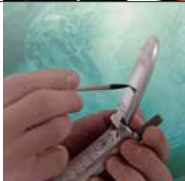


ETNO Annual Report 2006





Content

Introductions

The Director's word	3
ETNO 2007 General Assembly Chair	4
ETNO Executive Board Chair	5

Main topics of 2006

1. Regulatory environment	7
2. ICT Competitiveness	10
3. Digital divide	11
4. Innovation	12
5. Content	12
6. Security and privacy	14
7. Resource management	16
8. Taxation issues	17
9. International cooperation	18
10. Sustainability and corporate social responsibility	19

Communications and events

Communications	21
ETNO – Key interlocutor of the EU institutions on ICT related issues	22
Main events of the year	23
ETNO participation in external conferences and events	26

About ETNO

Networks	27
Positions papers	28
Working groups	31
Organisation	32
Staff	33
Members	34

The Director's word

The telecoms sector is high on the EU political agenda. Several important debates were initiated in 2006 with far reaching implications not only for telecoms operators but also for many other players active in the telecoms markets. These debates included in particular the review of the EU regulatory framework and the revision of the Television without Frontiers Directive.

ETNO played an active role in voicing the positions of its 41 members from 34 countries and called for a close dialogue between all stakeholders to enable investments to grow and innovation to flourish.

In this spirit, one of ETNO's main events in 2006 was the CEO Summit. Last June, 30 Chief Executive Officers of leading European telecommunications operators met with EU Commissioners Viviane Reding and Neelie Kroes. On the eve of important legislative developments in the EU, ETNO member companies demonstrated the importance of having a strong and united voice in Brussels.

CEOs called on the European Commission to use the opportunity of the review of the EU regulatory framework for e-communications services to focus first of all on consumers and to encourage highly risky investments in new networks and services. The review is a major priority for ETNO which is working actively with its members and third parties to explore various options for the sector's future.

The year 2006 was also marked by the legislative debate in the Parliament and the Council on the revision of the Television without Frontiers Directive. Over the past years, IP TV, video on demand, and many other innovative content offerings have developed in Europe. Some applications, based on self-made content have rapidly transformed into mass market products. These services have enabled the wide diffusion of niche content. Any new regulatory environment should allow these services to continue developing without being hampered by unnecessary regulatory burdens.

On behalf of a large coalition of other ICT sector trade associations, ETNO voiced the concerns of online communications services providers that traditional broadcasting rules should not be extended to new online services, still in an embryo phase and already covered by the eCommerce Directive. ETNO is pleased that Members of the Parliament paid particular attention to improve the distinction between traditional services and non-linear services to avoid legal uncertainty.

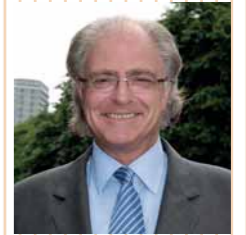
Online content has been another key priority for ETNO during 2006. The association pursued its cooperation at the EU level with content providers in order to discuss emerging business models for the distribution of online content.

Ultimately, the year 2006 may be remembered for another highly publicised debate: the roaming regulation. ETNO always advocated for competitive market forces to be trusted to provide consumers with the widest choice and affordable services. Quality and coverage of services have continuously improved over the years and mobile tariffs have significantly dropped, enabling all consumers to enjoy mobility. The mobile sector continues to be at the leading edge of innovation.

In 2007, ETNO is celebrating its 15th anniversary. Over this period, our sector has undergone major changes.

In 1992, the world counted seven million Internet users, 23 million mobile subscribers and 155 million PCs. Fifteen years later, there are already one billion Internet users, 2.7 billion mobile subscribers and more than 800 million PCs. Europe counts today more than a thousand fixed voice services operators and 73 million high-speed Internet subscribers. People can now access broadband services through many platforms, devices and technologies.

The political debates initiated in 2006 will continue throughout 2007, especially the review of the regulatory framework. ETNO hopes that in the light of these rapid changes, policy makers will trust market forces and technology breakthroughs to further bring consumer choice and innovation.



Michael Bartholomew

Michael Bartholomew
ETNO Director

Introduction by the ETNO 2007 General Assembly Chair



Jens Hauge

It is a pleasure for me to chair the ETNO General Assembly in 2007 and TDC is looking forward to welcoming the ETNO community in Copenhagen in October.

For any of ETNO's Annual Reports it might be justifiable to say it covers an important year. Nevertheless this statement may be even truer this year as the 2007 General Assembly takes place in a year full of critical decisions for the sector and where ETNO can celebrate its 15th Anniversary.

TDC was one of the founding members of the Association. Therefore it is very gratifying for us to chair the General Assembly at a point in time

where ETNO has become one of the best established and influential partners in any discussion on Europe's evolving telecommunications policy.

Even more important in 2007 than reflecting on our past successes is the challenge of ensuring that ETNO stays ahead as the most influential interlocutor for its member's vis-à-vis the European Commission, in this decisive year where the future regulatory framework is being laid out.

ETNO represents many aspects and interests but at the same time its strength is that the debate among its members at the General Assembly will allow refining our common views - the basis to forcefully join in the discussion at European level and promote our basic values.

As chair of the GA I wish to encourage ETNO members to continue or even strengthen their active participation in ETNO activities. Intense member involvement is a distinctive feature of ETNO which will ensure the future success of our work.

Finally on behalf of TDC I wish to express my gratitude to the work done by the ETNO Office, ETNO's Director and the Executive Board in carrying out our Work Programme for 2007. Their efforts created the significantly increased awareness at European level of the very broad and comprehensive policy objectives ETNO is pursuing.

Jens Hauge
Senior Vice-President Regulatory Affairs TDC
ETNO's 2007 General Assembly Chair

Introduction by Chair of ETNO Executive Board

2006 – Some highlights

ETNO member companies during 2006 continued to play an essential role in building the European Information Society in Europe. They increased their investment – worth 37 billion € – by almost six per cent compared to 2005. ETNO's 41 operators in 34 European countries account for more than 70% of total investment in the sector worth €47 billion. Telecoms revenues in Europe have grown by 2.3%, which is however much lower than the other segments of the ICT industry.

In 2006 broadband take up increased by 39% in the EU. This is the result of ETNO members' continuous investment and innovation effort.

ETNO member companies have embraced technological convergence and taken it one step further. Business and residential customers now enjoy fixed-mobile convergent offers. Consumers also find a large choice of triple or even quadruple play services. Totally new applications allowing consumers to create and share their own content creations are revolutionising the media industry.

Leading European telecommunications network operators have also pursued their efforts to bring broadband to the less favoured segments of Europe's citizens, including those living in remote, rural and underdeveloped regions. ETNO members contributed to a more inclusive information society through training and education initiatives in schools, enterprises and communities. They also achieved this objective by rolling out broadband networks in rural and remote areas – with public support when necessary under fair conditions.

ETNO – committed to an inclusive Information Society

Reflecting its members' contribution to the information society, ETNO continued throughout 2006 to be a proactive and constructive interlocutor in essential debates such as:

ICT Competitiveness

ETNO actively participated in the setting up and work of the joint Task Force on ICT Sector Competitiveness and ICT Uptake created by the Commission. The Association chaired the expert group in charge of making concrete recommendations on how to increase ICT uptake.

Trust and Security

ETNO has closely contributed to the Commission's initiatives related to cyber-security, fight against spam and the protection of critical infrastructure following a disaster or a terrorist attack. The association engaged in active dialogue with other EU and international stakeholders.

E-Inclusion and e-Accessibility

ETNO actively participated in the working groups established by the European Commission (TCAM sub-committees) on accessibility and disability issues.

