

HOW TELCOS CAN DRIVE A BETTER LIFE FOR ALL

at a lower cost for the planet



OUR VISION

The emergence of new coronavirus variants continues to drive the (high) level of uncertainty towards the future. Yet with vaccination programs hitting goals, society and economy are preparing to "get back to business".

The COVID-19 crisis has, indeed, raised a lot of concerns and discussions which have truly questioned the way we live and work. Moving past the hype of buzzwords like the "new normal" or "never normal", we should seize this once in a lifetime opportunity to make real change. As the backbone of digital society, we believe Telcos are strategically positioned to do this. But how and in which verticals should they enter to go "beyond connectivity"?

We believe Telcos can help to create a better life for all and at a lower cost for the planet.

Of course, this will not happen by itself. We will need to lay out a vision of how we want the future to look and what Telcos need to do to realise it.

This inspirational vision can moreover energize and motivate our employees, customers and local communities.

Let's have a look at what should drive our vision and what we will focus on within ETIS.



So don't forget to check out the ETIS Calendar to see when these topics are being addressed across our 17 working groups!

ABOUT ETIS

ETIS is a nonprofit organisation which brings together the major European telecommunications providers in 17 working groups ranging from digital sales and customer experience to information security to network and IT transformation to sustainability. Our goal is to enable our members to reach their strategic objectives and to improve their business performance by sharing knowledge on industry challenges and by collaborating where possible. We provide 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 24 members and 13 associate members, representing the telecommunications industry in 21 European countries. Learn more at www.etis.org.



10 DRIVERS TO REALISE OUR VISION

1	HELP TO LIMIT CLIMATE CHANGE	PAGE 4 - 5
2	HELP TO DIGITALLY TRANSFORM THE ECONOMY	PAGE 6 - 8
3	PUSH THE HYBRID WAY OF WORKING	PAGE 9 - 10
4	PUSH A BLENDED WAY OF LIVING: ONLINE MEETS OFFLINE, OFFLINE MEETS ONLINE	PAGE 10 - 12
5	INVEST IN INFRASTRUCTURE	PAGE 13 - 14
6	PROTECT PRIVACY	PAGE 15
7	SAFEGUARD SECURITY	PAGE 16
8	FOCUS ON BENEFITS, NOT ON TECHNOLOGY	PAGE 17
9	EMBRACE DIVERSITY AND LEAVE NO ONE BEHIND	PAGE 18
10	STRENGTHEN CONTINGENCY AND LONG TERM PLANNING	PAGE 19



HELP TO LIMIT CLIMATE CHANGE

According to the latest Intergovernmental Panel on Climate Change (IPCC) Report, which was released August 9, 2021, there is undeniable evidence that carbon emissions related to human activities is responsible for devastating changes in the Earth's climate. Some of the changes already set in motion – such as continued sea level rise – are irreversible. Drastic measures are needed to reduce our carbon footprint with 55% by 2030 (The "Fit for 55" Program of the European Commission) and reach zero carbon emissions by 2050.

Telcos can play a major role in this transition towards a carbon-free world:

- **By being a role model in embracing new technologies with higher energy efficiency:**

- FTTH consumes significantly less energy than copper
- 5G will consume less than 4G per bit transported
- AI can further decrease overall energy consumption (e.g. the Intelligent Energy Saver from Elisa reducing CO2 emissions from mobile stations) or use AI tools for managing energy efficiency in data centers.

As new digital services will be launched, more devices will be connected to the internet (and thus digital transformation will further be accelerated) overall energy consumption will not necessarily be driven down. This only reinforces the need to implement only the most energy efficient networks and technologies.

- **By focusing on renewable energy and reaching targets as quickly as possible.**

Members such as BT, Telia Company, Magyar Telekom (as well as the rest of DT Group) and Vodafone - are already powered exclusively by electricity from renewables. In fact, many are already adjusting their climate targets, as they reach them faster than forecasted. Having reassessed their capabilities and the criticality of the situation, Deutsche Telekom Group, for example, now have more ambitious targets of climate neutrality for in-house emissions by 2025 as well as net zero from production to customer by 2040.

- **By rethinking our position as Telcos.**

During our second ETIS Virtual Gathering in April of 2021, we learned why KPN is an industry leader in sustainability through various use-cases - including a zoom-in on the KPN Energy Innovation Lab and the Smart Energy System, which is a good example of how we can avoid wasting renewable energy using 5G connectivity and IoT. Another example could be IoT devices used to understand road traffic and its management as well as analytics to help citizens optimise fuel and energy consumption. This can help prevent unnecessary delays and avoid accidents.

- **By integrating circularity into all of its business decisions and thus redesigning the network from a circular perspective.**

To reach their circularity ambitions, Telcos are focused on strengthening their already mature refurbishment and buy-back

programs with circular by design - designing devices such as new modems to be more circular from the start. Communicating these steps are important as well. Thus Telcos are continuing to look for the best ways to include circular labeling on their products so that customers can see directly their commitment and progress. KPN for example has recently created circular product passports for products such as remote controls and modems. These passports highlight things such as the circular design features and what will be improved to reduce material impact in the future.

