

CIO Executive Forum

Information Security

Enterprise Architecture

Customer Self Service

BI & Data Warehouse

TeBIT

Procurement & Vendor Management

Anti Spam

Billing

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ETIS Annual Report 2010 | 2011

This Annual Report is dedicated to the memory of Bjorn Reimers.



ETIS Annual Report 2010 | 2011

Sharing Knowledge is our Strength!

Foreword

I would like to take this opportunity to introduce this year's Annual Report. This year is a special year, as ETIS will be celebrating its 20 year anniversary as an organisation. For associations such as ours this is remarkable result when one looks at the number of associations which have closed down due to lack of funding, relevance and above all interest from the member companies. This is proof to me that ETIS is truly unique and well worth all the work and effort that is put into continuing the work initially started in the early 90's. I am also proud to report that we are still a healthy and stable organisation with a solid financial position. In fact our membership, activities and participation rates have continued to rise demonstrating that our members are finding a real value in our organisation.



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Looking back on this past year we have seen that Telcos are struggling more than ever to stay relevant in a world dominated by over the top players, web 2.0, cloud services, social networking and fast changing consumer patterns. Responding to this critical issue, the theme of the ETIS Community Gathering hosted in Stockholm was: 'The Future of Telecom Services – How to stay relevant in a 2.0 world'. This highly successful event featured a memorable keynote presentation from TeliaSonera's CEO, Lars Nyberg, and brought together over 150 participants from 54 companies.

This past year continued to show high levels of activity as our members showed their ongoing commitment and interest in sharing experiences and best practices with their peers and working together on common challenges. I would also like to welcome our newest Member, Telefonica, who decided to join ETIS in 2010 after a trial membership period and have already been very active participants in the Information Security and Anti-Spam groups. We are looking forward to sharing knowledge with them and continuing this strong partnership. ETIS also welcomed several new Associate Members which have helped to support our specific activities with their valuable contributions to our working groups and events.

This year ETIS continued to produce benchmarking surveys, deliverables and best practices. It is important to note that with the help of The Boston Consulting Group we have upgraded the TeBIT Benchmarking Study which has greatly improved the quality and value of the report. The Information Security Benchmark has also entered its third year now which shows that it continues to be of value to our members.

A good part of 2010 was spent designing and building the new ETIS Members' Corner. The goal of the new site was to take advantage of web 2.0 technology, social networking and collaboration tools in order to build a new and improved ETIS website and Members' Corner. By introducing these new technologies to our Members' Corner we have created a Members' Corner that aims to encourage more openness and sharing of information. Since its launch we have already seen a large increase in the number of Members' Corner visits and have received a lot of positive feedback as our members are using the site to share knowledge and network in between physical meetings.

Last but not least, I would also like to take this opportunity to thank all of the Working Group Chairmen who volunteered their time and leadership to move our groups forward. It is important to remember that ETIS is a member driven organisation and it is the members who decide upon the key issues we cover. Our slogan has always been 'Sharing knowledge is our strength' but using the knowledge is clearly yours!

Yours sincerely,

Tora Tenden
ETIS Chairman

Council Report

The main responsibility of the Council is to ensure the effective management of ETIS allowing the organisation to provide benefits to its member companies by enabling the exchange of experience and information on the use of IT within the telecom business. The Council has, by the authority of the Management Board, the necessary executive powers for the actual management of the ETIS foundation. It consists of 7 to 9 members of the Management Board and members of the Council are elected for a period of two years.

In the past year, the Council held seven meetings either via conference call or physically in Brussels. The following is an overview of the key issues which have been dealt with during this reporting period.

COUNCIL MEMBERS

During this reporting period, the ETIS Council welcomed two new Council members, Dr Michael Damarowsky, Deutsche Telekom and Mr Marco Bavazzano, Telecom Italia. Mr Gerry Quinn, eircom stepped down following a reorganisation within his company. Later during the year, Mr Mark Easton, also had to step down as Council member. ETIS would like to thank Thomas Fach, Gerry Quinn and Mark Easton for their dedication and commitment to the ETIS Council during their time on the Council. Bjorn Reimers, TeliaSonera was re-elected for a two-year period as Secretary Treasurer.

ETIS ACTIVITIES & EVENTS

As always, the Council was actively involved in the ongoing activities of the organisation ranging from extending the remit for TeBIT to the Community Gathering hosted in Stockholm. Their involvement was also essential to the organising of the two Management Board meetings, hosted by Telecom Italia and TeliaSonera together with the CIO Executive Workshops. They also followed up on the activities of all working groups. The Council also re-endorsed the strategic KPIs in place and carefully analysed the KPI results for this reporting period.

“The ETIS Council is the driving force behind the adoption of new ETIS activities.”

Many of the new topics that are covered in ETIS come from the Council and they are heavily involved in the setting of agendas for our Board meetings, workshops and conferences.”



Tora Tenden
ETIS Chairman
since May 2002



Bjørn Reimers
TeliaSonera
Council Member & Treasurer
since June 2006



Andreas Asimomitis
OTE
Council Member
since April 2007



Wim De Meyer
Belgacom
Council Member
since October 2007



Kees Stok
KPN
Council member
since May 2009



Dr. Michael Damarowsky
Deutsche Telekom
Council Member
since February 2010



Marco Bavazzano
Telecom Italia
Council Member
since May 2010

ETIS STRATEGY & OBJECTIVES

The Council endorsed the project of updating the ETIS Members' Corner on the ETIS website. They actively participated in the brain storming sessions and beta-testing phases. The new website was successfully launched early 2011 and it has been very well received throughout the ETIS community.

The Council members were actively involved with the development and "going live" of the Next Generation Network questionnaire. This document was used as a basis for discussion at the CIO Executive workshop. The ETIS Council also approved the "Agile Product Lifecycle Management"(APLM) project proposed by the Enterprise Architecture Group.

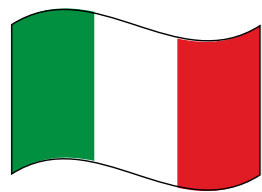
The Council was also responsible for introducing more defined work-plans and summaries for the working groups to help our members stay better informed and get more value out of their memberships.



39th Management Board meeting hosted by Telecom Italia in Rome

39th Management Board Meeting

The Management Board determines the policy of ETIS and approves the annual budget. The Board consists of representatives from all companies who are members of ETIS. The Management Board meets twice a year to exchange ideas, identify topics of interest and common concerns. The Management Board also elects a Chairman and Secretary-Treasurer for a two year period. The Board authorises the formation of Working Groups, with specific responsibilities to pursue these topics.



