ETIS Annual Report 2006 I 2007

Sharing Knowledge is our Strength!
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It is with great pleasure that I am able to introduce this year’s Annual Report. These are interesting times in the Telecom industry as networks and IT are converging to supply next generation services. This also places ETIS as an organisation at the heart of the telecom industry more than ever before. At the same time we are seeing the roles of our members changing as they are more involved on the business side than before and ETIS is the trusted platform where they can share their experience on this.

This past year showed a record level of activity with our 2nd ETIS Community Gathering, ETIS Conference 2007, CIO Workshop and many working group meetings. The members showed their commitment and interest in sharing experiences and best practices with their peers and working together on common challenges. I am pleased to report that our participation levels have more than doubled since 2003. This is a positive sign that our members are gaining real value from their membership and that we are also attracting new people to the ETIS community. I would also like to thank all of the Working Group Chairmen who volunteered their time and leadership to move our groups forward. A special thank you is also in order for BT, who hosted the successful ETIS Community Gathering event in Ipswich and shared their views on the future Telco at their Innovation and Research centre.

One of our major challenges has been maintaining our relationships with our members in this fast moving business environment. There are huge changes in the Telco business and people are changing positions and responsibilities more often than ever before. One of the main tasks for ETIS and our member representatives has been to increase the ETIS footprint in their companies and to find the right people to be involved in the right activities so that they can continue to gain value from their membership.

I would also like to take this opportunity to welcome our newest Full Member, Eircom who joined us at the beginning of 2007 and has already been an active participant in the ETIS Community. We are looking forward to sharing knowledge with them in the future and continuing this strong partnership. ETIS also received a significant amount of new Associate Members and Partners that have helped to support our specific activities with their valuable technical contributions.

One of the things that ETIS has been focusing on is producing concrete deliverables and tangible results for our members. Our yearly CIO executive reports reflect this and I am proud to introduce the new CIO Report which focuses on Information Security. Our Electronic Billing Working Group has also produced a CD-ROM containing the electronic billing standards they have developed which is free of charge for our members to use in their billing systems. Last but not least the ETIS Anti-Spam Pilot Project has shown how our members can pool together to fight urgent problems with tangible results.

ETIS is a member driven organisation and it is the members that decide upon the key issues we cover. In a sense, it is you, the members, who own this organisation and decide the topics to be covered. We encourage you to take full advantage of your membership to help you meet future challenges in your business by taking part in relevant ETIS activities, exchanging experiences and best practices and using the ETIS network effectively.

Yours sincerely,

Tora Tenden
ETIS Chairman
The main responsibility of the Council is to ensure that ETIS is being managed and run well so that it provides 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 seven members of the Management Board and members of the Council are elected for a period of two years and may be re-elected.

During the past year, the Council had 7 formal meetings either physically or via conference call. The following is an overview of the key items, which they have dealt with during the reporting period of April 2006-2007.

Council Members
This year, the Council welcomed one new member, Mr. Andreas Asimomitis representing OTE. Mark Easton, representing BT, Juerg Haseloff, representing DT, Eric Kramer, representing KPN, were all re-elected for another period of 2 years while Ivo Galea, representing Maltacom, ended his term as Council member and Secretary Treasurer.

The Council expressed their great thanks to Ivo Galea for his large contribution both as Council member and as Secretary Treasurer for many years.

Bjorn Reimers, representing TeliaSonera took over the position of Secretary Treasurer within the Council. Last but not least, the Council decided to propose to the Management Board that Tora Tenden remain Chairman for another period of two years, which the Board accepted unanimously.
2nd ETIS Community Gathering
The Council was significantly involved in the preparation of the 2nd ETIS Community Gathering which was hosted by BT in Ipswich, UK. The Council also prepared the 31st Board meeting hosted by Belgacom and the 32nd Board meeting hosted by BT.

As an outcome of the Gathering event in Ipswich, the Council decided to keep the same structure for future Community Gatherings. That is to say that the Gatherings should be composed of a Board meeting, a mini-conference combined with working group meetings. It was also decided that the next Gathering event to be hosted by OTE in Athens in October 2007, is organized in a similar way.

ETIS Activities & Events
The Council members have continued to be involved in the planning of ETIS activities. By monitoring their progress and achievements, the Council has played a key role in the success of the working group meetings as well as the ETIS 2007 Conference and the 6th CIO Workshop. They have also been greatly involved in the creation of the ETIS Anti-Spam task force, as they approved and encouraged the idea of this new Pilot Project.

ETIS Strategy & Objectives
This year, the Council decided to recommend to the Management Board to maintain the existing Strategy and Objectives for another period of two years. The progress made towards the strategic objectives is being followed closely and the expected results should be achieved by 2009.

The Council also gave valuable inputs to the Central Office in order to help them to increase the ETIS footprint in the member companies and subsidiaries. They concluded that the idea of an ‘ETIS community’ in each company, should be encouraged. This should begin with the CIO and the working group participants as well as other contacts such as PR and lobbying personnel.