- **By forging strategic partnerships with others outside of the industry to further foster sustainability across the entire supply chain.** For example, during a Spring webinar of the ETIS Supply Chain Task Force, Proximus noted a pilot that was done in Brussels with L'Oréal to see the operational viability of using electric bikes for urban deliveries. By combining deliveries, the goal is to not only reduce both company's carbon emissions but influence other transport partners with a successful use-case.

FURTHER READING:

- <https://www.etis.org/page/2021virtualgathering>
- https://www.interregeurope.eu/policylearning/news/12610/commission-launches-the-fit-for-55-package/?no_cache=1&cHash=a371af17736f1f2f09030ee45e7dd6f2
- <https://www.telecompetitor.com/study-5g-has-90-better-energy-efficiency-than-4g/>
- <https://www.ispreview.co.uk/index.php/2019/03/ftth-council-report-lists-barriers-to-uk-copper-telecoms-switch-off.html>
- <https://www.telefonica.com/en/web/responsible-business/article/-/blogs/did-you-know-that-fibre-optics-needs-7-times-less-energy-than-copper-connectedwiththeplanet>
- https://www.researchgate.net/publication/319659330_Towards_Real-Time_Road_Traffic_Analytics_using_Telco_Big_Data

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Sustainability Working Group - contact Michele Lalic (ml@etis.org)
- ETIS Supply Chain Task Force - contact Michele Lalic (ml@etis.org)
- ETIS Procurement and Vendor Management Working Group - contact Michele Lalic (ml@etis.org)
- ETIS Network and IT Transformation Working Group - contact Wim De Meyer (wdm@etis.org)
- ETIS Big Data Working Group - contact Andrija Visic (av@etis.org)
- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)





HELP TO DIGITALLY TRANSFORM THE ECONOMY

During the ongoing pandemic, Telcos have kept the economy running by being the backbone of society as the physical world has continuously gone into lockdown. As a consequence, the digital transformation of the economy has accelerated and is now driving economic growth.

The Digital Transformation of economy still has a long way to go and Telcos can continue to play an (even increasingly) important role in it. One can distinguish 2 areas of opportunities.

Firstly, Telcos still have a way to go in the digitalisation of their own activities:

- Automation of (preventive) network monitoring can optimise network utilisation, save energy and maximise customer experience as demonstrated by the Elisa Automate solution.
- Use of AI in marketing, sales and customer service can increase cost efficiency, customer insights and overall customer experience.

(ETIS has performed, together with Boston Consulting Group, a digital maturity benchmark across its Members, the results of which will be published in October 2021. Stay tuned to learn more!)

Secondly, Telcos can play an important role in the digitalisation of other sectors. This has been the focus of our first two ETIS Virtual Gatherings, which explored verticals such as health, manufacturing and energy - and will continue to be in October. (More information to come!) According to Ericsson, who shared their research on 5G opportunities in a recent ETIS webinar, there are 3 possible roles a Telco can play:



Role 1: Connectivity provider

offer a bitpipe to
consumer and businesses



Role 2: Service enabler

provide a service
platform on top of role 1



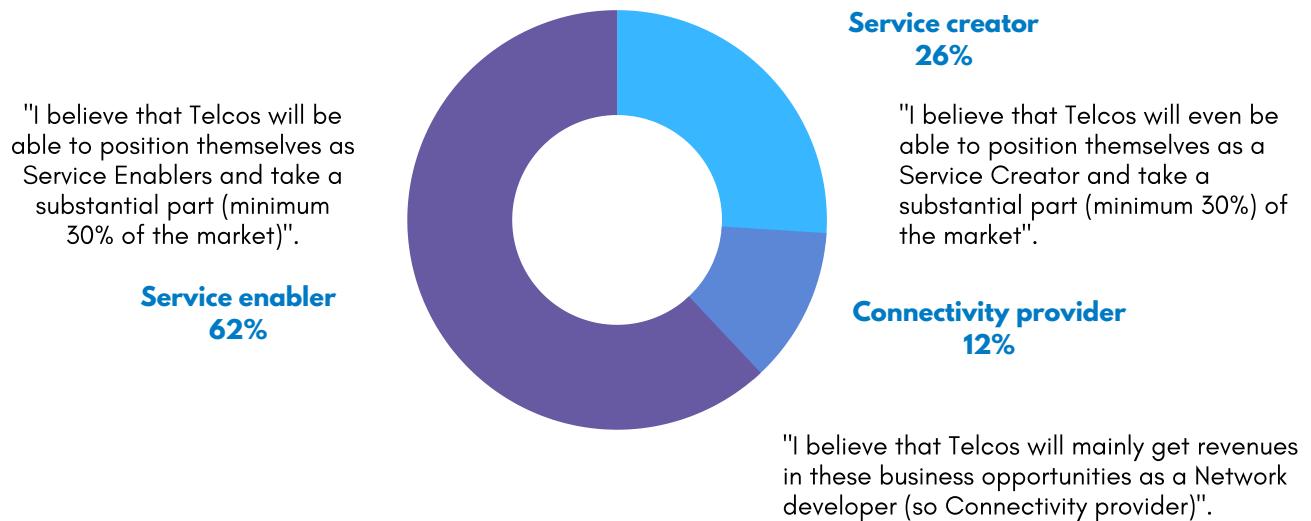
Role 3: Service creator

provide end-to-end
services and applications
on top of role 2

According to a poll ETIS held during this webinar, most participants believed that Telcos should be able to position themselves as Service Enablers and take minimum 30% of this market.