Sustainability and Climate Change

ETNO cooperated with WWF to elaborate a roadmap showing how a wider usage of new technologies such as video conferencing, web-based tax returns, teleworking could reduce CO² emissions.



Alfredo Acebal

World Summit on Information Society

As a sector member of the ITU, ETNO closely followed the implementation of the main decisions of the WSIS and in particular the set up of the Internet Governance Forum that held its first meeting in Athens in October 2006 and in which ETNO actively participated.

Review of Telecoms Rules– Focus on increasing consumer choice

There are still many challenges ahead for Europe to be in a position to fully reap the benefits of broadband and compete on the global scene.

For ETNO, the ongoing review of the EU regulatory framework for e-communications should adapt rules to today's highly competitive market dynamics and rapidly changing technologies. Now that competition is a reality in Europe, the review is an opportunity for EU policy makers to increasingly rely on market forces. A way to achieve this would be to adopt a mechanism reflecting the different competitive realities through a geographical segmentation of markets, favouring commercial agreements between market players supervised by competition law. It is also essential that the review of the EU telecoms rules leads to an environment conducive to competitive returns for the highly-risky investment in the next generation access networks and to a full facilities-based competition in Europe.

Customer-focused strategies and undivided attention to customer needs enable our member companies to be at the edge of a fiercely competitive environment. Fast paced innovation in products and services, new bundles and technologies are catering for these needs. However, our customers also demand increasing choice in infrastructures and platforms to enhance their preferences and interaction requirements. The regulatory framework review will inevitably have to focus on how to cope with this reality in order to be successful.

Unlike other lobbying associations, ETNO is not promoting self serving particular business models based on economic regulation. These efforts are distorting competition and hampering the unique ability of our sector to contribute to economic and productivity growth, thus unfortunately limiting European industry competitiveness.

Investment, innovation and risk-taking are our life and blood. While acknowledging a transitory period might be needed, our industry urgently deserves an environment fostering competitive rewards for the most able under the surveillance of social regulation and general competition law. A level playing field with other industries is also of essence to face the demands and increasing complexity of financial markets and ensure resources flow to our sector.

Finally, any winning ICT policy needs to be based on a clear and predictable framework for the information society we want to promote and build in Europe. ETNO is committed to actively and loyally engage in this crucial debate during the months to come and we look forward to share our vision for the future with all stakeholders and citizens at large.

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

Main topics of 2006

1. REGULATORY ENVIRONMENT

1.1 The Review of the EU Regulatory Framework

Background

The 1998 EU regulatory framework for e-communications services is the cornerstone of the EU liberalisation of the telecoms sector, bringing more choice and enhanced quality services for consumers. Ten years later, in the light of rapidly evolving technologies and market realities, is sector specific regulation still appropriate? Is the current price and access regime adapted to the highly risky deployment of next generation access networks? These questions are at the centre of the revision of the EU regulatory framework initiated at the close of 2005 by the European Commission. The review also coincides with the revision of the Commission's recommendation on the list of relevant markets potentially subject to ex-ante regulation.

Activities

The on-going review of the six directives of the EU regulatory framework has been the key theme of ETNO activities throughout 2006.

The review and the need for Europe to catch up with its trade partners in the roll out of new networks were the main themes for discussion at the **ETNO CEO Summit on 7 June 2006**. This was the largest CEO meeting ETNO ever organised. CEOs from 30 companies gathered in Brussels for meetings with Mrs. Viviane Reding, Commissioner for Information Society and Media and with Mrs. Neelie Kroes, Commissioner for Competition (see page 23).

In its response to the Commission's call for input early January, ETNO insisted on the need for a clear mechanism to ensure the roll back of ex-ante regulation when markets are competitive and the transition to competition law. In view of the strong competition in the markets, ETNO also recommended that all retail markets be removed from the list of relevant markets as well as some wholesale markets.

ETNO CEO Summit June 2006.

From left to right: CEOs meet with Viviane Reding, EU Commissioner for Information Society and Media; Press conference.





On 29 June, the European Commission presented its initial proposals for the review of the regulatory framework. Main areas for change included market analysis procedures, possible institutional arrangements to ensure consistency in the application of remedies, spectrum management and the introduction of new requirements for security and network integrity. Besides the official proposals, the introduction of new remedies such as functional separation was also envisaged and rejected in the European Commission impact assessment, as well as the possible creation of an EU regulator.

The Commission proposed to remove most retail markets from the list of relevant markets, thereby partly answering ETNO concerns. ETNO broadly supported the Commission proposal for a more flexible management of radio spectrum. ETNO reiterated its views, at a Commission public hearing with all stakeholders on October 10, that the proposed minor adjustments would not be sufficient to reflect highly competitive market realities and stimulate investment in the next generation access networks. ETNO also insisted that the possible inclusion of functional separation, as confirmed by many experts, was not appropriate in today's competitive markets and would discourage further investment in access networks.

ETNO increasingly worked with third party experts:

- ETNO took an active part in the Communications Task Force created by the European think tank CEPS 'Centre for European Policy Studies', whose final report - entitled «Last call for Lisbon» - was officially presented to the European Commission on 29 June.
- ETNO also worked with external experts to further analyse the link between regulation, broadband and investment. An analysis carried out by the UK-based consultant Indepen, with the support of ETNO, questioned the supposed link between regulatory intervention, increased investment and broadband penetration.

ETNO conveyed its priorities for the review on multiple occasions, including bilateral meetings with the European Commission, the European Regulators' Group, MEPs and through various external fora and conferences.

In the context of the review process, ETNO was eager to learn more from the US experience, especially as far as investment in new fibre networks is concerned. In March 2006, an ETNO delegation of member companies' representatives was in Washington to visit Government and industry representatives.

ETNO main priorities for the review of the EU regulatory framework:

- Removing all ex-ante regulation of retail markets from the recommendation of the list of relevant markets and limit wholesale regulation;
- Confirming the temporary character of ex-ante regulatory regime by adopting a clear mechanism to accelerate the transition to EU Competition Law;
- Supporting a more flexible management of radio spectrum in Europe while ensuring the quality of services for consumers;
- Defining a policy that encourages investment in the roll out of next generation access networks,
- taking into account the high risk investments as NGNs represent a technological break and demand is uncertain;
- Encouraging facilities-based competition in Europe as the best option for ensuring broadband penetration growth;
- Taking into account differences in competitive environments throughout the EU;
- Maintaining the current notification system of market reviews, making it more transparent.

Challenges

As consumer demand for new innovative services grows, increased bandwidth capacity and more performing access networks are essential. The key challenge for the on-going review is therefore to ensure the best conditions for all operators to invest in new and alternative access networks and accelerate the emergence of a truly sustainable facilities-based competition in Europe, for the benefit of consumers.

1.2 Next generation networks

Background

The migration to all IP networks represents a major technological and economic revolution that will enable consumers to benefit from new convergent services. It also has the potential to lower market entry barriers and bypass existing bottlenecks.

Activities

ETNO participated in a number of consultations and workshops on the regulatory challenges of the transition towards all-IP networks, organised among others by the European Regulators' Group (ERG). The move towards next generation networks (NGNs) represents a technological break, involving new architectures, new protocols and new types of access. ETNO reiterated the view that rules developed for existing networks should not be applied to a totally new world, risking blocking innovation and preempting market developments.

ETNO also took part in a consultation organised by the ERG on IP interconnection. The association concluded that the move towards all-IP networks has the potential to remove existing bottlenecks and current interconnection rules are not adapted to a totally different network architecture.

