



DIGITAL REFORM

for the user of the future

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01 ETNO INTRODUCTION

2015 will be remembered as the year in which a historic reform process was launched, engaging all stakeholders in Europe - civil society, institutions, and businesses - to support the European Commission in making the Digital Single Market a reality.

After being elected and appointed in the second half of 2014, the new members of the European Commission and the European Parliament began developing their narratives and strategies. One of the main focuses of 2015 was the Digital Single Market Strategy, published by the Commission in May 2015. This flagship initiative set the policy roadmap for the whole term and possibly also beyond, placing digital policy as a top priority for the mandate.

In this context, ETNO, the Association representing Europe's leading telecom operators, consolidated its position as a key interlocutor in the competitive Brussels' telecom and digital policy environment, providing timely input at all levels. The association advocated for a thorough reform of the regulatory framework to ensure a stronger, more inclusive digital single market, which would allow space for innovation and investment in high-speed broadband.

During the first European Commission consultation on how to create a Digital Single Market, ETNO was the only telecom association to put forward a full position paper to guide policymakers. Its presence as a credible voice was reinforced with the publication of various studies prepared by trusted consultancies including Charles Rivers Associates, DLA Piper, ComRes, IDATE as well as a second BCG study, which provided Five Priorities for Achieving Europe's Digital Single Market.

Throughout 2015, ETNO continued to provide space for open discussion among stakeholders, joining forces with other leading European associations in the tech, business and car manufacturing industries to deliver joint statements, press releases and responses to consultations as well as for closed-door one-to-one meetings and public debates. In the summer of 2015, ETNO invited leading tech associations for an open discussion on the main strengths and weaknesses of the Digital Single Market Strategy and to deliberate the next steps to bring it to life. Three large-scale events co-organised with leading news outlets MLex, the Financial Times and Politico also provided an essential platform for dialogue among key decision-makers and industry.

Building on the connections made in previous years, ETNO maintained its role as a constructive player at a global policy level, co-organising a joint workshop with the US counterpart US telecom in Washington DC to further lead the transatlantic debate.

ETNO would like to thank its valued Members for their help and assistance throughout 2015. The year marked a new start for Europe and as digital policies and regulation embarked on the road to change forever, we were left with the question 'will it be make or break for digital Europe?'





02 ETNO EVENTS AND NETWORKING OPPORTUNITIES

a) 18 March: Let's get the Fibre Rolling



#ETNO4Fibre

Presentation of the Charles River Associates report on "Economic Replicability Testing for NGA"

The Charles River Associates report on "Economic Replicability Testing for NGA" came in the wake of the implementation of the 2013 European Commission Recommendation on non-discrimination and costing methodologies, which includes an Economic Replicability Test (ERT) for NGA services.

The event provided the occasion to discuss with high-level stakeholders on EU policies incentivising fibre roll-out.

See section 5.a for more details on the report.

Speakers:

Steven Tas, ETNO Executive Board Chairman

Anthony Whelan, Director, Electronic Communications Networks and Services, DG CONNECT, European Commission

Geoff Edwards, Vice-President, Charles River Associates

Annegret Groebel, Director International Relations/Postal Regulation, BNetzA, Co-Chair of the BEREC Regulatory Accounting Working Group

Jos Huigen, Director of Public and Regulatory Affairs, KPN

Reinald Krueger, Head of Regulatory Coordination and Markets Unit, DG CONNECT, European Commission

MORE INFORMATION

Read the Press Release here: <https://etno.eu/news/etno/2015/619>

Read the speech of the ETNO Executive Board Chairman here:
https://etno.eu/datas/press_corner/speeches/ST_Speech_18032015.pdf

Download the report here: https://etno.eu/datas/publications/studies/FinalCRAreport_18032015.pdf

b) 22 April: Breakfast debate – Europe's new digital policies: Where should the focus be? Brussels



#Thinkdigital

A #ThinkDigital debate co-hosted by MEP Gunnar Hökmark and ETNO

In the run up to the presentation of the Digital Single Market Strategy on 6 May, ETNO co-organised a #ThinkDigital breakfast debate with MEP Hökmark to ask stakeholders from across the Digital ecosystem what they believe should be prioritised in the EU in the near future.

Key stakeholders discussed upcoming digital policies under the new European Commission, with a particular regard to the European Parliament viewpoint on the way ahead for digital.

The debate focused on issues such as spectrum policies, as well as the overhaul of the current regulatory framework for telecoms.

Speakers:

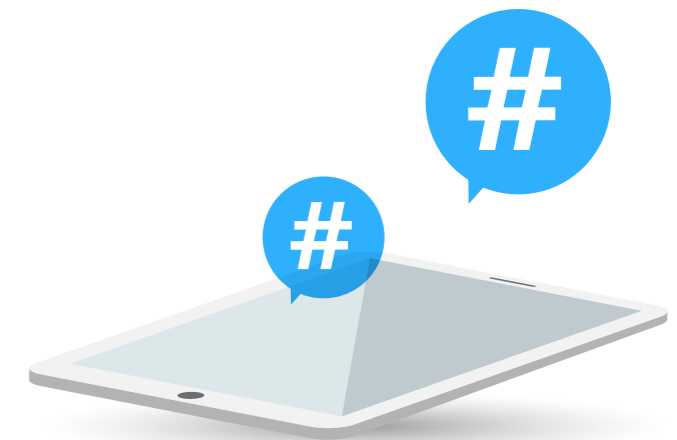
Michał Boni, Member of the European Parliament

Gunnar Hökmark, Member of the European Parliament

Gregory Pankert, Partner, Arthur D. Little

Steven Tas, ETNO Executive Board Chairman

Caroline van Weede, Managing Director, Cable Europe



MORE INFORMATION

Read a summary of the event here: <http://www.think-digital.eu/?n=2015/281>



c) 28 April: Increasing Broadband Investment and Innovation - Views from Both Sides of the Atlantic, Washington, DC

This joint workshop co-organised by US Telecom and ETNO featured two separate panel discussions and looked into industry on both sides of the Atlantic in the context of the move to next-generation fibre and IP networks and to secure the right policy environment to speed this process. The first panel provided perspectives on fostering broadband deployment, while the second focused on approaches to privacy, data protection and data flows.

Keynote speakers:

Walter McCormick, President and CEO, USTelecom

Steven Tas, Chair, European Telecommunications Network Operators' Association (ETNO)

Moderators:

Howard Buskirk, Associate Managing Editor, Communications Daily

Brian Beary, Washington Correspondent, Europolitics

Panellists:

Jeffrey Campbell, Vice President, The Americas, Global Government Affairs, Cisco

Peter Davidson, Senior Vice President - Federal Government Relations, Verizon

Heather Burnett Gold, President, Fiber-to-the-Home Council North America

Vianney Hennes, Director European Public Affairs, Orange

Robert Shapiro, Co-Founder and Chairman, Sonecon, LLC

Genie Barton, Vice President and Director, Online Behavioral Advertising Program and Mobile Marketing Initiatives, Council of Better Business Bureaus, Inc.

Carlos Rodríguez Cocina, Director and Head of Brussels Representation, Telefónica

Andrea Glorioso, Diplomatic Counselor, Digital Economy for the Delegation of the European Union to USA

MORE INFORMATION

Read the speech of the ETNO Executive Board Chair here:

https://etno.eu/datas/press_corner/speeches/SpeakingPoints_ST_28Apr_UST_ETNO.pdf

Read the press release here: <https://etno.eu/news/etno/2015/622>





d) 23 June: ETNO-MLex Regulatory Summit, Brussels



#ETNOMLex

In the wake of the presentation of the Digital Single Market Strategy, business leaders, regulators and policymakers gathered at the ETNO-MLex Regulatory Summit to discuss the digital priorities for 2015.

ETNO once again partnered with MLex, the leading provider of insight, analysis and commentary to regulation and competition specialists in Europe, the US, Brazil and China.

In its fourth successful year, the Summit created a platform for up to 200 high-level delegates, representing telecom operators, the EU institutions, regulators, academics, investors and other industry stakeholders, to discuss key EU regulatory issues.

The event's high level panels focused on two main aspects:

- An in-depth debate on how the rules of the current regulatory framework should be re-defined in light of today's competitive landscape.
- A general overview and assessment of the regulatory and policy initiatives of the new European Commission – with a specific regard to competition in the digital value chain at large.