ETIS held its 39th Management Board meeting on 26 May 2010 in Rome hosted by Telecom Italia. During this meeting, the main focus was on the administrative matters for the past fiscal year.

During this meeting, Bjorn Reimers' mandate as Secretary Treasurer was prolonged for a further two years. Two new Council members were also elected for a two year period, Dr Michael Damarowsky, Deutsche Telekom, and Marco Bavazzano, Telecom Italia.

The Central Office also presented the ETIS Deliverables together with an update on the ETIS Key Performance Indicator's for 2009. The results of these two reports generated discussion between the Management Board members and they concluded that all available deliverables and information were of very good standard and should be widely used within the member companies.

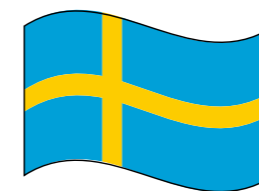
This meeting also enabled networking amongst members and sharing of their current experience on various issues ranging from transformation plans to future perspectives.

40th Management Board Meeting



40th Management Board meeting hosted by TeliaSonera in Stockholm

The ETIS Management Board gathers twice a year and handles the various administrative matters such as defining the budget. The Board also oversees the working groups progress together with approving new activities, events and membership applications.



The 40th ETIS Management Board meeting was held 13 October 2010 in Stockholm hosted by TeliaSonera. This preceded the ETIS Community Gathering on 14-15 October

2010 also held in Stockholm, Sweden.

The Board Meeting consisted of administrative and financial matters together with a report on ETIS activities. Also during this meeting the Chairpersons of the various Working Groups were invited to present updates and overviews of their groups' activities over the past year.

The Central Office announced that with regard the 2010 TeBIT Benchmarking study, this will now be enhanced with new topics, thanks to the co-operation with The Boston Consulting Group.

The Chairman also informed the Board members that, unfortunately Mark Easton, BT had to step down from his Council member role due to his new function within BT. As no candidates were proposed to replace Mark, this election was postponed to the next Management Board meeting.

The Chairman also announced that ETIS had, since the previous meeting, one new Member, Telefonica and subsequently they would be attending the Gathering. The Central Office also presented to the Management Board members the Annual Report 2009-2010 which will be distributed to all ETIS member companies, Associates & Partners. The calendar for 2011 events/meetings was also distributed at that time.

Central Office

The Central Office, is a permanent group of personnel employed by ETIS to provide stable administrative support, management, project co-ordination, internal and external communications and information to facilitate the activities of the Council, the Management Board and Working Groups

One of the main activities for the Central Office was the preparation of the ETIS Community Gathering hosted in Stockholm 14-15 October 2010. A lot of effort was also put towards the organisation of the various working group meetings, Management Board meetings, Council Meetings and CIO workshops all over Europe.

The Central Office is also key in helping to produce ETIS deliverables such as Benchmarks, Surveys and Reports. This year the Central Office helped to produce the following deliverables: the TeBIT Benchmarking Study, the Customer Self-service Quarterly Survey, the Procurement and Vendor Management Benchmarking Study, the document on KPIs for Procurement, the Information Security Data Retention Survey, the Operational Business Intelligence Survey, The Next Generation Network Survey and the Information Security Benchmark. These surveys are an excellent way for our members to share knowledge.



Terje Tøndel
Managing Director



Fred Werner
Business Development
Manager



Eirini Markoula
Benchmarking Project
Co-ordinator



Joanna Fitzgerald
Office Manager

New ETIS Website

One of the main tasks of the Central Office during 2010 was to create a new ETIS Website and Members' Corner. The goal of the new site was to take advantage of web 2.0 technology, social networking and collaboration tools in order to build a new and improved ETIS website and Members' Corner. By introducing these new technologies to our Members' Corner we have created a Members' Corner that aims to encourage more openness and sharing of information online and in between the physical meetings.



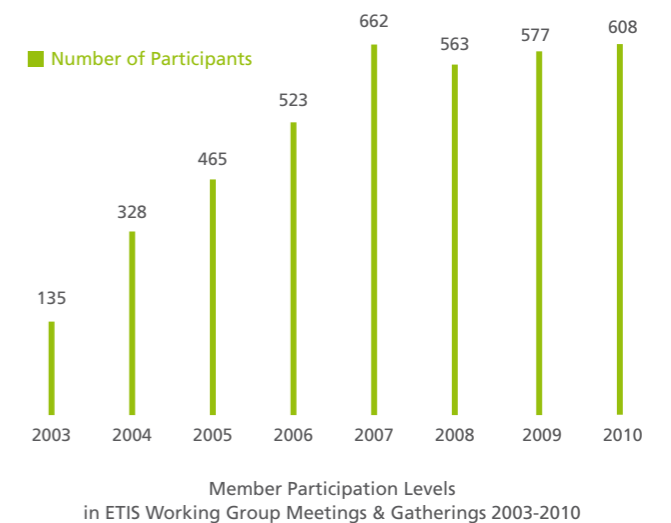
ETIS 20th Anniversary Booklet

To mark the 20 year anniversary of ETIS, the Central Office began work on an anniversary booklet to provide a short history and record of a remarkable organisation, ETIS, the ideas behind it, the motives of the people who were involved with it, from its earliest beginnings until present time. It also tries to identify and describe some of the major, underlying themes characterizing the changes which have taken place since ETIS began, in the domains of telecommunications and information technology. On a lighter note, we have included various tidbits of sporting, entertaining and historic events, so that you can try to remember where you were at that time.



Number of participants

One of the tasks of the ETIS Central Office is to maintain links with members and encourage member participation in ETIS activities. The following graph shows that there has been a healthy increase in activity with our members participating in more working group meetings, workshops and gatherings which is a positive sign that ETIS is growing in the right direction. Despite the economic crisis and wide spread travel restrictions 2010 continued to show impressive attendance levels



New Members

NEW MEMBER - TELEFONICA



After a trial membership, Telefonica joined ETIS as a Member in 2011 and is set to share knowledge with our members in our upcoming working groups and events. Telefonica has

been very active in the Information Security Working Group and the Anti-Spam Co-operation Group.

The member representative for Telefonica is Manuel Carpio, Director of Information Security and Prevention of Fraud for the Telefonica Group.

About Telefonica

Telefónica is one of the world leaders integrated operators in the telecommunication sector, providing communication, information and entertainment solutions, with presence in Europe, Africa and Latin America. It operates in 25 countries. As of April 2011, Telefónica's total number of customers amounted to 295 millions.