Regulatory challenges of the next generation networks were the focus of ETNO's fourth annual conference in November 2006 that attracted more than 300 high-level representatives from the EU institutions, national authorities and the industry (see page 23).



ETNO 4th Annual Conference October 2006. From left to right: Boris Nemsic, CEO Telekom Austria; Jon Fredrik Baksaas CEO Telenor; Peter Scott, European Commission; Alfredo Acebal, Telefonica, ETNO Executive Board Chair; Michael Bartholomew, ETNO Director.

1.3 Mobile regulation

Background

Early 2006, the European Commission DG Information Society and Media, published a website comparing international roaming tariffs across the EU. In July 2006, the European Commission issued a draft regulation introducing a mechanism to reduce tariffs at both wholesale and retail prices.

Activities

ETNO welcomed efforts made by its members to provide consumers with more information and tariffs tailored to their needs. ETNO also noted a constant reduction in mobile prices over the past years, including for roaming tariffs. ETNO expressed strong concern that the proposed regulation bypasses the tools available in the regulatory framework, thereby creating uncertainty for the sector. The association also underlined that regulation at both wholesale and retail levels would be disproportionate.

Challenges

Any regulatory intervention on international roaming tariffs must carefully weigh the short term benefits for the consumers against the long term impact of the regulation on the operators' ability to invest and innovate.



2. ICT COMPETITIVENESS

Background

The positive impact of information and communications technologies (ICT) on the EU society and economy as a whole is widely recognised. While rapid technological developments create more opportunities, businesses in the EU, mainly SMEs, are still slow in embracing ICT in order to improve efficiency and productivity. Lack of ICT investment is one of the main reasons behind Europe's slower productivity growth than its economic partners.

Activities

ETNO actively participated in the work of the joint Task Force on ICT Sector Competitiveness and ICT Uptake set up by DG Information Society and Media and DG Enterprise. The aim was to identify the main obstacles to ICT competitiveness and uptake of new technologies by businesses and citizens. On 27 November 2006, the European Commission endorsed the final report of the Task Force, composed of senior officials from 25 ICT companies and representatives from consumers, trade unions and SMEs. The final report is the result of five-month discussions within the six working groups created to address the following issues: *ICT Uptake, IPR, Innovation, SMEs, Skills and employability and Single Market*. ETNO was responsible for coordinating the work of experts on ICT uptake. Experts recommendations to boost ICT uptake included:

- Creating a more flexible production environment and an enhanced adaptability of the workforce through access to education and life-long learning;
- Promoting investment in next generation broadband networks and services;
- Stimulating consumer motivation and skills by making eGovernment online services widely available; organising campaigns to raise awareness about the benefits of broadband in everyday life; implementing programmes to promote and facilitate the purchase of basic equipment and training packages; connecting all European schools to broadband, etc.

Challenges

In view of the forthcoming mid-term review of the i2010 strategy, it is key that policy makers focus on creating the best conditions for businesses and citizens to embrace new technologies. This will allow European society as a whole to fully benefit from the broadband revolution in terms of social welfare and economic growth. In turn, increasing demand will boost growth and innovation in the ICT sector.



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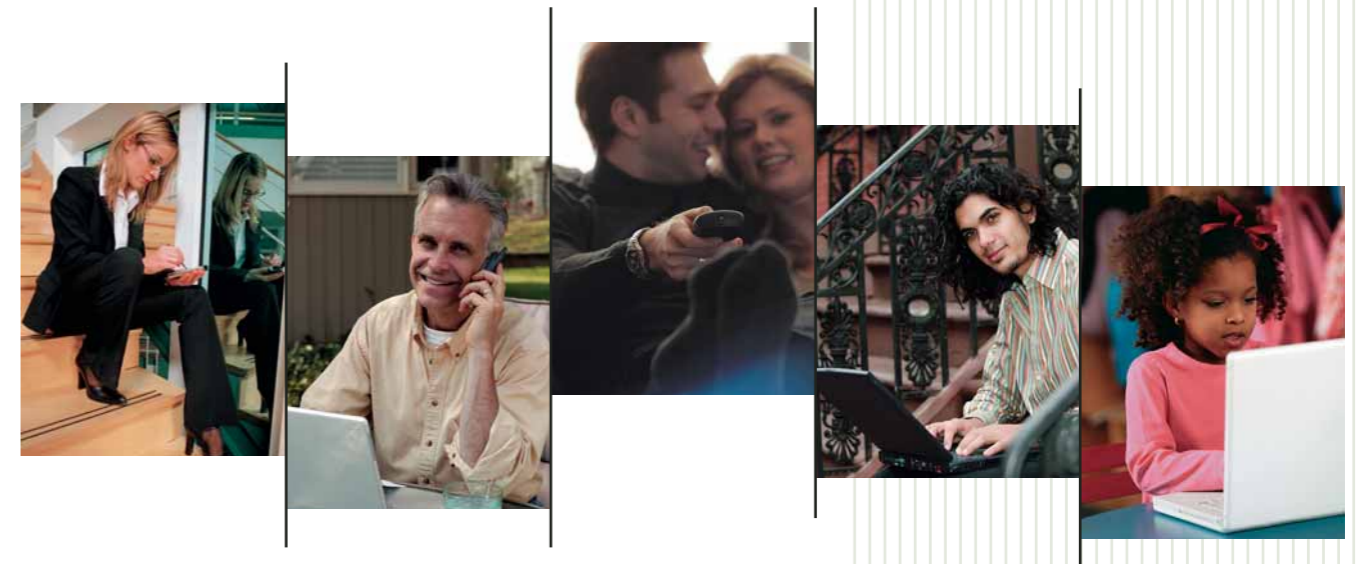
3. DIGITAL DIVIDE

As Information and Communication Technologies (ICT) are having an increasing importance in our everyday lives, it is essential to ensure that no citizens are left out of the Information Society. Bridging the digital divide, be it geographical or social, is a key priority for ETNO members.

- **Broadband for all:** ETNO welcomed the new EU broadband strategy launched in March 2006 jointly by Commissioners Reding, Fischer Boel, Hübner and Kroes, respectively in charge of Information Society and Media, Agriculture and Rural Development, Regional Policy and Competition. The strategy aimed at ensuring that all existing funds are mobilised to achieve appropriate coverage of broadband networks. ETNO insisted that thanks to market developments, there was a wide coverage throughout the EU. Public funds should therefore be used only in cases where private investment is not economically viable and where there is continued market failure. ETNO called for clear guidelines for the use of these funds in order to avoid distortion of competition and ensure transparency. The EU should primarily focus on stimulating demand by increasing digital literacy and skills and making government services widely available online.
- **E-accessibility:** ETNO members are multiplying efforts to bridge the social gap by improving citizens' skills. They also devote important innovation efforts to the deployment of services adapted to people with disabilities or special needs. ETNO members directly contribute to the goals set in June 2006 in Riga by Ministers of 34 European countries who committed to a series of actions to improve digital literacy by 2010. In this context, ETNO also actively participated in the working groups established by the European Commission (TCAM sub-committees) on accessibility and disability issues. The working groups composed of the disabled and industry representatives discussed necessary requirements to ensure that services are accessible to people with disabilities.



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4. INNOVATION

ETNO members are innovation leaders. Several ETNO members are among the top ten largest R&D investors in the European Union.

ETNO welcomed the importance given to Information Society Technology (IST) within the EU 7th Framework Programme for Research and Development. The Association also considers the creation of the European Technology Platforms (ETPs) as the most appropriate way to ensure a close link between research and market needs.

In this context, ETNO closely followed the EU debate on state aid and welcomed its opening to R&D and innovation. ETNO insisted however to the Commission that the use of state aid for innovation should not be restricted to small companies only.