Keynote speakers:

Fátima Barros, Chair 2015, Body of European Regulators for Electronic Communications (BEREC) and Chair of ANACOM's Management Board

Sébastien Soriano, Chairman, ARCEP – Autorité de régulation des communications électroniques et des postes

Steven Tas, ETNO Executive Board Chairman

Roberto Viola, Deputy Director-General, DG CNECT, European Commission

Panellists:

Jonas Bengtsson, Group General Counsel, Senior Vice President, TeliaSonera

Theo Bertram, Google Public Policy Manager, EMEA, Google

Eric Debroeck, Senior Vice President, Group regulatory affairs, Orange

Alexandre de Streel, Professor, Namur University and Research Fellow, Centre on Regulation in Europe (CERRE)

Roland Doll, Vice President European Affairs, Deutsche Telekom

Manuel Kohnstamm, Chief Policy Officer, Liberty Global

Enrique Medina Malo, Chief Policy Officer, Telefónica

Eduardo Martínez Rivero, Head of Unit, DG COMP, Antitrust – Telecoms, European Commission

Mark Shurmer, Group Director Regulatory Affairs, BT

Pastora Valero, Senior Director, Government Affairs EMEAR, Cisco

Moderator: Magnus Franklin, Chief Telecoms Correspondent, Mlex



MORE INFORMATION

Watch videos from the event here:

<https://etno.eu/home/news-room/pictures-videos/etno-mlex-regulatory-summit-2015-videos>

Find event photos here: <https://www.etno.eu/home/news-room/pictures-videos/etno-mlex-2015-photos>

Read the speech of the ETNO Executive Board Chairman here:

[https://www.etno.eu/datas/press_corner/speeches/Steven%20Tas_ETNOMLexSpeech_Final\(jm\).pdf](https://www.etno.eu/datas/press_corner/speeches/Steven%20Tas_ETNOMLexSpeech_Final(jm).pdf)

e) 14 July: ETNO #ThinkDigital Summer Debate -
The Association Pitch, Brussels



#Thinkdigital

A Midsummer Night's Debate on the Digital Single Market

Before the summer break, ETNO invited Brussels' leading tech associations for an open discussion on how they see the Digital Single Market Strategy and the next steps to bring it to life. The event attempted to answer the following questions:

- How can trade associations help to make the Digital Single Market a reality?
- Do they agree with the priorities set by policymakers?
- What's the first assessment on the main strengths and weaknesses of the Strategy?

Keynote speakers:

Steven Tas, Executive Board Chairman, ETNO

Georges Friden, Deputy Permanent Representative of Luxembourg to the EU

Panellists:

Ursula Pachi, Deputy Director General, BEUC

Caroline van Weede, Managing Director, Cable Europe

Jakob Kucharczyk, Director, CCIA Europe

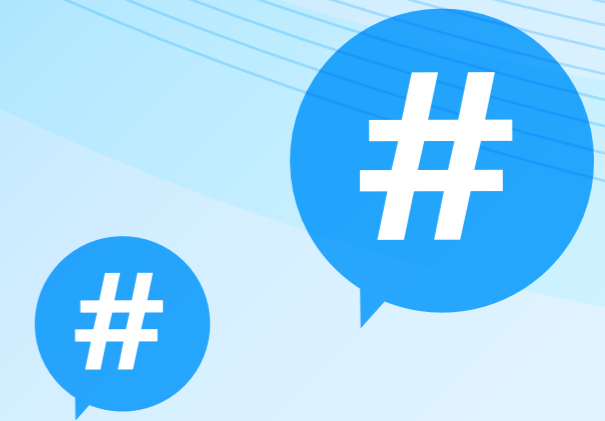
Peter Olson, President, Digital Europe

Erzsébet Fitori, Director, ECTA

Laszlo Toth, Senior Director, GSMA

Moderator:

Ryan Heath, Associate Editor, Politico Europe



f) 13 October: FT-ETNO Summit 2015, Brussels



#Thinkdigital

Policies and Regulation in the Digital Age: The New Wave

The FT-ETNO Summit took place in Brussels in October. For its 6th successful year the Summit brought together thought leaders, top policymakers, business executives, regulators and investors for a collective discussion about what it will take to ensure European telecoms can flourish and achieve global competitiveness.

Topics under discussion included the following questions:

- Does the telecoms industry require liberalisation from rules that are – arguably – no longer fit for purpose in the digital age?
- Do we need a fresh approach to competition to restore Europe's competitiveness on the global stage?
- Which new business models will guarantee on-going innovation, growth and jobs creation?
- How can we better align EU policies to investment cycles in superfast broadband deployment?
- What measures will boost investment in next-generation infrastructure?
- What are the key opportunities and risks for those investing in the EU's digital economy?

During the FT-ETNO, ETNO unveiled a new BCG study *"Five Priorities for Achieving Europe's Digital Single Market"* (https://etno.eu/datas/publications/studies/FINAL_BCG-Five-Priorities-Europes-Digital-Single-Market-Oct-2015.pdf)

 [For a summary of this report go to section 5^o of this report.](#)

To obtain a printed copy of the study, please write to info@etno.eu.



Opening Keynote:

Professor Jean Tirole, Chairman, Toulouse School of Economics and Winner, 2014 Nobel Prize for Economics

Keynote speakers:

Andrus Ansip, Vice-President for the Digital Single Market, European Commission
Wolfgang Bock, Senior Partner and Managing Director, The Boston Consulting Group
Günther Oettinger, Commissioner for Digital Economy and Society, European Commission
Dan Thomas, Telecoms Editor, Financial Times
Steven Tas, Executive Board Chairman, ETNO

Executive Panel: New business models, rulemaking and free enterprise:

César Alierta, Executive Chairman and CEO, Telefónica
Carlo D'Asaro Biondo, President EMEA, Strategic Relationships, Google
Mike Fries, President and CEO, Liberty Global
Stéphane Richard, Chairman and CEO, Orange

Executive Panel: Broadband, the next investment wave and EU policies:

Timotheus Höttges, CEO, Deutsche Telekom
Dominique Leroy, CEO, Proximus
Guo Ping, Deputy Chairman of the Board and Rotating CEO, Huawei Technologies
Giuseppe Recchi, Executive Chairman, Telecom Italia
Rajeev Suri, President and CEO, Nokia

Investor Panel: European telecom markets - the sovereign funds and investor view:

Maggie Fanari, Director - Relationship Investing EMEA, Ontario Teachers' Pension Plan
Warren Low, European Portfolio Manager, Universities Superannuation Scheme (USS)
Henrik Nyblom, Equity Analyst, Schroders Investment Management
Roger Wilkinson, Investment Leader, Global Research, Newton Investment Management

Moderator:

Stephen Howard, Head, Global TMT Research, HSBC

MORE INFORMATION

On the occasion of the event, ETNO hosted its second CEO committee. Read the press release here:
<https://etno.eu/news/etno/2015/825>

Speech of the ETNO Executive Board Chairman at the FT-ETNO Conference:
https://etno.eu/datas/press_corner/speeches/SpeechETNOChairman_FT-ETNO_2015_Web.pdf



Keynote Speakers:

Luis Neves, Board Chairman, GeSI / Group Climate Change and Sustainability Officer, Executive Vice President, Deutsche Telekom
Danilo Riva, Chair of ETNO's Corporate Responsibility Working Group / Sustainability Manager, Telecom Italia
Steven Tas, Executive Board Chairman, ETNO / Director Regulatory Affairs, Proximus
André Weidenhaupt, First Counsellor, Ministry of Sustainable Development and Infrastructure, Luxembourg Government

Speakers:

Philipp Buddemeier, Director, Sustainability Services, Accenture Strategy
Henrik Dam, Policy Officer, Research and Innovation, Energy Efficiency, DG ENER, European Commission
Jos Delbeke, Director General, DG CLIMA, European Commission
Andrew Lewis, Chief Sustainability Architect, Fujitsu Global
Hermann Meyer, CEO, ERTICO – ITS Europe
Eduardo Puig, Director Stakeholder Engagement and Corporate Reporting, Telefonica
Marco van Gelder, The New Life & Work Programme Manager, KPN

Moderator:

Dave Keating, Journalist

g) 28 October: Driving our Sustainable Future through ICT - A joint ETNO-GeSI event, Brussels



#ETNOGeSI

“Sustainability is not only about reducing carbon footprint, it encompasses a wider set of benefits related to improving people’s quality of life and creating growth.”

This event analysed the role of information and communication technologies (ICT) in enabling greenhouse gas reductions and resilience building across all sectors, with insights into how current markets will change, and what new services will be needed.

Leading experts and decision-makers discussed the environmental and societal benefits of ICT-based solutions as well as their market potential against the backdrop of a global deal on climate action at the UN climate conference (UNFCCC COP21) in Paris at the end of the year.