Q: There can be a lot of value in 5G enabled business opportunities and Telcos can play different roles in them. Which statement do you agree with?



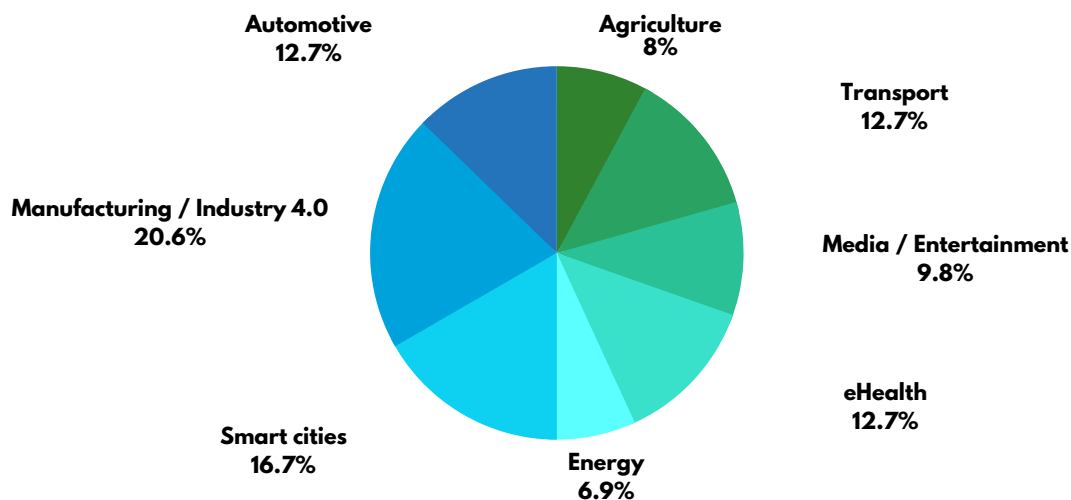
Source: "Why 5G is key for Telcos to help rebooting other industries by Ericsson" a webinar of the ETIS Network and IT Transformation Working Group on June 9, 2021

Thus Telcos can help to further drive digitalisation of the economy by offering new connectivity services based on new technologies like 5G and FTTH. However they can also do so by entering new verticals and going higher in the value chain (i.e. the role of service enabler and service creator.)

For example, A1 Austria addressed the business challenge of freight car tracking throughout all of Europe. In addition to offering services such as hardware delivery and installation, their IoT product analyses parameters such as weight, speed, km travelled, temperature, GPS, etc.

Which verticals offer the biggest opportunities? In a recent ETIS Network and IT Transformation Working Group webinar in which Swisscom discussed their own 5G product developments, participants from over 20 Telcos from around Europe shared their view.

Q: Which verticals are the most compelling for 5G services?



Source: "Swisscom's 5G Vision" webinar of the ETIS Network and IT Transformation Working Group on May 5, 2021.

As discussed in the Ericsson webinar, telecom service providers are not necessarily top of mind when business customers are looking for partners to accelerate their digital transformation activities - cloud players (hyperscalers), system integrators & IT consultants are better positioned at the moment.

5G market fragmentation is another risk: the likelihood that single company approaches will be successful is low. There is a real need for scalable commercial success stories to truly monetise the new services (on 5G or other technologies) thus more collaboration is needed.

FURTHER DETAILS:

- Slides and Recording ETIS Webinar "Swisscom's 5G Vision" May 5th by Swisscom
- Slides and recordings from ETIS Webinar "Why 5G is key for telcos to help rebooting other industries" June 9th by Ericsson
- Slides and Recording ETIS webinar "The Time is Now for Monetizing 5G Investments: KPN's Vision on 5G Market Development"
- Slides and Recording ETIS Virtual Gatherings 2020 - 2021

Contact the ETIS Central Office at info@etis.org for more information on how to access these materials.

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)
- ETIS Network and IT Transformation Working Group - contact Wim De Meyer (wdm@etis.org)
- ETIS B2B Working Group - contact Andrija Visic (av@etis.org)
- ETIS Digital Sales and Customer Experience Working Group - contact Michele Lalic (ml@etis.org)
- ETIS Smart Charging and Payments Working Group - contact Michele Lalic (ml@etis.org)
- ETIS Direct Carrier Billing Working Group - contact Michele Lalic (ml@etis.org)



PUSH THE HYBRID WAY OF WORKING

The new way of working will be very different from the pre-COVID era. Homeworking has been truly embraced by employees. Telework mandates from governments during the first few lockdowns proved that work-from-home is viable for many job profiles. In many cases, it also resulted in increased productivity, performance and employee satisfaction, thanks to increased flexibility allowing a better work-life balance. Thus offering work-from-home to employees may even become a competitive advantage in attracting talent.