NEW DAUGHTER COMPANIES

One of the benefits of ETIS membership is that the members can involve their daughter companies. During 2010 the following companies have joined ETIS. Avea is a daughter company of Turk Telekom. EMT is a daughter company of TeliaSonera operating in Estonia. PTC is a daughter company of Deutsche Telekom operating in Poland.



NEW ASSOCIATE MEMBER – PRAESIDIUM



Praesidium joined ETIS as an Associate Member in 2011 and is set to share knowledge with our members in our upcoming working groups and events. Praesidium is an active participant in the Information Security Working Group.

About Praesidium

Praesidium is a global Business Assurance consultancy working across numerous industries and based in the UK. Business Assurance is focused on managing risk and improving operational performance. Praesidium's consultancy portfolio covers revenue assurance, fraud management, network security, business continuity, margin assurance and operations assurance. Praesidium is an independent consulting division within WeDo Technologies.

NEW PARTNER – QUEST FORUM



ETIS and Quest Forum signed a partnership agreement during the ETIS Gathering in Stockholm. ETIS was also present at the Quest Forum Conference held in Rome.

QuEST Forum is a global communications association comprised of a unique partnership of industry service providers and suppliers dedicated to continually improving products and services in our industry.

NEW PARTNER – FIINA



In 2010, ETIS and Fiina signed a partnership agreement related to the area of Information Security. FIINA – The International Forum for Irregular Network Access – is an international Association of Telecommunications Operators whose aim is to promote understanding and cooperation between its members on issues such as fighting telecommunications fraud, maintaining network security and the protection of telecommunications infrastructures (www.fiina.org).

NEW ASSOCIATE MEMBER – ORGA SYSTEMS



Orga Systems contributed to our Billing working group meeting hosted by OTE in Athens and joined ETIS as an Associate Member shortly after. We are looking forward to welcoming Orga Systems to the ETIS Community and they are set to contribute to the Billing Working Group (WG), Business Intelligence & Data Warehouse WG and the Enterprise Architecture WG.

Ramez Younan, CEO, Orga Systems GmbH, had the following to say on ETIS membership: "Orga Systems is very pleased to become a member of ETIS. Orga Systems' vision for the industry is to improve business performance by personal exchange of information on using ICT effectively within the organization. Various options for collaboration between the members enable all parties to further enhance their knowledge and help on developing the ICT future."

About Orga Systems

Orga Systems' convergent real-time charging and billing portfolio enables profitable business for Telecommunication Companies, Mobile Finance Institutions and Energy Suppliers. Orga Systems' products and consulting services are designed for living in a connected world: scalable architecture, outstanding performance, lowest rating latency and consequent customer-centricity ensure reliable access to any kind of next generation mobile services.



ETIS Community Gathering Welcome Desk



ETIS Chairman, Tora Tenden, opening the ETIS Community Gathering 2010 in Stockholm

“ Thanks for organizing the event. I am very happy to had the opportunity to meet and talk to the people there and I think it was very beneficial. ”
 Ralph Schubert, LHS

ETIS Community Gathering 2010

ETIS Members met in Stockholm on October 14-15 to share knowledge at the ETIS Community Gathering 2010. The Gathering was held in conjunction with the 40th Management board hosted by TeliaSonera. This highly successful event brought together over 150 participants from 54 companies to share knowledge on key ICT issues facing the Telecom industry.

Telcos are struggling more than ever to stay relevant in a world dominated by over the top players, web 2.0, cloud services, social networking and fast changing consumer patterns. Responding to this critical issue the theme of the ETIS Community Gathering was: ‘The Future of Telecom Services – How to stay relevant in a 2.0 world’.

The Gathering began with a common session that looked at the future of Telecom services, with an emphasis on how service providers can position themselves to get the full value out of their next generation network investments, as well as how to monetise new services, applications and partnerships. The keynote presentation was made by Lars Nyberg, CEO of TeliaSonera who outlined his ‘One Company’ strategy with an emphasis on world class customer service.

The remainder of the Gathering was dedicated to parallel sessions for the following working groups: Information Security, Enterprise Architecture, Billing, Procurement & Vendor Management, Business Intelligence & Data Warehouse and Customer Self Service. The Gathering also featured a CIO Stream that covered the topics of Next Generation Networks, using and offering Cloud services as well as architecture and anti-trust issues.

There was also an ETIS Banquet dinner hosted at the Vasa Museum next to a restored historical ship. This Gathering was an ideal opportunity for all of the members, associates, partners and working groups to get to know one another, learn about each other’s activities, plans and expectations and above all, share knowledge.



Keynote presentation from TeliaSonera CEO, Lars Nyberg

“ Congratulations on a splendid event!! ”
 Carl Piva, CA Technologies

“ Thanks for arranging another great session in Stockholm, I find the working group to be incredibly useful. ”
 Richard Tunnicliffe, eircom

“ Thank you for a very useful, efficient and inspiring time at the ETIS gathering in Stockholm! ”
 Anders Holt, Telenor



Gerard Ponce de Leon from CA Technologies during the Q&A session

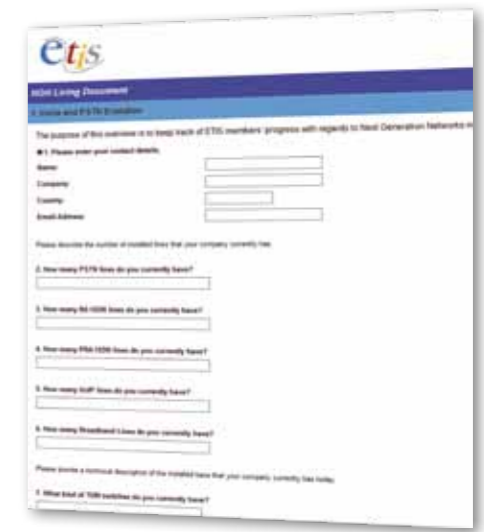


ETIS Banquet dinner next to the restored historical Vasa war-ship

CIO Executive Forum

“For me its always an invaluable source of knowledge and pleasure to attend the ETIS CIO Executive Workshops, because through exchanging of information between top IT professionals provides fertile ground for learning about multitude of approaches to Information Systems management in the telecom area.”

Andreas Asimomitis
OTE - ETIS Council Member



NGN online survey

In response to the critical issues facing the CIOs in the Telecom industry ETIS launched the CIO Executive Forum. The CIO Executive Workshop series has been running since 2003 and is one of the cornerstones of ETIS. The forum provides a unique opportunity for CIOs from the telecommunication providers, to share knowledge and experiences, and to discuss the current challenges, such as the use of IT to enable real transformation of companies.