The event was also an opportunity for ETNO to publish its Climate Change Report “Looking Forward to COP21”:

https://etno.eu/datas/publications/brochures/corporate%20responsibility/RAPPORT-BOOKLET-FINAL_WEB.pdf



MORE INFORMATION

Read a summary of the event here:

http://gesi.org/blog/2015/10/29/Driving_a_sustainable_future_through_ICT/



h) 5 November: ETNO #ThinkDigital Debate: Special General Assembly Edition, Sofia



#ThinkDigitalGA

Keynote speakers:

Valery Borissov, Deputy Minister of Transport and Communications, Bulgaria
Eva Paunova, Member of the European Parliament
Anthony Whelan, Director, DG Connect

Panel 1: Broadband deployment & the growth of the digital ecosystem:

Valery Borissov, Deputy Minister of Transport and Communications, Bulgaria
Adrian Whitchurch, Vice President for European Affairs, BT
Tiziana Talevi, Director Regulatory Affairs, Fastweb
Matthias Kurth, Executive Chairman, Cable Europe
Marta Neves, Head of Regulation, PT Portugal

Panel 2: Policy and regulation in the age of online platforms:

Steven Tas, Executive Board Chair, ETNO
Carlos Rodriguez Cocina, Director & Head of Brussels Office, Telefonica
Fabrizio Porrino, VP Global Public Affairs, FacilityLive Founding member of the European Tech Alliance
Steve Conlon, Economic Officer, US Mission to the EU

Moderator:

Frances Robinson, Journalist





i) 8 December: The Industrial Internet Era



#IndustriNetEra

The first event in the Politico Digital Single Market series was sponsored by ETNO.

Welcome to the Industrial Internet era: The event looked into how the Internet has transformed service industries, from taxis to take-out and how it is about to hit the heavyweights: manufacturing, energy, transportation... By connecting machines to people and to other machines, the Industrial Internet of Things (IoT) will revolutionise factories, business models and the workforce, bringing productivity and efficiency to unseen levels. But the road to the factories of the future is a long one, as companies face security and data protection risks, weak interoperability and uncertain return on investments.



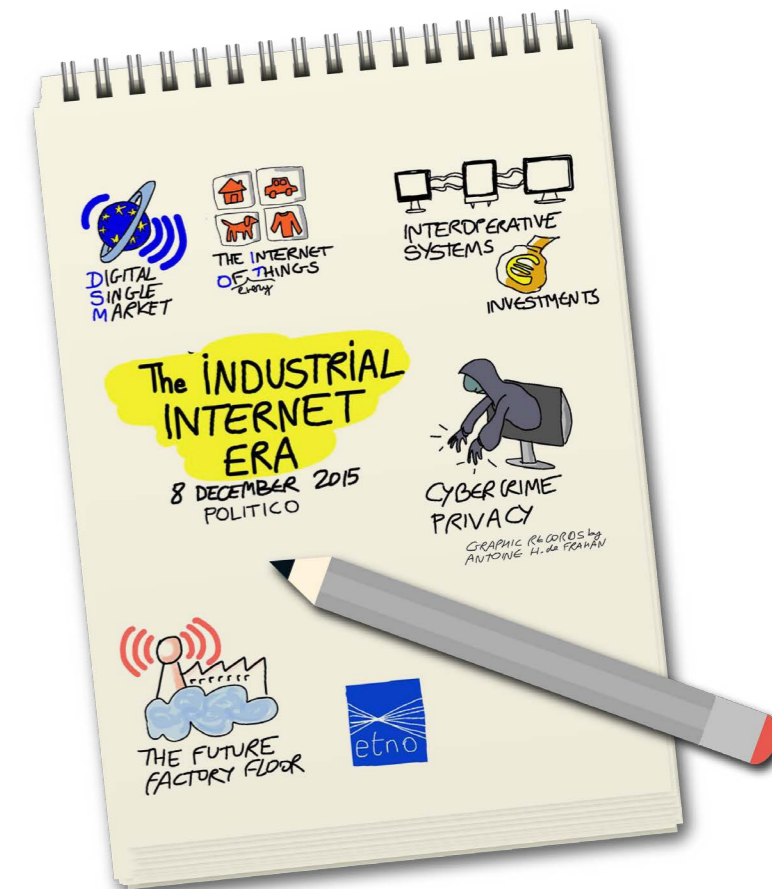
Speakers at the event attempted to answer the following questions: How can the Digital Single Market spur the development of the Industrial Internet? What incentives can policymakers create to encourage its adoption? Can the Industrial Internet deliver on its promise to turn Europe's traditional industries around? What will the impact on the workforce be?

Speakers:

- Michał Boni**, MEP, European Parliament
- Laure Chapuis**, Member of the private office of Andrus Ansip, the European Commission Vice-President for the Digital Single Market
- Christina Colclough**, Head of EU Affairs, UNI Europa
- Niels Haverkorn**, Vice President Vision 2020, Volvo Construction Equipment
- Kamil Kiljański**, Chief Economist — Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, European Commission
- Guillaume Mellier**, Deputy Director for Mobile Access and Equipment Manufacturer Relations, ARCEP
- Eva Paunova MEP**, Member of the Committee on the Internal Market and Consumer Protection, European Parliament
- Pablo Pfost**, Director of Corporate Regulatory Affairs, Telefónica
- Steve Purser**, Head of Core Operations Department, European Network Information Security Agency
- Egbert-Jan Sol**, Chief Technology Officer, TNO Industry
- Zoran Stančić**, Deputy Director General, DG Connect, European Commission
- Steven Tas**, Executive Board Chair, ETNO
- Wojciech Wiewiórowski**, Assistant European Data Protection Supervisor, European Data Protection Supervisor (EDPS)

Moderators:

- Noelle Knox**, News Editor, Technology, POLITICO
- Zoya Sheftalovich**, Reporter, POLITICO



MORE INFORMATION

Watch the event videos: <http://www.politico.eu/event/the-industrial-internet-era/>

A summary of the event can be found on the ETNO #ThinkDigital blog: <http://www.think-digital.eu/?n=2015/838>

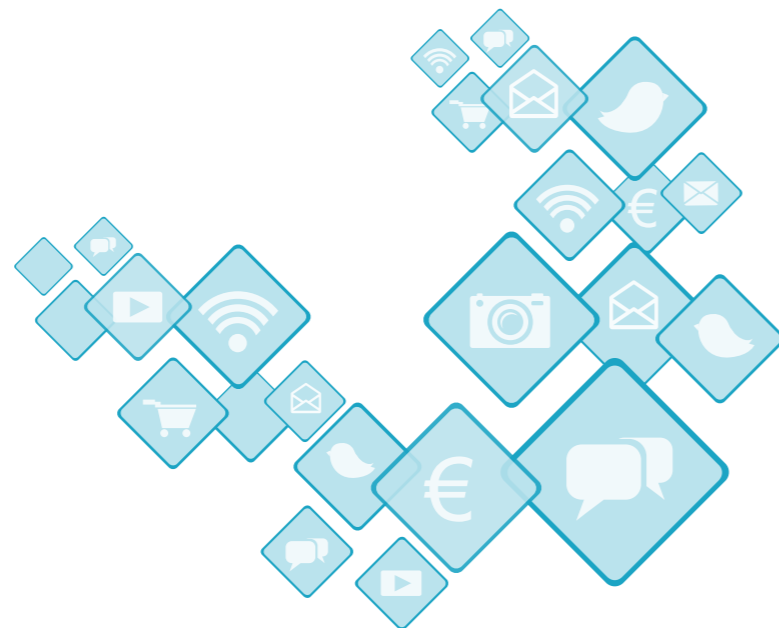
j) 9 December: VIP Presentation of the ETNO Annual Economic Report 2015, Brussels

On 9 December, ETNO presented its Annual Economic Report, prepared by IDATE Digiworld, the leading telecoms researcher. Experts discussed the latest data on the European telecoms sector, including consolidated figures from 2014, as well as projections for 2015 and the coming years. The telecom industry is instrumental to accelerating the implementation of a European Digital Society and with market outlook gradually improving, the planned telecom reform would really make the difference. Read the figures that indicated a positive shift in the sector with an enthusiastic take-up of mobile and data services, app-hungry consumers and telcos embracing new business areas such as M2M and Cloud:

https://etno.eu/datas/publications/economic-reports/AER2015_Final.pdf

MORE INFORMATION

Press Release: IDATE & ETNO unveil new Annual Economic Report on the European telecoms sector:
<https://etno.eu/news/etno/2015/836>



03 ETNO INTERVENTIONS IN EXTERNAL CONFERENCES

a) 10-12 February: FTTH Conference, Poland

ETNO partnered with the FTTH Council Europe for the FTTH Conference 2015 in Warsaw, Poland.

The conference discussed hot topics of fibre roll-out in Europe: FTTH in Central and Eastern Europe; fibre-enabled services including eHealth, eGovernment amongst others; financing of FTTH networks; marketing of FTTH networks and take rates; the role of FTTH in smart cities and smart regions; innovative solutions for fibre networks.

b) 27 April: Public Policy Conference on Disruptive Technologies and Over-the-Top Services

Steven Tas, ETNO Executive Board Chair, spoke at the Public Policy Conference on Disruptive Technologies and Over-the-Top Services of the Searle Center on Law, Regulation, and Economic Growth at Northwestern Law in Washington, DC.

