

Annual Report 2009

Building the digital society together



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European Telecommunications Network Operators' Association

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ETNO Director's intro to 2009 Annual Report



2009 was a year of transition on both the economic and political fronts. On the political side, the year was marked by the European Parliament elections and the end of the five year term of the Commission.

On the economic side, although our sector has been less hit than others by the overall economic downturn, its performance has been rather weak, similarly to 2008 which showed a revenue and investment decrease for the first time since the beginning of telecoms liberalisation. Large scale investments in high speed broadband networks continue to be timid.

The review of the EU telecoms package was finally completed following a conciliation procedure. Users' rights to privacy and data protection have been at the centre of the political debates, in particular in the Parliament.

Access to legitimate online content has gained increased attention through the Review of the EU Telecoms Package, although this goes beyond its remit. ETNO continued to call for an easier and wider access to legal online content as the best way to fight illegal downloads. This will be a key priority for the next Commission.

A shift in the debate is also noticeable for next generation access networks. Their key role as a driver for growth and social welfare has been highlighted by EU policy makers, as well as the need to define the appropriate regulatory conditions for investment.

While the NGA recommendation was further delayed – waiting for the new Commission to take office – several member states have developed their own approach, showing that a more targeted regulatory intervention can have a significant impact on investment.

Beyond the regulation of new networks, a more in-depth reflection has started in Europe on the changing value chain and the challenges it creates for the financing of the next generation access networks. ETNO is at the forefront of all these debates. As the voice of the leading investors in tomorrow's networks and services, ETNO has contributed with concrete proposals on how to improve incentives for private investment and better targeted regulation.

NGA was at the top of the agenda of the ETNO main flagship event for 2009: its 2nd CEO Summit in Seville hosted by Telefonica. This event gathered more than 20 CEOs of the main telecoms operators and equipment industries. In a joint declaration, they called for a new partnership in order to move Europe into the future and increase its competitiveness on the global scene. The ETNO's call has been echoed widely.

The association continued to expand by welcoming new observer members including Ericsson, Nokia Siemens and NTT Docomo and in early 2010, Alcatel-Lucent. In 2009, ETNO confirmed its position as a constructive and open interlocutor, initiating a dialogue and joint actions with other trade associations, including Cable Europe, EuroISPA and GSMA on key issues for the sector, including net neutrality and internet governance. ETNO also reinforced cooperation with the FTTH Council Europe. 

Achieving the goals set by the new Commission over the next few years and allowing all Europeans to fully benefit from high speed broadband will require the involvement and contribution of all stakeholders – a challenge ETNO is definitely embracing.

*Michael Bartholomew,
ETNO Director*

Introduction by the ETNO 2010 General Assembly Chair



It is always an honour to perform the role of the ETNO General Assembly Chair. I am extraordinarily delighted to act as the Chair because this is the first time when such role is being entrusted to the Telefonica O2 Czech Republic which is hosting the Assembly in Prague next October.

Last year, a predecessor of mine in this role mentioned on the same occasion that there was a combination of key factors which made the 2009 General Assembly a crucial event of that year. Those were, among others, the formation of the new EU political and administrative bodies and the challenges facing the telecommunications industry: i.e. New Generation Networks, convergence of products and services based on revolutionarily new technologies, all of that being surrounded by an economic and financial crisis of a scope which none of us had encountered for decades.

Despite a lot of changes since then, the fundamental challenges remain to be similar for 2010. The crisis has not yet been overcome. It still remains not easy to roll out services of the new generation due to enormous risks of economic as well as of regulatory nature. For ETNO General Assembly participants, these issues become key agenda to be discussed. More than ever before, we need to exchange views and experience on how to cope with customers' needs and regulatory burdens arising from both the EU and national levels.

In 2009, telecommunications regulatory package had been approved in the EU and the new directives are to be implemented in the Member States. The way we have successfully introduced during the consultation process at the EU level should be followed while seeking for best practices among our members. We acknowledge a necessity to harmonize the EU telecommunications markets regulation but it should be done with a respect to the specific characteristics of the national markets. The legislators and regulators still need to be persuaded that no investment can be made when there is no chance of an adequate return of capital.

Yet, the customers' needs must remain to be a pivotal point of our attention. This simple imperative is deeply incorporated in all the ETNO members' attitude from the very beginning of our association's existence. The mission of this year's General Assembly should be simple as well: how to satisfy those needs in a dynamic business and regulatory environment and how to foster a leading position of the ETNO members' companies. This is the only way we can help the businesses to grow and people to exploit opportunities for increasing welfare of all.

I would like to thank all who were working hard in order to that the ETNO family is able to reach those aims in practice, that is, the ETNO Executive Board and to the ETNO Office staff whose efforts will undoubtedly contribute to the success of the Prague's Assembly meeting in October, too. No lesser thanks are due to all the member companies' outstanding people who take part in the ETNO activities in a way which goes far beyond their standard professional duties. Thanks to your efforts, I am personally proud of being this year's speaker of such a prodigious community.

General Assembly Chairman 2010

Jiri Suchman

Director Corporate Affairs

Telefónica O2 Czech Republic, a.s.

EB Chair introduction to ETNO Annual Report 2009



It is an honour for me to have been elected as the new Chairman of the Executive Board of ETNO, the voice of Europe's leading network operators and main investors in tomorrow's infrastructure and services.

More than ever, the role of the telecoms sector as a driver for economic growth and social welfare has been fully recognised. It is one of the key pillars of the EU 2020 strategy. Next generation access networks and services will be the principal engine of the smart and sustainable growth at the centre of the new Commission's priorities.

Through their innovation efforts and new service development, ETNO member companies are demonstrating the direct impact telecoms services can have on people's welfare and quality of life. Public health and education sectors are those that can benefit the most from new technologies. Services already developed by telecoms operators throughout Europe enable citizens in remote areas to benefit from high quality healthcare and access to education. Online educational platforms allow exchanges between experts and teachers as well as students from all over the EU.

ETNO members have been the first to fully integrate broadband applications within their processes in order to increase efficiency and to address environmental constraints. Despite a significant increase in data and mobile traffic, they were able to further reduce their own CO2 emissions by 20% over the past two years. The telecoms sector is an example of how new broadband applications can help achieving a sustainable growth.

For Europeans to fully reap all these benefits and for the EU 2020 Strategy to meet its targets, bold action is needed.

First of all, European telecoms operators are expecting a clear signal about the regulatory approach that will apply to the very high speed wireless and fixed networks they plan to deploy. Rules which were defined for copper-based networks cannot be systematically extended to next generation access networks. They call for a more targeted regulatory approach which takes high investment risks into account.

Secondly, building on the successful projects implemented in Europe, public and private sectors, in particular health and education, must be encouraged to fully integrate broadband applications into their daily processes. The potential of low carbon broadband enabled applications for achieving a reduction of CO2 emissions must be fully exploited.

ETNO will continue to play its role as a constructive interlocutor in the debate by developing balanced views and concrete proposals to achieve these objectives, which are essential for the economic growth of the Europe and the welfare of its citizens and ultimately the competitiveness of the EU on the global scene.