5. CONTENT

Background

With the advent of convergence, the key driver for growth is content. Consumers want to use new broadband-based services to access content, any time, anywhere, through any device. In turn, online platforms create tremendous opportunities for the distribution of legitimate content.

Activities

5.1 ETNO dialogue with content providers

Back in 2005, ETNO launched an unprecedented dialogue at the EU level with representatives of the content industry to identify remaining obstacles to the distribution of legitimate online content. Building on this experience, ETNO held a second workshop which attracted more than 70 representatives from e-communications services providers, content producers and policy makers on 5 October 2006. The discussions focused on the variety of emerging business models and on the impact of the revision of the Television without Frontiers Directive on the roll out of new content-based offerings (see page 24).

ETNO second content workshop, October 2006.



5.2 Television without Frontiers Directive

Following the publication of the Commission's proposal for a revision of the Television without Frontiers Directive in December 2005, ETNO launched a broad coalition with the other trade associations representing the whole range of e-communications services in Europe – ECTA (European Competitive Telecommunications Association), EuroISPA and GSM Europe. The extension of the scope of the current directive to non-linear or on-demand services is a major issue for the entire e-communications sector. It risks bringing uncertainty at a time when major investments are being considered in new audiovisual services.

On behalf of this coalition, ETNO multiplied contacts with the European Parliament. For example, Michael Bartholomew presented the concerns of the industry regarding the scope of the revised Directive at a hearing organised on 1-2 June. He underlined that new online services were already adequately covered by the eCommerce Directive and by multiple self-regulatory codes. On 13 December, during their plenary session in Strasbourg, members of the European Parliament voted in first reading on the amendments proposed by the Culture Committee to the revised Television without Frontiers Directive. With their vote, MEPs significantly clarified definitions of services concerned by the new rules, echoing the fears expressed by ETNO and many other stakeholders.

Another major concern during the debates in the committees was the attempt to change the Country of Origin principle. ETNO joined a large coalition of trade associations, media industries and broadcasters to call on MEPs to safeguard this principle as a cornerstone of the EU internal market for television services. The Country of Origin principle was maintained. MEPs also agreed on making advertising rules more flexible and on authorising product placement in cinematographic and television films and sport programmes.

The distinction between linear and non-linear services is further defined along the lines of TV and TV-like, excluding a large number of Internet-based services which could have unduly hit with the initial text but not on-demand services.

5.3 EU Policies for Online Content

On 23 May at the Cannes Film Festival, Commissioner Reding unveiled the Film Online Charter, involving a number of content providers and telecom operators. The Charter aimed at identifying best practices for the distribution of legitimate online films. ETNO welcomed the Charter as an illustration of the increasing dialogue between telecom operators and content providers. Building on this initiative, the Commission launched an open consultation on the potential need for an EU strategy to improve distribution of online content. ETNO called on the European Commission to provide sufficient flexibility for market players to define new innovative business models. There is a wide consensus in the sector that any regulatory intervention on content distribution is premature and risk distorting the development of new business models. The EU has however a role to play in content licensing, through measures ensuring greater transparency of collecting society operations.



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6. SECURITY AND PRIVACY

6.1 Data retention

Background

The EU Directive on Data Retention was formally adopted in March 2006. The adopted text provides flexibility for member states to go beyond the Directive's requirements in terms of types of data to be retained, retention periods and cost reimbursement.

Activities

In view of the entry into force of the Directive in September 2007, ETNO closely monitored the implementation process within the member states

to ensure that rules are applying in a consistent way. Due to technical implications, a dialogue with all relevant actors is essential. ETNO, together with the other trade associations of the ICT sector – Cable Europe, ECTA, EuroISPA and GSME - urged the Commission to establish an expert group at the EU level involving industry to discuss issues pertaining to implementation as required by the Directive.

6.2 Spam

Background

Spam considerably hampers user confidence in new technologies. Spam has evolved over the years into malicious messages often used as a vehicle for spreading viruses, phishing, and more generally scams of a growing diversity. Indeed, spam has turned into a key security issue for customers and represents a major burden for network operators.

Activities

ETNO continued to promote its members efforts to combat spam, involving awareness raising, technical measures like filtering and the use of various kinds of white and black lists. ETNO welcomed the efforts of the European Commission to encourage coordinated actions to combat spam within the member states. ETNO believes that a consistent approach by all stakeholders involved (private and public) at the international level is needed, beyond the EU borders.

In November 2006, the European Commission adopted a communication taking stock of the measures implemented so far. The communication recognises the efforts made by the industry to raise awareness of users and to develop technical solutions such as anti-spam filters. Any EU regulatory framework for unsolicited commercial communications must be accompanied by strong technological solutions, developed by industry in a legislative environment that is free of uncertainties and internationally coherent. ETNO members believe it is essential to maintain a close dialogue between all stakeholders to fully understand the threats and agree on efficient responses. As most spam originates from outside the EU, this dialogue must also take place at a global level. The OECD Anti-Spam Toolkit and its annex on ISP best practices therefore constitute an obligatory reference for ETNO members.

6.3 Cyber-crime, fraud control and network security

Background

Enhanced network and information security is an essential pillar of the Information Society as Information and Communications Technologies become an intrinsic part of the daily life of Europe's citizens and businesses.

Activities

Security of services and networks, and protection of users is a priority for ETNO members who have taken proactive measures to guarantee as far as possible the security and robustness of their networks and services. They also continue to invest in the development of new solutions to ensure users can safely browse the Internet and to protect more vulnerable users, such as minors, from harmful content.

- ETNO welcomed the Commission's approach outlined in its Strategic Communications for a secure Information Society, building on complementary roles played by public and private sectors and favouring self-regulatory approaches.
- As part of the proposals for the review of the EU regulatory framework for e-communications services, the European Commission has included new security requirements for operators and given more power to National Regulatory Authorities to determine and monitor their technical implementation. Proposals also oblige operators to notify any security breach. ETNO voiced its concerns about the proportionality of the proposed measures. EU policy makers should encourage a self-regulatory approach and trust the industry players to determine the security measures to adopt given the high complexity and diversity of today's networks.
- ETNO closely followed the developments of a European approach for the protection and the recovery of critical infrastructure following a disaster or in case of a terrorist attack. For ETNO, any EU regulation in this field should aim at harmonising the objectives but should leave the responsibility to member states for the designation and the protection of critical infrastructure in close cooperation with the operators.





7. RESOURCE MANAGEMENT

7.1 Frequency management

Background

As providers of innovative and quality mobile and broadcast radio communications services to consumers, ETNO members are following closely the discussions on the allocation and use of radio frequencies. ETNO favours a flexible and fair use of the resources, while maintaining the high quality of services and avoid harmful interference.

Activities

- **Towards a new management of spectrum in the EU:** In its proposals for the review, the European Commission proposes to apply the principle of technology and service neutrality to the largest number of bands possible and to stimulate spectrum trading in selected bands. ETNO welcomes the harmonisation of frequencies in order to optimise the use of this resource. The association also favours the coordination of spectrum trading. The generalisation of the technology neutrality principle to certain spectrum bands will enable innovation and competition and should be introduced step by step with adequate feedback mechanisms. The possible risks of interference need to be carefully analysed.

- **Ultra-wide band (UWB) technology:** ETNO closely followed the Commission proposals, and the supporting compatibility studies by the CEPT, to allow UWB devices to be operated on a license-exempt basis in frequency bands such as 3.4-4.2 GHz and 5 GHz, already used by conventional radio services. Recent Commission decisions establishing the technical requirements for UWB devices take into account ETNO concerns about interference.