This conference was organised by Matthew L. Spitzer, Howard and Elizabeth Chapman Professor of Law and Director of the Searle Center on Law, Regulation, and Economic Growth at Northwestern University School of Law.

The goal was to provide a forum for economists, legal scholars, industry reps, and government regulators to engage in panel discussions on the issues surrounding the delivery of video entertainment and VOIP via over-the-top services.

Topics that were explored included:

- Existing and future regulatory structures for ISPs, cable companies, and over-the-top services.
- Vertical integration with entertainment studios
- FCC Notice of Proposed Rulemaking: OTT video providers as multichannel video programming distributors (MVPDs)
- Mismatch with Legacy Regulatory, Antitrust and Taxation Systems
- Privacy

MORE INFORMATION

Interview with Steven Tas, ETNO Executive Board Chair: http://www.warsaw.ftthconference.eu/news-media/conference-videos/interview-with-stein-tas?video_id=37

Mr Tas spoke on a panel on OTT in VOIP, moderated by Simon Wilkie, Professor of Economics, Communication and Law, USC Gould School of Law, and Microsoft Corporation. He reiterated the role of telcos in the OTT debate and discussed the developments in today's thriving and super-competitive markets. In the context of privacy, he mentioned the importance of all those delivering similar services being subject to the same rules to ensure that consumers and businesses enjoy the same sets of rights regardless of who is delivering a certain service.

Panellists:

Steven Tas, Chairman, Executive Board, ETNO (European Telecommunications Network Operators' Association)

Patrick Rey, Professor of Economics, Toulouse School of Economics and Ecole Polytechnique (Paris)

Robert W. Quinn, Jr., Senior Vice President-Federal Regulatory and Chief Privacy Officer, AT&T Services, Inc.

Glenn S. Richards, Partner and Chair, Communications Practice Section, Pillsbury Winthrop Shaw Pittman LLP

c) 28-29 April: 9th Digital Regulations Forum: The Juncker Digital Revolution, United Kingdom

The 9th Digital Regulation Forum, organised by IIR Telecoms and Technologies, in partnership with Broadband4Europe and ChinaEU, hosted leading representatives from regulators, OTTs, operators and experts to discuss a range of topics related to the Telecommunications and Digital Community.

Malte Firlus, Chair of the Digital Economy & Consumers Working Group, ETNO spoke on a panel which covered the "OTT and content provider perspective". The session was led by prominent OTTs and content providers and addressed insightful issues including replies to the following questions:

- What is a typical OTT business model?
- Should telcos be regulated less?
- How can OTTs support the investment in infrastructure?
- How do you encourage telco innovation?
- How do we avoid Internet congestion as video demand increases?

Speakers:

Theo Bertram, European Policy Strategy Team Manager, Google

Malte Firlus, Chair, Digital Economy & Consumers, ETNO

Aarti Holla, Secretary-General, ESOA

Tolga Kilic, Regulatory Director, Avea

Robert M McDowell, Partner, Wiley Rein LLP; former Commissioner and Senior Member, Federal Communications Commission

Sumit Sharma, Senior Consultant, Oxera

Anthony Whelan, Acting Director, Electronic Communications, Networks and Services, DG CONNECT, European Commission

Moderator:

Matthias Kurth, Executive Chairman, Cable Europe

Sponsored by



d) 15-17 September: 66th International Motor Show 2015, Frankfurt

Steven Tas, ETNO Executive Board Chair spoke at a Roundtable on Autonomous & Connected Driving which took place during the Frankfurt International Motor Show (IAA). The aim of the Round Table was to enhance cross-sector cooperation in order to accelerate the deployment of connected and automated driving in Europe.

The Automotive and telecom industries involved committed to entering into a structured dialogue, launching a joint EU Industry Dialogue under the auspices of Commissioner Oettinger. They committed to working on common roadmaps to speed up the development and deployment of connected automated driving. These roadmaps would cover better connectivity, mobile network coverage and reliability, the take-up of connected automated driving and how to address any security and privacy concerns of users.

MORE INFORMATION

Joint Industry Statement- Powerful digital highways for Europe's Connected and Automated Driving:
<https://etno.eu/news/etno/2015/311>

In collaboration with



Digital Single Market

22 September 2015 | 2pm

LIVE PANEL DEBATE **viEUWS**

e) 22 December: Live Panel Debate



#viEUwsTech

Leading Tech journalist Jennifer Baker was joined by Roberto Viola (Director-General, DG CNECT, European Commission), Pilar Del Castillo Vera MEP (Member of ITRE Committee) and Steven Tas (Chairman of the Executive Board, ETNO) to debate the question: "How to connect the dots to a Digital Single Market?"

Panellists:

Roberto Viola, Director-General, DG CNECT, European Commission
Pilar del Castillo Vera MEP, EPP Group, Member of ITRE Committee
Steven Tas, Chairman of the Executive Board, ETNO



MORE INFORMATION

Link to full debate:

<http://www.viewws.eu/live-panel-debate/digital-single-market-22-september-2015-live-panel-debate/>

Link to the highlight video: <http://www.viewws.eu/ict/tech-choices-for-the-digital-single-market/>

04 'THINK DIGITAL' INTERVIEWS



#Thinkdigital

The series of #ThinkDigital interviews and blog posts 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 2015 #ThinkDigital posts included opinions on the industrial internet, copyright, competition, investment, innovation, child protection and privacy in the digital age as well as the potential of ICT in combating climate change and many more.

All interviews are available on the ETNO #ThinkDigital Blog www.think-digital.eu
For direct access to each interview, please click on the links below:

1. Net Neutrality: *"We need balance, proportionality and common sense"*

<http://www.think-digital.eu/?n=2015/273>

J. Scott Marcus talks to us about his very timely study entitled *"Network Neutrality Revisited: Challenges and Responses in the EU and US"*

2. 5 February: *"We need a Digital Single Market that encourages scale and simplicity"*

<http://www.think-digital.eu/?n=2015/274>

In this ETNO #ThinkDigital interview, Google's Theo Bertram explains why new investments and innovation are crucial

3. 12 February: Innovation and high-tech jobs, the time is now

<http://www.think-digital.eu/?n=2015/275>

In this ETNO #ThinkDigital interview, Barry French, Executive Vice President, Marketing and Corporate Affairs at Nokia talks about the challenges and opportunities along the way to a European Single Market.

4. 19 February: Support entrepreneurship, reform the rules of the past

<http://www.think-digital.eu/?n=2015/276>

Orange's Deputy CEO Pierre Louette discusses the digital ecosystem, start-ups and how regulation and policymaking can promote a more innovative and investment-conducive environment.

5. 4 May: Global trade agreements in a fast-changing world

<http://www.think-digital.eu/?n=2015/280>

As Chairman of ETNO's newly formed Trade Working Group and Manager for Latin American Affairs and Trade Policy at Telefónica, David Frautschy Heredia shares his thoughts on trade negotiations and their place in the new Digital landscape: *"Trade agreements should incorporate a chapter on the Digital Economy, settling a new scenario of market openness, with equivalent responsibilities and obligations for all market participants"* #ThinkDigital

6. 4 May: Europe's digital plans: stakeholders converge on need for action

<http://www.think-digital.eu/?n=2015/281>

"The outlook is positive. If all players work together swiftly within the ecosystem, the EU will succeed in creating a Connected Continent that will lead the way in Digital." #ThinkDigital

7. 5 May: Aiming for a stronger Europe with less national division

<http://www.think-digital.eu/?n=2015/283>

Telekom Austria's CEO Hannes Ametsreiter looks at the changes in the telecom industry and how policy should adapt: *"We are no longer just telecommunication providers. We have to transform into digital companies, driving digital business and the lifestyle of the 21st century"*

8. 6 May: MEP Hökmark's #ThinkDigital vision of the future

<http://www.think-digital.eu/?n=2015/285>

With the publication of the European Commission's Digital Single Market Strategy, MEP Hökmark reiterates his view following the first #ThinkDigital event on 22 April 2015: *"It is in our hands to give Europe its strength and leadership back: the more advanced services our networks will allow for, the more businesses will invest in them."*

9. 11 May: Net Neutrality, Data Protection and more in the new world of the Internet of Things

<http://www.think-digital.eu/?n=2015/287>

Imagine ordering a pizza simply by pushing a button on the door of your fridge - On the occasion of the 2015 edition of the annual *"Internet of Things European Summit"* in Brussels, ETNO took the opportunity to talk to Francisco J. Jariego, Telefonica's Director of Industrial IoT (Internet of Things) and Member of the Executive Committee of Telefonica's I+D (Research & Development).