CIO WORKSHOP – TELECOM ITALIA, ROME

The 11th ETIS CIO Executive Workshop was hosted by Telecom Italia in Rome on 28 May 2010. The workshop was well attended by 16 people from companies like Telecom Italia, Deutsche Telekom, OTE, TeliaSonera, Belgacom, KPN, Telekom Austria, Oger Telecom, Slovak Telekom and The Boston Consulting Group.



CIO Executive Workshop hosted by Telecom Italia in Rome

The theme of the CIO Executive Workshop was 'How CIOs can Influence the Success of Next Generation Networks'. The transformation towards Next Generation Networks has placed many new challenges on the CIO's table. Responding to this critical issue the first half of the workshop covered our members' NGN roll-out experiences followed by a session on the specific IT Challenges related to NGN.

The workshop featured a welcome speech by Giovanni Chiarelli, CIO of Telecom Italia, and a keynote presentation from Sandro Dionisi on Telecom Italia's NGN Technology & Roll-out Strategies. Michiel Valk from KPN presented on KPN's Fiber to the Home Trials. The remainder of the workshop was dedicated to ETIS Member CIO presentations and open discussions related to NGN roll-out experiences and IT challenges. These sessions were moderated by Wim De Meyer from Belgacom and Juliane Kronen from The Boston Consulting Group to help ensure structured and active discussions.

CIO STREAM – ETIS GATHERING, STOCKHOLM

The ETIS Community Gathering 2010 hosted in Stockholm featured one and a half day CIO Executive Forum meeting. During the meeting a discussion session was held to identify and prioritise future topics for the CIO Executive Forum.

Some of the main topics discussed were:

- Next Generation Networks
- New BSS/OSS Vendor experiences
- Cloud business propositions
- IT Transformation
- Product Portfolio Governance
- Rationalisation
- How to sell EA to business and IT Strategy.

When it comes to Next Generation Networks one of the major challenges is retiring the legacy networks/ applications as well as rationalising the product portfolio linked to the legacy. The investment in Next Generation Networks offers the opportunity to provide more standardised and simplified new products to the market as a benefit from going all IP on the network side as well as by using SOA and other governance tools on the IT side.

One key decision was to create a 'living document' that would aim to follow the progress of our members with regards to Next Generation Networks as well as keep track of their IT Transformation. The Questionnaire was prepared by Wim De Meyer from Belgacom and with the help of the Central Office an online version was created and sent out to all Council and Board Members.



CIO Stream during the ETIS Gathering in Stockholm

Information Security

“ In times where cyber crime is a burgeoning industry and can no longer be considered as just irritating, the ISWG offers a unique platform to openly discuss concrete telco security issues and proven best practices. I haven't seen any other group which is so open to share, and discuss on a wide variety of topics related to Information Security. Moreover, participation in the Information Security benchmark has proven to considerably attract management attention for Information Security!

Andy De Petter,
Belgacom - Information Security WG Chairman

The role of the Information Security Working Group (IS WG) is to share knowledge and experiences among members concerning Information Security and related matters and, when relevant, provide requirements to the industry. The group is the only Information Security group in Europe to concentrate on the telecom market. The Chairman of the working group is Andy De Petter from Belgacom and the Vice Chairs are Goran Laxen from TeliaSonera, Johan Bakker from KPN and Krzysztof Mueller from Telekom Austria. The group held three physical meetings during the reporting period.

The first Information Security meeting was hosted by KPN in The Hague on 20-21 May 2010. Some of the topics covered were:

- IT and Network Security
- Protection against unauthorised access
- Security Metrics in TeliaSonera
- SS7 meets world – SIGTRAN border security
- Cyber Warfare
- Theft of Copper cable
- CERT and Abuse Desk
- DNS and Security issues
- European Public-Private Partnership for Resilience (EP3R)

The next ISWG meeting was hosted on 14-15 October in Stockholm during the ETIS Community Gathering. Some of the topics covered were:

- Information Security Governance models

- Online Security & Collaboration
- ETIS Feed-Back-Loop Project
- Fraud Management Systems and Revenue Assurance
- Managing fraud in the IP based Multi-play environment
- Governance of Security
- ETIS Security Benchmark 2010
- Next Generation Network and Security issues
- Privacy in the Cloud
- Security and Resilience Challenges of Migration to Converged IP Networks

The 3rd meeting was hosted by Telenor in Oslo on 27-28 January 2011. Some of the topics covered were:

- Data Security Threats
- Security Roadmap 2011 by KPN
- Telco Security Architecture
- ETIS KPI Sub Group
- CERT / CSIRT



Information Security WG in front of the World Championship Ski jump in Oslo



Information Security WG meeting hosted by Slovak Telekom in Bratislava

INFORMATION SECURITY BENCHMARK 2011



Now in its third year, this ETIS Information Security benchmark is motivated by the fact that there are few, if any, Telco specific security benchmarks for top management to consider when deciding what is an optimal amount of resources to spend on Information Security. This report provides an in-depth look at the security of the enterprise environment. It shows where our members perform well, and can be used to identify where improvements could result in substantial value in terms of savings

in resources expended, increased performance, and the benefits gained from the introduction of the Information Security best practices.

Comparability with the results established in 2009 and 2010 was put forward as an essential constraint. This year's benchmark, therefore, focused on security themes also addressed by its predecessors.

Specifically, the following security themes were pursued:

1. Corporate Security Function
2. Security Management
3. Commercial role of security
4. Fraud Management
5. Security in the development process
6. Next generation security readiness
7. Security Operations Centre

The participants of the benchmark 2011 are: TeliaSonera, Belgacom, KPN and Swisscom.



Anti-Spam Co-operation Group hosted by ReturnPath in Berlin

ETIS ANTI-SPAM CO-OPERATION GROUP

The goal of the group is to use a combination of different technologies and co-operation procedures with the aim of eliminating the majority of SPAM at the European network level before it even reaches the mail servers.

The current members of this group are Belgacom, KPN, Telenor, TDC, Telecom Italia, Telekom Austria, BT, Telefonica, Slovak Telekom, Deutsche Telekom and Turk Telekom. The Chairman of the group is Sergio Formicola from Telecom Italia and the Vice Chair of the group is Helge Aksdal from Telenor.

The Anti-Spam Co-operation Group had two meetings during the reporting period hosted by

1. 23-24 Sept 2010 – London, Hosted by Cloudmark
2. 17-18 March 2011 – Berlin, Hosted by Return Path

During the past year the members of the ETIS Anti-Spam Co-operation Group, started to formulate ideas on a project which would help reduce the spam volume of incoming mail streams by optimising existing data and resources. Led by KPN and TDC the basic idea was to utilise the data each ISP has on the spam being sent to each other to create statistics and identify the sending culprits on each other's networks resulting in a feedback loop. Our members are actively exchanging information via this feedback loop. This project is being run with the support of Return Path.

