

# GETTING AHEAD OF THE CURVE TOWARDS THE NEW NORMAL

A ROUND-UP OF  
LESSONS LEARNED  
AND PROPOSED  
NEXT STEPS

*etis*

DRIVING COLLABORATION  
WITHIN THE EUROPEAN  
TELECOM INDUSTRY

# JOIN US AT OUR VIRTUAL GATHERING ON OCTOBER 15TH

As has been frequently acknowledged, we are living in unprecedented times due to the current Covid-19 pandemic; the economy and our society have been disrupted to an extent that has not been experienced in over 75 years.

As almost 6 months have passed since the crisis started, it is the time now to make a round-up of lessons learned as well as discuss steps forward for society and industry as a whole--and Telcos specifically. As Winston Churchill once said, "Never waste a good crisis." Indeed the current coronavirus crisis can strengthen the resilience of our economy and society, but only if we so choose to apply the learnings we have seen and use this momentum to drive change.

With this in mind, we would like to invite you to participate in our first Virtual Gathering, which will take place on October 15th and focus on the opportunities Telcos have and are already pursuing to "get ahead of the curve towards the new normal." Join us for what should be interesting discussions by industry and other thought leaders who will share lessons learned and concrete use-cases in a number of potential verticals for your company.

Following an Introduction by **ETIS Chairman Paul Slot, Executive Vice President (Network, Mobile and IT Infrastructure) at KPN**, our first keynote speaker will be **Henri Korpi, Executive Vice President, International Digital Services at Elisa** from Finland. Elisa has an inspiring approach to how to get ahead of the curve and already has developed interesting new services--such as "Elisa Automate" and "Smart Factory"--which can help Telcos and industries to speed up digitalisation.

Our second keynote speaker will be **Amy Cameron, Senior Analyst at STL Partners**. Amy leads STL Partners' research on the opportunity for telcos in digital health and the application of AI in telecoms, as well as the Growing Enterprise Revenues research

ETIS VIRTUAL GATHERING

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THURSDAY, OCTOBER 15TH FROM 10:00 - 11:30 CET



stream. During her keynote speech, Amy will address opportunities in the health sector, which has seen a lot of experimentation during the crisis. It is clear that in a variety of directions we will not go back to business as usual when(ever) the pandemic is over. Thus there are many opportunities for Telcos to be a leader and partner in the digitalisation and "new normal" in healthcare.

Moreover, this will be just one of the many sessions on the "new normal" that will be discussed during webinars throughout the month (and into the future.) ETIS will continue to offer its platform for Members to share their visions, best practices, redesign plans & digital deals as they "get ahead of the curve."

From our Network and IT Transformation to B2B to Procurement and Vendor Management Working Groups, each will focus on the opportunities "the new normal" brings within their domain.

More information can be found on [www.etis.org](http://www.etis.org) or here:



For any questions or if your company is not yet an ETIS member, please contact me at [wdm@etis.org](mailto:wdm@etis.org).

We look forward to meeting you at our Virtual Gathering. Let's get ahead of the curve together!

Kind Regards,

Wim De Meyer  
ETIS Managing Director

## ABOUT ETIS

ETIS is a nonprofit association which brings together the major European telecommunications providers in 13 working groups ranging from digital sales and customer experience to information security to network and IT transformation to big data. Our platform provides a mirror in which our Members can gauge the progress of their IT integration, governance, and transformation strategies against each other in a non-competitive environment.

We currently have over 26 members and 14 associate members, representing the telecommunications industry in 21 European countries. Learn more at [www.etis.org](http://www.etis.org).

# LESSONS LEARNED + PROPOSED NEXT STEPS

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# 1

## LET'S STRENGTHEN CONTINGENCY AND LONG-TERM PLANNING

After peaking across Europe in the Spring of 2020, a second wave of the COVID-19 pandemic is beginning to hit many countries--and much earlier than expected. Additional waves are projected until a vaccine and effective treatment are available and massively applied. This requires constant focus on contingency plans and agile decision-making based on a quickly changing situation.

Although one can debate whether the corona pandemic was really a "Black Swan" - the World Economic Forum and Bill Gates have communicated on the risk of a global pandemic for years - it is clear that the world, and especially the West, was not prepared. Asian countries such as South Korea and Singapore were far better prepared as a result of their experience with similar epidemics such as the SARS outbreak of the early 2000s.

