ETIS Annual Report 2011 I 2012

Sharing Knowledge is our Strength!
The main event of the year was, of course, the celebration of our 20 year anniversary at the ETIS Community Gathering hosted in Cyprus on 13-14 October 2011. The theme of the Gathering was ‘ETIS 20th Anniversary – Innovative use of IT in Telcos’ and looked at the main events that have led to the marriage of Telecommunications and Information Technology during the past 20 years whilst looking ahead at the next 20 years. The gathering also used the opportunity to bring together the ETIS Veterans which welcomed some past ETIS Chairmen and working group participants who were most pleased to find each other again after many years. This highly successful event brought together over 150 participants from 47 companies to share knowledge on key ICT issues facing the Telecom industry.

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, BT, who decided to re-join ETIS after a short break and they are now very active in the Security and Anti-Spam areas. We are looking forward to sharing knowledge with them and continuing this strong partnership. ETIS also welcomed two new daughter companies with Fastweb who is a daughter company of Swisscom operating in Italy and Elion who is a daughter company of TeliaSonera operating in Estonia. They are both very active in our working groups and their participation has added knowledge and value to the ETIS community.

This year also saw the creation of an ETIS Telco CERT Network as a sub-group of the Information Security area. We have also increased our ability to conduct benchmarking studies, surveys and best practices which has proven to be one of the best ways of capturing the knowledge exchanged in the working groups.

At the beginning of 2011 we launched a new ETIS Members’ Corner with the aim of encouraging more openness and sharing of information. Since its launch we have already seen the number of Members’ Corner visits triple compared to previous years which is a good indication that the members are using the site to share even more knowledge and network in between physical meetings. We also re-launched a new e-telit News Portal that takes advantage of the latest social media and content aggregation technology to provide updated and relevant industry news to our members whilst creating a promotional space to promote our members, media partners & sponsors.

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
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.

In the past year, the Council held six meetings either via conference call or physically in Brussels. The overview of the key issues which have been dealt with during this period is here below:

COUNCIL MEMBERS

During this reporting period, Bjorn Reimers, TeliaSonera, ETIS Secretary Treasurer tragically died after fighting his battle against cancer. Following this, the ETIS Council made a contribution to the Swedish Cancer Foundation to honour his memory.

During this year, Kees Stok, KPN, Andreas Asimomitis, OTE were appointed to replace Bjorn Reimers as ETIS Chairman for another two-year period. Other changes to Council Members were made during this period. Andreas Asimomitis, OTE was appointed as ETIS Chairman for two years and Jens Erik Ebbesen, TeliaSonera was also elected as a new Council Member.

ETIS ACTIVITIES & EVENTS

As 2011 was the 20th Anniversary of ETIS, the Council was actively involved in the organisation of the ETIS Community Gathering at which this anniversary was celebrated. The Council was also actively involved in the ongoing activities of the organisation ranging from initiating the Nest Generation Network questionnaire and other benchmark surveys; the re-launch of the Members’ Corner on the ETIS Website and the e-telit news portal. Their involvement was also essential for the organising of the two Management Board meetings, hosted by A1 Telekom Austria and CYTA, together with the CIO Executive Workshops. The Council endorsed the strategic KPIs in place and carefully analysed the KPI results for this reporting period and developing regular updates of all working group activities.

The Council endorsed the project of creating the ETIS Anniversary booklet putting together the history of ETIS. This booklet was distributed to all participants at the ETIS Community Gathering in Paphos, Cyprus in October 2011 and it has been very well received throughout the ETIS community.

The Council Members were also actively involved with the establishment of new criteria and questions for the 2011 ETIS TeBIT Benchmark Survey and its subsequent Executive Report.

The Council Members were actively involved with the development and “going live” of the IT Applications Transformation Plans questionnaire. This document was used as a basis for discussion in the CIO Executive Forum.

ETIS STRATEGY & VALUES

The Council used the physical meeting in Brussels to update the ETIS Strategy 2012 - 2014. As a result the Council identified the following core values that are the guiding principals behind all ETIS activities:

• ‘Sharing Knowledge is our strength’ is our slogan and guiding principle.
• The type of knowledge shared in ETIS is non-competitive information on the effective use of IT in Telcos and best practices that are of benefit to the whole industry and in line with the Anti-Trust regulations.
• The type of knowledge and information shared in ETIS is based on real-life experiences that go well beyond the theoretical models covered in other industry bodies.
• ETIS activities are created by telcos, for telcos resulting in very actual and targeted knowledge.

