This report is dedicated to
Kenneth Svensson, former ETIS Chairman
Dear ETIS Members,

Allow me summarize the contents of this report by a brief introduction.

It seems like only yesterday when we celebrated our 20th anniversary during the 2011 Gathering in Cyprus. Now, 5 years later, we are celebrating our 25th anniversary!

We are clearly living in a fast paced world where technologies, business models, eco systems are changing with ever increasing speed.

The ETIS activities from April 2015-June 2016 definitely reflect this speed of change. We made sure that the (r)evolutions we will face are at the heart of our Working Group discussions.

During this reporting period, 24 Working Group meetings took place.

I am also very proud that ETIS has contributed to combating Cyber Crime. The Members continued to share knowledge via numerous conference calls, meetings and the shared platform - set up by ETIS - in order to automate the exchange of cyber threat intelligence in real time.

During the yearly Gathering, which took place 15-16 October 2015 in Copenhagen, 7 of our Working Groups met to exchange ideas, topics and best practices. We took as a central theme: “Disrupt or be Disrupted - The Telecom Innovation Roadmap”

Innovation was looked at from different angles during the common session and in the Working Groups: Big Data and IoT opportunities were addressed, discussions on new network architectures like SDN/NFV were initiated. A Master Class on Innovation was held and ways to organize innovation activities were addressed.

All of these topics were discussed further in the subsequent Working Group meetings in 2015 and 2016. These topics will also be at the heart of our new ETIS strategy, which can be found in the dedicated document called “The ETIS Strategy 2016”.

I would also like to thank Fred Werner, who has left ETIS for a top position at ITU in Geneva. He was very instrumental in making ETIS a successful organization and we wish him every success in his new endeavour!

Thanks should be given to the Working Group Chairmen and Vice-Chairmen who volunteered their time and leadership to move our groups forward. Finally, I wish to thank our Members and Associates.

Let’s continue to work together to execute the new strategy and to make sure we stay ahead in this fast paced era!

Yours sincerely,

Wim De Meyer
ETIS Managing Director
About ETIS

ETIS is the trusted community for telecom professionals.

Our goal is to enable our Members to reach their strategic objectives and to improve their business performance by sharing knowledge on industry challenges and by collaborating where possible.

In order to reach our goal, we focus on 5 domains:

- Finding Innovative Services & New Revenue Sources
- Delivering Digital Transformation
- Enhancing Customer Experience
- Deciding on Technological Evolution of Networks and IT
- Improving Security and Safeguarding Privacy

Two new Working Groups were created:

- Innovation WG
- Data Privacy Task Force

Current Working Groups*:

- Anti-Abuse
- Business Intelligence
- CIO Executive Workshop
- CERT-SOC
- Digital Sales & Service
- Enterprise Architecture
- Information Security
- Procurement & Vendor Management
- Smart Charging & Payments

* Some Working Groups will be rebranded after the ETIS Community Gathering 2016
The CIO Executive Forum, where all Member operators are welcome, provides a unique opportunity for higher management of Telecoms to discuss current challenges and future issues.

**Participating Members:** A1, eir, Hrvatski Telekom, KPN, Lattelecom, Magyar Telekom, Proximus, Slovak Telekom, Swisscom, TDC, Telia Company, Turkcell and invited guests.

**Topics discussed:**
- Digital transformation strategies and use cases
- DevOps as a driver of Innovation
- Agile projects
- Open assets and strategy
- Organizational aspects of Innovation
- Telco IT Governance strategies & Benchmarking
- Innovation panel session with start-ups
- Monetization of Big Data
- Privacy in a Digital World
- Moving the ETIS Strategy forward

---

The ISWG serves as a platform for sharing experiences on the development of Information Security touching on strategies, governance and cyber threats in Telcos.

**Participating Members:** BT, Deutsche Telekom, KPN, Magyar Telekom, Manx, Oger Telekom, Proximus, Swisscom, TDC, Telecom Italia, Telefonica, Telenor, Telia Company, Turk Telecom, Turkcell and invited guests. **Participating Associates:** Ericsson, Huawei, Oracle, Praesidium, TNO

**Topics discussed:**
- Telco Security Roadmap
- Security governance, strategy & architecture
- SDN/NFV
- Data management, governance & privacy
- Cloud security
- Updates on recent threats & challenges
- Insourcing & outsourcing of services
- Commercial Security
- Vendor presentations & statistics
CERT-SOC
Enhancing the overall protection of the telecommunications infrastructure in Member organizations through active exchange of information, intelligence and experiences and sharing of knowledge in the areas of cyber intelligence and security.


Topics discussed:
• Sharing latest information on threats and attacks of the Members infrastructure through regular conference calls and interactions on the ETIS Members Corner
• Use cases, lessons learned & walkthrough of incidents during the CERT-SOC Meetings
• Collaborative sharing of attack information and trends regarding DDoS attacks

AATN
Members of the ETIS AATN address a wide range of network abuse issues from various perspectives as the group shares knowledge and learns from each another as well as from other experts and partners in the field.