***THEREFORE CONTINGENCY AND LONG-TERM PLANNING NEEDS TO BE PRIORITISED AGAIN IN EUROPE IN ORDER TO BETTER COPE WITH THE NEXT GLOBAL CRISIS.***

### FURTHER READING:

2020. The Global Risks Report 2020. [ebook] Geneva: World Economic Forum. Available at: <[http://www3.weforum.org/docs/WEF\\_Global\\_Risk\\_Report\\_2020.pdf](http://www3.weforum.org/docs/WEF_Global_Risk_Report_2020.pdf)> [Accessed 21 August 2020].

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## 2

### **TELCOs HELPED TO KEEP THE ECONOMY AND SOCIETY RUNNING WHICH BOOSTED THEIR REPUTATION**

Telcos have done a tremendous job in helping to contain the impact of the Covid-19 crisis. When the physical world went into lockdown, the digital world took over thanks to the telecom networks.

Connectivity has been crucial to keeping the economy running and continuing to enable an inclusive society. Telcos have coped well with the challenges the crisis brought to the networks, which were able to manage the high traffic loads due to the increase in remote working, streaming services such as Netflix and online education, to name a few.

***AS A RESULT, CONNECTIVITY IS GENERALLY CONSIDERED NOW AS AN ESSENTIAL FACILITY (“CRITICAL INFRASTRUCTURE”) AND NOT MERELY AS A COMMODITY SERVICE. THE REPUTATION OF THE TELCO SECTOR HAS BEEN BOOSTED SIGNIFICANTLY AND IS ALREADY REFLECTED IN HIGHER NET PROMOTOR SCORES.***

## 3

### **LET’S REDESIGN ECONOMY AND SOCIETY AND HAVE SUSTAINABILITY AS A “COLLATERAL BENEFIT”**

Huge financial efforts were made to contain the crisis and its impact on the economy, employment and well-being of citizens. As a result, national debt levels increased significantly. Most analysts and investors believe that the economic recovery will be W- or L-shaped. Only a minority believes economic recovery will be V-shaped (or will be happening anytime soon).

Thus the COVID-19 pandemic has sparked discussions on how the economy and society should be redesigned in the post-crisis era instead of going back to business-as-usual. It is fair to think that the New Way of Working, Living and Consuming (“The New Normal”) we are experimenting with and experiencing now will continue--even when the pandemic is over. The public and private sectors as well as individuals will start to see the advantages on cost, efficiency, well-being, resilience & the environment.

As there is now a momentum to redesign our economy & society, we should use this opportunity to minimise our footprint on the environment and “flatten/crush the climate curve.” Innovation and transformation indeed can be done in a sustainable way.



***BY DOING SO WE WILL REDESIGN COMPANIES & SOCIETY AND HAVE SUSTAINABILITY AS A “COLLATERAL BENEFIT,” AND THUS AVOID DOUBLE COSTS IN THE END. BY FOCUSING ON SUSTAINABLE ECONOMIC GROWTH WE WILL BECOME RESILIENT TO COPE WITH FUTURE RISKS AND THREATS.***

**FURTHER READING:**

2020. COVID-19 Investor Pulse Check #8. [ebook] Boston Consulting Group. Available at: <<https://web-assets.bcg.com/7b/50/feccdb474b7e84d41e07c652dac4/covid-19-investor-pulse-8-200723.pdf>> [Accessed 21 August 2020].

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## 4

### **TELCOS ARE ACCELERATING THEIR OWN DIGITAL TRANSFORMATION**

The Covid-19 pandemic has also led to an acceleration of the digital transformation of the telco sector mostly visible by a significant increase of :

- Work From Home
- Videoconferencing
- Virtual meetings and events
- Digital Transformation of all customer touchpoints

#### ***TELCOS CAN FURTHER ACCELERATE THEIR OWN DIGITAL TRANSFORMATION***

Telcos are currently debating how many days per week employees will still come to the office in the “New Normal” era. Teleworking could become the norm and could increase productivity as employees can concentrate better at home than in open office spaces. Other positive side effects of this evolution are the increase in air quality (less home office travel), a better work-life balance for employees and a further reduction of office space costs.