Billing

“Working Groups, as ETIS’s mission clearly defines, give to their members the valuable opportunity to improve their business performance by personal exchange of information on using ICT effectively. Consequently, being a member of ETIS Billing Working Group means participating in an activity that encourages the exchange of ideas and the exploration of new concepts emerging from the vast landscape of billing processes.

Billing professionals from all around Europe are invited to share their knowledge and -why not- their frustrations on either retail or wholesale billing; paper-based or electronic; off-line or on-line; prepaid or postpaid; fixed or mobile. ”

Apostolos A. Tsakas,
OTE - Billing WG Chairman

The objective of the ETIS Billing Group is to share knowledge and best practices on the latest Billing challenges, opportunities and strategies as well as the main business drivers influencing the Telcos billing environment. The group is also responsible for maintaining the ETIS Electronic Billing Standards.

The Billing group had two meetings during this reporting period. The first meeting took place during the ETIS Community Gathering held in Stockholm on 14-15 October 2010. Some of the main topics covered were:

- Moving Towards a Customer Hub and Billing Implications
- How to monetise and manage 3rd party applications
- Billing Views Survey Results: Latest Billing Trends
- NG charging & billing services on SOA without compromising flexibility
- Changing nature of pre-paid
- Gain New Revenue and Operational Efficiency with Innovative Charging and Billing Services
- How to monetise and manage 3rd party applications
- ETIS Electronic Billing Standards

The Billing Working Group also held a meeting in Athens on 14-15 April which was kindly hosted by OTE. The meeting was attended by 25 people from companies like Deutsche Telekom, TeliaSonera, Telecom Italia, Cosmote, OTE, Telekom Austria, Swisscom, Turkcell, Oger Telecom, Oracle, Sybase, Ericsson, Orga Systems, Nokia Siemens Systems, Amdocs, Velti, Comarch and Billing Views.

The goal of the meeting was to discuss how current billing challenges, opportunities, strategies and business drivers influencing the billing environment. Some of the topics covered during the meeting were: Strategies for Electronic banking & payments, Pre-Post Paid Convergence, Telco strategies for advertising 2.0, Strategies for Billing of Cloud services, Revenue Sharing & Monetisation of 3rd Party Applications.

We would also like to take to this opportunity to announce that Apostolos Tsakas from OTE has been elected as the new Chairman of the group and Christian Miciecki from Swisscom has been elected as a new Vice Chair of the Group. Gottfried Marschitz from A1 Telekom Austria continues to act as one of the Vice Chairs as well.



Billing Working Group hosted by OTE in Athens

Customer Self-Service

“Being a member of the working group CSS is a big enrichment for each participant and his/her company. A reason for participation at ETIS CSS is for the day-to-day business and the invaluable discussion with the management board but also the network and the direct contact to the e-commerce responsables which could be used for continuing work (e.g. Meeting Deutsche Telekom & Telenor to compare notes on the business online portal). ”

Gunter Fritsche,
Deutsche Telekom - CSS WG Chairman



CSS Working Group hosted by KPN in Amsterdam

The objective of the working group is to exchange knowledge about Customer Self-Service strategies and solutions in order to enable ETIS members to succeed with their Customer Self-Service business objectives.

The Chairman of the Group is Gunter Fritsche, DT, and the Vice Chairs positions are held by Frank Timmermans, KPN and Markus Eberhard, Swisscom (who succeeded Hanne Lereim, Telenor who had to step down due to change of position).

The group aims to provide the following:

- Status of CSS maturity in the Telco industry
- The ETIS CSS quarterly survey
- Self Service Solutions
- Using New and Social Media to drive growth
- Design for CSS solutions from a user perspective

One of the most valuable outputs of the Customer Self-Service working group has been its quarterly benchmarking survey. This survey provides its users important feedback on how they are performing compared with their peers in the Telco industry and insights based on different performances.

CSS WORKING GROUP MEETINGS

During the reporting period the CSS WG had three meetings:

The first meeting was hosted by Telenor on 3-4 June, in Oslo. The main topics in the agenda were:

- Self Service KPI Dashboard
- Affiliate Marketing
- Customer Care

The second meeting took place along with the ETIS Community Gathering 14-15 October in Stockholm. Topics covered in the agenda were:

- IPTV
- Social Media Activities
- Self Service & Business KPIs
- Multi-Channel Management

The third meeting was held in Amsterdam, hosted by KPN on 3-4 March, where the main focus was on:

- Engagement in Social Media
- Forums
- “My Account” capabilities

On top of the above scheduled meetings, a 4th ad-hoc meeting was also held in Brussels on 16 June, attended by a pre-defined team of 5 telcos in order to look into how do telcos measure and benchmark online service, call deflection and an overall deep dive on Service KPIs.

Enterprise Architecture

“The traditional Telco business model is every day challenged aggressively by the OTT’s. The EAWG has already started looking at the impact to the Enterprise Architecture caused by the new models. I believe it is definitively a theme the EAWG will put very high in the agenda of the coming period.”

Benoit Godenir,
Belgacom - Enterprise Architecture WG Chairman

The objective of the Enterprise Architecture Working Group is to seek to identify and share best practices in the development and use of Enterprise Architectures in the business context of its members.

WORKING GROUP MEETINGS

Benoit Godenir, Belgacom was elected as a new Chairman of EAWG in October 2010 and Lage Eriksson, TeliaSonera and Oliver Höft DT/Detecon are Vice-Chairs. The EAWG had three meetings during the reporting period.

The first meeting was hosted by Romtelecom in Bucarest on 10-11 June 2010. Below are some of the key topics that were covered:

- Enterprise Architecture within Romtelecom
- Cloud services / computing
- Platform as a Service for Telcos
- Service Catalogue / Enterprise Product Catalogue
- ETIS Enterprise Architecture Maturity Survey 2010

The second meeting took place during the ETIS Community Gathering hosted in Stockholm on 14-15 Oct. 2010.

During the session with the ETIS CIO Executive Forum, the EAWG has been asked to address two issues common to the ETIS members. The first topic identified from the EA maturity survey carried out in 2010 is about “Closing the Gap” between Business and IT. The second one called “Agile Product Lifecycle Management” (APLM) aims at drastically reducing the product time to market of n-play bundles built from components managed in legacy silos. A new way of working based on project structure was decided and dedicated resources from companies were requested.