*Chairman Executive Board
Antonio Robalo de Almeida
Inspector General,
Portugal Telecom*

ETNO 2009 HIGHLIGHTS

ETNO CEO Summit – 30 October, Seville

Twenty-five chief executive officers (CEOs) from ETNO members and observers participated in the 2nd ETNO Global CEO Summit. The Summit was opened by César Alierta, Chairman and CEO of Telefonica, Michael Bartholomew, ETNO Director, and Alfredo Sanchez Monteseirin, Mayor of Seville. The first session, moderated by Elaine Weidman, Ericsson Vice President of Sustainability and Corporate Responsibility, focused on the contribution of the ICT sector to sustainability.



The positive impact of ICT services and infrastructures in making society more sustainable and contributing to a significant reduction of CO2 emissions was the theme of the interventions by a first CEO panel which included: Panagis Vourloumis, OTE; Rajeev Suri, Nokia Siemens Networks; Paul Doany, Turk Telekom; and Bernard Moscheni, Vivacom. The second CEO panel discussion, moderated by Luis Enriquez a McKinsey & Company director, was devoted to the next generation access networks and the investments they entail. Panelists included: Franco Bernabè, Telecom Italia; Julio Linares, Chief Operations Officer of Telefonica; Christopher Mattheisen, Magyar Telekom; and Carl-Henric Svanberg, Ericsson. The summit was the occasion of a lively debate with the EU institutions, represented by MEP Pilar del Castillo Vera, Fabio Colasanti, Director General of DG Information Society and Media and Detlef Eckert, Director for the Lisbon Strategy and policies for the Information Society and Media DG. The CEO Summit was closed by Francisco Ros Peran, Spanish Secretary of State for Telecommunications and Information Society.

The "Seville Declaration," endorsed by 37 CEOs, underlined the importance of digital and broadband technologies as "key enablers for growth, productivity and job creation" and called for "a spirit of co-operation between governments and industry similar to that which led to the success of mobile in the 1990s." The Declaration called on EU policy makers to strengthen incentives for risky investments in the forthcoming NGA Recommendation and, at the same time, adopt measures, such as tax incentives, to boost take up by businesses and consumers of low-carbon broadband solutions.

More information:

<http://www.etno.be/Default.aspx?tabid=2172>



General Assembly GA35 – 29 October, Seville

Senior executives of ETNO members from 36 countries were welcomed in Seville by José Fernando de Almansa, Member of Telefonica Board; Pilar Rodriguez, Andalusian Secretary General of Telecommunications and Information Society; and Carlos Lopez Blanco, 2009 GA Chairman. ETNO members elected France Telecom, KPN and Telenor as members of the Executive Board (EB).

The General Assembly also elected Antonio Robalo de Almeida, Portugal Telecom, as the new Chairman of the ETNO Executive Board for 2010, taking over from Alfredo Acebal who served as EB Chairman for the past five years. Karel Helsen, President of the FTTH Council Europe and the ETNO Director formally signed a memorandum of understanding to foster cooperation between the two organisations.



Other highlights of the 35th General Assembly included a presentation by Costanzo Perona, Telecom Italia and Chairman of the ETNO Tax Working Group and an update on the latest U.S. policy developments from Tom Tauke, Verizon Executive Vice-President, Public Affairs, Policy and Communications. Jiri Suchman, Telefonica O2 Czech Republic, was confirmed as 2010 GA Chairman, and the 37th General Assembly will take place in Prague on 21 and 22 October 2010. Mr. Robert Erzin, Telekom Slovenije will hold the Vice-Chairmanship in 2010. Telekomunikacja Polska confirmed that it will hold Vice-Chairmanship in 2011.

Business models for legitimate online content offerings were the main theme of the ETNO Forum, organised after GA35, with representatives from consumer organisations, content providers and telecoms industry. In a joint statement following the GA, ETNO members called on the incoming European Commission to ease access to legitimate online content, as the best way to fight against piracy.

More information:

<http://www.etno.be/Default.aspx?tabid=2208>



ETNO's 2nd High Level Conference, «Connecting Europe in the Digital Age» – 14-15 May, Istanbul

Over 90 representatives from regulatory, strategy and business development departments of ETNO member companies attended the event, hosted by Türk Telekom in the Çıra an Palace Kempinski in Istanbul.

The importance of broadband for the information society and universal service were the main topics. Keynotes were delivered by Türk Telekom CEO Dr. Paul Doany, Dr. Tayfun Acarer, President Information Technologies and Communication Institution of Turkey and the ETNO Director. Speakers included representatives from ETNO members, the European Commission, consultants and academics. The conference gave an overview of the state of play on the deployment of next generation access networks (NGA) in Europe and of the various programmes and initiatives developed at national level in the EU and outside Europe to encourage NGA roll out and bridge the digital divide. Speaking at the conference, several analysts suggested that initiatives to drive demand were more efficient than supply side measures.



The other key topic for discussion was the forthcoming revision of the EU Universal Service Directive and the possible extension of its scope. Outlining its initial draft position on the universal service reform, ETNO underlined that a wider strategy was needed to achieve broadband for all and that other social cohesion instruments would be more appropriate than universal service obligations. Analysts also questioned the current funding by the industry, suggesting that an extension of the scope without a revision of the financial aspects could be counterproductive. The conference was widely covered by Turkish media, highlighting the importance of new high speed broadband networks as a driver of economic recovery.

More information:

<http://www.etno.be/Default.aspx?tabid=2163>



ETNO Cool Connections – 9 December, Brussels

In September 2009, ETNO launched a new campaign highlighting the key role broadband networks and applications can play to achieve a more sustainable society and reduce CO2 emissions. Coinciding with the UN Climate Change Conference in Copenhagen, the campaign culminated with the Cool Connections event, attended by more than 130 stakeholders from the industry, EU institutions, member states and NGOs.

The main milestones of the event were live connections with experts around the world directly working on climate change, including the Princess Elisabeth Station in Antarctica, sponsored by Belgacom, the Swisscom supported Solar Impulse plane project and the Svalbard Telenor research station. Alain Hubert, a well known Polar explorer presented the work of the first polar base that is entirely designed and built as a "zero emission" structure, thanks to the use of ICT. Connected from Switzerland, Michael Guggisberg from Swisscom discussed the technology that will help the first ever zero-fuel plane. Telenor experts, Knut Solid and Vegard Gjerde working in the Arctic, at almost 80 degrees north, gave an account of the crucial value of a high capacity fibre network in collecting and distributing information on oil-spills, changing ocean currents, northern weather, or melting ice.

The connections were followed by a lively panel debate where Fabio Colasanti, Director General, DG Information Society & Media and MEP Jo Leinen, Chairman of the EP Environment Committee, gave further weight to the necessity of including the ICT sector's potential in contributing to sustainable solutions in the fight against climate change. The panel was completed with the contributions of Dennis Pamlin, consultant for WWF on ICT issues, Gee Rittenhouse of Alcatel Lucent, Colum Joyce of IMR World and Danilo Riva, Telecom Italia, Chairman of the ETNO Sustainability Working Group. Danilo Riva insisted on the continuously improving environmental performance of ETNO members and highlighted that over the years, ETNO members have managed to significantly reduce the emissions they generate. The event was followed by the ETNO Annual Reception.

