Report 2014 – November 2014

<http://www.think-digital.eu/?n=2014/258>

ETNO spoke with Greger Blennerud, who sits on the editorial board of the Mobility Report and is Ericsson's Head of Marketing - Mobile Broadband, and with Peter Olson, Ericsson's Vice-president for EU affairs. SUMMARY: the world will soon be fully mobile, hyper-connected and data-hungry.



## 05 STUDIES AND REPORTS

### a) NTT papers

ETNO prepared four position papers covering key digital issues with the aim of providing a policy roadmap for the next European Commission mandate. Each paper was prepared by an internal task force and contained key policy recommendations on a broad range of topics including the review of the e-communications framework, competition policy, non-strictly economic regulation and a new agenda for the EU Digital Economy. The papers were the basis of ETNO's advocacy work in the run up to the new European Commission. A fifth "umbrella" paper outlined ETNO's overall approach to foster the EU Digital Economy and fed into ETNO's **Agenda for Europe** (see 5.2 of this report), which was published during the FT-ETNO conference on 1 October 2014.

The key goals of these papers were:

- To foster the competitiveness of the EU telecom sector through de-regulation, market concentration and the promotion of a level-playing field
- To develop a Single Market for content and digital services
- To promote interoperability and standardisation
- To ensure trust and security
- To ease uptake of innovative services such as e-health, cloud, m-payments



### b) ETNO's Agenda for Europe: Shaping Europe's Digital Future

We live in extraordinary times. 505 million European citizens are hoping for an economic recovery and a return to growth and prosperity. A new digital strategy for Europe is needed and the European telecoms industry is ready to play its part. For this reason ETNO presented a new vision, based on five key pillars:

- Developing **Powerful Infrastructure** by aligning the regulatory framework to the 3rd investment cycle in 4G and fibre.
- Boosting a **Globally Competitive EU Industry** through an updated competition approach and by ensuring a level-playing field among actors in the digital value chain.
- Supporting **Digitally Enabled Companies** with early incentives for ICT adoption and EU-wide trials in areas as diverse as automation, smart-cities or mobility.
- Increasing **End-user Benefits** with consistent privacy and security rules and by allowing the development of innovative services.
- Promoting **Enriched Citizenship and Welfare** with strong demand-side policies, solid interoperability practices and a focus on digital literacy.
- According to figures developed by the consultancy Arthur D. Little (ADL) in the context of ETNO's Agenda for Europe, a new set of more coherent and supportive policies would help multiply the European telecom sector's five-year investment capacity of EUR 250 billion by an economic multiplier of up to 13 times the initial investment. The value at stake for the digital transformation of Europe would therefore be worth EUR 3.3 trillion in the best case scenario.