• Sharing knowledge implies that one has to both give and receive. All members are expected to contribute to the process of knowledge sharing, either as a source or as a reviewer.
• The possibility to actually know the other participants in the working groups and build a relationship and mutual trust, is an important facilitator for knowledge sharing in ETIS. That implies that working groups are limited in size.
• The ETIS membership is governed by a confidentiality agreement and members understand that the information shared is confidential.
• ETIS is member driven organisation and it is the members who decide on the topics and activities to be covered.
• ETIS is recognized as an organisation that delivers high quality services and reacts fast to members request.
ETIS held its 42nd Management Board meeting in Paphos, Cyprus on 12 October 2011, kindly hosted by CYTA. This was organised in conjunction with the ETIS Community Gathering event which doubled as the ETIS 20th Anniversary celebration.

The Management Board meeting focused on the ETIS strategy, administrative matters and the election of Council Members. The Board unanimously voted to re-elect Wim de Meyer from Belgacom as a Council member for a period of two years. Jens Erik Ebbesen, TeliaSonera was also elected as a Council Member during this meeting. The Chairman also announced that ETIS had, since the previous meeting, two new members, Elion, daughter company of TeliaSonera operating in Estonia and Fastweb, a daughter company of Swisscom operating in Italy.

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 ETIS 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 41st Management Board meeting which was hosted by A1 Telekom Austria in Vienna on 26 May 2011.

The Management Board meeting focused on the ETIS strategy, administrative matters and the election of Council Members. The Management Board unanimously voted to re-elect Tora Tenden as Chairman for another two-year period. Both Kees Stok from KPN and Andreas Asimomitis from OTE were re-elected as ETIS Council Members during this meeting. Andreas Asimomitis was also appointed Secretary Treasurer for a period of two years and Armin Sumeisgutner, A1 Telekom Austria and Michael Hughes, Oger Telekom were elected as Council Members.

The Board took the time to discuss the ETIS Strategy for 2011-2012 and reviewed the ETIS KPIs for 2010. The Central Office presented the ETIS Deliverables such as the various benchmarking studies, surveys, best practices and reports as well as all the presentations and minutes of our various meetings which are hosted on the Members Corner. The Board Members took the opportunity to network and update each on their company’s overall organisational structure, transformation plans and future perspectives.

All of the Working Group Chairmen presented an overview of their respective working group’s activities during the past year and future plans. It is important to note that the demand for doing benchmarks and surveys is growing in almost all of the working groups. The Central Office also presented the Annual Report 2010-2011 together with the meeting’s calendar for 2012. An additional publication was also presented during this meeting the “ETIS Anniversary booklet” specifically edited to celebrate the association’s 20th Anniversary and recount all the breakthroughs in the past two decades.
Central Office

One of the main challenges of the Central Office is organizing over 20 meetings a year all over Europe. We are able to do this thanks to our members who are always willing to take turns hosting the Working Group and Board meetings. Not only do they provide nice facilities but they also take the extra effort to show the local culture and way of working which adds value to our members’ Working Group experience. Despite the travel restrictions that have hit many companies over the years we have had healthy attendance rates which is thanks to a combination of interesting topics and speakers and the excellent job our members have done as willing hosts.

Terje Tøndel - Managing Director, ETIS

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 Management Board, the Council and Working Groups.

One of the main activities for the Central Office was the preparation of the ETIS Community Gathering hosted in Cyprus on 13/14 October 2011. This was a special Gathering as it marked the 20 year anniversary of ETIS as an organisation.

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, Mobile Device Management Platforms Survey, Business Intelligence Tools Survey, Billing Tools Survey, IT Applications Transformations Plans Survey, Information Security KPIs Library, Outsourcing and IT Service Survey, and the Information Security Benchmark. These surveys are an excellent way for our members to share knowledge.

Fred Werner
Communications & Programme Director

Joanna Fitzgerald
Office Manager

Eirini Markoula
Benchmarking Project Co-ordinator

Terje Tøndel
Managing Director

e-telit News Portal: www.etisportal.org

One of the main tasks of the Central Office during 2011 was to develop a dynamic e-telit News Portal that takes advantage of the latest social media and content aggregation technology to provide updated and relevant industry news to our members whilst creating a promotional space to promote our members, media partners & sponsors at the same time. The page contains a mix of self-updating news RSS feeds, tweets, blogs, white papers and videos from the telecom industry, our membership base and ETIS as an organisation.