More information:

www.etnocoolconnections.eu



ETNO Workshop on NGA and the Digital Economy – 30 September, Brussels

How to stimulate highly risky investment in NGA while maintaining today's intense competition was the main theme of a workshop held by ETNO. Speakers at the workshop included key officials from the European Commission involved in the drafting of the Recommendation on regulated access to NGA, national regulators, member state permanent representatives to the EU, MEPs, as well as industry representatives and applied economists.

The workshop aimed at presenting the various regulatory approaches developed at national level to encourage risky investments, including examples from France, Spain and Portugal.

Luigi Prosperetti, Chair of Economic Policy at the Faculty of Law of Università degli Studi, Milan and Partner at Luigi Prosperetti & Partners, expressed his views on the inappropriate 'rolling over' of the copper/PSTN-based regulatory regime to NGA. The FTTH Council Europe highlighted Europe's lagging position in terms of deployment of fibre networks compared to Asia and the United States. In a keynote speech, MEP Malcolm Harbour insisted on the need to ensure access to high-speed broadband for all and to shift the policy from the supply-side, i.e., NGA deployment, to demand-side initiatives in order to promote penetration and usage of innovative ICT services.

More information:

<http://www.etno.be/Default.aspx?tabid=2192>



ETNO 2nd Innovation Day – 7 October, Brussels

Next generation services and networks were at the centre of ETNO's second Innovation Day, held in Brussels to mark the publication of ETNO's latest Facts and Figures report. The ETNO report on the state of the sector reported a slowdown in 2008 in terms of revenue growth and investment, due to both economic and regulatory uncertainty.

During the Innovation Day which was conceived as an interactive marketplace, participants from the EU institutions, permanent representations, industry and the press attended demonstrations of new services in fields such as online content, e-health and assistance to disabled, security, mobile platforms, business applications by ETNO member companies including Belgacom, Orange, Portugal Telecom, TDC, Telefonica, Telekom Austria and Telenor. The event was closed by MEP Catherine Trautmann, who underlined that despite the economic uncertainty, innovation remained a key priority for telecoms operators.



More information:

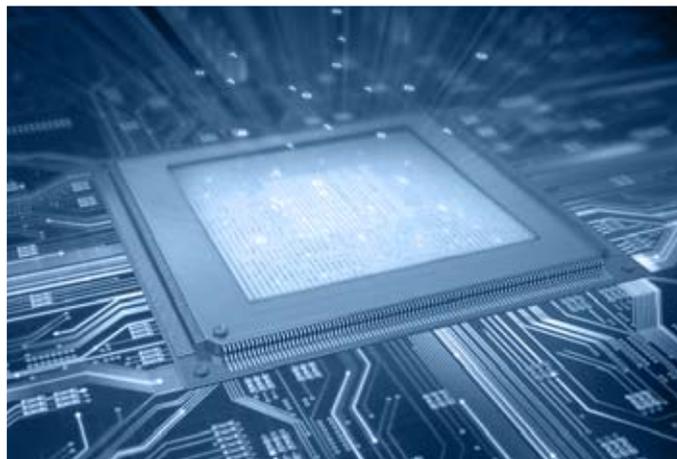
<http://www.etno.be/Default.aspx?tabid=2191>



Main activities of the year

Throughout 2009, ETNO was instrumental in putting next generation access networks (NGA) and their role as a driver of economic growth at the top of the EU policy agenda.

ETNO continued to increase its visibility as a leading interlocutor for EU and international institutions for all policy issues pertaining to the EU information society. ETNO's views on the review of the EU regulatory framework for electronic communications services and networks ('Telecoms Review') and, in particular, its concrete proposals for accelerating the deployment of NGA have been highly echoed in the European and international press and presented at many European and international fora and conferences.



ETNO organised regular meetings with key officials of the European Commission's Directorates General for Information Society & Media, Competition and Enterprise. The association maintained close ties with members of the European Parliament and, in particular, the rapporteurs for the Telecoms Review, providing them with factual and timely information related to the various proposed reforms and amendments.

ETNO worked closely with the Czech and Swedish Presidencies, holding regular meetings and participating in Presidency conferences. During the second half of 2009, ETNO coordinated the preparation of a joint ICT industry contribution to the EU Spanish Presidency, involving all key associations and under the auspices of Mr. Baron Crespo, former President of the European Parliament. The joint ICT industry contribution was officially presented at a meeting hosted by Spanish Secretary of State for Information Society Mr Francisco Ros in January 2010.

1- Post-i2010: Digital Agenda

BACKGROUND:

In August 2009, the European Commission launched a broad consultation of all stakeholders on its post-i2010 strategy. The consultation looked at all key aspects for the sector, stretching from regulation and research to content and quality of life issues. The exercise aimed at identifying the key priorities for the sector and designing the forthcoming EU Digital Agenda to be unveiled in spring 2010 by Neelie Kroes, new EU Digital Agenda Commissioner.



ACTIVITIES:

ETNO actively participated in the post i2010 consultation. Given the broad range of topics addressed, several ETNO working groups were involved, including Regulatory Policy, Sustainability, European Information Society, Research and Development, Content, Data Protection, Internet Governance and e-Inclusion.

In its response to the post-i2010 consultation, ETNO reiterated the key importance of the ICT sector for the economic development of Europe and for the recovery from the economic crisis. For European citizens to fully reap the benefits of broadband services and applications, the deployment of high speed infrastructure must be a key pillar of the forthcoming EU digital agenda. Besides the need to reinforce incentives for private investment in new networks, ETNO also insisted on the importance of creating a truly European single market for online content. ETNO urged the Commission to fully exploit the potential of ICT for achieving a low-carbon economy. ETNO also called on Europe to continue playing a key role in global discussions over the governance of Internet, in line with the current mechanisms and principles, and contributing to a favourable environment for European ICT players active on world markets.

The ETNO Director presented the association's views at a hearing organised by the Information Society and Media DG in September 2009 on 'Priorities for a new Strategy for European Information Society (2010-2015)'.

RD309 - ETNO Reflection Document in reply to the public consultation on post-i2010 - Priorities for new strategy for European information society (2010-2015)

<http://www.etno.be/Default.aspx?tabid=2190>

2- Regulatory environment

2.1 Telecoms Package Review

BACKGROUND

Almost two years after the European Commission presented its initial proposals, the EU co-legislators, the European Parliament and the Council, concluded in November 2009 the 'Telecoms Review,' called officially the Review of the 2003 Regulatory Framework for Electronic Communications, in November 2009.



Following the first reading vote by the European Parliament (EP) plenary in September 2008 and the adoption of a common position under the French Presidency in November 2008, the year 2009 was marked by the efforts of the European Parliament, the Czech Presidency (representing the Council of Ministers) and the European Commission to reach a second reading agreement for the adoption of the EU regulation and three directives of the Telecoms Review. Although the main aspects of the Review, including the creation of the Body of European Regulators for Electronic Communications (BEREC) and new provisions regarding NGA investments were approved, the second reading agreement was rejected by MEPs during their plenary vote in May. The major stumbling block was the so-called "Amendment 46/138" on possible restrictions to Internet access, leading to the opening of a conciliation procedure and delaying the adoption of the revised directives. As a result of the conciliation process, a final agreement on the only remaining issue was reached in November and the package was finally voted by the European Parliament that same month, marking the end of the review process. The revised EU Regulatory Framework is to be transposed by end-May 2011. The Regulation establishing BEREC entered into force upon its publication in the Official Journal in early-2010 and does not require any transposition into national law.