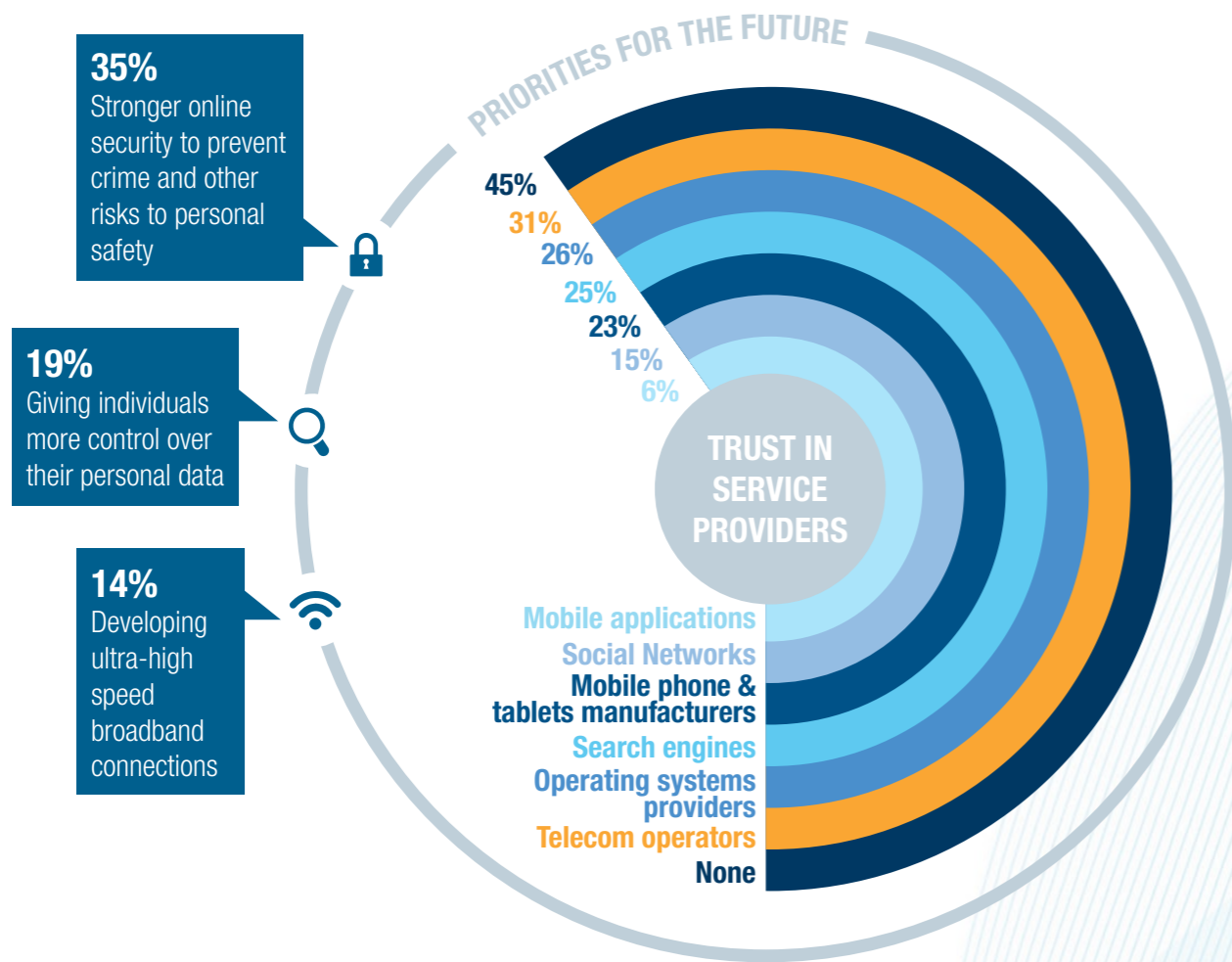
The full version of ETNO's Agenda For Europe is available here:  
[https://www.etno.eu/datas/publications/other/Final\\_ETNO\\_AgendaForEurope\\_Think\\_digital\\_reform\\_prosper.pdf](https://www.etno.eu/datas/publications/other/Final_ETNO_AgendaForEurope_Think_digital_reform_prosper.pdf)



# 05 STUDIES AND REPORTS

## c) ComRes Report

ETNO commissioned the polling & research agency ComRes to explore public attitudes towards digital and mobile communications in Europe with the aim of understanding the priorities of today's modern European telecom consumers. In July 2014, the agency surveyed thousands of consumers across 7 European markets. Participants were asked to express their views on concerns and priorities that should be taken into account by decision makers when designing future digital policies. The survey highlighted that consumers see more security and control over their personal data and higher speed networks as priorities. The below graph gives an overview of the results:



## d) ETNO Annual Economic Report 2014. Prepared by ETNO and IDATE

Through figures, ETNO's Annual Economic Report 2014 looked at the evolution of the European telecom markets in 2013, describing the state of the art for the European telecoms sector at the time, including figures from 2013, as well as projections on 2014 and the coming years.

The year's figures confirmed the trends identified in the past, but opened up to growth prospects as from 2016. The 2014 report also confirmed that the investment gap between Europe and the U.S. was widening.

**ETNO Annual Economic Report 2014.**  
 Prepared by ETNO and IDATE. December 2014.  
[https://www.etno.eu/datas/publications/economic-reports/ETNO\\_Annual\\_Economic\\_Report\\_2014\\_FINAL\\_21012015.pdf](https://www.etno.eu/datas/publications/economic-reports/ETNO_Annual_Economic_Report_2014_FINAL_21012015.pdf)



## 06 PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)



### a) Digital Economy and Society

*"EU telecom operators are ready to build a Smarter Europe - ETNO's open letter to the Greek Presidency of the European Union."*

14 January 2014

<https://etno.eu/news/etno/2014/238>

#### Position Paper:

RD403.