A big topic of discussion was how to achieve satisfied ETIS members. Everyone agreed that the key to happy members was maintaining active personal networks.
The Management Board determines the policy of ETIS and approves the annual budget. The board consists of representatives from all companies who are full members of ETIS. The Management Board meets twice a year to exchange ideas, identify topics of interest and common concerns. The board authorises the formation of Working Groups, with specific responsibilities to pursue these topics.

ETIS held its 31st Management Board meeting in Brussels on 8-9th June 2006. The event was kindly hosted by Belgacom and attended by 21 participants from 12 companies. The Board meeting had two sessions composed of an ETIS Administrative and Strategy discussion and an IPTV Workshop.

During the first day, the Management Board worked on administrative matters, ETIS activities, ETIS strategy and the election of Council members. The Management Board unanimously voted to extend Tora Tenden’s Chairmanship by a period of one year. Additionally, Bjorn Reimers from TeliaSonera and Petr Jendrejcik from Telefonica O2 CR were re-elected as Council Members for a period of two years.

The second day of the meeting was a mini-conference centered around the topic of IPTV and Digital Media content delivery. The conference featured five presentations from the European Multimedia Forum, Belgacom, IBM, Telenor and HP.

All of the presentations were well received and our members have shown that this is a topic that should be further pursued in the future. As a result this topic was also featured during our ETIS Conference 2007.

It was a pleasure to host the 31st ETIS Management Board meeting. One of the topics covered was IPTV which is very relevant to us as Belgacom has launched its own Belgacom TV service and was able to share knowledge on this experience with the other ETIS members.

Philippe Ribonnet, Head of Network & IT Belgacom
ETIS held its 32nd Management Board meeting in Ipswich, United Kingdom on 13 November 2006. This was organised in combination with the 2nd ETIS Community Gathering event which was hosted at BT’s research, technology and IT centre in Adastral Park.

This Board meeting featured presentations from all of the Working Group Chairmen which gave the Board a good overview of the work being performed in ETIS. This session highlighted the new Anti-Spam task force activity and the Customer Self-service benchmarking survey. The Board also covered administrative and financial matters concluding with the election of Council members.

The terms of office for Mark Easton, BT and Juerg Haseloff, DT were renewed for another two years. The Board was also pleased to welcome Andreas Assimotis from OTE and see that OTE is once again an active member.

During the Board meeting the Central Office also presented the 2005/2006 Annual report as well as the new CIO Strategic Report which was well received.

The Board meeting was then followed by a highly successful ETIS Community Gathering, which brought together over 83 participants from 35 organisations and 17 European countries.
The Central Office, is a permanent group of personnel employed by ETIS to provide stable administrative support, management, project co-ordination, internal and external communication and information to facilitate the activities of the Council, the Management Board and Working Groups.

One of the tasks of the ETIS Central Office is to maintain links with members and encourage member participation in ETIS activities. During the past four years a lot of effort has been spent designing our information systems to monitor ETIS activity and participation levels.

The following graph shows that there has been a healthy increase in activity with our members participating in more working group meetings, workshops, conferences and gatherings which is a positive sign that ETIS is growing in the right direction.
Central Office

One of the main activities was the preparation of the ETIS 2007 Conference which ended up being our biggest event to date with over 130 participants. The organisation of this conference was key in attracting new participants to ETIS. While the Community Gatherings aim to consolidate all that is ETIS, the Conferences aim to break the mold and attract new members, topics and international exposure.

Another major event was the 6th CIO Executive Workshop which was hosted by BTC in Sofia. As usual, the Central Office was also heavily involved in the running of the six working groups. The Central Office was involved in supporting all of the Council meetings and Board meetings.

The Central Office is also key in helping to produce ETIS deliverables. This year the Central Office help to produce three major deliverables: the CIO Executive Reports, the TeBIT Benchmarking Study and the Electronic Billing CD-ROM.

The Telecom industry is moving faster than ever before and one of our major challenges has been maintaining the relationships with our fast moving members as well as gaining new members. Despite this we are pleased to report that our participation levels have been climbing steadily during the past four years. Last year we were also pleased to welcome Eircom to the ETIS community as well as a number of new Associate members, Partners and sponsors for our events.

Terje Tondel,
ETIS Managing Director
ETIS is proud to announce that Eircom has formally joined as a full member and is set to share knowledge and add value to the upcoming activities and events.

The Eircom member representative is Mr. Gerry Quinn, CIO of Eircom, who also gave a presentation at our 6th CIO Executive Workshop on ‘Eircom’s Transformation Plans’ on April 20 in Sofia, Bulgaria. Eircom’s Head of IT Enterprise Strategy, Mr. Stephen Giffney, also gave a presentation at our 2007 Conference in Brussels on the topic of ‘Billing Challenges and Strategies’ in Eircom.

Some other areas of interest for Eircom include Enterprise Architecture, the TeBIT IT Benchmarking Study, the Customer Self-service Working Group and the CIO Executive Forum. ETIS is looking forward to working with Eircom and wishes them a warm welcome to the ETIS Community.