Topics discussed:
• Building a unique phishing take-down system
• Sharing knowledge and wider implementation of DMARC
• Increasing Telco efficiency in combating spam and abuse
• Statistics and analytics of incidents
• Best practices and use cases
**BIWG**

The BI Working Group comprises of experts from the Business Intelligence and Big Data departments discussing internal opportunities and external monetization of Big Data.

**Participating Members:** Telefonica, Lattelecom, Hrvatski Telekom, Deutsche Telekom, Magyar Telekom, Swisscom, TDC, T-Mobile NL, Turkcell, Telecom Italia, Proximus, BT, Fastweb and guests. **Participating Associates:** Oracle, Huawei.

**Topics discussed:**
- BI & Big Data governance
- Big Data monetization
- BI competencies, strategies and surveys
- Social networks analytics
- Customer journey
- Churn reduction
- TV recommendations
- Data Privacy

**BRMWG**

This group looks at the latest Billing challenges, opportunities and strategies as well as the main business drivers influencing the Telcos billing environment. BRMWG is covering revenue management and billing fraud issues. To embrace the 21st century, the group is expanding its scope to include smart charging & payments, the group’s new name is Smart Charging & Payments.

**Participating Members:** CYTA, Deutsche Telekom, eir, KPN, Lattelecom, OTE, TDC, Telenor, Turkcell and invited guests. **Participating Associates:** Matrixx, Openet, Oracle, Redknee, Disruptive Views.

**Topics discussed:**
- Real-time, charging to the enterprise
- Architecture models & billing challenges
- Revenue assurance & insurance for new products
- The payments & vendor landscape
- Going digital in a hurry: an alternative to traditional BSS transformation
- E-invoicing
- In-app purchases and revenue sharing solutions
- Smart Cities
Enhancing customer experience through ongoing digitization of sales and servicing.

**Participating Members:** A1, CYTA, Deutsche Telekom, eir, KPN, Telfort, Simyo, Lattelecom, Proximus, Swisscom, Telenor Serbia, T-Systems and invited guests. **Participating Associates:** Lithium Technologies, Matrixx Software, Openet.

**Topics discussed:**
- Digital Transformation
- Digital Servicing & Sales
- Webchat, Video Chat & Apps
- Customer journey & experience
- Omni-channel management
- Data Science & Personalization
- Trigger – based emailing
- Agile, waterfall & hybrid projects
- User experience
- Identity management
- Omni development & strategy

**Meetings:**
- **4**
- **109 PARTICIPANTS**
- representing **25 TELCOS & VENDORS**
- from **15 COUNTRIES**

**DSS KPIs Benchmark**
- **19 MEASURES**
- **13 COMPANIES**

The Enterprise Architecture group is looking at the evolution and transformation of Telecom networks and IT systems, starting from the strategic point of view but also discussing technical solutions.

**Participating Members:** Hrvatski Telekom, Swisscom, Turk Telekom, Turkcell, Avea, Deutsche Telekom, KPN, Lattelecom, Magyar Telekom, OTE, TeliaSonera, Cyta, Telecom Italia, Telenor, T-Mobile NL and invited guests. **Participating Associates:** Oracle, Huawei, Ericsson.

**Topics discussed:**
- IT Transformation projects
- Product Simplification & lifecycle management
- Network Function Virtualization/ Software Defined Networks
- Data management & governance
- Cloud architecture
- 360 Degree view of the customers
- Data science & personalization
- Business Innovation
- Reference architecture
- Agile environment & projects
- IoT

**EA is facing many challenges but also opportunities, such as legacy issues, product evolution and new technology trends, such as SDN/NFV. Data management & quality become increasingly important.**

**Dr. Thomas Krueger**
Boston Consulting Group
The aim within the Procurement & Vendor Management Group is to further explore common interest areas and determine best practices within Governance of Vendors and deliver common tools to enhance the PVM processes in each company.

**Participating Members:** Lattelecom, Magyar Telekom, Proximus, Telia Company, Turkcell, Swisscom, Fastweb, KPN, TDC and invited guests.

**Surveys:**
- Trends in Procurement
- KPI Benchmark
- Cloud Computing Survey
- Global operator Survey on SDN/NFV

**Key findings:**
- Digital initiatives are paying off. TeBIT Study 2015 found that:
  - The participants most actively pursuing the digital space suffered the smallest revenues declines
  - The investment focus continues to be on areas that reduce operational costs or improve customer experience
  - Big Data initiatives are emerging

**TeBIT**

One of the best ways for our Members to share knowledge and best practices is through Benchmarking and Surveys.

The ETIS IT benchmarking study (TeBIT) is run annually by ETIS in cooperation with The Boston Consulting Group.

**Theme 2015:**
“Digital Delivers”
The ETIS Community Gathering is our annual event bringing together the majority of the Working Groups.