10. 19 May: ICANN and the transition of the IANA stewardship: Ensuring a unified, global Internet for all

<http://www.think-digital.eu/?n=2015/288>

ETNO's #ThinkDigital team interviews Jean-Jacques Sahel, Vice-President, Europe at the Internet Corporation for Assigned Names and Numbers (ICANN): *"A successful transition would ensure the continuation of the Internet as a global platform for innovation, by maintaining its open, secure, stable and interoperable nature for all users across the globe."*

11. 22 May: EU Ambassador to the US David O'Sullivan talks internet platforms, TTIP, privacy and protectionism concerns

<http://www.think-digital.eu/?n=2015/290>

"The changes brought about by the digital revolution require careful choices, not emotional reactions; discussions based on facts, not fears." #ThinkDigital

12. 22 May: Mobile internet price comparisons – a review of the Digital Fuel Monitor methodology

<http://www.think-digital.eu/?n=2015/289>

Enrique Medina Malo, Chief Policy Officer at Telefónica explains why the figures advertising the DFM's findings should be treated with the utmost precaution.

13. 26 May: Digital technologies fundamental to our sustainable future

<http://www.think-digital.eu/?n=2015/291>

Luis Neves, GeSI Chairman: *"With GHG emissions rising and Europe still recovering from the financial crisis, there is an increased sense of urgency for a comprehensive strategy to achieve low-carbon growth. ICT, with its cross-sector role, is central to this approach."* #ThinkDigital

14. 3 June: International Law firm Pinsent Masons' Diane Mullenex on achieving the degree of super-connectivity that the world demands.

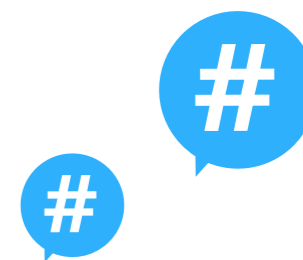
<http://www.think-digital.eu/?n=2015/292>

Diane Mullenex, French lawyer and UK Solicitor: *"Regulation in my view, must not inhibit investment or innovation in the development and deployment of high-speed networks to achieve the degrees of super-connectivity that the world demands"* #ThinkDigital

15. 10 June: Putting Europe back in the driver's seat.

<http://www.think-digital.eu/?n=2015/293>

David Cantor, Attorney & Advisor, Telecommunications Law & Strategy: *"My own feeling is that the only revolutionary way forward, with a real chance of putting Europe back in the driver's seat, is to repeal the sector ex-ante regulatory framework."* #ThinkDigital



16. 25 June: Transforming Europe into a Digital Economy by giving businesses the tools to invest in the future
<http://www.think-digital.eu/?n=2015/298>
Kjell-Morten Johnsen, Executive Vice President and Head of Telenor's European operations : *"I think there is no other power that can save so much time and energy as the internet services whether broadband or mobile"* #ThinkDigital

17. 30 June: Sweden vs. Slovenia: What we can learn from hard and soft approaches to net neutrality
<http://www.think-digital.eu/?n=2015/300>
Roslyn Layton on Net Neutrality: *"Soft rules are associated with higher telecom infrastructure investment - hard rules are overkill"* #ThinkDigital

18. 2 July: A Bulgarian telco's perspective on stimulating innovative ideas, local start-ups and getting the EU's priorities right
<http://www.think-digital.eu/?n=2015/302>
Janet Zaharieva, Chief Regulatory Advisor to the Managing Board, Vivacom: *"We believe that support for young and ambitious people with good ideas is the cornerstone of a better future for local and global businesses as well as for society as a whole"* #ThinkDigital

19. 7 July: The right balance between investment and competition
<http://www.think-digital.eu/?n=2015/303>
Achour Messas, Partner at Mazars, Head of Telecom sector, explains the results of Mazar's Telecom Study 2015 which indicates that investment is the key to success for telecom operators in Europe.

20. 26 August: Do we still need the ePrivacy Directive?
<http://www.think-digital.eu/?n=2015/306>
Global law firm DLA Piper looks into solutions for harmonising privacy rules in light of the on-going discussions related to the new General Data Protection Regulation (GDPR). #ThinkDigital

21. 31 August: Filling the e-skills gap in Europe
<http://www.think-digital.eu/?n=2015/308>
Deutsche Telekom (DT)'s Markus Lecke, Programme Manager for corporate HR-Development, talks to ETNO about future ICT skills requirements, what his company is doing to prepare for the future expert gap and how to make the sector more attractive to women.

22. 7 September: A Safer Internet: Unleashing opportunities for the young too
<http://www.think-digital.eu/?n=2015/307>
ETNO's Child Protection Task Team Chair Pedro Gonçalves, Manager, International Relations at Portugal Telecom, elaborates on the role of telcos in creating a safer Internet for all. #ThinkDigital

23. 14 September: Aiming for the highest standard of 5G in Europe
<http://www.think-digital.eu/?n=2015/310>
Pierre-Yves Danet, Head of European collaborative Research at Orange Labs and Chair of ETNO's Research and Innovation Working Group shares advice on what Europe can do to remain a global leader in the race for 5G and how start-ups and telcos can collaborate.

24. 23 September: *"I cannot predict the future, but we can only expect exciting new digital developments."*
<http://www.think-digital.eu/?n=2015/312>
Luis Jorge Romero, ETSI's Director General explains how standardisation creates a healthy business environment and benefits consumers in the latest #ThinkDigital interview.

25. 7 October: New CERRE study: Concentration in the mobile communications industry generates a true economic trade-off
<http://www.think-digital.eu/?n=2015/313>
"A merger will have static price effects to the detriment of consumers but also dynamic benefits for consumers, as investments can enhance their demand for services."
Professor Bruno Liebhberg, #ThinkDigital

26. 19 October: Saving the climate and driving economic growth at the speed of light
<http://www.think-digital.eu/?n=2015/826>
Danilo Riva, Sustainability Manager, Telecom Italia and Chair of ETNO's Corporate Responsibility Working Group gives insight into the positive contribution of ICT to fighting climate change: *"ICT has the potential to enable a 20% reduction of global CO2 emissions by 2030"* #ThinkDigital

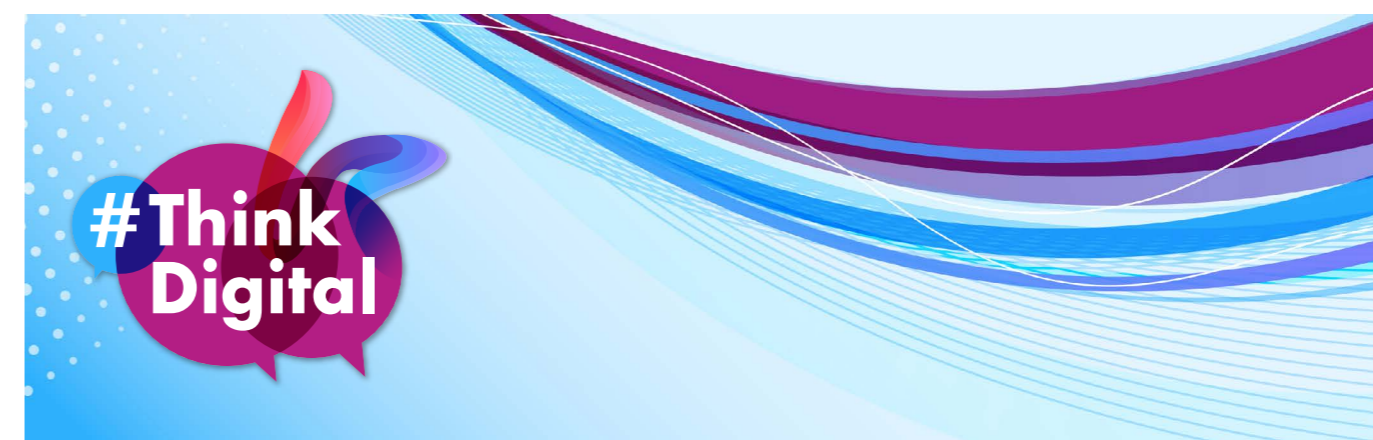
27. 29 October: Digital power maps, data flows, the new way of working and the future of smarter citizens
<http://www.think-digital.eu/?n=2015/830>
An interview to Dr Tim Jones, Programme Director for Future Agenda, a global open foresight programme: *"Perhaps data should be treated like water in that the ability to control the flow is not down to national governments and agreements, but more down to protocols and security levels."* #ThinkDigital

28. 3 November: CEO of VIVACOM talks customers, innovative products and EU regulation ahead of ETNO's General Assembly in Sofia
<http://www.think-digital.eu/?n=2015/831>
"Our basic credo is around ubiquitous, fast broadband and convergence." Atanas Dobrev - Member of the Managing Board and CEO, VIVACOM #ThinkDigital

29. 7 December: Three ingredients for successful reform
<http://www.think-digital.eu/?n=2015/833>
Steven Tas, ETNO Executive Board Chair : *"If our industry continues investing at the current pace, the good old Digital Agenda targets will be missed by a €106bn investment gap. A real leap in investment is what we need to be working for collectively."* #ThinkDigital

30. 10 December: A modern and balanced copyright framework fit for the Digital Age
<http://www.think-digital.eu/?n=2015/834>
ETNO's copyright experts delve into a highly contentious issue in today's digital world: *"Online content can reach people in a way that could never have been imagined before, new business models are emerging every day. It is time to look at the new reality and create a modern and balanced copyright framework"* #ThinkDigital

31. 14 December: The industrial internet needs broadband investment and the right regulation
An ETNO blog on Politico following on from the *"Industrial Internet Era"* conference.
"In 2020 we will have over 50 billion electronic devices in Europe, and if you want them to communicate, we need standardisation" – Michał Boni, Polish MEP #ThinkDigital



05 STUDIES AND REPORTS

a) March 2015: Economic Replicability Testing for NGA Services

ETNO, the Association representing Europe's leading telecom operators presented a Charles River Associates report on "Economic Replicability Testing for NGA Services" at an event in Brussels.