*"ETNO response to the Public Consultation on the review of the EU copyright rules."*

28 February 2014

<https://etno.eu/home/positions-papers/2014/285>

*"Parliamentary vote on the Connected Continent a step in the wrong direction."*

3 April 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/280>

*"New European Commission: ETNO advocates for a stronger European ICT sector."*

10 September 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/295>

*"Telecoms - Return to growth in sight, reform is needed to support investments."*

11 December 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/320>

#### Position Paper:

*"ETNO views on M2M."*

23 July 2014

<https://etno.eu/home/positions-papers/2014/305>

#### Position Paper:

*"ETNO response to the OECD's Public Discussion Draft on the Tax Challenges of the Digital Economy."*

14 April 2014

<https://etno.eu/home/positions-papers/2014/304>

### b) E-Skills, Employment And Good Practices

#### E-SKILLS

*"Joint UNI Europa-ETNO Press Release: Unions and telecom companies launch recommendations on future skills requirements."*

28 November 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/319>

#### GENDER EQUALITY

*"ETNO and UNI Europa sign a Joint Declaration on gender equality." 22 September 2014*

<https://etno.eu/home/press-corner/etno-press-releases/2014/298>

### c) Intellectual Property And Copyright

*"Copyright in the digital age: we need to re-think the current rules."*

5 March 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/269>

#### Position Paper:

*"ETNO views on the EU Commission's Forthcoming White Paper on the Review of EU Copyright Rules."*

31 July 2014

<https://etno.eu/home/positions-papers/2014/297>

#### Position Paper:

*"ETNO Response to Australian Online Copyright Infringement Consultation."*

5 September 2014

<https://etno.eu/home/positions-papers/2014/288>

#### Joint Statement:

*"Intellectual Property Rights Enforcement." 28 October 2014*

<https://etno.eu/home/press-corner/etno-press-releases/2014/315>



## 06 PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)



### d) Internet Governance

*"Europe's leading telcos welcome NTIA announcement."*  
17 March 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/271>

*"NetMundial: promessa de modelo global e inclusivo de governança na internet."*  
23 April 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/283>

*"NetMundial: A unique opportunity to deliver on the promise of a global and inclusive Internet governance model"*  
23 April 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/281>

*"ETNO note on the São Paulo multi-stakeholder statement."*  
24 April 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/286>

*"Internet Governance Forum, ETNO: 'the right place for an inclusive debate'"*  
2 September 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/294>

*"ETNO Statement on today's Council meeting."*  
27 November 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/318>

### e) Naming, Addressing And Numbering

**Position Paper:** RD339.

*"ETNO Reflection Document on 'Draft ECC Report 212: Evolution in the Use of E.212 Mobile Network Codes'."*

3 January 2014

<https://etno.eu/home/positions-papers/2014/280>

**Position Paper:** RD400.

*"ETNO Reflection Document on 'Draft ECC Recommendation (14)03: Charging Principles for National and International Freephone Numbers'."*

31 January 2014

<https://etno.eu/home/positions-papers/2014/281>

**Position Paper:** RD401.

*"ETNO Reflection Document on 'Draft ECC Report 213: Impact of Number Portability between Fixed and Mobile Services'."*

31 January 2014

<https://etno.eu/home/positions-papers/2014/282>

**Position Paper:** CP87.

*"ETNO RESPONSE TO ECC Report 225."*

23 September 2014

<https://etno.eu/home/positions-papers/2014/290>

**Position Paper:** RD406.

*"ETNO response to the ICANN public comment request on the board working group report on nominating committee."*

31 October 2014

<https://etno.eu/home/positions-papers/2014/302>

## 06 PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)

### f) Privacy, Trust And Network Security

*"Trust & security: the cornerstone of a thriving digital value chain."*

28 October 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/314>

#### CHILD PROTECTION

*"Safer Internet Day: Swisscom is expanding its media skills courses by more than 30%."*

10 February 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/263>

*"Safer Internet Day 2014: 'Online child safety must be a common effort'"*

11 February 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/264>

*"Telefónica launches 'Digital Family' platform to create a better internet for children."*

11 February 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/266>

#### DATA PROTECTION

*"One step closer to Europe's future privacy rules: let it be a win-win for citizens and businesses."*

12 March 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/270>

*"Big data: an opportunity to improve quality of life and competitiveness in Europe."*

2 July 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/293>



## 06 PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)



### g) Regulatory Environment

*"Platform-competition era: ETNO calls for reduction of sector-specific regulation."*

26 February 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/268>

*"Relevant markets: New Plum study warns against risks of overregulation."*

26 March 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/272>

**Position Paper:** RD405.

*"ETNO response on BEREC report on Monitoring Quality of Internet Access Services in the context of Net Neutrality."*

30 April 2014

<https://etno.eu/home/positions-papers/2014/296>

*"ETNO at the FCC Open Internet Roundtable: 'Let's talk Future, Innovation and Investments'."*

16 September 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/296>

*"Next Commission Term: 'Let's work together for the trillion-euro opportunity'."*