About Eircom
Eircom is the principal provider of fixed-line telecommunications services in Ireland with approximately 2.2 million fixed-line telephone access channels in service. Their mobile division, Meteor, which was acquired on November 23, 2005, is the third largest mobile operator in Ireland. As at June 30, 2006, Meteor had approximately 683,000 mobile subscribers.

Eircom had turnover of approximately €1.7 billion in the financial year ended March 31, 2006 and EBITDA of €567 million in the financial year ended March 31, 2006.

Over the past two years I have witnessed the growing momentum of ETIS and its activities. After gaining positive feedback from the ETIS Community Gathering in Ipswich, I was convinced that ETIS was a unique place to network with my peers in the Telco industry. Eircom is looking forward to an active membership with ETIS and sharing knowledge with its members.

Mr. Gerry Quinn
CIO of Eircom

New Members

Terje Tondel, Director of ETIS and Gerry Quinn, CIO of Eircom shake hands after Eircom joins as a full member.
The involvement of ETIS Associate Members, Partners and Sponsors enables a valuable exchange of knowledge and expertise that helps make ETIS working groups and events a success.

Comverse joined ETIS as an Associate Member in February 2007 and has since actively contribute technical knowledge to our events, forums and working groups.

Comverse CTO, Birger Thorburn presented on the subject of Telco Billing of Multi-media services at our Annual Conference in Brussels and had the following to say about ETIS.

"Comverse Converged Billing Group is excited about joining ETIS, it will give us a unique opportunity to share ideas & thoughts on the ever changing technology and telecom’s marketplace with other experts in the industry".

Greg Day, Security Analyst, McAfee Inc.

TNO joined ETIS as an Associate Member in late 2006 and has since actively contribute to several ETIS Working Groups. TNO was a key partner in the launch and project management of the ETIS Anti-SPAM Pilot Project. It is also active in the areas of Enterprise Architecture and Electronic billing.

Marcel Teunissen, Board Member of TNO Information and Communication Technology: "Our recent participation in ETIS-activities confirmed that we made the right decision to become an active associate member of the ETIS-community. TNO is looking forward to share knowledge with ETIS-members via the various working groups and by contributing reports such as white papers. We also look forward to building up new business relationships with other ETIS-members."

IronPort joined ETIS as an Associate Member in early 2007 and was also involved in contributing technical knowledge to the ETIS Anti-SPAM Pilot Project.

"Our new membership in the ETIS Anti-Spam Task Force highlighted the great value for IronPort of being part of the ETIS community. IronPort is looking forward to an active membership and helping the European network operators to combat SPAM."

Jason Steer - Product Manager, IronPort.

ETIS is also pleased to introduce two new partners that it will be co-operating with in the future: EU-INSIT, The European Institute for Innovative Technologies and PMI - The Project Management Institute.

MaCafee has joined ETIS as an Associate Member in early 2007 and has been actively involved in the Anti-SPAM Pilot Project. McAfee contributed valuable technical knowledge as well as manpower and hardware which was instrumental to the project’s success.

"Our recent involvement in the ETIS Anti-Spam Task Force highlighted the great value for McAfee of being part of the ETIS community. McAfee is looking forward to an active membership and helping the European network operators on an international level, to combat SPAM specifically and to obtain Clean Pipes in general."

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Following the success of the first ETIS Community Gathering held in Cyprus in 2005, ETIS started a new tradition by following up with a second Gathering hosted by BT in 2006. The gatherings are 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.

The 2nd ETIS Community Gathering was hosted by BT in Ipswich, UK on 14/15 November 2006. The gathering was held at BT’s research, technology and IT centre in Adastral Park which is a 99-acre site that houses one of the highest concentrations of ICT technologists in Europe. This successful Gathering brought together over 83 participants from 35 organisations and 17 European countries.

The gathering kicked off with a welcome from BT and a presentation on BT’s 21st Century Network followed by showcases on how Telecommunication technologies will be used in the future in various real-life settings such as in a bank, a home, a hospital and with public security. The day concluded with an energetic, eye-opening presentation by BT futurologist, Ian Pearson.

Many of these challenges were also discussed on day 2 in our working groups such as the Information Security, Customer Self-Service and Enterprise Architecture meetings.

Building on day 1, a ‘Future Telco Forum’ was also launched featuring presentations on our members transformation plans from TeliaSonera, Belgacom, Maltacom, KPN, OTE and Telefonica O2 Czech Republic.

The Gathering ended with a common session where the working group Chairmen reported on the groups’ activities and answered questions from the participants. Overall the working groups reported considerable progress and most already scheduled their future meetings.

In addition to the education programmes, there were plenty of unique opportunities for networking, with lunches, networking breaks and the pleasant gala dinner. ETIS would also like to extend a special thank you to Mark Easton and Rosemary Price from BT for their excellent organisation and hospitality during our stay in Ipswich.
ETIS held its 2007 Conference: ‘Innovative Telecommunication Services & Business Models to Win New Markets’ which was hosted in Brussels on 7-8 June 2007.