Back in 2013, the European Commission approved a key legislative document which constituted a first step in the path towards boosting investment in Next Generation Access services: the *"Recommendation on consistent non-discrimination obligations and costing methodologies to promote competition and enhance the broadband investment environment"*

Almost two years into the implementation, the Charles River Associates report proposed a consistent and proportionate approach to promoting efficient investment and safeguarding competition when applying Economic Replicability Testing, a key feature of the recommendation.

The report fed into the debate on future measures to incentivise investment in superfast broadband and provided strategic input at a time in which National Regulatory Authorities were working to implement the 2013 Recommendation.

The approach recommended by Charles River Associates in this report is guided by the spirit of the 2013 Recommendation and offers suggestions for achieving a consistent and proportionate implementation of Economic Replicability Testing, with a view to contributing to the achievement of the Commission's goals on deployment of faster networks.

MORE INFORMATION

Read the Press Release here: <https://etno.eu/news/etno/2015/619>

Read the speech of the ETNO Executive Board Chair at the event here:
https://etno.eu/datas/press_corner/speeches/ST_Speech_18032015.pdf

Download the report here: https://etno.eu/datas/publications/studies/FinalCRAreport_18032015.pdf

b) March 2015: Achieving a Stronger Digital Union: ETNO contribution to the Digital Single Market Strategy



#Digital4EU

Read ETNO's contribution to the #Digital4EU stakeholder's debate on the Digital Single Market (DSM) Strategy for the European Commission. This paper puts forward ETNO's ideas on how a new DSM Strategy should contribute to a more prosperous and smarter society by leveraging and unlocking the innovation and investment potential of Europe's telecom operators.

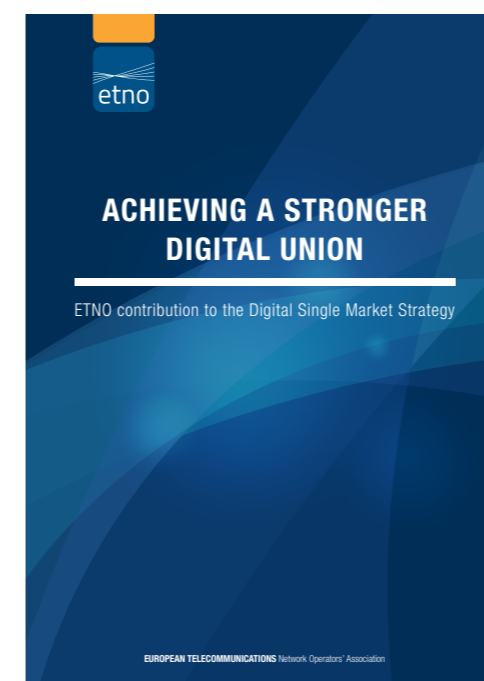
Putting the focus on networks, among other things, is an important step towards achieving a fully digitalised Europe, in which both citizens and businesses are empowered to grow and prosper.

MORE INFORMATION

Read the Press Note: <https://etno.eu/news/etno/2015/620>

Read the Press Release: <https://etno.eu/news/etno/2015/284>

Read the report:
https://etno.eu/datas/publications/studies/DIGITAL%20STRATEGY-72dpi_website.pdf



c) May 2015: Proposals for an amendment to the General Data Protection Regulation and repealing the ePrivacy Directive

With this paper, global law firm DLA Piper looked into solutions for harmonising privacy rules in light of the discussions related to the new General Data Protection Regulation (GDPR). They propose a series of amendments to the GDPR as well as to repeal the ePrivacy Directive.



MORE INFORMATION

Read the report: https://etno.eu/datas/publications/studies/DPTS_study_DLA_31052015_Final.pdf

Read the blog posts:
<https://etno.eu/news/etno/2015/306>
<https://etno.eu/news/etno/2015/271>

d) September 2015: ComRes Digital Consumer Survey

ETNO and ComRes, the leading research consultancy, published a new consumer survey on the digital habits and expectations of Europeans in nine major EU markets. ComRes interviewed 9,011 people aged 15+ online between 29th June and 13th July 2015. Countries surveyed were: UK, Poland, Germany, Italy, France, Spain, Sweden, Estonia, Romania. ComRes developed the questionnaire, methodology and full report. Results showed changing consumer habits and priorities when using digital services.

The survey provided a useful instrument in the context of the debate on the evolution of consumers' rules.

MORE INFORMATION

Read the Press Release:
<https://etno.eu/news/etno/2015/309>
 Read the report:
<http://ow.ly/S2VAq>

1

DATA PROTECTION

- Consumers are not fully aware of differences in inconsistencies in protection standards between traditional telecoms and OTTs
- Consumers generally expect less of OTTs compared to traditional services, but safeguards on personal data are a big concern, consumers are also very opposed to companies using their personal data for commercial use



2

COMMUNICATION SERVICES

- Consumers consider the non-portability of data and identifiers in OTT communication services a major barrier
- Consumers welcome the possibility of more options, such as unbundling of services and equipment, or choice between sharing data or paying fees - though they may not have decided how to act when given new choices
- Consumers don't consider emergency call functionality for OTTs major issue



3

OUTDATED RULES

- Directories are not the main source of contacts for consumers in most countries - physical directories in particular are used by a minority of consumers, but specific country peculiarities
- Consumers report payphones have a value in case of emergencies: however, a very small minority actually uses payphones, indicating the possibility of emotional attachment to public payphones with little practical use





e) October 2015: Five Priorities for Achieving Europe's Digital Single Market

ETNO undertook a high-level study with the Boston Consulting Group, in order to develop a broad political narrative for the telecoms review and to make the case for ambitious reform.

A sustained and pervasive digitalisation of the EU economy is today's main growth opportunity. Ubiquitous, powerful broadband networks are the prerequisite.

European telecom operators are investing heavily for citizens and for the economy: by 2020, our industry will allocate €86bn to broadband deployment. Despite this effort, the BCG study for ETNO estimates that an investment gap of €106bn will persist unless we take action with major regulatory reforms.

For this reason, ETNO supports the European Commission in its review of the Telecoms Framework and encourages a swift, broad re-thinking of Europe's policy and regulatory tool-set for the digital age. It is not about one industry only, it is about the whole economy and offering more to European citizens.

f) October 2015: Looking forward to COP21: ETNO Climate Change Report

On the occasion of a joint ETNO-GeSI event, ETNO presented its Climate Change report ahead of the COP21.

The report looks at climate change from a business perspective, that of telecommunication operators, which are an integral part of a wider industry sector - the Information and Communication Technology (ICT) - a sector that plays a crucial role in the development of the economy and society worldwide. This sector has a unique potential in delivering solutions that can effectively contribute to combating climate change by enabling significant reductions in greenhouse gas (GHG) emissions across all sectors of the economy.

MORE INFORMATION

Read the report: https://etno.eu/datas/publications/brochures/corporate%20responsibility/RAPPORT-BOOKLET-FINAL_WEB.pdf

Read the blog post by the ETNO Corporate Responsibility Working Group Chair: <https://etno.eu/news/etno/2015/826>

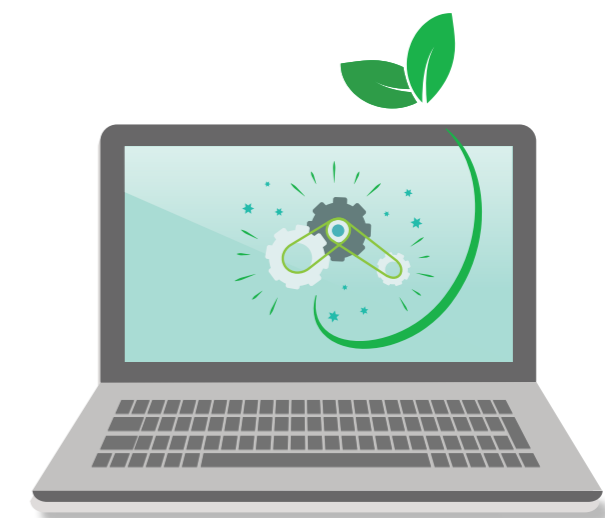
MORE INFORMATION

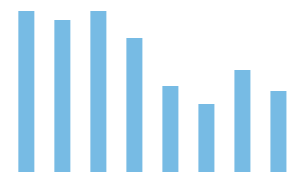
Read the Boston Consulting Group study for more information: Five Priorities for Achieving Europe's Digital Single Market, 2015.

https://etno.eu/datas/publications/studies/FINAL_BCG-Five-Priorities-Europes-Digital-Single-Market-Oct-2015.pdf

Read the ETNO CEO Statement on Achieving Europe's Digital Single Market:

<https://etno.eu/news/etno/2015/825>





g) December 2015: ETNO Annual Economic Report 2015

The ETNO Annual Report 2015 describes the state of the art of the European telecoms sector and the leading role played by ETNO members across its various sub-segments. It includes consolidated figures from 2014, as well as projections for 2015 and the coming years.