# SME

## 5

### TELCOS CAN HELP TO DIGITALLY TRANSFORM OTHER INDUSTRIES

Emerging technologies such as AI, big data, virtualisation, edge computing, IoT, robotics, quantum computing & blockchain will play an important role in the digitalisation of the traditional ecosystems of our industries.

Telcos have a good track record as well as knowledge and experience which can help digitally transform other industry verticals (eg health, government, manufacturing, retail, agriculture, energy, etc.)

***TELCOS CAN BE VERY INSTRUMENTAL IN THE FURTHER DIGITAL TRANSFORMATION OF THE WAY WE WORK, LIVE & CONSUME. TELCOS HAVE THE NECESSARY NETWORKS, SERVICES, EXPERTISE AND KNOWLEDGE TO TURN THE REDESIGN PLANS FOR OUR SOCIETY AND INDUSTRIES INTO REALITY.***

## 6

### TELCOS CAN TRANSFORM SOCIETY BY HELPING LOCAL SMES TO GO DIGITAL

During the lockdown local initiatives flourished, so not only global players (eg Amazon) reaped the benefits. The discovery of the local aspect may be here to stay. Some even say that globalisation is under attack, though this seems premature as a conclusion.

***SMES NEED SPECIAL FOCUS -- A "MARSHALL" PLAN IS NEEDED TO DIGITISE THIS SEGMENT AND THEIR OPERATIONS. THE COVID-19 CRISIS FORCED SOME SMES TO DIGITALLY TRANSFORM OVERNIGHT AND THERE IS STILL A HUGE POTENTIAL TO TAKE IT A STEP FURTHER.***

#### FURTHER READING:

BT gets a grip on key coronavirus issues. 2020. BT Gets A Grip On Key Coronavirus Issues. [online] Available at: <<https://newsroom.bt.com/bt-gets-a-grip-on-key-coronavirus-issues/>> [Accessed 21 August 2020].





# 7

## LET'S AUDIT AND REVISE SUPPLY CHAINS WHERE NEEDED

An important side-effect of the Covid-19 pandemic was the global supply chain breakdown:

- components or resources for manufacturing industries were missing and led to plant lockdowns.
- Just-in-time processes got stuck completely.
- Full dependency on the production of medical equipment (eg facemasks) in low cost countries led to delivery problems and dramatic consequences in public health.

An important lesson of the crisis is that supply chains need to be audited, adapted and improved where needed. Local production can make sense for critical and other goods as well as make actionable the commitment to sustainability (decreasing the environmental impact and cost of transport; less carbon consuming production facilities; and better work conditions and accountability than in low-wage countries). From the latter perspective LCA - Life Cycle Assessment - is important to take into consideration. Fiscal incentives can help to stimulate this process.

***EVEN RESHORING CAN AGAIN BE AN OPPORTUNITY: MANUFACTURING CAN AGAIN BE DONE IN EUROPE ESPECIALLY IF IT MAKES USE OF ROBOTICS AND AI (INDUSTRY 4.0) MAKING COST OF LABOR LESS RELEVANT.***

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The Economist. 2020. Has Covid-19 Killed Globalisation?. [online] Available at: <<https://www.economist.com/leaders/2020/05/14/has-covid-19-killed-globalisation>> [Accessed 21 August 2020].

Sciedirect.com. 2020. Life Cycle Assessment - An Overview | Sciedirect Topics. [online] Available at: <<https://www.sciencedirect.com/topics/earth-and-planetary-sciences/life-cycle-assessment>> [Accessed 21 August 2020].

# 8

## LET'S REDESIGN THE TELCO PURPOSE IN A SUSTAINABLE, DIGITAL AS WELL AS INCLUSIVE ECONOMY AND SOCIETY

Companies in general, and Telcos specifically, are re-inventing themselves and looking for their "purpose" in a post Covid-19 era. Why does my company exist? How does it contribute to society and its many challenges (climate change, resilience towards pandemics, fake news, racism - Black Lives Matter, etc.) What if my company didn't exist? Having a clear purpose with which employees and customers can identify will be essential to keep engagement and ensure sustainable growth?