The conference began with a joint session on day 1 followed by 3 tracks on day 2, focusing on Business Trends & IT Consequences, Telco Billing Opportunities & Challenges and Information Security. The conference was well attended and gathered over 130 delegates from 20 countries and 63 organisations.

The keynote speaker was William Mosseray, Executive Vice President for Strategy, Belgacom who presented his views on the future services and business models for the Telecom industry. The conference also featured over 40 presentations by senior ICT executives in the Telecom industry from companies such as BT, Deutsche Telekom, Telecom Italia, TeliaSonera, KPN, TDC, Belgacom, Telenor, Eircom, HP, Oracle and more.

Below are but a few of the topics that were covered:
- Innovative Telecommunication Services & Business Models
- Future networks & technology as driver for new services
- Digital Content Delivery
- New Business Trends & IT Consequences
- Customer Self-service & moving the Telco business online
- Partnerships, Mergers & Acquisitions
- Vendor, Outsourcing & Cost Management
- Telco Billing Opportunities & Challenges
- Information Security & Data Retention
- Fighting Spam on the EU Network Level

In addition to the education programmes, there were plenty of unique opportunities for networking, with lunches, networking breaks and the pleasant gala dinner.
Continuing turmoil throughout the telecommunications industry forces us to closely examine the forces that are now pushing the industry forward: the end user’s demand for more bandwidth; increased reliance on mobility services; and the end users’ assessment of cost versus performance. Telecom profits are continuing to drop while the pressure to build business through technological differentiation continues. Telcos at all levels are struggling with convergence, integration, switching to IP and managing resources in this fast changing business environment.

Responding to this critical issue ETIS launched the first in a series of CIO Workshops dealing with the topic of the Telco’s transformation plans and the changing role of IT in the organisation.

This first workshop was called the ‘Future Telco Forum’ and was hosted by BT in Ipswich during the ETIS Community Gathering. It featured presentations on our members transformation plans from TeliaSonera, Belgacom, Maltacom, KPN, OTE and Telefonica O2 Czech Republic.

Building on the presentations that were made during the ETIS Community Gathering at BT in Ipswich a follow-up CIO Workshop ‘Telco Transformation Plans & IT’s Position in the Organisation’ was hosted by Bulgaria Telecom Company in Sofia, Bulgaria on 20 April 2007.

The workshop featured member presentations from the CIOs of BTC, KPN, TDC, Telecom Italia and Eircom as well as a strategic keynote presentation from the Boston Consulting Group with plenty of room for open discussions.

The CIOs who participated in both workshops would all agree that it was a great learning experience and the knowledge that was gained can only be obtained whilst discussing similar challenges with your peers.

KPN had the pleasure of hosting an ETIS CIO Workshop and I must say that the workshops have been very useful as we have been discussing our recent transformation plans and strategies. ETIS is a trusted environment where I feel comfortable discussing these issues with my peers.

Eric Kramer
CIO Office, KPN
Following the success of the CIO Strategic Report 2006, ETIS has launched a second report focused on the topic of Information Security.

This report is a consolidation of presentations, discussions and panels held during our numerous working group meetings, workshops and conferences on the topic of Information Security over the last three years. It takes into account the statement of actions, visions and recommendations made by senior executives from our members and projects the challenges, opportunities and issues present in our ever-changing business environment.

During its creation we aimed to provide significant added value by analysing the content of the presentations and discussions, rather than merely reporting on the proceedings.

This report has been created using the contributions from numerous speakers including those who participated in the following ETIS events:

- ETIS Annual Conference: Aligning IT & Corporate Goals in the Information Age
  Hosted by TeliaSonera in Stockholm
  10-11 Jun. 04

- ETIS VoIP Workshop: Identifying how VoIP is enabling new entrants to challenge established Operators
  Hosted by ETIS in Brussels
  15 Dec. 04

- ETIS Annual Conference:
  Aligning IT & Corporate Goals in the Face of Convergence
  Hosted by ETIS in Brussels
  16-17 Jun. 05

- ETIS Community Gathering 2005
  Hosted by CYTA in Cyprus
  3-4 Nov. 05

- Critical Information Infrastructure Resilience: A Risk Management Approach to a Tech Issue
  Hosted by ETR²A, ETSI & ETIS in Nice
  1-2 Jun. 06

- Mobile Security Conference 2006
  Hosted by Informa in London
  3-5 Oct. 06

- ETIS Information Security WG Meetings
  Hosted by various members around Europe during 2004 to 2006
The role of the group 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 Information Security working group is chaired by Torkel Norda, Senior Advisor at CIO Office, TeliaSonera. The vice-chair is Thomas Tschersich, Executive Vice President Information Security of Deutsche Telekom. The working group has 42 members from 24 companies.