- **Introduction of multimedia services in the frequency bands allocated to the broadcasting services:** ETNO closely contributed to the work of the Radio Spectrum Policy Group (RSPG) to authorise the delivery of mobile multimedia services, currently offered to customers through UMTS networks, in the 470-862 MHz band. Opening this new band will allow to diversify ways customers access audio-visual services.



- **RFID:** ETNO welcomed the launch of EU policy on the deployment of RFID technology, recognising many potential benefits for the consumers. ETNO believes that the current regulatory tools are sufficient to deal with radio frequencies and privacy issues. The association believes however that the use of frequencies should be harmonised to avoid interferences and that standardisation is key in order to ensure interoperability inside and across markets.

7.2 Numbering, Naming and Addressing

Background

Through its Naming, Addressing and Numbering working group, ETNO continues to closely cooperate with the EU, ITU (International Telecommunications Union), RIPE (Réseaux IP européens) and ICANN (Internet Corporation for Assigned Names and Numbers) on all issues regarding number and address allocation and domain name creation. The working group also worked on the policies pertaining to the development of IPv6 addresses. ETNO also followed closely the work of the CEPT on the future of numbering taking into account the different networks (fixed and mobile), the increased demand for nomadic services and VoIP.

Activities

- **Internet Governance:** In the aftermath of the World Summit on Information Society in November 2005 (see chapter on International cooperation – p. 18), ETNO continued to voice its support for ICANN in the daily management of Internet domain names. ETNO participated in an open consultation by the US Department of Commerce on the future of ICANN. ETNO confirmed its support to the private multistakeholder «bottom up» model ICANN is currently built on and welcomed the transition of ICANN as soon as possible into an International Organisation in its own right. End of 2006, ETNO created a new working group of experts to deal with Internet Governance issues.

- **116 range:** ETNO welcomed the adoption of a Commission decision on the reservation of the 116 number range throughout the EU for European added-value social services. This decision is the result of a long debate between member states and industry in which ETNO has always been actively involved. The association consistently pointed to a series of technical issues that needed to be solved such as the eligibility of services and number assignment. Remaining issues will now need to be solved at the national level by the national regulatory authorities responsible for the assignment of the numbers. ETNO welcomed the creation of the first number in this range, the 116 000 number attributed to missing children services, and engaged into a dialogue at the EU level on its implementation.

8. TAXATION ISSUES

ETNO closely follows the efforts by the EU and OECD to harmonise national VAT rules on the treatment of telecoms and e-commerce services, as well as harmonising the VAT treatment of phone cards and premium rate services. ETNO calls on the EU decision makers to ensure that the development of innovative e-commerce and e-payment services is not indirectly hampered by horizontal regulation. Indirect taxes such as VAT remained the main topic for the ETNO's Taxation Working Group. ETNO followed with interest the debates at the European Court of Justice on the recuperation of VAT included in the fees paid for the acquisition of UMTS licenses. Members also discussed changes to the currently disparate EU-wide tax treatment of vouchers (prevalent in the mobile industry for consumers). Members contributed to a Commission consultation paper, to achieve a sensible and pragmatic solution. A sub-group was also created to discuss direct taxes, such as local taxes. ETNO also closely followed the debate around the revision of the e-Money Directive.





9. INTERNATIONAL COOPERATION

9.1 WTO/ International trade

Background

The EU's telecoms market is among the most open in the world. Strategic interest of members demand this openness is matched in other parts of the world. Following the conclusion of Trade negotiations at the Hong-Kong meeting in December 2005 to develop a new approach for services negotiations focusing on eight sectors including telecoms, ETNO continued to monitor the progress of the Doha round.

Activities

ETNO maintained a close dialogue with the European Commission throughout the year providing input on on-going GATS round negotiations. ETNO called for more countries to join the current telecoms agreement while existing signatories should be persuaded to fully implement it and expand the scope of their commitments.

9.2 Internet Governance Forum

One of the main decisions of the World Summit on Information Society held in Tunis in November 2005 was the creation of a multi-stakeholder platform for discussion on public policy issues pertaining to Internet governance, the Internet Governance Forum (IGF). ETNO closely followed in 2006 the setting up of the Advisory Group chaired by Nitin Desai, United Nations Secretary-General's Special Adviser for Internet Governance, and the creation of the Internet Governance Forum Executive Secretariat headed by Markus Kummer. A delegation of ETNO experts participated in the first meeting hosted in Athens on 30 October – 2 November 2006. The main themes for discussions were openness, security and diversity. ETNO is already actively preparing for the second meeting to be held in Rio de Janeiro on 12-15 November 2007. In parallel, ETNO continued to draw the EU attention to the need to avoid any duplication between the IGF and the daily work of ICANN. The association also followed the on-going discussions on the second main outcome of the WSIS, the launch of enhanced cooperation between governments and stakeholders on Internet Governance. ETNO insisted that whatever the form this «enhanced cooperation» would take, it should remain in line with the key principles of openness and multi-stakeholder dialogue agreed upon in Tunis.

9.3 International Telecommunications Union

A delegation of ETNO members participated in the Plenipotentiary conference in November 2006 during which ETNO hosted an official dinner for European delegations of CEPT and senior representatives of the ITU. ETNO has multiplied contacts with the newly elected ITU Secretary General, Hamadou Touré, to share views on the future of ITU and reinforce cooperation between the two organisations. As a sector member of the International Telecommunications Union, ETNO closely participated in the preparation of the 2006 ITU Plenipotentiary Conference in Antalya marked by the election of a new management team and a debate on the reform of the Union. ETNO has always been of the opinion that a change in the ITU mandate or name is not necessary to reflect the realities of convergence. The ITU should in particular continue to play an important role in discussions relating to global technical standards, use of radio-frequency spectrum, global numbering plans and the development of networks and services in developing countries. In order to remain close to the market needs, it is essential however that the ITU reforms its organisation to increase transparency and involve more actively members from the private sector.



ITU Plenipotentiary conference, Antalya November 2006. ETNO Director meets with ITU Secretary General Hamadou Touré.

10. SUSTAINABILITY AND CORPORATE SOCIAL RESPONSIBILITY

10.1 Sustainability Working Group

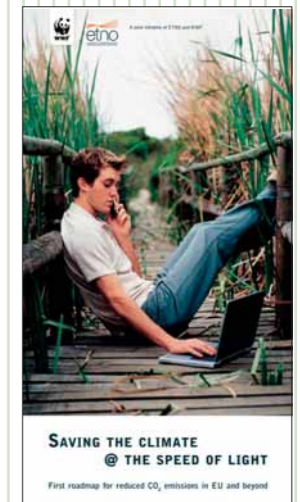


With its Sustainability Charter launched in 2004, ETNO is directly contributing to the EU strategy for sustainable development which is a cornerstone of the renewed EU agenda for jobs and growths. In 2006, ETNO members through the Sustainability Working Group, actively prepared the 2006 Sustainability Report of the Association. This report released early 2007 marks the 10th anniversary of ETNO's commitment to environmental protection and sustainability. This report shows that since the creation of the ETNO Environmental Charter in 1996, telecoms network operators have continued to improve their performance. Considerable progress has been accomplished in the optimisation of energy consumption and waste policies, thereby reducing the overall CO2 emissions.

Building on a partnership initiated in 2005 between ETNO and WWF, the two organisations published their first roadmap on climate change. The study shows how to reduce CO2 emissions by already 50 billions tones by 2010 by stimulating the use of new technologies such as video conferencing, web-based tax return, teleworking, etc. During the year, ETNO and WWF actively participated in multiple fora and international conferences to convince EU decision makers to ensure that ICT are fully integrated in EU and national climate change strategies.