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 widespread travel restrictions, 2011 continued to show impressive attendance levels.

Team Building Exercise in Trondheim

At the end of 2011 the ETIS Central Office paid a visit to Trondheim, Norway where the ETIS Director, Terje is based. The Central Office engaged the help of a professional team builder who is also responsible for training the Norwegian Olympic athletes and football team. Much was learned on how to build an even stronger team and we also used the chance to experience Norway in its full winter glory.

The Central Office Team Building in Trondheim, Norway

ETIS Central Office
NEW ASSOCIATE MEMBER

Vade Retro

ETIS is pleased to announce that Vade Retro joined as an Associate Member to help support the ETIS Anti-Spam Co-operation Group and the member representative is, Gregoire Lepoutre, VP Sales & Partnership, Vade Retro.

About Vade Retro

Vade Retro Technology is a French company specialized in the development and distribution of solutions designed to protect messaging systems against unwanted messages. Vade Retro Technology protects more than 150 million e-mail addresses worldwide and counts most of the biggest French and International internet providers (Free, Neuf, Numericable...) amongst its clients along with many SMEs and companies and hundreds of thousands of self-employed and private users.

SPONSORS

Each year the ETIS Associate members have the possibility to be more visible towards our members by helping to support the ETIS Community Gathering. This year’s gathering was kindly sponsored by Sybase as a Gold sponsor, Netclean as a Silver Sponsor and IBM as a Silver sponsor. The event was also supported by The Cyprus Tourist Organisation.

NEW MEMBER - BT

BT, one of the founding members of ETIS, has rejoined ETIS after a brief 2 year hiatus and is set to share knowledge with our members in our upcoming working groups and events. The member representative from BT is Aernout Reymer, Chief Security Officer EMEA, BT and is already an active participant in the ETIS Security, Anti-Spam and CERT activities.

About BT

BT is one of the world’s leading communications services companies, serving the needs of customers in the UK and in more than 170 countries worldwide. Our main activities are the provision of fixed-line services, broadband, mobile and TV products and services as well as networked IT services.

In the UK we are a leading communications services provider, selling products and services to consumers, small and medium sized enterprises and the public sector.

We also sell wholesale products and services to communications providers in the UK and around the world. Globally, we supply managed networked IT services to multinational corporations, domestic businesses and national and local government organisations.

NEW DAUGHTER COMPANIES

One of the benefits of ETIS membership is that the members can involve their daughter companies in ETIS activities. The following companies have joined ETIS during the reporting period.

Fastweb is a daughter company of Swisscom operating in Italy and Elion is a daughter company of TeliaSonera operating in Estonia.

NEW DAUGHTER COMPANIES

Fastweb

Elion
ETIS Community Gathering 2011

The ETIS Community Gathering 2011 was held in Paphos, Cyprus on 13-14 October 2011. This Gathering had significant importance for ETIS as it coincided with its 20th Anniversary, an event somewhat rare for associations such as ours. The Gathering was held in conjunction with the 42nd Management Board hosted by CYTA. This highly successful event brought over 150 participants from 47 companies to share knowledge and celebrate our 20th Anniversary.

The main theme for this Gathering was ‘ETIS 20th Anniversary – Innovative use of IT in Telcos’. The common session focused on the main events that have led to the marriage of Telecommunications and Information Technology during the past 20 years. This served as a stepping stone for the next 20 years where telecommunications will be embedded in the environment and IT will be part of many objects, creating an intelligent, aware and responsive environment. Keynote presentations were made by various speakers outlining their vision for the next 5 years in different market places. These presentations really conveyed the message pertinent to our main theme.

The ETIS Gathering dinner was held at the Aphrodite Hill Courtyard garden where we were able to experience first hand the Cypriot hospitality with the traditional dances, performed by the CYTA folkloric dance group and above all share the wonderful ambiance which was present during this dinner.

The Gathering was, once more, an ideal opportunity for all Members, Associates, Partners and Working Groups to meet each other and gain first hand experience from all involved and share knowledge.

Firstly, I wanted to say a huge thank you for your hospitality last week at the ETIS event. It was one of the best events I’ve ever attended, in terms of content and organisation, so please pass on my thanks to the wider ETIS team.