What are the advantages/disadvantages? Some learnings thus far?

- Homeworking seems best suited for contemplative tasks (like decision making), individual work (like producing documentation) and other activities where strong focus and concentration is required.
- Tasks requiring collaboration, co-creation and team building are better suited for the office.
- Besides the type of activity, the employee personality is also important. Some employees perform better in a group and crave human interactions, others prefer to work on their own.
- Company culture and employee commitment to the company can suffer if home working is done full time.
- There are obvious cost advantages related to office space and travel cost reduction.

We are therefore facing a new reality - the hybrid work space.

Even within the same company a one-size-fits-all approach will not work - different models will need to be offered to employees based on the type of activity and the type of employee. Some models will imply mainly work from home, while others will mainly work in the office. Employees should be consulted and involved in the decision to find the right balance for themselves.

Experimentation may be needed to find the right balance for the organisation.



Office based
(4 days in the office)



Office / home mix
(2 - 3 days in the office)



Home based
(1 day in the office)



Some employees - the digital nomads - may even work abroad and hardly ever come to the office.

The practical implementation of the hybrid work space (in the office and at home) will be more complex than earlier iterations. Long-term planning must involve the HR, IT and facility management departments to organize office space mainly for collaborative work and meetings. Good tools need to be present to allow for remote workers to join and to be "immersed" as if they were physically present.

All of the new types of work will also have important consequences related to labour law.

In our monthly ETIS Corona Crisis Team calls we are discussing concretely how Telcos will organise this hybrid way of working. If you want to join the discussions, please contact Wim De Meyer via wdm@etis.org.



PUSH A BLENDED WAY OF LIVING: ONLINE MEETS OFFLINE, OFFLINE MEETS ONLINE

Besides the way we work, many other activities will become more hybrid or "blended". This is what scientist and writer Kai-Fu Lee calls the creation of the OMO SAPIENS: "Online Meets Offline, Offline Meets Online" (OMO).

The pandemic greatly accelerated the transition to digital as the offline world went into lockdown. Behaviour and expectation has accordingly evolved as online activities have changed from "nice-to-have" to "must-have." Just a few examples include:

- **Online shopping:** Customers are now used to fast delivery times, which means it needs to be supported by a robust logistics system.
- **Digital billing and payments:** Digital payments have been boosted tremendously changing customer behaviour and leading to growth in the fintech sector - which some Telcos, such as Orange, are entering. Telcos are also looking for new verticals to enter in the DCB market, as discussed through the ETIS Direct Carrier Billing Working Group, which currently has 23 MNOs discussing ways to develop the DCB ecosystem in Europe.

A key focus of the ETIS Smart Charging and Payments is also to share exchanges in how Telcos are approaching and accelerating both digital payments and billing. For example in an upcoming webinar, Swisscom and Telia Estonia will share best practices and learnings as they've accelerated digitalisation in a webinar on "the customer journey to the invoice". Moreover, in collaboration with CALVI, the working group will launch a billing experience and capabilities benchmarking survey - the aim of which is to provide insight into where Members stand in comparison with peers in the industry across Europe as well as which emerging trends are dominating. It is essentially a follow-up to see how Members have progressed since their vision for digital billing was outlined in an ETIS Digital Billing position paper a few years ago.

- **Distance learning:** Schools are investing a lot in infrastructure and online courses.
- **E-health:** Real-time health monitoring and automatic data transmission to healthcare centers for patients at home and video consultation are just some opportunities for Telcos regarding e-health. For example, Proximus launched Doktr, an innovative video consultation service for patients to get a basic primary care consultation with a qualified doctor in a convenient and secure way.
- **Videoconferencing:** Although many were eager to restore physical contacts after the lockdowns, tools like Zoom, MS Teams, Webex and many others have become a part of the way we communicate. Telcos like Elisa also have developed their own tool (Videra) to grab part of this market.
- **Online entertainment:** Streaming movies, music, TV series, gaming and even concerts or theatre have become mainstream. In some cases, movies are now being released simultaneously in both cinemas and online online (eg, the release of the movie "Black Widow" from Disney). Telcos, like Tet, have their own OTT platform (competing with Netflix, Disney+) which will be presented in an upcoming webinar in October.



This blended way of living will continue to accelerate as new technologies will make the online experience even more compelling and closer to the physical world. Some examples include:



AUGMENTED AND VIRTUAL REALITY

Telcos have been focusing on AR and VR solutions for years, however the pandemic accelerated this to offer a more immersive experience for online residential customers and enterprise customers alike. Yet members are also looking to use these new technologies in a way that reflects customers' new blended lifestyle and the need to socialise and experience the physical world again. Swisscom, for example, held a "Swisscom Summer Hunt" - a hybrid virtual and real world ice-cream scavenger hunt where customers could also win prizes.



ADVANCED CHATBOTS

Telcos are also advancing customer self-care through advanced chatbots, which offer the customer an immediate response (no queues) 24 hours a day, 7 days a week. How? Through AI and an increasing depth of the bot to include not only publicly available FAQs, but personalised content concerning everything from billing to sales. In fact in a chatbot survey of the ETIS Digital Sales and Customer Experience Working Group earlier this year, the average of those participating had a solution rate (% successfully deflected by the bot without a transfer to an agent) of about 30%, with some even as high as 50 - 60%.