ACTIVITIES

ETNO closely followed the trilogue negotiation process aimed at reaching a second reading compromise. Throughout this process, ETNO insisted on the need for the final agreement to reflect the new provisions introduced by the EP in order to reinforce incentives for private investments in NGA.

ETNO welcomed the agreement reached by all the parties on the main aspects of the Review, in particular on instruments to facilitate investment in NGA. Following the 2nd reading vote, ETNO members called on the parties not to create further uncertainty by reopening the issues already agreed upon and focusing the conciliation only on the issue of Amendment 46/138. ETNO insisted that the agreement on the latter should fully respect users' fundamental rights by ensuring that no action can be taken against a consumer outside of a judicial procedure.

ETNO Reaction to the EP 2nd Reading Vote:
<http://www.etno.be/Default.aspx?tabid=2149>

In November 2009, ETNO welcomed the final agreement reached by the EP rapporteurs, the European Commission and the Swedish  the only remaining issue and the adoption of the package by the EP Plenary.

"With today's vote approved by a large majority, the European Parliament has confirmed the importance of the telecoms sector for the economy and society as well as the need to reinforce users' rights and legal certainty. Today's vote also highlights the necessity to encourage large scale private investment in high-speed broadband access networks for the full benefit of consumers", said Michael Bartholomew, ETNO Director.

ETNO welcomed the inclusion in the revised package of new provisions that have the potential to reinforce incentives for all players to invest while at the same time maintaining today's lively competition. These provisions include the adaptation of regulatory interventions within a national market to the degree of competition in different geographic areas and new mechanisms for investors and access seekers to share investment risks. ETNO called on the three institutions to ensure that these new instruments are fully translated into regulatory practice mainly through the forthcoming NGA Recommendation of the European Commission.

ETNO, however, reiterated its concern about the inclusion of the new and relatively untested remedy of functional separation in the package. This remedy is not appropriate to today's lively competitive markets and adds uncertainty in a climate of economic downturn and at a time when the sector is facing highly risky investments, warned ETNO.

ETNO reaction following the adoption of the package:

<http://www.etno.be/Default.aspx?tabid=2202>

Besides close contacts with all stakeholders involved, ETNO also continued to voice its positions on the review through various EU and international fora (see ETNO events and interventions at external conferences). Moreover, ETNO took an active role in a new task force round table launched by the Centre for European Policy Studies (CEPS) on the second reading of the Review.

2.2 Next Generation Access Networks

BACKGROUND

NGA and the investments they entail have been intrinsically linked to the Telecoms Review, although they were not addressed in the initial 2007 Commission proposals. The European Council of March 2009 sent a strong signal that investments in new and innovative infrastructure need to be promoted through cooperative agreements between investors and access seeking parties to diversify the risk, while maintaining strong competition. The need to reinforce investment incentives by allowing a more targeted regulatory approach and enabling investors and access seekers to better share the risks, in line with the provisions introduced by the EP, was reflected in the final agreement on the package. In parallel to the Review, a Commission Recommendation on regulated access to NGA was announced in order to ensure a consistent regulatory approach throughout the EU. After a first consultation in 2008, the Commission issued a second draft and launched a new consultation in June 2009. The Recommendation is expected in 2010.

ACTIVITIES

NGA remained an underlying theme of ETNO events and activities and an ongoing priority for its regulatory policy working group. The key role of high speed broadband networks and applications for the economic recovery were fully embraced. Similarly, there was an increasing recognition by EU and national policy makers that regulation imposed for copper networks need to be adapted for NGA in order to reflect the new market realities and the high risks involved. The regulatory approach to NGA was the main theme of an ETNO Workshop on NGA and the digital economy. ETNO called for the new provisions introduced in the Telecoms Review to be fully reflected in the forthcoming Commission Recommendation. The association also closely followed the approaches developed by several member states. Echoing the EP proposals, several member states, including Spain, Portugal, the UK and Finland, took into account the various degrees of competition within their respective national markets and adapted regulation accordingly. Greater emphasis was given to symmetric obligations for opening up ducts, which represent a major part of the deployment cost.

ETNO regretted, however, that the second draft version of the Recommendation did not incorporate these new provisions. On the contrary, it foresees a systematic transposition of current access obligations to new high speed networks. ETNO called for a more proportionate regulation focused on the real bottlenecks instead of ensuring that all forms of access are made available in parallel and provided at cost-based prices. ETNO argued that strict cost-based pricing for regulated access products would undermine the NGA investment case. In line with the principle of technological neutrality, the Recommendation should give operators enough flexibility to opt for the technology and network architectures which are more adapted to market needs. The Recommendation should encourage wherever possible commercial agreements between investors and access seekers in order to share risks.

ETNO reaction to the second draft Commission Recommendation on NGA

<http://www.etno.be/Default.aspx?tabid=2157>

ETNO response to the public consultation on the second draft Commission Recommendation on NGA:

<http://www.etno.be/Default.aspx?tabid=2174>

CEO Seville Declaration focusing on NGA



2.3 Net neutrality

BACKGROUND

New provisions were included in the revised EU Regulatory Framework to increase transparency in customers' contracts and give additional powers to national regulatory authorities in case of distortion of competition while guaranteeing the ability of operators to manage networks and traffic.

ACTIVITIES

Jointly with other associations, such as Cable Europe and GSMA, and other key industry players, ETNO campaigned with policy makers across the EU institutions on the need for an open internet. An open internet is not in contradiction with the need for operators to manage traffic. Consumers will increasingly benefit from new innovative applications – in areas such as e-health or assistance to elderly – which require resilience and a guaranteed quality of service. In an 'NGA world' and in the context of continuously increasing data traffic, the ability of operators to manage traffic is essential to ensure an optimal consumer experience. ETNO and the other stakeholders believe that current rules are sufficient to avoid any distortion of competition. Any attempt to set a minimum quality of service or to limit network management risks on the contrary to deter innovation and hamper the business model for NGA.

2.4 Other regulatory initiatives

Throughout the year, ETNO closely monitored the notification of market analyses by national regulators as well as the work of the European Regulators' Group (ERG). For example, ETNO responded to the ERG public consultation on Internet Protocol (IP) interconnection. ETNO considers premature any regulatory intervention for future charging mechanisms for IP interconnection, such as the mandatory 'Bill and Keep' regime. Such a regime would not encourage investment and would negatively impact consumers.

RD312 - Reflection Document on Bill & Keep for IP interconnection charging:

<http://www.etno.be/Default.aspx?tabid=2206>

Fixed and mobile termination rates continued to be a priority for the European Commission. Although ETNO welcomed the recommended end of asymmetric termination rates within the fixed and mobile sectors respectively, the association warned against a drastic change in the methodology for calculating termination rates. In light of the consistent reduction of mobile termination rates and retail tariffs over the past five years, there was no justification for a drastic overhaul of termination rates, said ETNO.

ETNO expressed concerns about the impact of a rapid and drastic reduction of the mobile termination rates on the industry's capacity to invest as well as on low spending customers, using mainly pre-paid cards.