Benoit Godenir, IT Transformation Strategy, Belgacom

I should like to express my appreciation for the warm hospitality that You and the ETIS Organisation extended to me, my wife and to the other ETIS Veterans. I was very pleased to attend the ETIS 20th Anniversary since this event provided me with the welcome opportunity to meet many ETIS friends with whom I worked initially to set up the ETIS Foundation, in 1991 in Budapest, and afterward to contribute towards the development of the Organisation which now, thank to the effective work of the present ETIS Management, is considerably expanded and perceived as one of the key Organisation in the telecommunication community.

Vincenzo Randazzo, Former ETIS Chairman & Telecom Italia

It was a great event. I enjoyed the format, the discussion openness and the networking with many participants.”

Olivier Colinet, Enterprise Engineering Director, Google

The conference was indeed an outstanding success: in terms of organisation, hospitality and the technical content of the presentations and working groups. I am so pleased to see that the organisation I started has grown so much and is so successful.

Dr John Spackman, ETIS Founder & Former Director of Computing & Information Services for BT
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 – A1 TELEKOM AUSTRIA, VIENNA

The 13th ETIS CIO Executive Workshop covered the topic of ‘IT Implications of Product Portfolio Management’. The Workshop was hosted by A1 Telekom Austria in Vienna on 27 May and was attended by 21 participants from 10 companies such as A1 Telekom Austria, Belgacom, Deutsche Telekom, KPN, Oger Telecom, OTE, Slovak Telekom, TDC, Telecom Italia and TeliaSonera.

The goal of the workshop was to look at how to optimise the Product Portfolio Management in Telcos and how a better co-operation between business and IT can contribute to the success. Some of the topics covered were:

- Product Portfolio Management
- Active Product Portfolio Rationalisation
- Building and Managing an NGN Product Portfolio
- Improving co-operation between business and IT

There was a very productive session which showed that the members have many common challenges but also many different approaches towards product portfolio management. We have seen the budgets and decision making process coming from different parts of the organisation in different companies. Many of the members have opted for a more cross-functional approach where the network, IT and marketing people work together on the product portfolio management process together.

CIO STREAM – ETIS GATHERING, CYPRUS

The ETIS Community Gathering 2011 hosted by ETIS in Cyprus, featured a one and a half day CIO Executive Forum. The Workshop was attended by 22 participants from 15 companies such as A1 Telekom Austria, Belgacom, Boston Consulting Group, Innatura, CYTA, Deutsche Telekom, Google, IBM, Ipskaft, KPN, OTE, Slovak Telekom, Telecom Italia, TeliaSonera and TNO.

The Workshop focused on sharing knowledge on our members’ mid to long-term IT strategies whilst looking deeper into the following topics:

- Target roadmap & 5 year vision for IT
- Managing IT & Network Resources
- How to measure business value from IT
- How to reduce IT spending if revenue drops sharply

The various roundtable sessions generated a lot of interesting discussions and a lot was learned from the members’ practical experiences on these topics.

IT APPLICATIONS TRANSFORMATION PLANS SURVEY

During the first part of 2012 the CIO Executive Forum conducted an ‘IT Applications Transformation Plans 2012’ Survey that was designed to provide an overview of what our members have done or are doing to transform their IT applications and systems. This will be a starting point for tracking the IT applications transformation progress over time as has been done with the NGN Survey conducted in 2011. This will also help our members to identify common interests in areas of development, cut-backs, investments and retirement plans that may be visible through the survey’s results.
The role of the Information Security Working Group (ISWG) 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:

1. 15-16 September 2011 hosted by Swisscom in Zurich, Switzerland
2. 8-9 March 2012 hosted by ENISA in Crete, Greece
3. 2-3 February 2012 hosted by A1 Telekom Austria in Vienna

The 3rd meeting was hosted by A1 Telekom Austria in Vienna on 2-3 February 2012. Some of the topics covered were:
- Incident Response & Resilience
- NGN – Managing Security Risk & Vulnerability
- Security Strategy
- Data Privacy & Data Retention
- ETIS Security KPIs

The 2nd meeting was hosted on 13-14 October 2011 in Cyprus during the ETIS Community Gathering. Some of the topics covered were:
- Information Security Governance – Methods & procedures
- EU Directive 2002/58 EG
- Incident Response & Resilience
- Digital Natives and new Gadgets!
- ETIS Common Security KPIs

Now in its fourth year, this ETIS Information Security Benchmark is motivated by the fact that there are few, if any, Telco specific security benchmarks representing the European Telco landscape. Between 2009 and 2012 the Benchmark has incorporated a total of 16 European Telecom providers, many of which are now repeat participants. This continuity lends even more value to the Benchmark results as it allows a good degree of comparability with the previous years and enables one to track the evolution of the security landscape and adoption of best practices. This is now a ‘living’ Benchmark that is continually evolving and adapting its themes and KPIs according to our members’ needs and we hope it will continue to serve our members for many years to come.