The Gathering starts off with a common session featuring invited speakers. This time, a keynote presentation from the Innovation Institute of America set the stage to our theme: “Disrupt or be Disrupted”. Alexander Blass’ presentation aimed at dismissing the myth that Telcos are too big to innovate whilst inspiring our Members to become innovators themselves.

Olivier Colinet, Business Solutions Director - Apps for work, Google, shared his company’s ‘Moon-shot Thinking’ strategy that consists of solving huge problems, providing radical solutions and providing breakthrough technologies. The following session on ‘Innovation in a fast-changing industry’ was delivered by Joakim Cerwall, Vice President, Head of PLCM Operations, Ericsson.

The Common Session concluded with an animated panel discussion moderated by Tony Poulos, Editor of Disruptive Views.

The remainder of the Gathering was dedicated to parallel ETIS Working Group sessions. These sessions also included a CIO Executive Workshop that featured an Innovation Master-class, Innovation challenges and Innovation Panel session with some delegates from Google and Facebook as well as some key Danish innovators and business leaders.

ETIS would also like to thank the 2015 Community Gathering’s sponsors that made the event a great success:

- Ericsson (Gold sponsor)
- Huawei (Silver sponsor) and
- TATA Consulting Services (Silver sponsor).
Thanks for inviting digital companies like Google and Facebook to the ETIS Gathering 2015. Great level of & very open discussions. Keep disrupting!

Olivier Colinet
Google

Let me thank you for your kind support during ETIS Gathering 2015. Truly, it was the most well-organised meeting I have ever seen. We were happy to be a part of it.

Inna Stelmakh
Astelit / Wemove

Congratulation to yet another fantastic event and interesting discussions in combination! I do not know how you do it but you have a row of successes that is impressive! Already looking forward to the next Gathering.

Maria Eriksson
Ericsson AB

135 Participants

80/20 Participant ratio: Telecom / Vendor
ETIS Governance

Management Board

The Management Board, consisting of all Member operators, is the main governing body of ETIS that deals with the legal and administrative matters of the Foundation. The Board is also responsible for overseeing the Working Group’s scope and progress, approving new activities and events. Additionally, the Management Board is accountable for electing the ETIS Chairman and Secretary Treasurer together with Council Members.

49th MANAGEMENT BOARD MEETING
Hosted by KPN, Amsterdam, 27 May 2015

50th MANAGEMENT BOARD MEETING
Hosted by TDC, Copenhagen, 14 October 2015

51st MANAGEMENT BOARD MEETING
Hosted by ETIS, Brussels, 26 May 2016

- Retention/recruitment of Members and Associates
- Approval of the strategic questions
- Designation of “sponsors” for the strategic questions
- Creation of Innovation Working Group and Data Privacy Task Force
- Election of Council Members
- Administrative matters, financials, elections and calendar of events

Council

The key responsibility of the ETIS Council is to prepare all resolutions and recommendations for the Management Board. The Council has a mandate from the Management Board to oversee all ETIS’ operations.

Current ETIS Council Members: Wim De Meyer, ETIS Chairman / Helene Graham (eir), Secretary Treasurer / Uldis Tatarcuks (Lattelecom) / Marijo Volarević (Hrvatsky Telekom) / Paul Slot (KPN) / Fabrice Clement (Proximus).

Stepped down: Kees Stock (KPN) / Gian Enrico Paglia (Telecom Italia) / Tora Tenden (ETIS) / Armin Sumesgutner (A1).

7 Meetings
6 Conference Calls
1 Physical Meeting

Central Office

The main objective of the Brussels based Central Office is Working Group management and ETIS Community Gathering preparation. Additionally, the employees are accountable for internal and external communications, special projects, Member recruitment and retention, finances and all other administrative and logistical support of the ETIS.
This year has been a “time of renewal” for the Central Office following the decision to refresh the ETIS Strategy and put in place new focus and momentum throughout the Working Groups. The “ETIS Strategy 2016” will be formally launched during this year’s Community Gathering in October 2016 which will take place in Zagreb, Croatia.

The Central Office has actively supported the Council, Management Board and CIO Executive Forum with the outlining of the Strategy and its subsequent approval by our Governing bodies. The CO has also actively contributed to the launch of the new ETIS Strategy 2016 by establishing the Innovation Working Group, Data Privacy Task Force, setting the agendas and obtaining Members’ buy-in to these new groups.

During this reporting period, the Council made decisions regarding the leadership within the ETIS Central Office. Terje Tondel was asked to step down from his position. Wim De Meyer was then appointed Managing Director as of April 2016, enabling ETIS activities going forward and ensuring the continuity of the Working Groups as well as preparing for the forthcoming Community Gathering.

To deal with the departure of Fred Werner, who took a top position at ITU, the Central Office has been reinforced. Veronika Jermanova joined the CO early September as Communications Coordinator and will be responsible for communications, website & social media activities. Sepideh Javaherian will join us as of early October in the role of Project & Community Manager.