10.2 Social Dialogue

Social issues and good working conditions have always been a longstanding priority for ETNO. Through the European Social Dialogue Committee, ETNO and UNI-Europa, have continued their cooperation at EU level on issues such as working conditions in call centres, telework, prevention of musculo-skeletal disorders. In many of these topics, ETNO members are frontrunners and the best practices gathered from operators established all over the EU serve as model for other industry sectors. This has been further illustrated by the work initiated in 2006 on best practices to promote diversity in the workplace and fight against any discrimination linked to the employee's race, religion, gender or sexual orientation. With the Support of the European Commission, ETNO and UNI-Europe are gathering examples of initiatives and projects to ensure for instance the promotion of a diverse workforce, the equal treatment of men and women and the integration of disabled employees. The result of the study will be released in 2007 on the occasion of the European Year of Equal Opportunities.



Communications and events

COMMUNICATIONS



The main highlight of ETNO's external communications activities this year was the publication of the first edition of ETNO's facts and figures. This brochure gave an overview of the investment made by ETNO members in networks and services and outlines the main trends in the new products launched. It also illustrated with concrete examples the contribution of ETNO member companies in the field of e-health, e-learning, assistance to elderly and disabled and e-inclusion.

ETNO continued to provide regular information on the sector and on key legislative developments to the representatives of EU and international press in Brussels. Several press briefings were organised. In June 2006, journalists had the opportunity to meet about 30 CEOs of ETNO member companies on the occasion of ETNO's CEO Summit. The event was largely echoed in the EU and national press.

In September 2006, ETNO's Communications Working Group held a first workshop on rebranding and brand management with communications experts from telecoms operators. A representative of the European Commission DG Communication also presented the new Commission's Communications Strategy.



ETNO Communications Workshop, September 2006.
Top picture: Georgios Markopouliotis, Communications DG,
European Commission.

ETNO – KEY INTERLOCUTOR OF THE EU INSTITUTIONS ON ICT RELATED ISSUES

Given the wide range of issues covered by its numerous working groups and task forces, ETNO is an essential interlocutor for the European Commission, the European Parliament and the Council on multiple issues pertaining to the telecoms sector and to the Information Society at large.

ETNO lunch-debates with senior officials of the Commission and with representatives of the EU Presidency are well established. ETNO held regular bilateral meetings with representatives from the European Commission DG Information Society and Media, DG Competition, DG Trade and DG Justice, Freedom and Security on various issues. DG Enterprise also called on ETNO's support in the context of the preparation of the 2007 e-Business Watch report on the uptake of ICT by different sectors of the economy.



ETNO lunch debates. From left to right: Frank Krüger, German Presidency; Fabio Colasanti, European Commission; Klaus Ackert, Austrian Presidency.

ETNO had regular meetings with members of the European Parliament and participated in a number of hearings, in particular on the revision of the Television without Frontiers Directive, where ETNO represented a large coalition of trade associations.

ETNO participates as an observer in the meetings of the Communications Committee. The Association also reinforced its cooperation with the European Regulators' Group by taking part in briefings, public hearings, consultations and through regular bilateral meetings.

MAIN EVENTS OF THE YEAR

20-23 March 2006 – Telecoms policy: US experience

ETNO organised a visit to Washington to meet with key Government representatives and private players in the US telecoms industry, including ETNO member companies representative offices in the US, Verizon, US Department of Commerce, the Federal Communications Commission (FCC) as well as the European Commission delegation in the US. As the European Commission had started the process of reviewing the EU regulatory framework for e-communications policy, it was the occasion to learn more about the US experience in dealing with the convergence challenges. In order to encourage broadband penetration and stimulate investments in alternative infrastructure, including fibre, the FCC has considered DSL services as information services rather than telecoms ones, thereby excluding broadband from the scope of ex-ante regulation. Other topics on the agenda included the implementation of the agreement achieved in Tunis at the World Summit on Information Society and the future of ICANN as well as relations with content providers and the revision of the Television without Frontiers Directive. The issue of net neutrality, currently at the centre of policy debates in the US, was also discussed.

7 June 2006, Brussels – ETNO CEO Summit

The review was the main theme for discussions of the ETNO CEO Summit, the largest meeting at the CEO level ever organised by the trade association. CEOs from 30 companies¹ representing the whole of Europe met with Mrs. Viviane Reding, Commissioner for Information Society and Media, and with Mrs. Neelie Kroes, Commissioner for Competition. CEOs insisted that Europe's competitiveness in 2015 will largely depend on the infrastructure that will be available. «Networks we are concentrating on today are not sufficient to carry tomorrow convergent innovative services that will enable Europe to compete», they told the Commissioner. The availability, magnitude and quality of these networks will depend on whether the Commission will send a strong signal to the investing community. «Investments in new networks are highly risky because of still uncertain demand», they added. The meeting was also the occasion for CEOs from new member states to raise the regional peculiarities of these markets, such as much lower fixed line penetration rates and a high degree of fixed-mobile substitution. The ETNO CEO Summit closed with a press conference that gathered a large number of representatives of EU press agencies and national media. ETNO messages were largely echoed in the press.



ETNO CEO Summit, June 2006. CEOs meet with Neelie Kroes, EU Commissioner for Competition.

1. Belgacom, BH Telecom (Bosnia-Herzegovina), BT, Cesky Telecom, Croatian Telekom, CYTA (Cyprus), Deutsche Telekom, Eircom, Elion (Estonia), EPT (Luxembourg), France Telecom, Latt Telekom (Latvia), Magyar Telekom, ONO (Spain), OTE (Greece), Romtelecom, Siminn (Iceland), Slovak Telekom, TDC, TDF (France), Telecom Italia, Telefonica, Telekom Austria, Telekom Slovenije, Telenor, Telia Sonera, Telekomunikacja Polska, Turk Telekom.

5 October 2006, Brussels - 2nd ETNO Content Workshop



ETNO Content workshop, October 2006.

More than 70 representatives from e-communications services providers, content producers and policy making bodies attended the second ETNO cross industry workshop on content distribution over new media platforms organised by ETNO on 5 October 2006. This event was the follow-up of the first joint-industry dialogue at the EU level launched by ETNO back in March 2005 in cooperation with the trade associations representing the different segments of the content industry. The main topic of the workshop was the development of new business models. This theme was fully covered by interesting contributions from major audiovisual media companies, broadcasters, fixed

and mobile operators and fellow associations, including: Walt-Disney, Telefónica, Time Warner, Hutchinson, Vivendi Universal, Liberty Global Europe, BBC, EDI/MA (European Digital Media Association), ISFE (Interactive Software Federation of Europe). Speakers insisted on the rapid market developments which are still at an embryo phase. It was remarked that new business models were emerging but consumer demand still remained largely uncertain. Self-made content was identified as an increasingly important driver for growth and it has led to totally new and revolutionary business models.

26-27 October 2006, Bratislava: ETNO 29th General Assembly

ETNO's 29th General Assembly hosted by Slovak Telekom in Bratislava, was opened by Pavol Kukura, 2006 GA Chairman and gathered about 80 representatives of ETNO member companies. The event was welcomed by Mr Lubomir Vazny, Slovak Minister of Transport, Posts and Telecommunications, Mr Milan Luknar, Chairman of the Slovak National Regulator and Miroslav Majoros, CEO of Slovak Telekom. Alfredo Acebal, Chairman of ETNO Executive Board and Michael Bartholomew, Director, gave an extensive overview of the main activities of the past year and main challenges for the next months. The review of the regulatory framework was on the top of the agenda as the General Assembly coincided with the end of the Commission's consultation. ETNO also organised a workshop on consequences of convergence for regulators with the participation among others of James Thomson from Cullen and Professor Alexandre de Streel (see picture on the right) from University of Namur, Belgium. During the GA, members re-elected Alfredo Acebal of Telefonica as board chairman and confirmed France Telecom and Swisscom as board members. Telenor was appointed as a new member of the board. Another highlight of this 29th GA was the admission of a new full member, the Lithuanian operator TEO LT.