This report will provide you with an in-depth look at the security of your 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.

ETIS ANTI-SPAM CO-OPERATION GROUP

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.

ETIS EU CERT TELCO NETWORK

In January 2012, our members met to discuss the creation of an ‘EU CERT Telco Network’. The meeting was hosted by Belgacom in Brussels and was attended by 14 participants from companies such as A1 Telekom Austria, Belgacom, Deutsche Telekom, KPN, Slovak Telecom, TDC, Swisscom and Eliion.

CERT stands for ‘Computer Emergency Response Team’ and the purpose of this meeting was to see how the EU Telcos are running their CERTs. The group also explored how the CERTs can co-operate across borders and they decided to establish an EU wide Telco CERT Network. The main focus of the group will be to share their honey-pots and feedback loops as well as set up real time communications between the CERTs.

The current members of this group are Belgacom, KPN, Telenor, TDC, Telecom Italia, A1 Telekom Austria, BT, Telefonica, Slovak Telecom, Fastweb, Deutsche Telekom and Turk Telekom. The Chairman of the group is Sergio Formiconia 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:
1. 15-16 September 2011 hosted by Swisscom in Zurich, Switzerland
2. 8-9 March 2012 hosted by ENISA in Crete, Greece
Billing & Revenue Management

The time when billing solely aimed at the generation of accurate, transparent, readable and thus easily understandable bills for the customers, has long passed. Nowadays, billing encompasses a broad range of concepts and functionalities varying from the application of simultaneous complex discounting schemes and allowances either on a prepaid or a postpaid basis, to the implementation of rigorous reconciliation controls that assure revenues. On top of that, in these times of economic crisis, billing becomes a pillar of paramount importance, as an activity that not only manages but also generates revenue by being the face of the company towards the customer, either through the dispatch of a postpaid bill or through the provision of real-time services directly to customer such as cost & policy control, balance inquiry, balance transfer etc. To us, therefore, the billing and revenue management professionals, participating in ETIS is all about sharing knowledge, exchanging ideas and comparing experiences, in order to identify the best practices as well as to explore new concepts regarding billing and revenue management processes.

Apostolos A. Tsakas, OTE - Billing WG Chair

The objective of the ETIS Billing & Revenue Management Working Group (WG) 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. More recently the group is covering revenue management and billing fraud issues as well. The group is also responsible for maintaining the ETIS Electronic Billing Standards.

The Billing & Revenue Management WG had two meetings during this reporting period. The first meeting took place during the ETIS Community Gathering held in Cyprus on 13-14 October 2011. Some of the main topics covered were:

- Telco Billing Strategies
- Billing Beyond Telecoms
- M2M billing challenges
- Billing of Cloud Services
- Billing Analytics

The second Billing Group took place in Bern, Switzerland which was kindly hosted by Swisscom on 19-20 April. The meeting was attended by 21 people from companies like Swisscom, OTE, Deutsche Telekom, Turk Telekom, Turkcell, Vimpelcom, Matrix Software, Comarch, Orga Systems, NSN, Ericsson 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: Billing Transformation Strategies, Smart Charging, Bill Presentment Strategies, Policy Management, Real-time billing & analytics, BSS Consolidation and Cloud Billing Services. The group conducted a billing tools and applications survey among its members which will run until the next meeting in October. The group also decided to rename the group to ‘Billing & Revenue Management Working Group’ as the scope of interest and discussions goes well beyond pure billing.

Apostolos Tsakas from OTE is the Chairman of the group and Christian Mieczki 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.

Customer Self-Service

With the support of the excellent knowledge within our ETIS CSS working group, Swisscom was able to significantly increase our self-service channel share. We were able to challenge our ideas with senior experts in our industry, also we adopted successful approaches of our peers to our business and last but not least we learned from unsuccessful approaches of others and so did not copy mistakes and saved otherwise lost investments.

Markus Eberhard, Vice-chair, Swisscom

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.

The group aims to provide the following:

- Overview of e-Strategy
- 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.