VIDEO CHAT

Telcos are experimenting with how to bring the in-store customer service interaction online. For example, in an upcoming ETIS Digital Sales and Customer Experience Working Group webinar, A1 Telekom Austria Group will share how they are using video support for the webshop by transferring users to a video call in order to help bridge the sale online. Other members such as Altice Portugal have been using video-supported services such as this as well in order to enable customers to watch product and service demonstrations and interact with experts to clarify questions.

FURTHER READING:

- <https://www.nancyrademaker.com/merging-online-and-offline-in-the-post-corona-era/>
- <https://www.proximus.com/news/2021/20210518-proximus-innovates-in-the-field-of-ehealth.html>

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Digital Sales and Customer Experience Working Group - contact Michele Lalic (ml@etis.org)
- ETIS Direct Carrier Billing Working Group - contact Michele Lalic (ml@etis.org)
- ETIS B2B Working Group - contact Andrija Visic (av@etis.org)
- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)

5

INVEST IN INFRASTRUCTURE

Although telecom networks have delivered and were able to cope with the high traffic load during the pandemic, pressure on the networks is still increasing and customer expectations high. Here is just a glimpse of what will be needed in the near future.

IN THE HOME

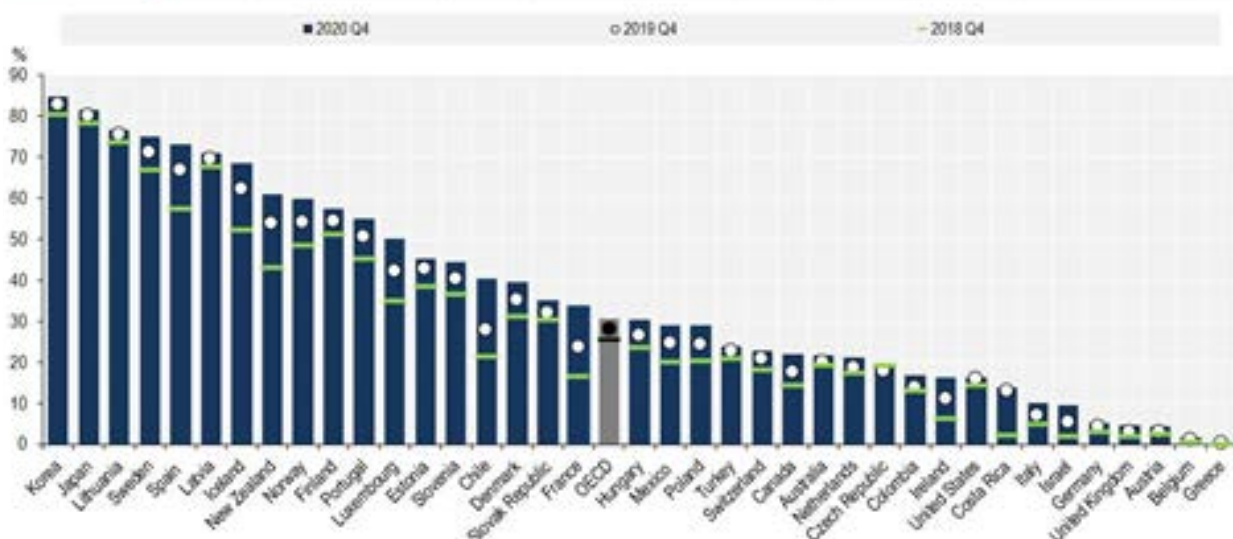
- Home internet can no longer be best effort, but requires guaranteed & secured bandwidth as each home becomes a part-time office and/or classroom. Indeed, both parents and children need the same connectivity, security and privacy tools as they are used to in the office or in school.
- Our blended way of living is becoming mainstream and new technologies like 4k, 8k, AR/VR will drive bandwidth needs further up to improve the online experience.

IN THE OFFICE AND FACTORY

- In the office employees will videoconference a lot more, as external meetings and travel will be reduced. Moreover, workers from home will join via hybrid meetings.
- In manufacturing and other verticals, digital transformation will continue to accelerate. As a result, more devices and people will be connected creating higher bandwidth needs as well.

As a consequence of the need for bandwidth, reliability and the proliferation of connected devices investments in FTTH and 5G are already being accelerated globally.