**AS A CONSEQUENCE WE SEE "NEW DIGITAL DEALS" BEING PUT FORWARD BY COMPANIES AND TELCOS AIMING TOWARDS A DIGITAL, SUSTAINABLE AND INCLUSIVE ECONOMY & SOCIETY.**

However, it will be important to keep one's promises as brands are increasingly held accountable for not doing so and 2020 has seen many positioning themselves as leaders in supporting various movements. Thus, which sustainability and diversity changes will your company undergo by when? How do you increase social inclusion, digital literacy and help to win the war on poverty?

### FURTHER READING:

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co.responsibility. 2020. Co.Responsibility | Co-Creating Future Proof Solutions For People And Business Beyond COVID-19.. [online] Available at: <<https://co-responsibility.be/>> [Accessed 21 August 2020].



## **FTTH AND 5G ARE KEY ENABLERS TO ACCELERATE DIGITAL TRANSFORMATION AND TO MATERIALIZE THE “NEW NORMAL”**

The broadband infrastructure which Telcos already have and are rolling out, will be the backbone to implement the national redesign plans for economies and society to their full potential. New technologies such as Fiber and 5G are more efficient in energy consumption when managing traffic increase linked to further digitalisation. Thus some Telcos have already set forward ambitious goals to move to become 100% carbon neutral.

***FTTH AND 5G WILL BE KEY ASSETS TO ACCELERATE THE DIGITAL TRANSFORMATION AND TO MATERIALIZE THE “NEW DIGITAL DEAL” AND OPERATORS ARE ACCELERATING THEIR ROLLOUT.***

However the rollout of 5G has been controversial in more and more countries, with some experiencing arson attacks and other vandalism on their (sometimes 4G infrastructure.) One way to mitigate this is through awareness building of neutral scientific studies and condemnation of disinformation by industry and other stakeholders.

### **FURTHER READING:**

T-Mobile Newsroom. 2020. T-Mobile Launches World’s First Nationwide Standalone 5G Network | T-Mobile Newsroom. [online] Available at: <<https://www.t-mobile.com/news/network/standalone-5g-launch>> [Accessed 21 August 2020].

overons NL. 2020. KPN Zet 5G Aan!. [online] Available at: <<https://www.overons.kpn/nl/nieuws/2020/kpn-zet-5g-aan>> [Accessed 21 August 2020].

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Proximus Group Website. 2020. News. [online] Available at: <[https://www.proximus.com/en/news?utm\\_source=linkedin&utm\\_medium=social&utm\\_campaign=news\\_MoU\\_eurofiber\\_deltafiber&utm\\_content=20200731\\_corporatepost\\_EN](https://www.proximus.com/en/news?utm_source=linkedin&utm_medium=social&utm_campaign=news_MoU_eurofiber_deltafiber&utm_content=20200731_corporatepost_EN)> [Accessed 21 August 2020].



# 10

## LET'S STRENGTHEN THE FOCUS ON CYBERSECURITY AND PRIVACY

In addition to the threat of phishing, breaches (eg ransomware) and other security threats, the importance of cybersecurity teams in enabling the smooth transition to "new ways of working"--specifically remote working-- have never been so apparent than now. Moreover, the risk of incidents and consequences of falling afoul of regulations will only increase when connecting more people and devices in the Digital Era.

***THUS WHEN DIGITALLY TRANSFORMING OUR INDUSTRIES AND SOCIETY IN A SUSTAINABLE WAY, A STRONG FOCUS SHOULD BE ON STRENGTHENING CYBERSECURITY AND PRIVACY DEPARTMENTS.***

### FURTHER READING:

Turner, A., 2020. Telefónica Tech Launches IoT And Big Data Solutions To Drive Economic Recovery. [online] Mobileeurope.co.uk. Available at: <[https://www.mobileeurope.co.uk/press-wire/14996-telefonica-tech-launches-iot-and-big-data-solutions-to-drive-economic-recovery#.XyAnx-1BX\\_1.linkedin](https://www.mobileeurope.co.uk/press-wire/14996-telefonica-tech-launches-iot-and-big-data-solutions-to-drive-economic-recovery#.XyAnx-1BX_1.linkedin)> [Accessed 21 August 2020].

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Microsoft Security. 2020. New Data From Microsoft Shows How The Pandemic Is Accelerating The Digital Transformation Of Cyber-Security - Microsoft Security. [online] Available at: <<https://www.microsoft.com/security/blog/2020/08/19/microsoft-shows-pandemic-accelerating-transformation-cyber-security/>> [Accessed 21 August 2020].