ETNO General Assembly, Bratislava, October 2006.

7 November 2006, Brussels - ETNO 4th Annual Conference:

«Building tomorrow's networks - Defining the long-term policy»

More than 250 senior officials and experts from the EU institutions, national authorities, telecoms industry, financial analysts and academics attended ETNO 4th Annual Conference. The two keynote speakers from the industry, **Jon Fredrik Baksaas**, CEO of Telenor and **Boris Nemsic**, CEO of Telekom Austria, insisted that the current rules designed for old fixed line networks were not suitable to tomorrow highly competitive and convergent next generation networks. **Antti Kohtala**, from the EU Finnish Presidency, insisted on the importance of the harmonisation of spectrum management but rejected the idea of the creation of a new EU body. He also added that the market driven approach applied to spectrum should also be reflected in other areas of telecoms markets.



ETNO Annual Conference, October 2006.

The two main sessions respectively moderated by **Philippe Defraigne**, from Cullen International and **Malcolm Harbour**, MEP dealt with new market trends and technologies and with regulatory challenges. Speakers from the telecoms and equipment industries highlighted that convergence had completely changed the rules of the game and revolutionised the way people access and use content. Beyond IP TV and video, the production and exchange of self made content is becoming a key driver. During the session on regulatory challenges, several visions for the future of EU regulation were presented. **Leonard Waverman**, Professor from the London Business School questioned the capacity of the current rules to reflect the changes in today's markets. **Kathryn Brown** from Verizon also insisted that the best environment or providing choice to consumer was still platform competition. **Roberto Viola**, 2007 Chairman of the European Regulators' group highlighted that the biggest dilemma for regulators was to guarantee a level playing field for all operators while at the same time maintaining incentives for incumbents to invest. **Peter Scott**, Head of Unit at DG Information Society responsible for the review, gave an overview of the numerous submissions given to the Commission. He insisted that the current regulatory framework was globally responding to the challenges. The conference also consisted of an interactive debate animated by **David Molony**, Editor in Chief of Total Telecom, between the European Commission, the telecoms industry, an economist and a financial analyst. The main theme of the debate was the impact of the telecoms sector on the Lisbon goals.

6 December 2006, Brussels - ETNO Annual Reception

ETNO's annual reception has become a landmark for the telecoms community in Brussels and beyond. More than 200 people gathered in an old Brussels Theatre «Le Vaudeville». Michael Bartholomew, ETNO Director, Rudolf Strohmeier, Head of Commissioner Reding's Cabinet, Malcolm Harbour, MEP and Alfredo Acebal, Telefonica, Chairman of ETNO's Executive Board, addressed the numerous participants from the European Commission, the Parliament, telecoms industry and others.



ETNO Annual Reception, December 2006, Theatre «Le Vaudeville», Brussels.

ETNO PARTICIPATION IN EXTERNAL CONFERENCES AND EVENTS

Throughout the year, ETNO participated in multiple conferences on various aspects related to the telecommunications markets and services in Europe and beyond.

- **24 January, Brussels** – EC Public Workshop on the review of the NRF and Recommendation on Relevant Markets
- **30 January, Ljubljana** – NextGen Forum, *round Table «CEE operator strategy & regulatory affairs»*
- **1 February, Brussels** – *Chocolate or Vanilla? New industry in a flat world*
- **23 February 2006, Brussels** – EITO 2006 report launch
- **8 March 2006, Brussels** – CEPS Task Force on Communications, *The revision of the Television without Frontiers Directive and content regulation*
- **23 March, Las Vegas** – ETNO Director gave a keynote speech at the TelecomNEXT conference
- **2-4 May, Athens** – «The Prospects of Broadband in the Mediterranean», EETT Conference
- **1st June 2006, Brussels** – EP Hearing on the revision of the Television without Frontiers Directive
- **12-14 June 2006, Brussels** – 9th Mobile Regulation Conference
- **7 September 2006, Krynica (Poland)** – Krynica Economic Forum Panel
Panel Discussion: *Applying old telecoms rules to new Internet Communications – Why, When and How?*
- **11 October 2006, Berlin** – CEPT Conference
- **19 October, Brussels** – Information meeting on European common proposals for the work of the ITU – Plenipotentiary conference
- **November 2006, Antalya** – ITU 2006 Plenipotentiary Conference
- **16 November 2006, Brussels** – ECTA Annual Conference: *Converged services: TV Without Frontiers*

About ETNO

NETWORKS

ETNO has a long record of cooperation and synergies with organisations, associations and fora involved in aspects related to the telecoms sector in Europe. In the context of convergence, ETNO is increasingly working with other Brussels-based associations on topics relevant for the whole e-communications industry in the EU, such as data retention. ETNO has also initiated an unprecedented dialogue with content providers.



POSITIONS PAPERS

- EC078** ETNO Expert Contribution commenting on draft ECC/REC/(05)09 – Customer Protection in case of misuse of international E.164 Resources – JANUARY 2006
- RD232** ETNO Reflection Document on the EC Green Paper on a European Programme for critical infrastructure protection – JANUARY 2006
- RD233** ETNO Reflection Document on the revised draft ERG Common Position on the approach to appropriate remedies in the ECNS regulatory framework – JANUARY 2006
- RD234** ETNO Reflection Document in response to the call for input on the forthcoming review of the EU regulatory framework for electronic communications and services (Radio Spectrum aspects) – JANUARY 2006
- RD235** ETNO Reflection Document - ETNO contribution to the 2006 Review – JANUARY 2006
- RD236** ETNO Reflection Document in reply to the European Commission call for input - Recommendation on relevant markets – JANUARY 2006
- EC079** ETNO Expert Contribution to the Film on Line project – follow up of the Enlarged Meeting on Film on Line, January 13, 2006 – FEBRUARY 2006
- RD237** ETNO Reflection Document on the Communication from the Commission to the Council and the European Parliament on the Review of the Sustainable Development Strategy MARCH 2006
- EC080** ETNO Expert Contribution on the «Internet Assigned Numbers Authority (IANA) policy for allocation of IPv6 blocks to Regional Internet Registries» – MARCH 2006
- EC081** ETNO Expert Contribution in response to the «Study on collective use of spectrum» performed by a consortium of behalf of the European Commission – MARCH 2006
- RD238** ETNO Reflection Document on «Net neutrality» in the US - framing the debate – APRIL 2006
- RD239** ETNO Reflection Document on the draft WIPO Treaty on the Protection of Broadcasting Organisations – APRIL 2006
- EC082** ETNO Expert Contribution on the harmonised use of radio spectrum by equipment using ultra-wideband (UWB) technology in the European Union – MAY 2006
- EC083** ETNO Expert Contribution on draft decision ECC /DEC/(06)EE on the harmonised conditions for devices using Ultra-Wideband (UWB) technology in the frequency band 3.1 – 4.8 GHz MAY 2006
- EC084** ETNO Expert Contribution on «Draft ECC Report 87 - The future of numbering» – MAY 2006
- EC085** ETNO Expert Contribution on «Draft ECC Report 86 – Draft Report on Consumer Abuses and Fraud Issues relating to High Tariff Services» – MAY 2006
- RD240** ETNO Reflection Document as an input to a future European Commission Communication on SPAM – JUNE 2006
- RD241** ETNO Reflection Document on draft ECC Decision on the designation of the bands 880-915 MHz, 925-960 MHz, 1710-1785 MHz and 1805-1880 MHz for terrestrial IMT-2000/UMTS systems JUNE 2006
- RD242** ETNO Reflection Document on the Strategic Development of ITU – JULY 2006
- EC086** ETNO Expert Contribution on the introduction of Multimedia Services in particular in the frequency bands allocated to the broadcasting service – RSPG Opinion – JULY 2006
- RD243** ETNO Response to Notice of Inquiry from the U.S. Department of Commerce on the Transition of the Technical Coordination and Management of the Internet Domain Name and Addressing System – JULY 2006
- EC087** ETNO Expert Contribution commenting on CoCom06-24: Guidelines on implementation and roadmap for Commission Decision on reserving the number range beginning with «116» for harmonised numbers for harmonised European services – JULY 2006
- RD244** ETNO Reflection Document on RFID – SEPTEMBER 2006
- RD245** ETNO Reflection Document in reply to the public consultation on Content Online in the Single Market – OCTOBER 2006
- EC088** ETNO Expert Contribution on Community Framework for State aid for Research and Development and Innovation – OCTOBER 2006
- RD246** ETNO Reflection Document in reply to the ECC Consultation on the draft new ECC/DEC/(06)MM OCTOBER 2006
- RD247** ETNO Reflection Document with Comments on the Commission draft Recommendation on relevant product and service markets in the electronic communications sector OCTOBER 2006
- RD248** ETNO Reflection Document on the Commission Communication on a Review of the EU Regulatory Framework for electronic communications networks and services OCTOBER 2006
- RD249** ETNO Reflection Document on the draft ERG 2007 Work Programme – NOVEMBER 2006
- RD250** ETNO Reflection Document on the ERG draft Principles of Implementation and Best Practice for WACC calculation – NOVEMBER 2006
- RD251** ETNO Reflection Document on the ERG Broadband market competition report 2006 DECEMBER 2006
- RD252** ETNO Reflection Document on the ERG IP interconnection consultation – DECEMBER 2006