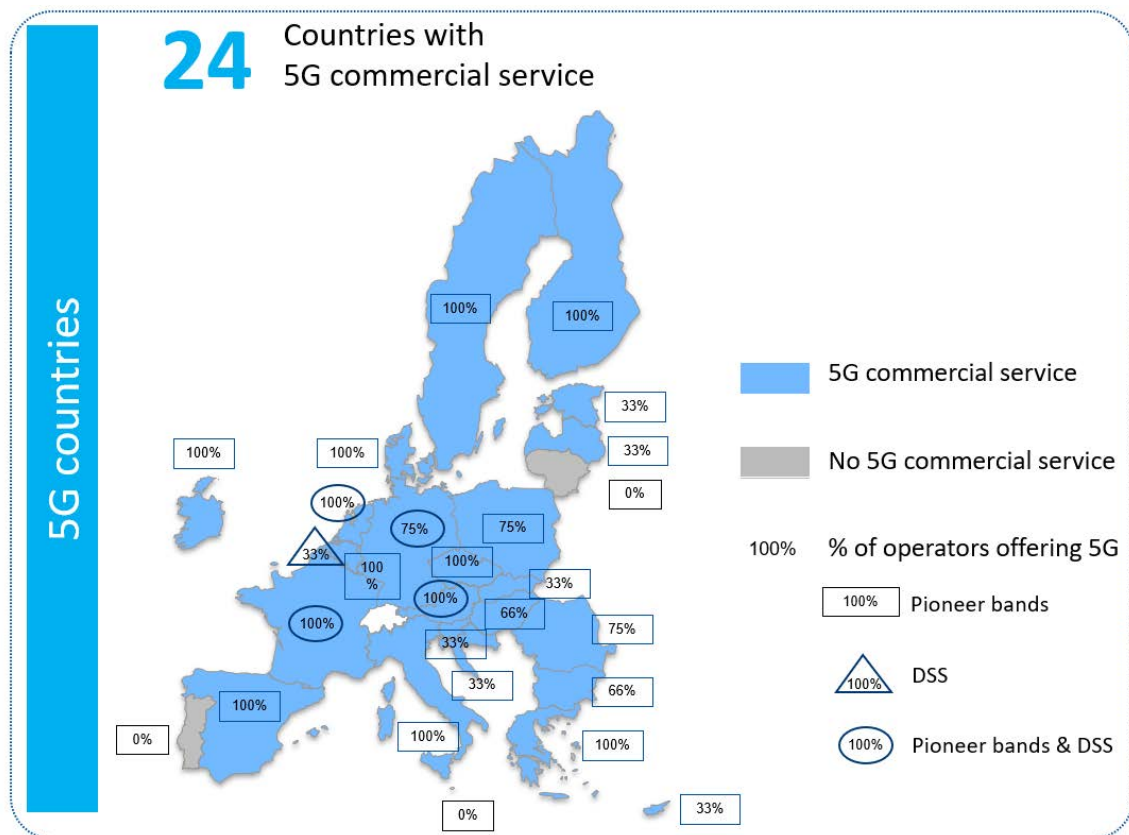
However, according to a recent OECD Broadband Statistics Report published in July of 2021, the percentage of fiber connections as percentage of total fixed broadband connections is still very diverse across Europe. In countries with a low percentage of fiber connections, Telcos have decided to catch up and are now investing heavily.



Source: Oecd.org. 2021. Broadband Portal - OECD. [online] Available at: <https://www.oecd.org/sti/broadband/broadband-statistics/> [Accessed 2 September 2021].

Also the status of 5G in Europe is very country specific as shown by the 5G Scorecard (Status EU27 plus UK Dec2020 of the EU 5G Observatory). Investments in broadband infrastructure, in general, are being prioritised by governments and Telcos worldwide, eg \$65bn allocated to states to improve broadband access in the US as part of US President Joe Biden’s infrastructure plan.

Another strategic topic for Telcos is the transition to Telco cloud and edge computing networks, including the positioning versus hyperscalers. This topic is debated in our Network and IT Transformation Working Group.



Source: h5gobservatory.eu. 2021. 5G Scoreboards - 5G Observatory. [online] Available at: <<https://5gobservatory.eu/observatory-overview/5g-scoreboards/>> [Accessed 2 September 2021].

FURTHER READING:

- <https://www.ft.com/content/88293f53-9bf5-49fe-9f03-59fa3be5d9c8>
- <https://www.telecomtv.com/content/fttx/dt-on-track-with-fttx-build-but-calls-for-other-operators-to-lend-a-hand-42174/>
- <https://www.oecd.org/digital/broadband/broadband-statistics/>

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Network and IT Transformation Working Group - contact Wim De Meyer (wdm@etis.org)
- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)



PROTECTING PRIVACY

At the start of the COVID crisis, misinformation in a few countries led some Telco customers to believe or fear that their non-anonymised location data would be shared with authorities tracking the pandemic. When in fact Telcos were making considerable efforts to protect their customers privacy by sharing only anonymised data as well as sending sms on behalf of the government regarding advice and measures to be followed. Communicating these messages to customers mitigated these fears, however this is a good example of how important data privacy and security continues to be for Telco customers and is a cornerstone to the trust telecom services are based on.

The invalidation of the Privacy Shield last year further highlights the criticality that transfers of personal data need to be done in a safe and trusted way. Indeed the ETIS Data Privacy Task Force held webinars earlier this year to discuss how due diligence on data flows are done. The conversation will continue in an October webinar on transfer impact assessments (TIAs), where members will discuss them and supplementary measures used to ensure adequate privacy levels in third countries. Hrvatski Telekom, a subsidiary of the Deutsche Telekom Group, will lead the discussion with a presentation on their approach.