The ETIS Council on 11/02/2011 approved the APLM project plan proposed by the EAWG core team with resources

committed by Belgacom, KPN, OTE and TeliaSonera. The Council recommended continuing the analysis of the “Closing the Gap” topic in order to get it mature enough to move into project mode. Below are some of the other key topics that were covered at the EA October meeting:

- Enterprise Architecture within TeliaSonera
- Trends within Network Outsourcing
- Service Oriented Architecture & Governance

The third meeting was hosted by Telecom Italia in Rome on 10-11 March 2011. The sessions were articulated around the two themes with the objective to capture the feedback of our members. The EAWG was aligned with the Council recommendation. Below are some of the key topics that were covered:

- Enterprise Architecture within Telecom Italia
- Best practices in building actionable roadmaps
- Complex product combination
- Identity Management

The group has also conducted an Enterprise Architecture Maturity Survey with support of Detecon attended by 16 member companies. A TOGAF 9 Certification Training was also offered this year by ETIS with support of Detecon in Bonn 14-17 September for the third time. 20 people from 8 companies took part.



EA Working Group hosted by Telecom Italia in Rome



Benchmarking Study

Each year ETIS carries out a Telecommunications IT benchmarking Survey called TeBIT for its members which aims to analyse the cost of leading European telcos as well as potential relations between business and IT figures and their drivers.

The survey allows our members to compare their own effectiveness and efficiency with others and also provides an opportunity for the exchange of information on the business drivers and IT strategies with peers in other member companies.

In 2010 ETIS started a co-operation with BCG, The Boston Consulting Group, in order to provide a deep dive analysis on IT Cost structure and the provisioning and activation process as a special topic. The deep dive on IT Cost can be summarised in the graph below:

This year the participants have been the following member companies: Belgacom, Cosmote, Crnogorski Telekom, Croatian Telecom, Cyta, Magyar Telekom, Makedonski Telekom, OTE, Swisscom, Telecom Italia, Turkcell, Vimpelcom and Vivacom.

OVERVIEW OF TEBIT 2010 - BUSINESS DRIVERS:

This year the main drivers identified are divided in 6 clusters:

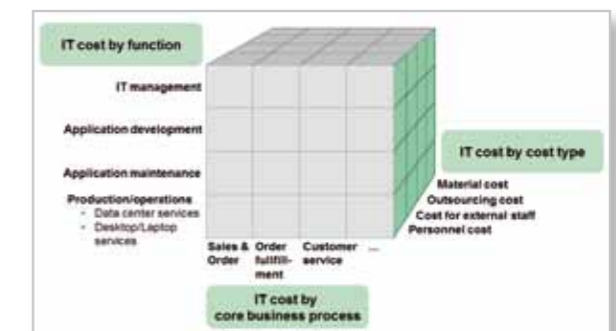
- Strategy
- Products
- Operations
- Market
- Customer Interface
- Miscellaneous

The companies were identified on a basis of services provision or maturity of the market operating in.

Some general observations included:

- IT Opex in average grows faster than revenues
- Majority of telcos suffer from declining markets
- Automation is regarded as major competitive advantage and aim for improvement, and is also driving satisfaction.
- Revenues heavily declined - mobile operators were affected most
- By rigorous cost reduction, EBITDA margin could be slightly improved
- IT CAPEX was reduced far more than the IT OPEX which in average increased resulting in a fairly stable total
- Regarding the provisioning process, data consistency turns out to be the main issue for mobile and integrated operators

On top of benchmarking IT Cost metrics, scenarios of continuing declining revenues were examined and their implication in cost cutting strategies but also hypothesis on drivers influencing the level of spend on IT Opex.



Procurement & Vendor Management

“ During the last year the Procurement & Vendor Management working group initiated a common meeting with the Information Security working group and I am also pleased to see that we have smoothly added members. This has widened and deepened the knowledge sharing as a benefit for the members' companies by creating value in common views of procurement procedures and vendor management. More common work within the working group and between respective members is initiated as an advantage for the members in ETIS. ”

Mats Lundin,
TeliaSonera - PVM WG Chairman

The objective of the working group is to share experience within the procurement and vendor management area and to further explore areas on common interest such as to determine the best practice within Governance of Vendors and, based on common experience and findings, deliver common work tools to enhance the work in each company

The most challenging topics of procurement are how to manage global sourcing offices, how procurement works with the business functions how to be a strategic business partner, how to reach lowest costs or best value for money, how to achieve "world class supplier management", how to become environmentally responsible, how to analyse the strategic outsourcing opportunities.

The working group is Chaired by Mats Lundin, TeliaSonera with Candan Asil, Turkcell and Piet van Heiningen, KPN as Vice-Chairs. The group held three meetings during the reporting period and two sub group meetings.

The first meeting was hosted by Execon in Copenhagen on 17-18 June 2010. Some of key topics addressed were:

- How do we measure achieved procurement savings
- License issues, Oracle in particular
- Software license/asset management

The second meeting was hosted during the ETIS Community Gathering in Stockholm on 14-15 October 2010. Some of key topics addressed were:

- ETIS PVM Benchmark Study 2010
- Finalised the Outsourcing Handbook
- EC presentation: Antitrust rules and software markets



PVM Working Group hosted by Swisscom in Zurich

The third meeting was hosted by Swisscom in Zurich on 24-25 February 2011. Some of key topics addressed were:

- RFID – chances for Procurement?
- Oracle license issues
- A slightly modified Benchmark questionnaire for 2011
- Contract clauses with target to have a common work tool
- License management
- Classification of Vendors
- Vendor assessment and performance measurement
- Sustainable supply chain

A forth internal Procurement Survey has been carried out to get a better understanding of the situation in the different companies and also to include the new members of the group in the Survey.

Business Intelligence & Data Warehouse

“ The working group gives us really good opportunity to meet our peers within the business intelligence & data warehouse area from other Telecom operators. We share many of the same challenges but there is always some really valuable learning's from every meeting we have. ”

Jan Frändegård,
TeliaSonera - BI&DW WG Chairman

The BI&DW working group is a network of experts from the Business Intelligence and Data Warehouse area among the ETIS members. The objective of the group is to drive business value and exchange knowledge in the Business Intelligence & Data Warehouse area whilst innovating the Business Intelligence field.

The working group is used as a forum for sharing competence and expertise. By sharing experience in actual case studies and best practices the working group members will be able to progress and learn from each other. The working group is also used as a forum for presenting, discussing and evaluating new trends, technology and applications within the area. Jan Frändegård from TeliaSonera is the Chairman of the Group and Nikos Karagiannidis from OTE is the Vice Chair.