Some of the topics which are being studied by the group during the reporting period are:
- Information security as a business enabler
- Information security awareness
- Spam & phishing
- CSS & e-Business security
- Identity and Access Management
- TOP Level Policy document
- SOX compliance
- Outsourcing experiences and more...

The group held three physical meetings during the reporting period as well as several telephone conferences.

The first meeting was hosted by Deutsche Telekom in Berlin on 11/12 May 2006. This meeting focused on topics such as Security Governance Models, Incident Management, Security Benchmarks & KPI’s, Balanced scorecards for security and the Anti-SPAM Task Force.

The second meeting was held during the ETIS Community Gathering hosted by BT in Ipswich on 14/15 November 2006. This meeting covered topics such as Security on Next Generation Networks, De-perimeterisation and Boundaryless Infrastructure and Anti-SPAM.

The third meeting was hosted by Turkcell in Istanbul on 26/27 April 2007. The focus of this meeting was Compliance issues, Identity & Access Management, Customer Security Awareness, Mobile Security and New Challenges with e-Crime / Cyber Crime.

During the ETIS Annual Conference there was a full day session dedicated to the topic of Information Security. Several of our members were speakers in this session and the focus was on the topics of Data Retention and Anti-Spam strategies.

Some members of the Information Security group also attended an ETIS Partner event in Sophia Antipolis in co-operation with ETR2A & ETSI where the work of the group was presented by Fred Werner from ETIS. ETIS was also a partner in a Mobile Security conference in which some of our members were able to attend for free.

Another direct result of the group’s positive activity has been the creation of this year’s CIO strategic report which focuses on the topic of Information Security.
In January 2007, ETIS joined forces with TeliaSonera, KPN, Belgacom and Telenor to launch a pilot project to fight SPAM.

With the help of McAfee, IronPort and Dutch research organization TNO, the Telcos implemented a combination of different technologies and co-operation procedures with the aim of eliminating the majority of SPAM on the European network level before it even reaches the mail servers. Seven months later, the pilot project is now complete and it yielded some very encouraging results that warrants further investigation and co-operation among the European Telcos.

The Anti-Spam pilot project members recently met to discuss the results of the pilot project and all agreed that project had been a worthwhile experience with positive results. The group found that the active information exchange among ISPs, especially regarding SPAM traffic flows received from one another, is a successful approach towards reducing SPAM. Even within the limited time frame of the pilot, this level of information sharing dramatically reduced the SPAM rates as well as customer complaints in the participating ISPs. The existence of trust among partners under the ETIS umbrella allowed the process of remediating SPAM incidents to be automated to a great extent. This approach enabled one of the participating ISPs to remediate close to 16000 SPAM incidents in less than a day during the six-week pilot period.

One of the key success factors in the project has been the co-operation and information sharing between the carriers and ISPs. “Using this combination of anti-spam techniques along with sharing data with the other ISPs has allowed us to get rid of more spam, at a faster speeds, with fewer errors and at a lower cost. It has also freed up time, space and resources which can be used to better serve our customers.” Andy De Petter, Belgacom.

On the technology side, the project found that employing hybrid technologies on inbound e-mail streams to be an effective approach for reducing SPAM in end-user mailboxes. The pilot project results have undeniably proven IP reputation filtering and content scanning to be complementary in nature. For all of the components, both technical and procedural, that were tested to sufficient extent during pilot, the benefits they offered in terms of SPAM and cost (time) reduction far outweighed the effort to maintain them.

It is the belief of all the project partners that the anti-SPAM cooperation framework would considerably gain effectiveness if more partners were to join it from a range of geographic regions. Standardizing reporting formats and adopting a common set of best practices in anti-SPAM are important requisites for the cooperation framework to further exploit its potential, especially if the framework is to be extended with more partners.

ETIS would like to extend a special thank you to Toni Bekker from TeliaSonera who was the driving force behind the creation of the ETIS Anti-SPAM Task Force.

Anti-SPAM Pilot Project

Info. Security meeting hosted by Turkcell in Istanbul

KPN & ETIS kicking off the Anti-SPAM Pilot Project

TNO meeting with ETIS to discuss the Anti-SPAM Pilot
Customer Self Service WG

The objectives 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 working group is chaired by Per Rasmussen, Vice President TDC Residential. The vice-Chair of the working group is Ulla Sommerfelt, Deputy CEO of Halogen. The working group is very active and boasts around 38 members from 20 companies.

The working group has a clear business focus and the current scope is the online channel in the consumer market. However, the corporate market will also be a topic developed in this working group because the objectives are the same for consumer/mass market issues and the corporate customers.

Deliverables & Downloads
The group will aim to provide the following:
- Overview of the status of CSS maturity
- The ETIS CSS Benchmarking Survey
- Best practices for carrying out the CSS project (Strategy to implementation)
- Best practices for measuring and ensuring continued business success
- How to organise, governance models
- Overview of vendors in the CSS space
- Conceptual 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 is filled in via an online tool which was developed by the ETIS Central Office. The quarterly reports are produced with the help of TDC and gives its users important feedback on how they are performing compared with their peers in the industry.