European initiatives such as Gaia-X and IDSA, topics covered in webinars of the ETIS Big Data Working Group and Digital Telco Strategy Forum, should be supported. Indeed the use of personal data can offer benefits both to Telcos and their customers, a like. Telcos are already building privacy into the product and system development processes through privacy by design. But a Digital Deal is necessary to balance the protection of privacy and to take advantage of opportunities data can bring. Offering free services, like hyperscalers do, in exchange for using personal data (making the customer the product) can be detrimental to the trust that Telcos have built up in the wake of scandals such as Cambridge Analytica and not an option.

FURTHER READING:

- <https://www.ft.com/content/88293f53-9bf5-49fe-9f03-59fa3be5d9c8>
- <https://www.telecomtv.com/content/fttx/dt-on-track-with-ftth-build-but-calls-for-other-operators-to-lend-a-hand-42174/>

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Data Privacy Task Force - contact Michele Lalic (ml@etis.org)
- ETIS Big Data Working Group - contact Andrija Visic (ave@etis.org)



SAFEGUARDING SECURITY

In Allot's December 2020 Global Consumer Security Survey, of 11,400 participants, over 90% of consumers think the CSP should provide a security solution. This does not come as a surprise in an age when consumer and SMB cyber threats (ransomware, phishing, adware, etc.) are exponentially growing.

Connection points are increasing, with users connecting several devices either in the office, outside, in their car or at home, but the security measures taken are not harmonized across all these points. Instead of relying on security apps installed by users, CSPs should focus on improving network-based cybersecurity, capable of blocking attacks before they reach the customer.

In fact, the ETIS B2B Working Group held a webinar earlier this year to discuss what security products Telcos were developing for B2B markets, including those necessary for the hybrid work from home/office model. The shift to digital has brought an increased risk of cyberthreats and as a longtime target of cybercrime through their infrastructure, Telcos can leverage this knowledge in new product offers.

The demand for new security capabilities and solutions is also rising with the adoption of 5G. Telcos should be planning their 5G network architecture transformations considering the diverse 5G ecosystem they will be serving, addressing the need for more automated security processes and flexible security services.

In ETIS, leading 5G security experts from Telcos and vendors all around Europe frequently meet to discuss trust management in 5G, automation of security management and monitoring in the NFV, architecture management for the EU 5G Toolbox, and protection at the edge and the decentralisation which introduces new challenges of physical and logical security.

Mapping threat landscapes, conducting Telco security benchmark studies and organising frequent threat intelligence information sharing calls are some of the activities ETIS conducts every year for Telco security experts around Europe. If you would like to join us please contact Andrija Višić from the ETIS central office: av@etis.org

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS Information Security Working Group
- ETIS 5G Security Expert Group
- ETIS CERT-SOC Telco Network
- ETIS Anti-Abuse Telco Network



FOCUS ON THE BENEFITS, NOT ON TECHNOLOGY

Telcos should focus on the benefits technologies bring (eg lower climate impact of FTTH & 5G, our services bring people together, make our lives easier, improve our health) instead of pure technological arguments. Why?

Anti-5G movements are on the rise, with hundreds of arson attacks taking place on 5G mobile phone masts in the last two years. These movements are successful because of the emotional impact of their narrative. They appeal to widely accepted values like family, care for others, community and democracy - which all emphasise morality and humanity, even if their arguments are not based in science or fact. This is in sharp contrast with the messaging of the telecom industry, which focuses on speed, efficiency and technology.

As discussed in the ETIS 5G Resistance Task Force, 5G campaigns should also include emotion and the narrative should celebrate humanity and morality. Our Vision to drive a better world for all at a lower cost for the planet could be helpful to do so.

FURTHER READING:

- <https://www.policytracker.com/blog/why-have-anti-5g-campaigns-been-so-successful>
- <https://www.climatechangecommunication.org/wp-content/uploads/2020/03/ConspiracyTheoryHandbook.pdf>

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS:

- ETIS 5G Resistance Task Force - contact Wim De Meyer (wdm@etis.org)
- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)
- ETIS Sustainability Working Group - contact Michele Lalic (mle@etis.org)





EMBRACE DIVERSITY AND LEAVE NO ONE BEHIND

What is the Telco's impact on society?

In order to keep our customers loyal and have engaged employees, the "purpose" of the company needs to be well articulated and delivered upon. Indeed, both customers and employees want to make sure your company aligns with their values and contributes to society and its many challenges (climate change, sustainability, racism, gender equality, privacy ...)

Telcos can also help bridge the opportunity gap by connecting underserved areas with high speed internet - enabling access to information but also opening up economic opportunities. Hrvatski Telekom, for example, has been using hybrid technology to provide 30 megabits per second speed to more customers in rural and less populated areas of Croatia such as the many islands along its coast. Moreover in an effort to bring FTTH to less commercially viable rural areas in France, part of its so-called "public initiative networks", Orange this year brought on investors to its newly created Orange Concessions fiber unit.

As the enabler of connectivity, Telcos can also play an important role in ensuring that everyone has the necessary digital skills for this digital age. Indeed, during discussions of the ETIS Sustainability Working Group members such as Swisscom and AI Croatia mentioned that various initiatives being implemented related to youth education. Telcos are also supporting parents in ensuring their children have access to the digital space but do so in a safe and healthy way. Members such as TDC, for example, has had initiatives focus on awareness building of "sharenting" - the posting of a child's image on social media without their consent.