1 October 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/303>

*"Relevant markets recommendation: positive signals, more ambition needed."*

9 October 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/307>

*"ETNO delegation visits Beijing: EU-China mission on telecoms/digital."*

3 November 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/316>

*"ETNO and Commissioner Oettinger meet to discuss the importance of investments and growth for Europe's digital economy and society."*

18 December 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/321>

*"Joint Industry Statement on the Open Internet Debate."*

2 April 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/276>

*"ETNO Statement in view of the Informal Telecoms Council."*

30 September 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/306>

**Position Paper:** RD402.

*"ETNO Reflection Document on EU-Ecuador Trade Relations."*

31 January 2014

<https://etno.eu/home/positions-papers/2014/283>

**Position Paper:** RD404.

*"ETNO response on BEREC consultation BoR (13) 186."*

7 February 2014

<https://etno.eu/home/positions-papers/2014/284>

*"ETNO Comments regarding the FCC NOTICE OF PROPOSED RULEMAKING."*

15 July 2014

<https://etno.eu/home/positions-papers/2014/287>

*"ITU elects new Chairman and holds Plenipot in South Korea."*

23 October 2014

<https://etno.eu/home/press-corner/etno-press-releases/2014/312>

**Position Paper:** RD407.

*"ETNO Reflection Document on the draft BEREC Strategy 2015-2017 and Work Programme 2015."*

27 October 2014

<https://etno.eu/home/positions-papers/2014/291>

**Position Paper:** RD408.

*"ETNO Reflection Document on BEREC draft guidance on the regulatory accounting approach to the economic replicability test."*

27 October 2014

<https://etno.eu/home/positions-papers/2014/292>

# 07 ETNO WORKING GROUPS 2014

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

In 2014, the WGs focused on identifying new policy goals for the telecoms sector and a vision suitable for the Digital Future of Europe. Their research and input allowed ETNO to continue to provide reliable information at the highest levels, to key policymakers and thought leaders.

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

## ETNO WG Chairs in 2014

**ben** **Benchmarking**  
 Chair: Mr Thierry Denant (Orange)  
<https://www.etno.eu/home/working-groups/benchmarking>

**core** **Corporate Responsibility**  
 Chair: Mr Danilo Riva (Telecom Italia), danilo.riva@telecomitalia.it  
<https://www.etno.eu/home/working-groups/corporate-responsibility>

- Energy Task Force  
 Chair: Mr Griffa Gianluca (Telecom Italia), gianluca.griffa@telecomitalia.it
- Child Protection Task Force  
 Chair: Mr Pedro de Vasconcelos Gonçalves (Portugal Telecom), pedro.v.goncalves@telecom.pt  
<https://www.etno.eu/home/topics/corporate-responsibility/child-protection>

**CMA** **Competitive Markets**  
 Chair: Mr Ralf Nigge, Deputy Director EU Representative Office (Deutsche Telekom)  
<https://www.etno.eu/home/working-groups/digital-infrastructure>

**dpts** **Data Protection, Trust and Security**  
 Chair: Ms Cristina Vela Marimon (Telefonica)  
<https://www.etno.eu/home/working-groups/data-protection-trust-security>

**dsm** **Digital Single Market**  
 Chair: Ms Caterina Bortolini (Telecom Italia)  
<https://www.etno.eu/home/working-groups/digital-single-market>

**ehs** **Employment, Health and Safety**  
 Chair: Ms Nathalie Delacotte, Relations Sociales Internationales & Gestion des ASC Déléguée (Orange)  
<https://www.etno.eu/home/working-groups/employment-health-safety>

**igv** **Internet Governance**  
 Chair: Mr Christoph Steck (Telefonica)  
<https://etno.eu/home/working-groups/international-affairs-and-internet-governance>

**fraud** **Network and Services Security, Fraud and Cybercrime**  
 Chair: Mr Samir Albadine (Orange)  
<https://etno.eu/home/working-groups/network-and-services-security-fraud-and-cybercrime>

**spec** **Spectrum**  
 Spectrum (SPEC)  
 Chair: Mr Massimiliano Simoni, Program & Process Control Senior Specialist Engineer (Telecom Italia)  
<https://www.etno.eu/home/working-groups/spectrum>

**trade** **Special Rapporteur on External Trade Issues**  
 Mr David Frautschy Heredia (Telefonica)  
<https://www.etno.eu/home/working-groups/trade>

**diso** **Digital Society**  
 Chair: Mr Michele Bellavite, Public Affairs - Relations with International Institutions (Telecom Italia)  
<https://www.etno.eu/home/working-groups/digital-economy-and-consumers>