ETNO reaction to the Commission proposal regarding fixed and mobile termination rates:

<http://www.etno.be/Default.aspx?tabid=2150>

3. Broadband for all

BACKGROUND

Providing universal coverage of basic broadband to all Europeans has become a key policy objective to be harnessed by the new Commission. Although on average 93% of European households have access to broadband, this rate falls to 77% in rural and remote areas with strong divergences between countries, particularly in the new member states. Bridging the digital divide is one of the key objectives of the EU spectrum policy. Although an in-depth review of the universal service regime was not included in the Telecoms Review, the Commission announced a consultation on universal service, launched early 2010.



ACTIVITIES

How to bridge the digital divide was the main theme of an ETNO high level conference hosted by Turk Telekom in May 2009, entitled "Connecting Europe in the Digital Age" (Link). ETNO reiterated its view that achieving broadband for all requires a mix of supply- and demand- side policy measures. On this occasion, ETNO explored the different national broadband policies, underlining that demand side programmes are often more efficient in driving broadband take up. ETNO expressed doubts that the universal service regime would be the best instrument to achieve this objective and before any extension of its scope called for an in-depth review of its concept, designation process and funding.

ETNO also closely followed and welcomed the publication by the European Commission of guidelines on the use of state aid for broadband networks in September 2009.

"The European Commission confirms that investment in high speed broadband access networks should be primarily driven by the private sector. Today's guidelines enable public authorities to play their role in supporting network deployment, while setting clear safeguards to avoid crowding out private investment", said Michael Bartholomew, ETNO Director.

ETNO reaction on the EC Guidelines on the use of State Aid for broadband:
<http://www.etno.be/Default.aspx?tabid=2176>

4. Privacy, cyber-crime and network security

4.1 Network security

BACKGROUND

Consumer confidence has always been a key priority for ETNO members, who are committed to continuously investing in the security of their networks, well beyond existing regulatory requirements. Network security is often considered as a quality differentiation. ETNO members are also including features in all their new offerings aiming at improving protection of minors. Reinforcing consumer confidence was a key priority during the Review of the EU Telecoms Package.



ACTIVITIES

ETNO shared the European Commission's objectives to increase users' confidence in networks and services, as a key condition to foster broadband take up. Systematic notification of security failures, including those which did not put personal data at risk, would, however, lead to increased confusion instead of more confidence.

ETNO participated in the EU consultation on strengthened network and information security policy in Europe. New mandatory security levels are not necessary, it argued. Due to rapid technological changes, industry self-regulation is best suited to address security challenges. However, ETNO supports a legal coordination and a common approach at the international level against countries that tolerate illegal activities against network and information security.

ETNO response to the EC Public Consultation "Towards a Strengthened Network and Information Security Policy in Europe":

<http://www.etno.be/Default.aspx?tabid=2132>

4.2 Data protection

BACKGROUND

EU citizens benefit from high level standards of privacy and data protection, which are clearly established by the existing EU legislation and with which ETNO members fully comply.

Activities

In its response to the EC public consultation launched in December 2009 on the legal framework for data protection, ETNO underlined the high level of data protection provided in the EU. Jointly with other trade associations, including GSMA and Cable Europe, ETNO called for a better harmonisation of national legislation across member states and their more effective implementation, rather than modifying the current obligations. ETNO also called for a 'level playing field' for all entities that run websites and services targeting European citizens, regardless of whether the operator is established within the EU.

ETNO position on the Data Protection Framework:

<http://www.etno.be/Default.aspx?tabid=2212>

4.3 Data retention

BACKGROUND

March 2009 was the transposition deadline for all provisions of the EU Data Retention Directive, as the derogation granted to member states for the implementation of provisions related to Internet data expired. By the end of 2009, however, nine member states had still not fully transposed the Directive into national law.

ACTIVITIES

ETNO actively followed the transposition process in the EU 27 to ensure that the discretion of member states, e.g., in fixing the type of data to be retained or the storage period, would not create new barriers to the provision of pan-European services.

ETNO continued to closely participate in the expert group set up by the European Commission and in the meetings with member states to discuss technical and practical problems linked to the implementation process. The group adopted a series of industry position papers on issues such as web mail, third party networks and service providers' role. Other topics, such as Voice over IP, centralised data storage, port numbers, are also being discussed.

In view of the evaluation of the Data Retention Directive, ETNO issued a joint statement together with other associations including Cable Europe, EuroIPSA, and GSMA to highlight the economic impact of the obligations, the lack of EU harmonisation in the implementation process and to raise doubts about the effectiveness of the measures. ETNO will continue to closely monitor the evaluation process of the Directive.

ETNO also participated in the EC Conference on Public Private Dialogue to fight online illegal activities. The aim of this conference was to reinforce the dialogue between the public and private sectors within the EU. ETNO gave a joint presentation together with EuroISPA to forward the industry's position. The platform will work on developing a European voluntary agreement model between all participants. ETNO will continue to participate and closely monitor the work of the platform.

4.4 Fraud Control and Network Security

BACKGROUND

It is generally accepted that about 3% to 8% of total revenue can be expected to be lost due to fraud or crime. Those most at risk are the new start-up companies and nations whose telecom infrastructures are undergoing de-regulation and change. There is no single universal remedy to solve the problem of fraud against telecommunications operators. This presents communication operators world wide with a challenge to remain ahead of the fraudster, wherever this can be achieved, similar to virus protection software companies.

ACTIVITIES

The primary aim of ETNO Fraud working group is to provide a framework for exchange of experience and development of industry best practice in the domain of fraud prevention and control. Its main activity is to disseminate information related to fraud and security incidents in order to assist in identifying such incidents and developing analysis and monitoring techniques to improve prevention and control.

At the same time, ETNO is analysing and studying the process of risk management and the development by its members of awareness plans for revenue assurance. The careful introduction of how to handle competitive intelligence on fraud, information security and infrastructure protection matters is another target to be reached.

In 2010 attention will be paid to international revenue sharing fraud, mainly to those cases with an origin in mobile networks. This is particularly important since the unified network platform presents a new challenge for addressing the needs of network and security functions and fraud prevention.

Fraud prevention and control activities are undertaken in close cooperation with other organisations such as ITU, ETSI, FIINA and GSMA.

5- Distribution and production of online content services

BACKGROUND

Ensuring a truly single market for legitimate online content, as a key driver for growth, is a key priority for the new Commission. Despite persisting barriers, such as the lack of harmonisation of data protection laws, licensing and VAT regimes, ETNO members are developing legitimate online offers which are increasingly taken up by consumers.

ACTIVITIES

Although the debate was dominated by the introduction of new initiatives in several member states to fight against piracy, ETNO maintained that the best way to counter piracy is through educational campaigns and a wide availability of legitimate content offerings.

In 2009, ETNO launched a new web site giving an overview of legitimate online offers developed by its members throughout Europe, from IPTV to video on demand and legal music downloads. This new web site is part of the ETNO members' commitment to promote a legitimate use of the Internet and fight against illicit filesharing.

More information:

<http://www.etno.be/Default.aspx?tabid=2086>

ETNO is actively participating in a multi-stakeholders dialogue launched by Directorate General for Internal Market and Services on illegal downloads. The meetings have addressed various issues, such as educational and awareness campaigns and the diverging legal frameworks throughout the EU. The work of the platform will continue until July 2010.