The telecom industry is instrumental to accelerating the implementation of a European Digital Society. With market outlook gradually improving, the planned telecom reform will really make the difference. Read the figures that indicate a positive shift in the sector with an enthusiastic take-up of mobile and data services, app-hungry consumers and telcos embracing new business areas such as M2M and Cloud.



MORE INFORMATION

Press Release: IDATE & ETNO unveil new Annual Economic Report on the European telecoms sector:
<https://etno.eu/news/etno/2015/836>

Read the report: https://etno.eu/datas/publications/economic-reports/AER2015_Final.pdf



06 PRESS RELEASES, STATEMENTS & POSITIONS (BY TOPIC)

a) Regulatory reform, innovation and investment

7 January - Press Release

[“Let 2015 be the year of digital reform”, Steven Tas takes up ETNO chairmanship - by ETNO](#)

16 January - Press Release

[Investment in broadband, ETNO supports lighter regulation - by ETNO](#)

25 February - Press Release

[A better investment climate, more value for consumers: let's make it happen - by ETNO](#)

04 March - Press Release

[Strengthening EU's digital economy: We need a positive conclusion to the Connected Continent debate - by ETNO](#)

18 March - Press Release

[Unlocking fibre roll-out: let's make the most of the 2013 Recommendation - by ETNO](#)

25 March - Press Release

[ETNO's viewpoint on the Digital Single Market Strategy - by ETNO](#)

29 April - Press Release

[Broadband policy: a pro-investment and pro-innovation approach is needed on both sides of the Atlantic - by ETNO](#)

06 May - Press Release

[ETNO welcomes the Digital Single Market Strategy and asks for swift and concrete actions](#)

12 June - ETNO Statement

[Statement by Steven Tas, Executive Chairman of ETNO, on the TSM Regulation - by ETNO](#)

16 June - CEO letter

[Telecom CEOs' letter to Heads of State and Government ahead of the European Council of 25 June 2015 - by ETNO](#)

26 June - ETNO Statement

[ETNO statement following the European Council of 25-26 June 2015 - by ETNO](#)

30 June - ETNO Statement

[ETNO statement on the Telecom Single Market agreement](#)

3 September - Joint Response

[Joint GSMA-ETNO response to the questionnaire on contract rules for online purchases of digital content and tangible goods](#)

1 October - Position Paper

[ETNO response to the consultation on Directive 2010/13/EU on audiovisual media services \(AVMSD\)](#)

13 October - CEO Statement

[ETNO CEO Statement on Achieving Europe's Digital Single Market](#)

27 October - ETNO Statement

[ETNO Statement on the final TSM vote](#)

29 October - Press Note

[ETNO Executive Board meets Business Europe - by ETNO](#)

30 October - Position Paper

[RD417 - ETNO Response to BEREC Consultation on the 2016 Draft Work Programme \(BoR \(15\) 140\)](#)

6 November - ETNO Joint Statement

[ETNO Member & Observer Joint Statement - by ETNO](#)

16 November - ETNO response

[ETNO response to the Public Consultation on the Review of the EU Satellite and Cable Directive](#)

7 December - ETNO response

[ETNO response to the public consultation on the evaluation and the review of the regulatory framework for electronic communications networks and services](#)

8 December - ETNO Statement

[ETNO statement on the Framework Review Consultation - by ETNO](#)

9 December - Press Release

[IDATE & ETNO unveil new Annual Economic Report on the European telecoms sector - by ETNO](#)

10 December - ETNO Statement

[ETNO statement in view of the Telecoms Council - by ETNO](#)

30 December - ETNO response

[ETNO response to the consultation on the regulatory environment for platforms, online intermediaries, data and cloud computing and the collaborative economy](#)

30 December - ETNO response

[ETNO response to the European Commission public consultation on “The needs for Internet speed and quality beyond 2020”](#)

b) Open internet and level playing field

26 January - Joint Statement

[Joint Open Internet Statement: Choice, quality, innovation and investment in an Open Internet - by ETNO](#)

16 March - Joint Statement

[Open Internet: INTUG and ETNO call for a user-friendly approach - by ETNO](#)

3 November - Position Paper

[RD418 - ETNO Response to the Public Consultation on the draft BEREC Report on OTT services BoR \(15\) 142](#)

c) Competition and tax issues

30 January - Position Paper

[RD412: ETNO Response to BEREC Consultation on Oligopoly Analysis and Regulation - BoR \(14\) 172 - by ETNO](#)

20 February - Open letter

[Open Letter on OECD Discussion Draft on International VAT/GST Guidelines for Business-To-Consumer \(B2C\) Supplies](#)

31 July - Position Paper

[RD 415 - ETNO comments on the Draft BEREC Report on Oligopoly Analysis and Regulation – BoR \(15\) 74](#)

3 August - Press Release

[ETNO comments on the Draft BEREC Report on Oligopoly Analysis and Regulation](#)

17 December - Joint response

[ETNO-GSMA Tax Policy Committee contribution to EU consultation on Modernising VAT for cross border e-commerce](#)

d) Privacy, trust and network security

15 June - Joint Statement

[Telecom operators welcome the Justice and Home Affairs Council agreement on the General Data Protection Regulation and call for an urgent repeal of the ePrivacy Directive](#)

11 September - Press Release

[EU consumer survey reveals major changes in communication habits](#)

e) Spectrum management, IoT, 5G and connected driving

12 January - Position Paper

[RD410: ETNO comments on the Draft RSPG Opinion on Common Policy Objectives for WRC-15 - by ETNO](#)

12 January - Position Paper

[RD409: ETNO comments on the Draft RSPG Opinion on a long-term strategy on the future use of the UHF band \(470-790 MHz\) in the European Union - by ETNO](#)

30 April - Position Paper

[RD413 - ETNO response to the “Public consultation on the Lamy Report: the future use of the UHF TV broadcasting band”](#)

16 September - Joint Statement

[Joint Industry Statement - Powerful digital highways for Europe’s Connected and Automated Driving. - by ETNO](#)

27 October - Position Paper

[CP88 - ETNO Common Position on the World Radiocommunication Conference \(WRC-15\)](#)

28 October - Press Release

[Spectrum: leading EU telcos publish common position in view of WRC-15](#)

9 November - Position Paper

[RD419 - ETNO Contribution to the Public Consultation on the draft BEREC Report on enabling the Internet of Things BoR \(15\) 141](#)

f) Naming, addressing and numbering

19 January - Position Paper

[Comments on Draft ECC Recommendation 15\(02\): “Guidelines for Major Changes to National Numbering and Dialling Plans concerning E.164 Numbers” - by ETNO](#)

30 June - Position Paper

[RD 414: ETNO Comments on Draft ECC Report 238 “3rd Party Access to Number Portability Data \(NP Data\)” - by ETNO](#)

g) Internet governance

16 February - ETNO Response

[ETNO Response to the NETmundial Initiative Consultation for the development of the Terms of Reference of the NETmundial Initiative](#)

5 May - Joint Statement

[Joint Stakeholder statement on the World Summit on the Information Society \(WSIS\)](#)

07 ETNO WORKING GROUPS 2015

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.