The BI&DW WG meeting had 2 meetings during the reporting period.

The first meeting was hosted during the ETIS Community Gathering in Stockholm on 14-15 October 2010.

Some of the topics covered were:

- Requirements analysis, Requirements testing and software development models for Telco DWs
- Operational CRM activities & challenges
- BI&DW Architecture Segmentation
- Telco Handbook Chapters
- Enterprise 2.0 The Value of Real-Time Business Intelligence
- TeliaSonera EDW programme updates

The second meeting was hosted by Avea in Istanbul on 15-16 April 2010. The meeting was attended by 31 people from companies like TeliaSonera, OTE, A1 Telekom Austria, Swisscom, Avea, Turk Telekom, Turkcell, Oger Telecom, Oracle, Teradata, Sybase and Data Management & Warehousing.

Some of the topics covered were:

- BI convergence strategies
- Enterprise Meta Data Management Strategies
- BI churn prediction
- Data Warehouse Solutions
- Real-time Business Intelligence



BI&DW WG meeting hosted by Avea in Istanbul

Information Services

One of the main responsibilities of the Central Office is the development and continual improvement of ETIS Information Services. Our information services can be divided into 3 main sections:

- ETIS Website
- ETIS Members' Corner
- e-Telit Newsletter

The ETIS Website is our corporate website which contains public information on all of our working groups, activities, events, members and news.

A good part of 2010 was spent designing and building the new ETIS Members' Corner. The goal of the new site was to take advantage of web 2.0 technology, social networking and collaboration tools in order to build a new and improved ETIS website and Members' Corner. Some of the new features are a fresh design, discussion forums and wikis with automatic emails alerts, in-depth search engine (in files), membership overview function, more visible profiles, possibility to favourite documents, automatic news feeds, and links to other social media outlets like LinkedIn and twitter.

By introducing these new technologies to our Members' Corner we have created a new and improve website that aims to encourage more openness and sharing of information online and in between the physical meetings.



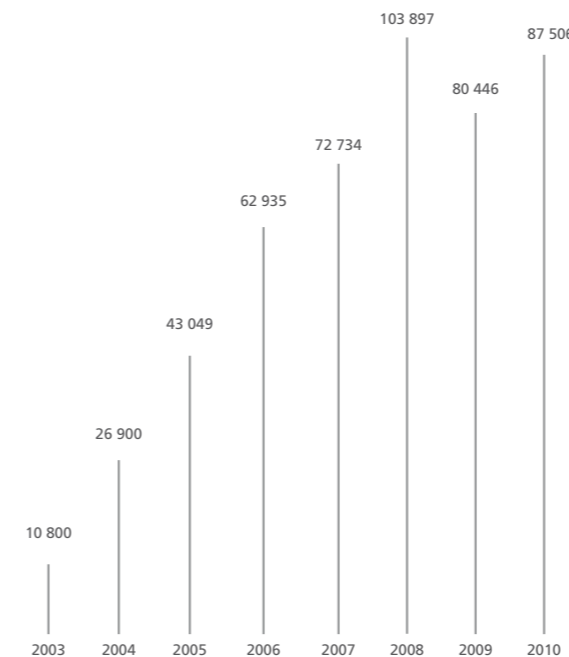
“ The new ETIS Website was launched in February 2011. Since its launch we have received lots of positive feedback from our members but more importantly the amount of logins to the members corner has rocketed sky high compared to previous years. This is proof that our members are finally using the Members' Corner to share even more knowledge in between physical meetings and as a real networking/knowledge sharing tool. ”

Fred Werner
Business Development Manager, ETIS

ETIS WEBSITE STATISTICS

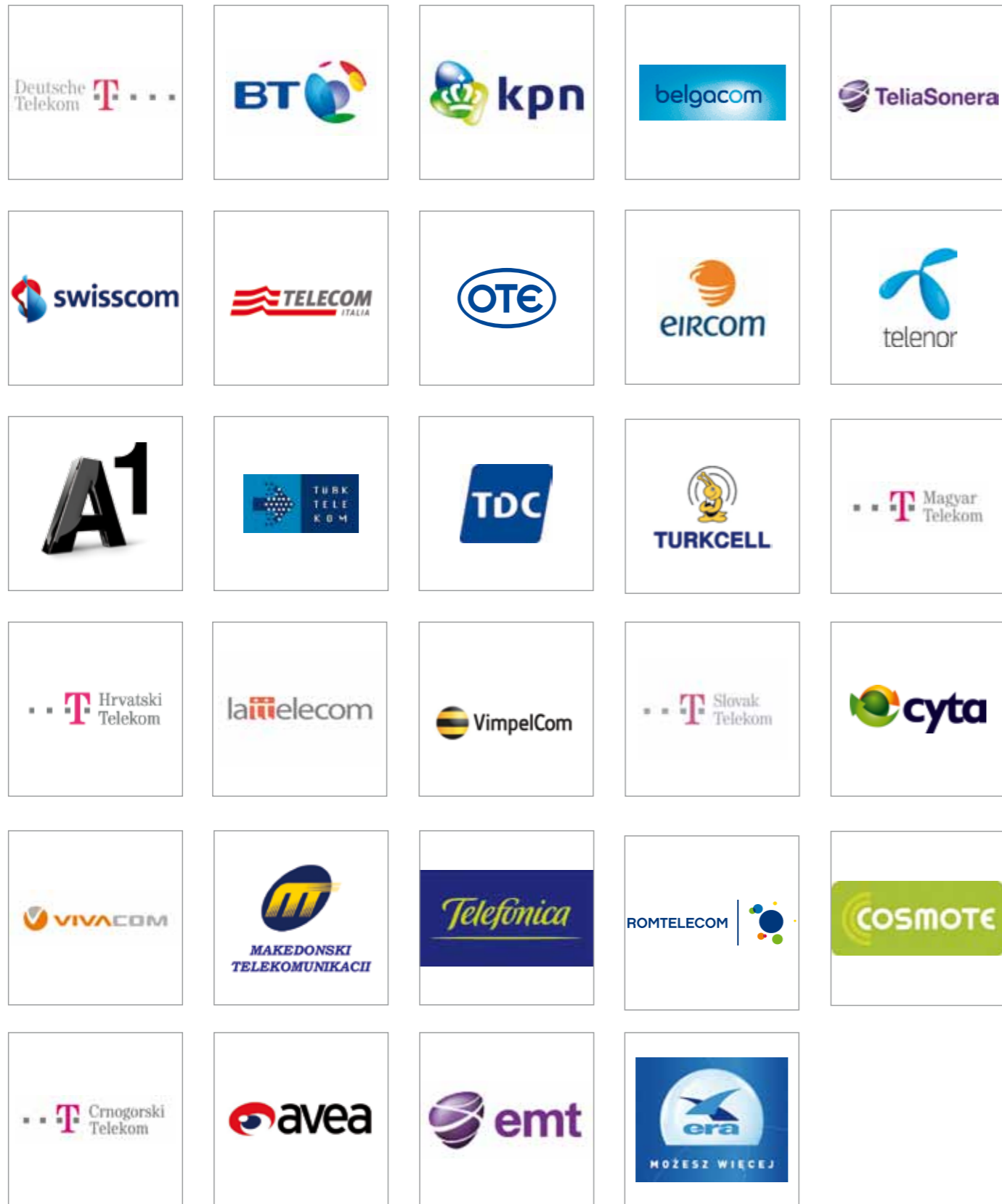
We have been able to measure website traffic since August 2003. It is clear to see from the following graph that ETIS website traffic has increased steadily over the past seven years. This increase in use is linked to the overall increase in activity that ETIS has seen over the past seven years as well as increased marketing and promotional efforts.