**itu** **International Telecommunication Union**  
 Chair: Mr Dominique Würges (Orange)  
<https://www.etno.eu/home/working-groups/International-Telecommunication-Union>

**nani** **Naming, Addressing and Numbering**  
 Chair: Ms Donatella Chiara, Senior Researcher (Telecom Italia)  
<https://www.etno.eu/home/working-groups/naming-addressing-and-numbering>

**resi** **Research and Innovation**  
 Chair: Pierre-Yves Danet (Orange)  
<https://www.etno.eu/home/working-groups/research-innovation>

**tax** **Tax**  
 Chair: Mr Costanzo Perona (Telecom Italia)  
<https://www.etno.eu/home/working-groups/tax>

### Note

A major plan to strengthen the association and re-organise the WG landscape around the new European Commission priorities was approved in December 2014.

## 08 ETNO ORGANISATION

### General Assembly

- Chair: Kjell Lindström, VP Head of Group Public Affairs (TeliaSonera), [kjell.lindstrom@teliasonera.com](mailto:kjell.lindstrom@teliasonera.com)
- Vice-chair: Janet Zaharieva, Chief Regulatory Advisor to the Managing Board (Vivacom), [janet.zaharieva@vivacom.bg](mailto:janet.zaharieva@vivacom.bg)



### Executive Board

- Chairman: Luigi Gambardella, Vice President, Relations with International Institutions and Organisations (Telecom Italia), [luigi.gambardella@telecomitalia.it](mailto:luigi.gambardella@telecomitalia.it)
- Lotte Abildgaard, Senior advisor, corporate affairs Telenor Denmark (Telenor), [lotte.abildgaard@telenor.com](mailto:lotte.abildgaard@telenor.com)
- Philipp Wolfram, (Telekom Austria Group),
- Carlos Cocina, Head of Brussels Office (Telefonica), [carlos.rcocina@telefonica.com](mailto:carlos.rcocina@telefonica.com)
- Mustafa Aykut, Group Representative (Türk Telekom), [mustafa.aykut@ttmail.com](mailto:mustafa.aykut@ttmail.com)
- Roland Doll, Executive Vice President International Government Relations (Deutsche Telekom), [roland.doll@telekom.de](mailto:roland.doll@telekom.de)
- Luigi Gambardella, Vice-President, Public and Economic Affairs Relations (Telecom Italia), [luigi.gambardella@telecomitalia.it](mailto:luigi.gambardella@telecomitalia.it)
- Vianney Hennes, Head of Brussels Office (Orange), [vianney.hennes@orange.com](mailto:vianney.hennes@orange.com)
- Jos Huigen, Director Regulatory and European Affairs (KPN), [jos.huigen@kpn.com](mailto:jos.huigen@kpn.com)
- Phillip Malloch, Vice-President, Head of Public Affairs – Head of Brussels Representation (TeliaSonera), [phillip.malloch@teliasonera.com](mailto:phillip.malloch@teliasonera.com)
- Marta Neves, Director, Competition and Regulatory Affairs (Portugal Telecom), [marta-m-neves@telecom.pt](mailto:marta-m-neves@telecom.pt)



### Administrative Committee

- Chair: Thomas Müller (Swisscom), [thomas.mueller1@swisscom.com](mailto:thomas.mueller1@swisscom.com)
- Members: Roland Doll (Deutsche Telekom); Vianney Hennes (Orange); Steven Tas (Belgacom), [steven.tas@proximus.com](mailto:steven.tas@proximus.com)
- Permanent Observer: Luigi Gambardella, Vice President, Relations with International Institutions and Organisations (Telecom Italia), [luigi.gambardella@telecomitalia.it](mailto:luigi.gambardella@telecomitalia.it)

## 09 ETNO STAFF



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Director-General  
[pataki@etno.eu](mailto:pataki@etno.eu)



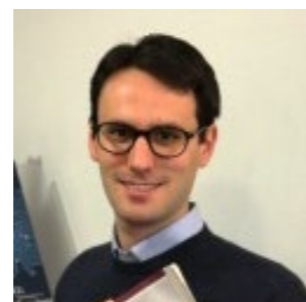
**Caroline Greer,**  
Regulatory and Public Affairs Manager  
[greer@etno.eu](mailto:greer@etno.eu)



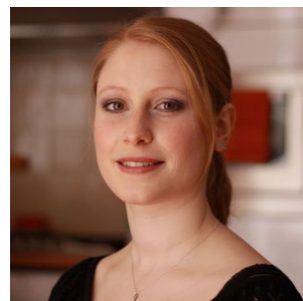
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