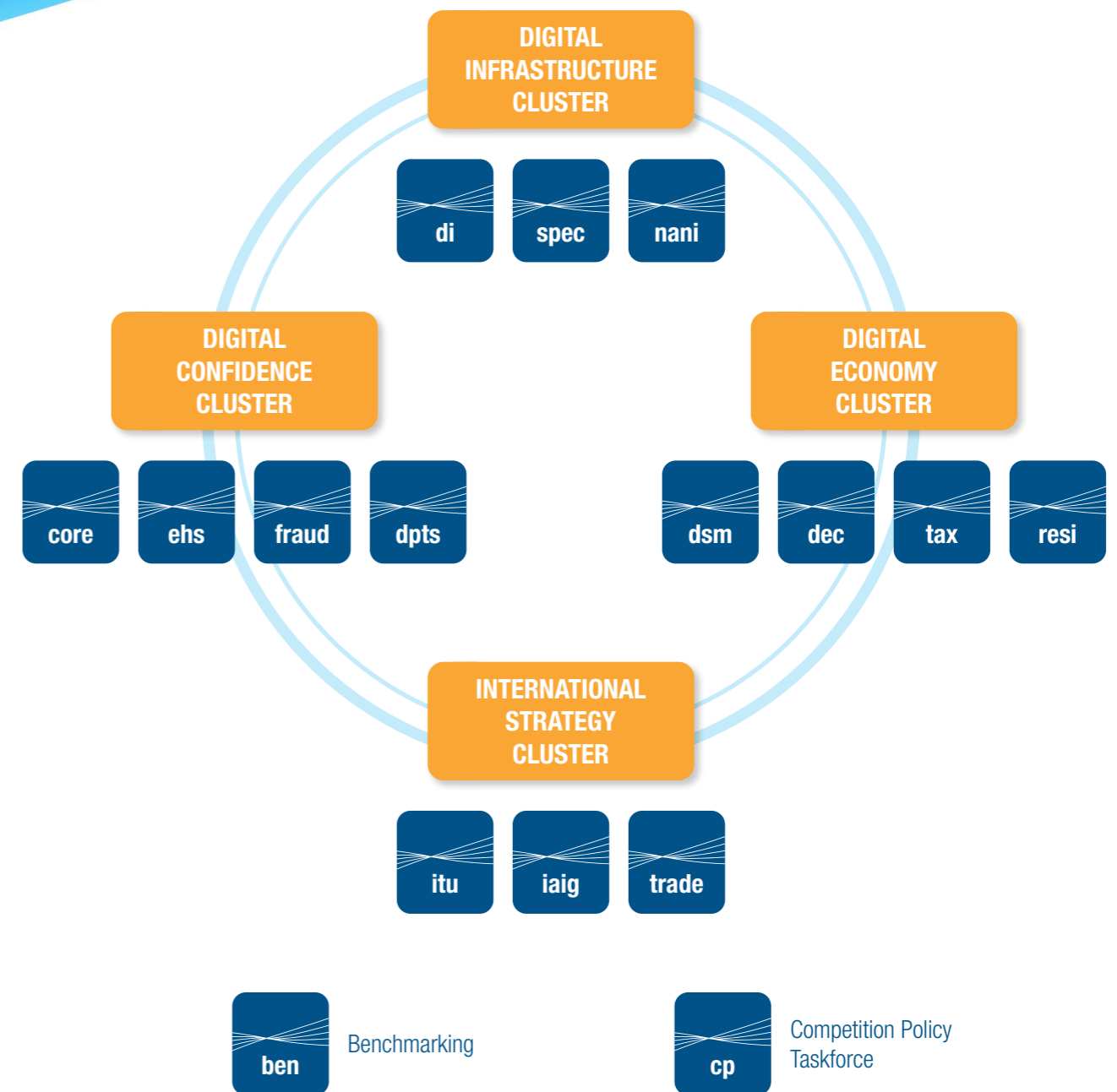
Increasingly, as issues, technologies and conversations converge, ETNO's working groups are working closer together, often within clusters, to ensure a good spread of knowledge and competency and allowing for more robust ETNO positions.

The structure of the new European Commission, clustered around a few main policy priorities (including of course the digital pillars), the increasing emphasis of the "level playing field" debate, and other considerations sparked an overall rethinking of the organisation and focus of ETNO WGs. The re-organisation was put in place as from the start of 2015.

The main changes occurred as follows:

- The refocusing of the previous "Competitive Markets" (CMA) WG (now the **"Digital Infrastructure"** WG) with the inclusion under its remit of all issues related to the Universal Service and of the public financing of broadband networks;
- The transformation of the former "Digital Society" (DISO) WG into the new **"Digital Economy and Consumers"** (DEC) WG. This WG is now responsible for the main policy and regulatory issues related to services regulation, and for the level playing field between telcos and the other actors in the digital value chain;
- The creation of a **"Competition Policy Task Force"**, with the aim to develop ETNO's position on the evolution of EU competition policy and law, on consolidation and the overall efficiency of telecoms markets.
- The creation of a fully-fledged **"Trade" WG**.
- All ETNO WGs have been grouped within four main **"clusters"**, to improve policy coordination and streamline the reporting of their activities by the ETNO Office.
- The four clusters, depicted in the diagram below, are as follows: Digital Infrastructure, Digital Economy, Digital Confidence and International Strategy.

In 2015, the working groups contributed to the DSM debate, developing a comprehensive policy paper outlining the Association's priorities. They also worked proactively to develop concrete policy asks for the forthcoming review of the telecoms framework, including both access and services regulation, and competition policy.



MORE INFORMATION

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

ETNO WG Chairs in 2015

ben
Benchmarking
Chair: Thierry Denant (Orange),
thierry.denant@orange.com
<https://www.etno.eu/home/working-groups/benchmarking>

cp
Competition Policy Task Force
Chair: Marc Lebourges (Orange),
marc.lebourges@orange.com
Vice-Chairs: Grania Holzwarth, Deutsche Telekom;
Marta Vejseli, Telekom Austria
<https://www.etno.eu/home/working-groups/competition-policy-task-force>

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

- Energy Task Force
Chair: Griffa Gianluca (Telecom Italia),
gianluca.griffa@telecomitalia.it
- Child Protection Task Force
Chair: Pedro de Vasconcelos Gonçalves
(Portugal Telecom),
pedro.v.goncalves@telecom.pt

<https://www.etno.eu/home/topics/corporate-responsibility/child-protection>

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

dec
Digital Economy and Consumers
Chair: Malte Firlus, Deutsche Telekom:
malte.firlus@telekom.de
Vice-Chair: Luisa Rossi, Orange

dic
Digital Infrastructure
Chair: David Garcia Indurain, Telefonica:
david.garciaindurain@telefonica.com
Vice-Chairs: Manuel Braga, Deutsche
Telekom; Volcy Lesca, Orange

dsm
Digital Single Market
Chair: Caterina Bortolini (Telecom Italia)
Vice-chair: Sylvie Le Franc (Orange)
<https://www.etno.eu/home/working-groups/digital-single-market>

ehs
Employment, Health and Safety
Chair: Jean-Luc Godard (Orange):
jeanluc2.godard@orange.com
<https://www.etno.eu/home/working-groups/employment-health-safety>

iaig
International Affairs and Internet Governance
Chair: Christoph Steck (Telefonica):
christoph.steck@telefonica.com
<https://etno.eu/home/working-groups/international-affairs-and-internet-governance>

itu
International Telecommunication Union
Chair: Dominique Würges (Orange),
dominique.wurges@orange.com
<https://www.etno.eu/home/working-groups/International-Telecommunication-Union>

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

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

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

spec
Spectrum
Spectrum (SPEC)
Chair: Anna Matsouka (OTE):
amatsouka@ote.gr
<https://www.etno.eu/home/working-groups/spectrum>

tax
Tax
Chair: Costanzo Perona (Telecom Italia),
costanzo.perona@telecomitalia.it
<https://www.etno.eu/home/working-groups/tax>

trade
Trade
Chair: David Frautschy Heredia (Telefónica),
david.frautschy@telefonica.com
<https://www.etno.eu/home/working-groups/trade>

08 ETNO ORGANISATION

General Assembly



Chair: **Janet Zaharieva**
Chief Regulatory Advisor to the Managing Board (Vivacom),
janet.zaharieva@vivacom.bg

Vice-chair: **Wim De Rynck**
Head of regulatory markets & development (Proximus),
wim.de.rynck@proximus.com

Executive Board



Chair: **Steven Tas**
Director Regulatory; PROXIMUS

Carlos Rodriguez Cocina
Head of Brussels Office; TELEFONICA

Jos Huigen
Director Regulatory and European Affairs; KPN

Krisztina Baracsi
Vice President EU Affairs // Mr Christian Wulff Sondergaard,
Vice President Public Affairs; TELENOR

Luigi Gambardella
Vice-President, Public and Economic Affairs Relations;
TELECOM ITALIA

Marta Neves
Director, Competition and Regulatory Affairs; PORTUGAL
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Ramazan Demir
Chief Regulation Officer; TÜRK TELEKOM

Roland Doll
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DEUTSCHE TELEKOM

Valeria Barbaro
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Vianney Hennes
Head of Brussels Office; ORANGE

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SWISSCOM

Permanent Observer: **Steven Tas**
PROXIMUS

Members:
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Vianney Hennes, ORANGE;
Michele Bellavite, TELECOM ITALIA

09 ETNO STAFF



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ETNO would like to thank Antonio Robalo de Almeida for stepping in as Interim Director General throughout 2015.



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