ETNO also closely followed the negotiation process of the Anti-Counterfeiting Trade Agreement (ACTA) between the EU, the United States and other trading partners. The association raised strong concerns about the scope of the agreement (mixing piracy and counterfeiting in general), the possible introduction of the "graduated response" and changes to the liability concepts enshrined in EU law (mere conduit principle). ETNO also called for more transparency in the process in order to ensure a balanced outcome and involving ~~X~~ all the relevant stakeholders.

EC 104 - ETNO position on the ACTA negotiations:

<http://www.etno.be/Default.aspx?tabid=2209>

As regards online single market and in the framework of the new digital agenda, ETNO also called on the new Commission for a simplification and harmonisation of the licensing system for online content in Europe. ETNO supports the promotion of competition between collecting societies as well as multi-territorial licences for all types of content. Facilitating the development of legitimate online content offerings was also the main theme of the ETNO Forum at its 35th General Assembly in Seville (Link).

RD 315 - EC Reflection Document on Creative Content

<http://www.etno.be/Default.aspx?tabid=2217>

RD 305 - Online Commerce Roundtable Conclusions consultation

<http://www.etno.be/Default.aspx?tabid=2166>



6- Tax issues

Through its Tax Issues Working Group, ETNO closely followed developments in indirect and direct taxation which impact on business models and operations of its members. In recent years, a major priority for ETNO has been the review of the EU Value Added Tax (VAT) package, which entered into force on January 1, 2010.

The revised package generalises the rule according to which business-to-business cross-border services are now subject to VAT in the customer's country, which was already the rule for telecoms services since many years. However, the introduction of the VAT package raised some concerns, such as the complexity of new compliance requirements and the discretion of member states to implement a "use and enjoyment" rule as a possible derogation to the default place-of- supply rules.

Via the working group, ETNO called for a better harmonisation of VAT regimes. The different interpretations by member states of the nature of some services and related agreements lead to cases of double taxation. ETNO also looked into VAT rules discrepancies regarding the treatment of prepaid cards.

ETNO has also been increasingly monitoring the proposed introduction by several member states of additional taxes on the telecoms sector to either fund broadband deployment or compensate for the suppression or reduction of advertising on national broadcasting networks. 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.



7- Fair Management of Resources

7.1 Frequency Management

The changes in spectrum management and in particular the opening up of the UHF spectrum band to electronic communications networks as a result of the switchover from analogue to digital television was a major focus of the Review. ETNO regretted that the potential of the 'digital dividend' to facilitate the deployment of broadband in rural and high-cost areas has not been fully embraced. Accordingly, it is working to achieve a greater harmonisation of spectrum allocation.



Through its Frequency Management Working Group, ETNO closely followed the work of the CEPT and the EU Radio Spectrum Policy Group. The association actively participated in the preparation for the forthcoming ITU World Radiocommunications Conference which will take place in 2012.

RD306 - ETNO response to the RSPG public consultation related to the draft Opinion on the coordination of EU spectrum interest: Preparation of ITU World Radio Communication Conference of 2012:

<http://www.etno.be/Default.aspx?tabid=2170>

RD318 - ETNO response to the RSPG public consultation related to the draft RSPG 2010 Work Programme:

<http://www.etno.be/Default.aspx?tabid=2224>

RD322 - ETNO Reflection Document on the first Radio Spectrum Policy Programme

<http://www.etno.be/Default.aspx?tabid=2239>

Further activities covered other aspects of spectrum management, focusing on the protection and improvement of frequency bands and applications for ETNO members.

RD314 - ETNO Reflection Document on draft RSPG report on Cognitive Technologies

<http://www.etno.be/Default.aspx?tabid=2213>

RD316 - ETNO Reflection Document on a possible revision of the 18 GHz band regulatory framework in Europe

<http://www.etno.be/Default.aspx?tabid=2218>

7.2 Naming, Addressing and Numbering

The exhaustion of IPv4 addresses remained a key issue for ETNO's Naming, Addressing and Numbering working group. Based on its previously developed views with regards to IPv4 address exhaustion, ETNO agreed on a further set of principles to be considered when developing a RIPE policy on the use of the last IPv4 /8 address space. These principles aim at enabling both a fair and equitable use of the last IPv4 /8 address space and a flexible approach with regards to its management.

EC100 - Expert Contribution on the Principles for the use of the last IPv4 /8 address space in the RIPE NCC Region:

<http://www.etno.be/Default.aspx?tabid=2137>

ETNO also continued addressing issues relative to telephony numbering, in particular the implementation of the EC decision to reserve the 116 number range for pan-European services of social value:

CP084 - ETNO Common Position on the ECC draft Decision on "Reserving the National SMS Numbering Range beginning with '116' for Harmonised SMS Numbers for Harmonised Services of Social Value":

<http://www.etno.be/Default.aspx?tabid=2179>

EC101 - Expert Contribution on issues relating to numbering resources used for Services of Social Importance:

<http://www.etno.be/Default.aspx?tabid=2138>

~~*CP084 - ETNO Common Position on the ECC draft Decision on "Reserving the National SMS Numbering Range beginning with '116' for Harmonised SMS Numbers for Harmonised Services of Social Value"*~~

ETNO also monitored issues related to Calling Line Identification (CLI) and Originating Identity (OI) at European and ITU level.

RD308 ETNO contribution to the ECC consultation "Increasing trust in Calling Line Identification and Originating Identification"

<http://www.etno.be/Default.aspx?tabid=2180>

EC102 Comments on Draft ITU e.cpnd Recommendation

8- Research and Development

The organisation of the European Research Area was one of major topics of interest for ETNO's R&D Working Group. To ensure that the needs of the market will be reflected through the different instruments (7th EU Framework Programme for Research and Development (FP7), Eureka clusters, EIT) ETNO responded to the consultation launched by the European Commission in September 2009 on simplifying the implementation of the EU Framework Programmes. The ETNO R&D working group also contributed to the ETNO global answer to the public consultation on «post i-2010» in October 2009.



Specific attention was given to the fourth call (March 2009) and fifth call (October 2009) for proposals under the FP7 as well as to ITEA-2 and Celtic Calls in 2009.

The R&D working group also followed the development of a Public Private Partnership on Future Internet, the pursuit of the Celtic programme for three years and the work of the European Technology Platforms.

9- Global Dimension

9.1 World trade issues

BACKGROUND

During 2009, the Doha Round of negotiation for the World Trade Organization (WTO) made little or no progress, forcing the EU to concentrate its trade efforts on negotiating bilateral deals. Evidence of this is the closing of the agreement with Korea and negotiations with the Andean and Central-American countries, which might be completed during 2010. The European Commission has also pursued negotiations with India and launched first talks with Singapore and Canada. On a separate matter, through its External Trade Issues and Content Working Groups, ETNO followed the developments of the ongoing negotiations on the Anti-Counterfeiting Treaty Agreement (ACTA) which risks affecting the liability limitations of intermediaries ([link](#)).