WORKING GROUPS

(situation as at May 2007)

ETNO's working groups--a key strength of the Association--cover a broad range of topics directly relevant to the business of telecoms operators.

Linked to one another by an Intranet for rapid consultation, each group draws on specialists from ETNO companies who examine a particular subject and reach a convergence of views. In most cases, the outcome is a Common Position or a Reflection Document, which is presented to decision-makers and the public to help shape debate on telecoms policy, rules, standards and regulations.

Regulatory Policy – Working Group

CHAIR: Ralf Nigge (Deutsche Telekom)

Regulatory Economics – Task Force

CHAIR: Paul Richards (BT)

European Information Society – Working Group

CHAIR: Pablo Pfof (Telefonica)

e-Inclusion – Working Group

CHAIR: Henk Mannekens (BT)

Digital Divide – Working Group

CHAIR: Paula Sunjic (Croatian Telecom)

Internet Governance – Working Group

CHAIR: Konstantin Kladouras (OTE)

Content Issues – Working Group

CHAIR: Neil Gibbs (BT)

Data Protection & Information Security Working Group

CHAIR: Cristina Vela (Telefonica)

External Trade Issues – Working Group

CHAIR Tilmann Kupfer (BT)

Tax Issues Related to Telecom Services Working Group

CHAIR: Dave Taylor (BT)

Employment, Health & Safety – Working Group

CHAIR: Laurent Zylberberg (France Telecom)

Sustainability – Working Group

CHAIR: Danilo Riva (Telecom Italia)

Fraud Control – Working Group

CHAIR: Luis Sousa Cardoso (Portugal Telecom)

Joint Task Force on Security Issues

CHAIRPERSONS: C. Vela and L. Sousa Cardoso

Frequency Management – Working Group

CHAIR: Massimiliano Simoni (Telecom Italia)

Benchmarking – Working Group

CHAIR: Jacques Tamisier (France Telecom)

Naming, Addressing and Numbering Issues Working Group

CHAIR: Christina Kelaidi (OTE)

Research & Development – Working Group

CHAIR: Geoff Scott (BT)

ITU – Working Group

CHAIR: Dominique Würges (France Telekom)

Communications Managers – Working Group

ORGANISATION

General Assembly

CHAIR: Jens Hauge, TDC
VICE-CHAIR: Luigi Gambardella, Telecom Italia

Executive Board

CHAIR: Alfredo Acebal, Telefonica

Stephen Crisp, BT
Roland Doll, Deutsche Telekom
Patrick Galvin, Eircom
Vianney Hennes, France Telecom
Francisco da Silva, Portugal Telecom
Thomas Müller, Swisscom
Allan Bartroff, TDC
Luigi Gambardella, Telecom Italia
Harriet Berg, Telenor
Gunnar Forsgren, TeliaSonera



EB meeting Sevilla, May 2007.
From left to right: first row: Roland Doll, Michael Bartholomew, Harriet Berg, Alfredo Acebal, Luigi Gambardella, Joachim Hoenig (DT alternate).
Second row: from left to right: Martin Atherton (BT alternate), Patrick Galvin, Allan Bartroff, Vianney Hennes, Francisco da Silva.

Administrative Committee

CHAIR: Thomas Müller, Swisscom
MEMBERS: Stephen Crisp, BT – Gunnar Forsgren, TeliaSonera
OBSERVER: Alfredo Acebal, Telefonica

STAFF

Michael Bartholomew, Director ④

Leo Debecker, Executive Manager, Operations ⑧

Thierry Dieu, Communications Manager ②

Fiona Taylor, Senior Adviser, Public Affairs ③

Bernardo Herman, Regulatory Affairs Manager ⑦

Anne Vallès, HR & Financial Officer ⑥

Isabelle Claeys, Assistant to the Director ①

Maria Rodriguez-Dhénin, Secretary ⑤



ETNO Members

	Belgacom (Belgium)
	BH Telecom (Bosnia and Herzegovina)
	BT (British Telecom)
	BTC (Bulgarian Telecommunications Company)
	Croatian Telecom (Croatia)
	Cyprus Telecommunications Authority (Cyprus)
	Deutsche Telekom (Germany)
	Eircom (Ireland)
	Elion Enterprises Ltd. (Estonia)
	Elisa Corporation (Finland)
	Entreprise des Postes et Télécommunications
	Finnet Group (Finland)
	France Telecom (France)
	Invitel (Hungary)
	Koninklijke KPN (The Netherlands)
	Lattelecom (Latvia)
	Magyar Telekom (Hungary)
	Makedonski Telekomunikacii (F.Y.R. of Macedonia)
	Maltacom (Malta)
	Netia Telekom (Poland)
	OTE (Greece)

	OTE (Greece)
	Portugal Telecom (Portugal)
	RomTelecom (Romania)
	Síminn (Iceland)
	Slovak Telekom (Slovakia)
	Societatea Nationala de Radiocomunicatii (SNR) (Romania)
	Swisscom (Switzerland)
	TDC (Denmark)
	TDF (France)
	Telecom Italia (Italy)
	Telefónica (Spain)
	Telefonica 02 Czech Republic (Czech Republic)
	Telekom Austria (Austria)
	Telekom Slovenije (Slovenia)
	Telekomunikacja Polska (Poland)
	Telenor (Norway)
	TeliaSonera (Sweden-Finland)
	Teo (Lithuania)
	Türk Telekomünikasyon (Turkey)
	VIPNet (Croatia)

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