The first meeting was hosted by Deutsche Telekom on 16-17 June 2011, in Berlin. The main topics in the agenda were:

- Social Media Activities
- Marketing Campaigns
- Co-creation & Crowd-sourcing
- Net Promoter Score

The second meeting took place during the ETIS Community Gathering 13-14 October 2011 in Paphos.

The third meeting was held in Brussels, hosted by Belgacom on 15-16 March 2012, where the main focus was on:

- Portal Convergence
- Social Sales Chat
- Search Engine Marketing (SEM) and Search Engine Optimisation (SEO)
- Self - Repair
- Customer Recognition

The ETIS CSS quarterly survey

Overview of e-Strategy

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- Customer Recognition
Enterprise Architecture

We see now our ETIS members accelerating the transformation of their business towards a convergence of services offered to the customer. Their strategy is to combine the traditional Telco fixed and mobile components with multimedia content and cloud-based ICT. Partnership will be a key element to speed-up such business evolution. The EAWG keeps looking at the impact to the Enterprise Architecture from various aspects.

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

The EA working group is chaired by Benoit Godenir, Belgacom with Lage Eriksson, TeliaSonera and Oliver Höft DT / Detecon as Vice-Chairs. The EA working group had three meetings during the reporting period and two sub-group meetings related to the project ‘Agile Product Life-cycle Management’, hosted by ETIS and Belgacom.

The ETIS EA working group is one of the largest ETIS working groups with more than 80 people on the participants list from more than 30 companies. The average numbers of participants at the meetings are approximately 25 members from 12-15 companies.

The main topic this period has been to follow up the Agile-PLM project run by Belgacom, TeliaSonera, KPN and OTE as a core-team with support of 10 other members during the physical meetings. Two vendors have been invited to each meeting as input for the RFI which was distributed to 8 pre-selected vendors from which 5 responded within the deadline.

The first EA Working Group meeting within the reporting period was hosted by TeliaSonera in Stockholm 10-11 June 2011. Business Architecture was presented by The Open Group, what it is, what belongs to it and how can we get closer to it. Service Oriented Architecture reference architecture based on Gartner research and how to get closer to it. Service Oriented Architecture reference architecture based on how to get closer to it.

The main topics for the second EA Working Group meeting in Cyprus 13-14 October were:
- Report from the ‘Service Assurance’ survey carried out early October 2011
- New business models related to the Utility Industry and to Cloud Services
- Inventory & Identity Management

The third EA Working Group meeting was hosted by Turkcell in Istanbul on 1-2 March 2012. The group decided at the last meeting to follow-up and dig deeper into some main areas like Service Oriented Architecture, Identity & Access Management and Cloud Services, which were done on top of finalising the ETIS Agile-PLM RFI document.

At each meeting the group always invite the host to present their company and main challenges related to Enterprise Architecture like Governance, finance, cooperation with the business etc. This session is very much appreciated by the working group members as well as the open session where members can share and discuss all kind of challenges related to Enterprise Architecture.

The need for TOGAF training seems to be fulfilled so no TOGAF training was offered in this period.

The main findings revealed that IT units are well prepared to provision or maturity of the markets they are operating in.

The companies were identified on a basis of services business drivers and IT strategies with peers in other member companies.

Since 2010 ETIS is co-operating with 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.

In 2011 the participants were the following member companies: Belgacom, Croatian Telecom, CYTA, Ericom, Elion, Fastweb, KPN, OTE, Slovak Telekom, Telecom Italia, TeliaSonera and Vivacom.

The main findings revealed that IT units are well prepared to support the business in current challenging times. The steps they are taking appear to be well prepared and well timed, putting telcos on the path to greater savings and more efficient processes.

Some general observations included:
- Majorit of Telcos was able to manage IT Opex in line with revenue development or even better
- Higher IT Opex does not necessarily translate into better operational efficiency
- Operators spend largest share of IT Opex on Sales & Order

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.

The full results of the report were distributed only among the participating telcos. An executive report including major findings and members interviews was published and distributed to all ETIS members under the title: “TeBIT 2011: Telco IT Units Did Their Homework”

TeBIT Benchmarking Study

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

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OVERVIEW OF TEBIT 2011:

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

The main findings revealed that IT units are well prepared to support the business in current challenging times. The steps they are taking appear to be well prepared and well timed, putting telcos on the path to greater savings and more efficient processes.