It has been a pleasure participating in the CSS working Group. The discussions in the group together with our benchmarking survey has given us so much valuable industry wide information that would have been very difficult to obtain independently.

Per Rasmussen
TDC
CSSWG Chairman

Networking after a CSS WG meeting hosted by BT
CSS Working Group Meetings

This was a busy year for the CSS WG which had four meetings.

The first meeting was hosted by BT on 21 June 2006. Below are some of the topics that were covered:
- Best practices and trends
- How to improve website usability
- How to work with Usability studies

The second meeting was held in Oslo on 13-14 September 2006 and was hosted by Telenor. Some of the topics covered were:
- How to measure ‘e-mail avoidance’?
- Definition of ‘Online Contacts’
- How to best measure customer satisfaction

The third meeting was hosted by BT during the ETIS Community Gathering on 15-16 November 2006. This meeting focused on a number of topics such as:
- Virtual Personal Assistants:
  - Call and Chat Avoidance
- Lattelecom’s e-School to educate users of new products and services
- Customer Self Service Strategies and future Services

The fourth meeting was hosted by Deutsche Telekom in Bonn on 7-8 February 2007. Below are some of the topics that were covered:
- Online Marketing
- CSS Survey 2006
- KPI – Future focus and expectations
- Marketing requirements for CSS KPI’s
- TDC & KPN’s Online Marketing

The CSS WG Benchmarking survey is conducted every quarter and the reports are provided to the working group participants.
In recognition of the growing interest in electronic commerce, and of billing as an integral part of this, ETIS set up a working group to develop and promote the use of a standard subset of the UN EDIFACT INVOIC message. This subset was completed some years ago and is now in everyday use within several ETIS member companies, and is in a trial phase within other companies.

The Electronic Billing Group (EBG) has been dealing with the development of standards for electronic end-customer billing since 1992. Standards developed by the group are implemented successfully by many Telecom providers. Due to the fact that new technologies have to be supported, the EBG is mainly focused on XML developments today. However, the group’s EDIFACT subsets for billing in the telecommunication world are also maintained and widely used.

The XML Standard is now being used internally by Deutsche Telekom and Telekom Austria has fully implemented the solution and is offering it to its customers. Magyar Telekom was also involved in developing the standard and has been testing it.

One major meeting was held last year in Brussels and was hosted by ETIS on 6 June just before the annual conference. The 2007 Conference also had a full session dedicated to the topic of billing.

This meeting began by presenting the latest activities of the Electronic Billing group, in particular the XML Billing package which is ready to be used by the Telecom industry. The rest of the meeting focused on dealing with technical issues and dealing with EBG matters.

Below are some of the topics that were covered:
- The ETIS EBG XML CD-ROM
- The ETIS EBG XML schema
- Digital Signature in XML schema
- XML Standard for billing in Telekom Austria, ebCrossBorder as a European Standard

This meeting was targeted towards the existing members of the Electronic Billing group as well as some potential new members.

The EBG is optimistic that the new EBG CD-ROM will encourage ETIS members to use our standard in their billing systems and enjoy the benefits of electronic billing.

Rainer Paepcke
Deutsche Telekom / EBG Chairman
In 2003 the group started an XML standard for the telecom industry in addition to the existing EDIFACT message. Telecom operators can now choose if they want to use EDIFACT or XML. Both ETIS standards are the only telco specific ones on the market and are now available to ETIS members and non-members alike on a new CD-ROM.

The goal of this CD-ROM is to provide the ETIS community and other interested parties with the ETIS Electronic Billing Standard in the XML and EDIFACT formats. This CD-ROM contains the files necessary to implement the standard in your company and benefit from the expertise of the working group.

The fact that this solution was developed by billing experts in telecommunications companies means that this is the only telco specific billing standard that is flexible enough to meet a telco’s billing needs.

The Standard
The deliverables created by the ETIS Electronic Billing Group are designed as a standard for telecom operators. Regarding the EDIFACT world the group provides the only existing subset for telecom invoices and also offers additional items such as Data Models and Code Lists. The XML format is based on the same Data Model and therefore covers the same contents as the EDIFACT subset.

The ETIS standard describes all billing data in a detailed way. By dropping optional parts in the XML formats a lean version of the complex structure can be created. This enables all potential users to create XML files according to their individual needs. However, some mandatory parts describing the most important billing data have to remain.

Convergent Billing
Both, the XML format and the EDIFACT subset are prepared to be used in a convergent billing environment. Fees and traffic for fixed net and mobile services can be invoiced and also data used in inter-carrier billing can be included in ETIS formats.

The formats cover the whole range of billing data and also details for each call or connection may be included.