FURTHER READING:

- <https://www.orange.com/en/newsroom/press-releases/2021/support-its-fibre-development-rural-areas-and-underline-value-its>
- <https://alertify.eu/hrvatski-telekom-releases-broadband-map-of-croatia/>
- <https://tdcgroup.com/en/responsibility>

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STRENGTHEN CONTINGENCY AND LONG TERM PLANNING

COVID-19 was a wake-up call and has demonstrated the importance of "digital readiness". This means that the necessary infrastructure needs to be put in place to support business and society through future pandemics but also other threats and risks. Threats and risks resulting from the climate crisis - the impacts of which are being felt much sooner than expected - are just one example.

Indeed, this past summer some countries (Germany, Belgium, the Netherlands, ...) experienced extreme flooding, while other countries (particularly those along the Mediterranean Sea such as Greece, France, Italy, Cyprus ...) were devastated by forest fires due to extreme weather conditions. Cities across Southern Europe were on "red alert" from the heat, with Sicily setting new European records by hitting 48.8 degrees.

Disaster recovery needs to be in place to keep communication up in all circumstances. Robust contingency planning is therefore of the utmost importance.

According to a survey of the World Economic Forum's Global Risks 2021 Report, the top risks by impact range from infectious diseases to natural resource crises to extreme weather to IT infrastructure breakdown; while the top risks by likelihood range from extreme weather to digital inequality to cybersecurity failure to livelihood crises.

As the backbone of our digital society, Telcos are uncoincidentally heavily impacted by all of these risks - but are also well positioned to make positive impacts by strengthening contingency and long term planning.

The COVID-19 pandemic also disrupted (and is still disrupting) the global supply chain for chips, materials and resources. While Telcos handled this well during the pandemic and were not as heavily impacted as other sectors, the risk continues. Some factories (eg car manufacturers) are still shutting down regularly. New technologies such as big data, cloud computing, Internet-of-Things ("IoT") and blockchain can help to build a more resilient supply chain system for the future.

FURTHER READING:

- http://www3.weforum.org/docs/WEF_The_Global_Risks_Report_2021.pdf

ETIS WORKING GROUPS FOCUSED ON THESE TOPICS

- ETIS Network and IT Transformation Working Group - contact Wim De Meyer (wdm@etis.org)
- ETIS Digital Telco Strategy Forum - contact Wim De Meyer (wdm@etis.org)
- ETIS Supply Chain Task Force - contact Michele Lalic (ml@etis.org)
- ETIS Procurement and Vendor Management - contact Michele Lalic (ml@etis.org)

UPCOMING WEBINARS



- SEPTEMBER 14TH FROM 10:00 - 11:30 CET - "**Best practices with emerging technologies and 'new' forms of digital customer interaction**"



- SEPTEMBER 15TH FROM 10:00 - 11:00 CET - "**Insights, tips and the direction of DCB fraud prevention**"



- SEPTEMBER 15TH FROM 14:00 - 15:30 CET - "**Leveraging Data & Analytics in Marketing**"



- SEPTEMBER 21ST FROM 11:00 - 12:00 CET - "**Corona Crisis Team call series - How our Members are meeting the challenges of the pandemic**"



- SEPTEMBER 22ND FROM 11:00 - 12:00 CET - "**Privacy and the European Electronic Communications Code**"



- SEPTEMBER 23RD FROM 14:00 - 15:30 CET - "**The customer journey to the invoice**"



- SEPTEMBER 23RD FROM 11:00 - 12:30 CET - "**5G Cybersecurity Knowledgebase and the Security Manual - presentation by GSMA**"



- SEPTEMBER 23RD FROM 15:00 - 16:00 CET - "**Impact of 5G on Lawful Interception - presentation by TNO**"



- SEPTEMBER 28TH + OCTOBER 14TH FROM 14:00 - 15:30 CET - "**What is SOAR (Security Orchestration, Automation and Response) and What Isn't?**"



- OCTOBER 5TH FROM 15:00 - 16:00 CET - "**Circularity in practice - How Telcos are approaching circular design, recovery + reporting**"



- OCTOBER 6TH FROM 15:00 - 16:00 CET - "**Deutsche Telekom's Detection of Abusive Logins**"



- OCTOBER 7TH FROM 11:00 - 12:00 CET - "**IT Labour Outsourcing - How Telcos are managing this**"



- OCTOBER 7TH FROM 11:00 - 12:30 CET - "**How to build a successful and unique OTT platform? Learn all about Tet+**"



- OCTOBER 13TH FROM 11:00 - 12:00 CET - "**Transfer impact assessments - approaches and challenges**"



- OCTOBER 21ST FROM 10:00 - 11:30 CET - **ETIS VIRTUAL GATHERING** - "**How Telcos can drive a better life for all at a lower cost to the planet**"



- OCTOBER 28TH FROM 14:00 - 15:00 CET - "**Strategies to retain customers and reduce bad debt**"