Some general observations included:
- Majority of Telcos was able to manage IT Opex in line with revenue development or even better
- Higher IT Opex does not necessarily translate into better operational efficiency
- Operators spend largest share of IT Opex on Sales & Order

TeBIT does not just track IT expenses but looks at how they break down over various categories, how they compare to revenues and other expenses and how spending patterns and strategies have evolved.

The full results of the report were distributed only among the participating telcos. An executive report including major findings and members interviews was published and distributed to all ETIS members under the title: “TeBIT 2011: Telco IT Units Did Their Homework”
The objective of the working group is to share experience within the procurement and vendor management area and to further explore common interest areas 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 PVM Working Group is chaired by Mats Lundin, TeliaSonera with Piet van Heiningen, KPN as Vice-Chair. The group would like to thank Candan Asil, Turkcell for his engagement in this group as a vice-chair for many years. The PVM group has been very active working group with the following telcos as the main drivers this period: TeliaSonera, Belgacom, Swisscom, A1 Telekom Austria, LatviaTelecom and CYTA.

One of the main tasks this fiscal year for the PVM group was to define a ‘Common Vendor Management’ with a focus on ‘License Supplier Management’ with the following telcos as the main drivers of this group: TeliaSonera, Belgacom, Swisscom, A1 Telekom Austria, LatviaTelecom and CYTA.

The PVM Working Group hosted by Lattelecom in Riga

The second meeting was hosted during the ETIS Community Gathering in Cyprus 13-14 October 2011 and the group used the opportunity to meet with other groups like Enterprise Architecture. The ETIS Procurement Benchmark 2011 was also presented and discussed among other issues like ‘Beyond Kraljik and Maverick’ buying, both presented by Belgacom.

The third meeting was hosted by TeliaSonera in Stockholm 16-17 February 2012. Some of the key topics addressed were:

- Vendor Management with focus on License Supplier overview
- KPIs – The group decided to go further with the KPI activity to verify if they have some common KPIs to report on
- Category Management – how to get approval and how to implement Category Council

The ‘ETIS Contract Item Tool box’ has greatly progressed during this period but still some work remains. The group sees this as an important task which will be finalised during 2012.
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 4 main sections:
- ETIS Website
- ETIS Members’ Corner
- e-telit Newsletter
- e-telit news portal

The ETIS Website is our corporate website which contains public information on all of our working groups, activities, events, members and news. The new ETIS Members Corner was launched in February 2011 and 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 email alerts, in-depth search engine (in files), membership overview function, more visible profiles, possibility to favourite documents 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 improved website that aims to encourage more openness and sharing of information online and in between the physical meetings.

The Central Office also developed a dynamic e-telit News Portal that takes advantage of the latest social media and content aggregation technology to provide updated and relevant industry news to our members whilst creating a promotional space to promote our members, media partners & sponsors at the same time.

The page contains a mix of self-updating news RSS feeds, tweets, blogs, white papers and videos from the telecom industry, our membership base and ETIS as an organisation.

**ETIS WEBSITE STATISTICS**

We have been able to measure website traffic since 2003. It is clear to see from the following graph that ETIS website traffic has increased steadily over the past nine years. This increase in use is linked to the overall increase in activity that ETIS has seen over the past nine years as well as augmented 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 information sources and conferences sites.

One year later, it could be said that the new Members’ Corner was a success as the use of our Members’ Corner more than tripled during 2011 compared to previous years. Our Associate Members were also pleased to have access to the e-telit news portal as a promotional tool.

Fred Werner
Communications & Programme Director

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**ETIS Website Statistics - Hits to the ETIS Website 2003 - 2011**

<table>
<thead>
<tr>
<th>Year</th>
<th>Hits</th>
</tr>
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<tbody>
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</tr>
<tr>
<td>2011</td>
<td>89,300</td>
</tr>
</tbody>
</table>
ETIS is a membership based organisation which brings together the major telecommunications providers in Europe on key information and communication technology issues. What makes ETIS truly unique is that its members share real-world experiences delivering knowledge and value that goes well beyond the theoretical models covered in other industry bodies. 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 and workshops.

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 9 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 & Revenue Management
- Enterprise Architecture
- Procurement & Vendor Management
- Business Intelligence & Data-warehouse
- Customer Self-Service
- TeBIT Benchmarking Study
- CIO Executive Forum
- Anti-Spam Co-operation 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.

Sharing knowledge is our strength...

Using it is yours...