Benefits of ETIS EBG standards
- EDIFACT and XML solutions are suitable for fixed net services, mobile services, inter-carrier billing (national, and possibly international).
- The standard fulfills the needs of big companies, small and medium size enterprises and residential customers.
- Both data formats provide interoperable, reliable, secure and low-cost data transfer, independent of software and/or accounting system on site.
- The unique electronic bill format allows for easy (cheap) post-processing at customer / client side.
- Customer-oriented business cases show proven Return on Investment (RoI) after 5-6 weeks.

The CD-Rom will provide you with the actual data models, schema, demo tool and supporting documentation. This CD-Rom is free of charge to ETIS Members. Non-members may purchase this CD-ROM via our website.
The objective of the Enterprise Architecture group is to seek to identify and share best practice in the development and use of Enterprise Architectures in the business context of its members.

All ETIS members are in the same business and use the same technologies. They often co-operate in the provision of service to customers, or in specific business relationships. There is much to be gained by working together. The quality of Enterprise Architectures can be improved, the cost of ownership may be reduced if common items of work can be identified and defined. The ultimate performance of business can be improved and customer service enhanced.

Working Group Meetings
The Chairman of the Enterprise Architecture WG is Jan Cylwick from BT. The EAWG had four meetings during the reporting period. The first meeting was hosted by Czech Telekom in Prague on 11/12 May 2006. The second meeting was hosted by Magyar Telekom in Budapest on 21/22 September 2006. The third meeting was hosted by BT during the Ipswich Gathering. The fourth meeting was hosted by TeliaSonera in Stockholm on 10-11 May 2007.

Below are some of the topics that were covered at those meetings:
- Service Oriented Architecture
- CC&B Architecture and Order Decomposition
- SOA Service Maturity Metrics
- Mapping EAWG Services to TAM
- Enterprise Architecture Maturity Assessment
- Analysis of Applications Usage Survey
- Mapping Applications to Vendors

We are all on common journey driving architecture implementation further up the business value chain. We started with IT Infrastructure and Systems, arrived at business services (SOA) and will be moving onto business process management. As the journey gets more difficult so we find more value in our meetings. We had stimulating discussions, identified best practices, and using case studies uncovered the reality behind industry hype. The groups’ reputation has allowed us to attract keynote speakers notably, TMF, IBM, CBDI, Oracle & Sogetti, and to benefit from their leading edge thinking. These activities have better prepared us for the road ahead, which looks as challenging as La Bollène to Sospel, the steepest stage of the Monte Carlo Rally. Now - that would be a good team building exercise!

Jan Cylwick, BT/EA Chairman
Each year ETIS carries out a Telecommunications Benchmark IT Survey called TeBIT for ETIS members, which describes business and IT trends in various areas, such as key figures, business drivers and outsourcing.

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. This year’s TeBIT 2006 report, which includes data from 2004 and 2005, has been developed in close co-operation with the following ETIS members: Belgacom, Czech Telecom (today Telefonica O2 Czech Republic), OTE, Magyar Telekom, CYTA, TeliaSonera, KPN and BT Global services.

Following is a short summary of some of the findings in this year’s report.

Business Drivers
The companies’ Business Drivers seem to be centered around three main areas: Protect / Improve Revenue, Customer Relations and Services offering. All of which are described more deeply in the report.

Key Figures
We see many encouraging figures showing that IT in Telcos is becoming more efficient. The Customers per Employee ratio is up by almost 12% on 2004 and Revenue per Employee is up by almost 6% since 2004. On the other hand, a decrease in Revenue per Customer, of 4.4%, shows that this trend has still not yet bottomed out, although it is considerably less than the average over the last 4 years of about 8%.

Operating Expenditure per Customer shows a slight increase, of 5.5% compared with 2004, but taken into account corresponding figures related to 2001 it shows a reduction of more than 40% in four years. IT Expenditure per Customer is down once again, by approximately 12.5%, to 16.65 Euro per Customer. Although IT Opex as a percentage of Total Opex, remains almost the same at 5%.

Plan/Build/Run
This year’s results show an average of 4%:38%:58% for PLAN:BUILD:RUN.

Outsourcing
This year’s results suggest that Outsourcing has increased by almost 50% from 2004 to 2005. Clearly Outsourcing is favoured as a means to reduce Costs, reduce Headcount and Acquire new skills. Out of an unweighted possible total of 100% Outsourced of the defined IT-processes, we see that around 28% is outsourced. There are some concerns that few companies have in place procedures for bringing work back in-house if this became necessary. This is considered to be good practice.

IT Business Value Delivery
Results were disappointing. This may reflect an inability to find (innovative) ways to measure IT Value Added, but also indicates that it cannot find ways to justify itself.

IT Time to Market
As with IT Business Value Delivery, results were disappointing. It may be useful to address this topic and IT Business Value Delivery in future ETIS activities.
ETIS started a Procurement & Vendor Management activity in January 2007 based on an initiative from TDC. The preliminary group consists of 8 member companies which are: TDC, TeliaSonera, Telenor, KPN, Belgacom, BTC, Turkcell and CYTA.

The group was created to share knowledge and experiences on the phase that begins after a company has decided to Outsource or buy something. The focus is on the implementation of the decision including the processes of following-up the contract.