Links to the ETIS Website and Members' Corner can also be found on many of our members' corporate intranets thus helping to spread the ETIS footprint in member companies. ETIS also engages in numerous media partnerships with other Telco informations sources and conferences sites.

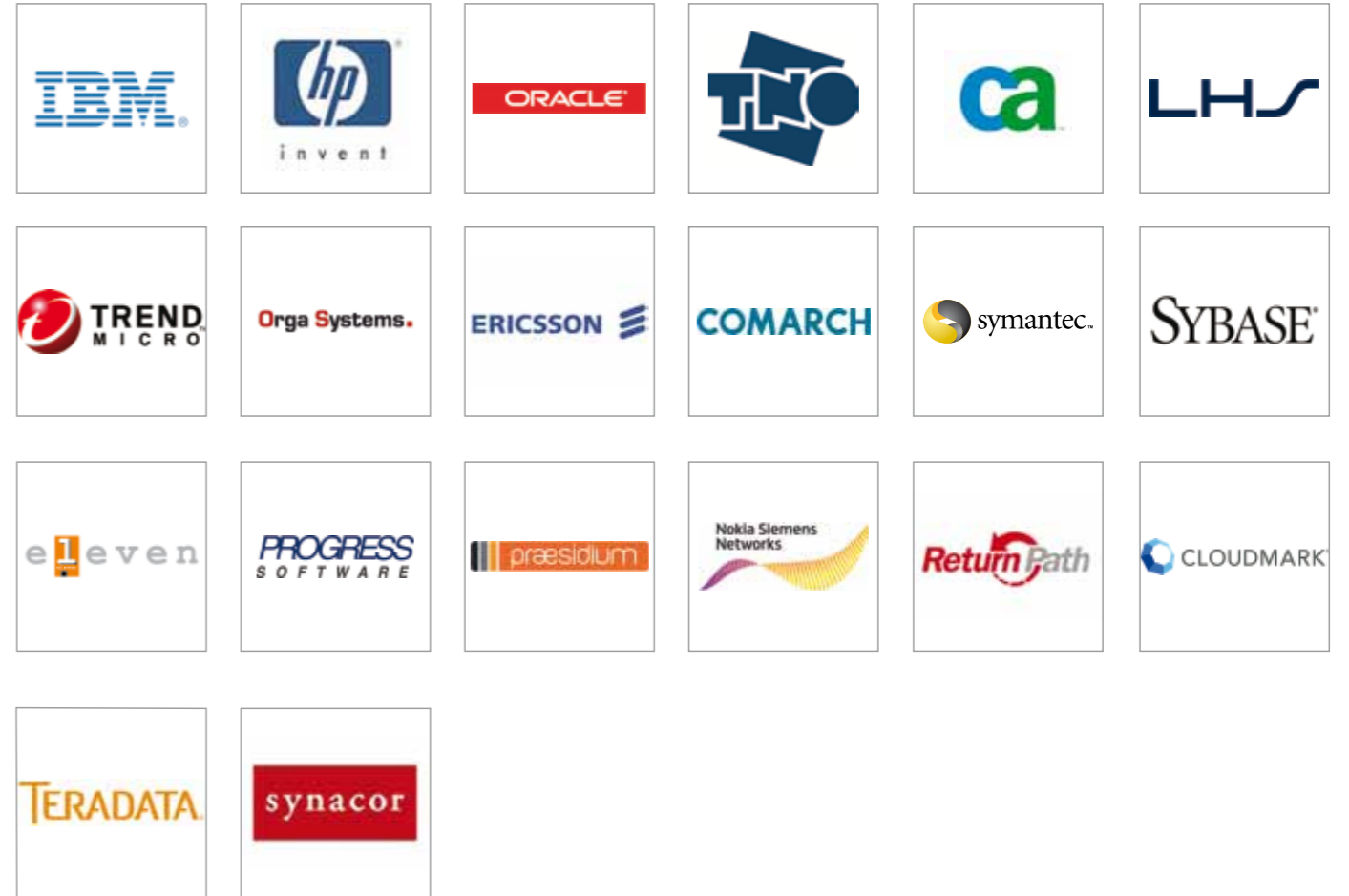


ETIS Website Statistics - Hits to the ETIS Website 2003 - 2010

ETIS Members



ETIS Associate Members



ETIS Partners



About ETIS

“Sharing knowledge is our strength...
Using it is yours...”

ETIS is a membership based organisation which brings together the major telecommunications providers in Europe on key information and communication technology issues. The mission of ETIS is to enable its members to improve their business performance by personal exchange of information on using ICT effectively. ETIS achieves this by engaging its members in various working groups, sharing best-practices, benchmarking, web-based information services, discussion forums, workshops and conferences.

ETIS Membership brings a wide range of business benefits such as:

- Expanded business relationships & networking
- Improved strategic decision making & cost reduction
- Sharing knowledge via working groups & events
- Access to best practices & benchmarking
- Access to ETIS Information Services
- Personal & professional development

ETIS currently maintains nine working groups that are made up of experts from the member companies who wish to participate in them and the associate companies that are invited to participate. Below is a list of our active working groups:

- Information Security
- Billing
- Enterprise Architecture
- Procurement & Vendor Management
- Business Intelligence & Data-warehouse
- Customer Self Service
- TeBIT Benchmarking Study
- CIO Executive Forum
- Anti-Spam Co-ordination Group

ETIS also regularly organises Conferences and Workshops on key topics of IT practice in telcos and invites acknowledged experts and managers from the industry to present their views.