The Lisbon Treaty entered into force in January 2010. The Treaty introduced major changes for the EU with respect to trade policy. The Commission increases its responsibilities, having exclusive competence now on trade in services, trade issues related to intellectual property and foreign direct investments. The powers of the European Parliament in trade matters are also enhanced. The European Parliament will now have to give its consent to all trade agreements. Test cases for the European Parliament's new powers in 2010 will be the Free Trade Agreements (FTAs) with Korea and Colombia, as well as ACTA. All of them seem to have generated a controversial debate for their own reasons.

ACTIVITIES

While ETNO shares many of the European Parliament's serious concerns about ACTA, it considers the Korea and Colombia FTAs as important steps towards similar bilateral and regional agreements with other important trading partners of the EU where ETNO members have strong interest.

ETNO also has been following several cases of protectionist measures, ruled by some EU's major trade partners, which seem resulting from the current economic crisis and that might put foreign direct investments into trouble.

9.2 The ITU

ACTIVITIES *com*

Following the 2008 World Telecom Standardisation Assembly (WTSA), 2009 was considered as a year of transition for current ITU activities. The main event of 2009 was the extraordinary meeting of the World Telecom Policy Forum (WTPF 09), attended by many ETNO members.

WTPF 09 adopted six non-binding opinions which will serve as the basis of ongoing policy-making and technical standardisation efforts within ITU and at a broader international level. These opinions cover many ICT policy issues such as: internet-related public policy matters, the implications of the advent of next-generation networks (NGNs) and advanced broadband access, ICT and the environment, collaborative strategies for creating confidence and security in the use of ICTs, capacity building in support of the adoption of IPV6 and International Telecommunication Regulations (ITRs).

Key representatives of ETNO member companies were also invited to express the industry view in a strategic dialogue on the evolution and impact of the financial and economic crisis on the telecommunications sector.

Through its ITU Working Group, ETNO focused on the outcomes of the WTSA, with physical meetings during Telecom Standardisation Advisory groups. Members agreed in particular to support work on ICTs and climate change and shared common concerns and action in support of manufacturers on the controversial ITU-mark programme (conformance and interoperability testing). Other collaboration concerned the preparation, in conjunction with the coordination of European administrations organised by CEPT, of the 2010 ITU key events: World Telecommunications Development Conference and Plenipotentiary Conference.

9.3 Internet Governance

ICANN

In view of the expiration of the Joint Project Agreement between ICANN and the US Department of Commerce in September 2009, ETNO actively participated in the consultation organised by the National Telecommunications and Information Administration (NTIA) on the future of ICANN. ETNO renewed its support to the transition of ICANN towards a fully independent and fully privatised organisation, accountable to all stakeholders, by the expiration of the Joint Project Agreement (JPA). Together with EuroISPA and GSMA, ETNO issued a joint statement reiterating that the private-sector led multi-stakeholder model on which ICANN is built should be preserved and enforced, as a key factor of the success of the Internet. ETNO, EuroISPA and GSMA warned against an oversight function over ICANN by governments only. Following the expiration of the JPA in September 2009, ETNO welcomed the Affirmation of Commitments which reinforces the independence of ICANN and establishes stronger accountability and transparency mechanisms.

ETNO, EuroISPA and GSMA Joint Statement - Europe's e-communications providers call on the EU to ensure a truly multi-stakeholder model for ICANN:

<http://www.etno.be/Default.aspx?tabid=2165>

RD303 - ETNO Reflection Document in response to the National Telecommunications and Information Administration of the US Department of Commerce Inquiry, on the Assessment of the Transition of the Technical Coordination and Management of the Internet's Domain Name and Addressing System:

<http://www.etno.be/Default.aspx?tabid=2155>

RD302 - ETNO Reflection Document in response to the «Implementation Plan for Improving Institutional Confidence» presented by the ICANN President's Strategy Committee:

<http://www.etno.be/Default.aspx?tabid=2154>

INTERNET GOVERNANCE FORUM

As with the previous meetings of the Internet Governance Forum (IGF), ETNO played an active role in the preparatory work and in the meeting of the 4th Internet Governance Forum held in Sharm El Sheikh in November 2009, entitled "Creating Opportunities for All". At the end of its initial mandate of five years, the IGF is subject to a review as foreseen by the conclusions of the World Summit on Information Society (WSIS) held in Tunis in 2005. ETNO called for the IGF to pursue its role of promoting a dialogue on Internet Governance. ETNO also insisted that the success of the IGF relies on the multi-stakeholder and non-binding principles that need to be maintained and strengthened. ETNO began actively preparing its participation in the 5th IGF meeting to take place in September 2010 in Vilnius.

RD301 - ETNO Reflection Document on the draft Programme, Format and Schedule for the 2009 IGF meeting:

<http://www.etno.be/Default.aspx?tabid=2153>

RD299 - ETNO Reflection Document on Taking stock of the Hyderabad meeting and the way forward, as well as on the Review of the IGF:

<http://www.etno.be/Default.aspx?tabid=2135>

10-Socially Responsible Management

10.1 Environment and Sustainability

The progress made by ETNO Sustainability Charter signatories is well documented in the 2009 ETNO Sustainability Report: care for the environment, fair management of resources, CO2 emission reduction, attention to company's employees welfare in terms of work-life balance, safety in the workplace and opportunities for their professional careers.

The Charter continues to represent a widely recognised, meaningful commitment by industry. The number of Signatories increased in 2009, totalling now 22, following the addition of OTE and EPT Luxembourg.



The Sustainability Working Group has been addressing threats and opportunities that ICT products and services are bringing to make sure that the enabling potential of e-communications is fully exploited with maximum advantage for all stakeholders.

Energy efficiency in ICT operations and wide and smart ~~x~~ use of ICT to increase energy efficiency in other industry sectors, as well as CO2 emissions reduction, are strategic targets which are called for by a recommendation issued by the European Commission in October 2009. ETNO will take part in the work of the ICT for Energy Efficiency (ICT4EE) Forum that has been launched by the industry to respond to such a challenge.

The ETNO Energy Task Force is particularly active in identifying the most cost efficient practices to optimise network and end-user equipment energy consumption. ~~x~~It has, for example, contributed to the development of both the codes of conduct on Broadband Equipment and Data Centres promoted by the EC Joint Research Centre.

Click here to consult the 2009 Sustainability Report <http://www.etno.be/Default.aspx?tabid=1925>
and for more information on ETNO Sustainability activities:

10.2 Social Dialogue

ETNO worked actively with UNI during the year on different issues towards a dynamic social dialogue. The main focus was the project "Good Work Good Health" partially funded by the European Commission. This project will facilitate the dissemination of good practices in the telecoms sector regarding mental health at work.

Social dialogue was also focused on the future jobs in the sector as skills are evolving very quickly.

UNI and ETNO met four times under the umbrella of the European Commission in the Social Dialogue Committee. Those meetings were fruitful and helped to develop a better understanding of the changes in the telecom sector. Corporate Social Responsibility (CSR), skills and training were the main topics of those meetings.