The objective of the activity is to share experience within the procurement and vendor management area and to further explore areas on common interest. With the help of TDC, the group has done an internal Procurement Survey to get a better understanding of the situation in the different companies. This Survey will be used to prioritize the future work.

The main topics of the three meetings which have been organized so far have been:
- Creating common ‘language’
- Governance models
- How to measure Procurement?
- Defining Key Performance Indicators
- Implementation of Vendor Management
- Best practices

The overall goal is to find the answer of: How do you in an efficient way run a Procurement department with focus on Right level of people, Smart contracts, Skills needed, Rules and Processes – Best practice!

During the year the group has had three meetings hosted by TDC, Telenor and KPN. There was also a session on Procurement and Vendor Management at the ETIS Conference 2007 which generated a lot of interest in this activity.

I am very satisfied with this new initiative within ETIS. I see ETIS as a trusted platform where I can safely discuss procurement and vendor management strategies with my peers in the European Telecom industry. It also gives me opportunities to increase my networking in procurement and to bring up new areas to share experience within.

Mats Lundin
TeliaSonera
The ETIS International Settlements Working Group is a group of experts from different Telecom Operators dealing with the development and implementation of standards for electronic data interchange of accounts, invoices and settlement statements for global inter-carrier billing and accounting.

The IS group has been working on definition of an EDI HUB principle, that would enable the conversion of files into a format which is readable for the receiving party. This could be applied for the exchange of documents between two ETIS members who exchange in XML or flat file format. Beside this, this HUB would also allow ETIS members to convert any incoming electronic files into XML or flat files (from member carriers or non-member carriers) which would then be able to upload it to the members own billing system.

The advantages the group sees are:
- Enable direct automatic upload of data into billing systems
- Allow automatic reconciliation process without manual typing or converting the received data
- Reduction of the reconciliation time
- Give a more precise and accurate reconciliation
- Improve/speed up the dispute process
- Reduction of Settlement Period of Disputed Amounts

All in all, this would lead to a better cash flow and give a better control of the business.

This year, although the IS core team met several times through conference calls working on the implementation of the EDI HUB (converter), the group did not have the chance to meet. As a matter of fact, it was decided to put the activity on hold for a while and leave the project open for new challenges and opportunities in the future.

Last but not least, Gertrud Halter from Telekom Austria has retired from her position as Chairman of the group, as well as Margareta Aronsson from TeliaSonera as Vice-Chair. This is due to the fact that they have both changed jobs within their respective companies. In this respect, ETIS would like to formally express a great thanks to them for their large contribution, great support and involvement both as Chairman and Vice-chair of the ISWG.
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
- ETIS Portal

One of the key factors in mind while redesigning the ETIS website and members corner was to make sure that we would be able to get some marketing feedback from our users. In an effort to keep track of our users and target our marketing activities more effectively, we have created marketing feedback reports that measure a number of criteria and performance factors.

These reports measure numerous factors such as:
- Web Traffic & performance increases
- Members Corner traffic
- Most popular pages viewed
- Geographic breakdown of visitors
- User profile of information requests
- Discussion forum posts
- Portal search results and more...

We have been able to measure website traffic since August 2003. It is clear to see from the graphs that ETIS website traffic and Members Corner use has increased dramatically over the past four years. This increase in use is linked to the overall increase in activity that ETIS has seen over the past four years.

We have been able to measure all of the information requests that come via our website on a variety of topics ranging from membership info to more technical questions. The next graph shows a strong upward trend in info requests as our site becomes more and more well known.

These information requests come from a wide range of people such as ICT practitioners in Telcos, IT suppliers, consultants, lobbyists and researchers.

Information Services

All of our information services have been designed to enable easy and secure sharing of knowledge in a trusted environment. We are pleased to see our members using our web services more than ever, resulting in a true knowledge hub.

Fred Werner
Business Development Manager, ETIS
ETIS Websites

www.etis.org

ETIS Members’ Corner

www.etisportal.org
ETIS Members

Deutsche Telekom
BT
kpn
belgacom
TeliaSonera
Telefónica
O₂
TDC
OTE
eircom
GO
telenor
6T
la.ittelecom
Magyar Telekom
Hrvatski Telekom
FINNET GROUP
Telekom Slovenije
Slovak Telekom
CYTA
VimpelCom
TURKCELL
telesur
Telekom Srbija
Telekom Austria
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, EU projects, workshops and conferences.

ETIS comprises three permanent bodies: the Management Board, the Council and the Central Office.

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

The Council consists of 7 to 9 members of the Management Board. They are elected for a period of two years and may be re-elected. The Council is chaired by the Chairman of the Board and meets periodically to determine strategy and oversee operational aspects.

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

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.
The mission of ETIS is to enable its members to improve their business performance by personal exchange of information on using ICT effectively.

The ETIS vision is to be the acknowledged best platform for sharing knowledge on the use of ICT in Telcos.