ETNO Interventions in external conferences and events

Brussels, 20 January
CEPS Task Force
Brussels, 21 January
Liberty Global Seminar
Brussels, 29 January
Implementation and communication of 116000: the European telephone number for missing children - Round table
Brussels, 26 March
IIC Telecommunications and Media Forum (Session NGN)
Prague, 15 and 16 April
Future Europe: Modern Communications for Everyone, High-Level Seminar on e-Communications
London, 22 April
Facilitating the roll out of next generation access networks, VIB conference
Brussels, 26 May
Broadband policy in the 21st century: A Transatlantic Perspective, Session 1 Broadband and IT in the broader economy - CEPS
Munich, 9 June
FTTx Summit
Auckland -NZ, 24 June
10th Annual Telecommunications & ICT Summit
Brussels, 25 June
ECTA Conference
Paris, 8 September
Broadband World Forum Europe
Amsterdam, 2 October
European Regulatory Framework and Next Generation Access Networks, Experian International Telecom Forum
Brussels, 13 October
2nd Annual Next Generation Telecommunications conference
London, 17-18 November
Broadband Traffic Management Conference

ETNO Positions

January 2009 - EC099

ETNO Expert Contribution in reply to the Public consultation "Towards a Strengthened Network and Information Security Policy in Europe"

<http://www.etno.be/Default.aspx?tabid=2132>

January 2009 - RD298

ETNO Reflection Document on the "Questionnaire for the Call for Input in the fundamental review of Commission Decision 2005/050/EC on automotive Short-Range Radar"

<http://www.etno.be/Default.aspx?tabid=2133>

February 2009 - RD299

ETNO Reflection Document on Taking stock of the Hyderabad meeting and the way forward, as well as on the Review of the IGF

<http://www.etno.be/Default.aspx?tabid=2135>

February 2009 - EC100

Expert Contribution on the Principles for the use of the last IPv4 /8 address space in the RIPE NCC Region

<http://www.etno.be/Default.aspx?tabid=2137>

February 2009 - EC101

Expert Contribution on issues relating to numbering resources used for Services of Social Importance

<http://www.etno.be/Default.aspx?tabid=2138>

April 2009 - RD300

ETNO Reflection Document with strong support for FDD as the sole channelling arrangement in 790 - 862 MHz

<http://www.etno.be/Default.aspx?tabid=2147>

May 2009 - RD301

ETNO Reflection Document on the draft Programme, Format and Schedule for the 2009 IGF meeting

<http://www.etno.be/Default.aspx?tabid=2153>

May 2009 - RD302

ETNO Reflection Document in response to the "Implementation Plan for Improving Institutional Confidence" presented by the ICANN President's Strategy Committee

<http://www.etno.be/Default.aspx?tabid=2154>

June 2009 - RD303

ETNO Reflection Document in response to the National Telecommunications and Information Administration of the US Department of Commerce Inquiry , on the Assessment of the Transition of the Technical Coordination and Management of the Internet's Domain Name and Addressing System

<http://www.etno.be/Default.aspx?tabid=2155>

June 2009 - RD304

ETNO Reflection Document on the draft "Community Guidelines for the application of State aid rules to rapid deployment of broadband networks"

<http://www.etno.be/Default.aspx?tabid=2159>

June 2009 - RD305

ETNO Reflection Document on the Online Commerce Roundtable Conclusions consultation

<http://www.etno.be/Default.aspx?tabid=2166>

July 2009 - RD306

ETNO response to the RSPG public consultation related to the draft Opinion on the coordination of EU spectrum interest: Preparation of ITU World Radio Communication Conference of 2011

<http://www.etno.be/Default.aspx?tabid=2170>

July 2009 - RD307

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

<http://www.etno.be/Default.aspx?tabid=2174>

July 2009 - RD308

ETNO contribution to the ECC consultation "Increasing trust in Calling Line Identification and Originating Identification"

<http://www.etno.be/Default.aspx?tabid=2180>

September 2009 - CP084

ETNO Common Position on the ECC draft Decision on "Reserving the National SMS Numbering Range Beginning with '116' for Harmonised SMS Numbers for Harmonised Services of Social Value"

<http://www.etno.be/Default.aspx?tabid=2179>

October 2009 - RD309

ETNO Reflection Document in reply to the public consultation on post-i2010 - Priorities for new strategy for European information society (2010-2015)

<http://www.etno.be/Default.aspx?tabid=2190>

November 2009 - RD310

ETNO Reflection Document on the ERG Draft 2010 Work Programme

<http://www.etno.be/Default.aspx?tabid=2200>

December 2009 - RD311

ETNO Reflection Document with Comments - In the Matter of Broadband Study Conducted by the Berkman Center for Internet and Society – NBP Public Notice #13

<http://www.etno.be/Default.aspx?tabid=2203>

December 2009 - RD312

Reflection Document on Bill & Keep for IP interconnection charging

<http://www.etno.be/Default.aspx?tabid=2206>

December 2009 - EC104

ETNO Expert Contribution on the on-going ACTA negotiations

<http://www.etno.be/Default.aspx?tabid=2209>

December 2009 - RD313

ETNO Reflection Document on the EC Public Consultation on the Framework Data Protection Directive

<http://www.etno.be/Default.aspx?tabid=2212>

December 2009 - RD314

ETNO Reflection Document on draft RSPG report on Cognitive Technologies

<http://www.etno.be/Default.aspx?tabid=2213>

ETNO Presentation

ETNO has been the voice of Europe's telecommunications network operators since 1992. Its 41 members in 35 countries collectively account for a turnover of more than € 270 billion and one million employees.

ETNO members also hold new entrant positions outside their national markets. ETNO brings together the main investors in innovative and high-quality e-communications platforms and services, representing 70% of total sector investment.

ETNO closely contributes to shaping the best regulatory and commercial environment for its members to continue rolling out innovative and high quality services and platforms for the benefit of European consumers and businesses.

ETNO Working groups

(as of march 2010)

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

ETNO organisation

GENERAL ASSEMBLY

Chair:	Jiri Suchman	Telefonica O2
Vice-chair:	Robert Erzin	Telekom Slovenije

EXECUTIVE BOARD

Chair:	Antonio Robalo	Portugal Telecom	3
Members:	Alfredo Acebal	Telefonica	7
	Steven Tas	Belgacom	10
	Roland Doll	Deutsche Telekom	9
	Patrick Galvin	Eircom	1
	Pierre-Antoine Badoz (Alternate of Vianney Hennes)	France Telecom - Orange	5
	Jos Juigen	KPN	11
	Luigi Gambardella	Telecom Italia	8
	Lotte Abildgaard	Telenor	4
	Wilfried Stratil	Telekom Austria	6
	Kaisu Karvala	TeliaSonera	2



ADMINISTRATIVE COMMITTEE

Chair:	Thomas Müller	Swisscom
Members:	Alfredo Acebal	Telefonica
	Luigi Gambardella	Telecom Italia
	Roland Doll	Deutsche Telekom
Observer:	Antonio Robalo de Almeida	Portugal Telecom

ETNO staff

	Director	Michael Bartholomew	2
	Executive Manager Operations	Josef Leonard Debecker	5
	Senior Adviser, Public Affairs	Fiona Taylor	1
	Regulatory Affairs Manager	Victoria Gerus	3
	Communications Manager	Thierry Dieu	7
	HR & Financial Officer	Anne Vallès	6
	Assistant to the Director	Isabelle Claeys	8
	Secretary	Joanna Fliszewska	4



ETNO members

