

	01 Powerful Infrastructure	02 Globally competitive EU industry	03 Digitally Enabled Companies	04 End-user benefits	05 Enriched Citizenship & Welfare
Today's reality	<ul style="list-style-type: none"> Lagging Ultra-Broadband infrastructure Many enabling platforms missing or fragmented 	<ul style="list-style-type: none"> Undersized companies vs. global peers Lost innovation capabilities 	<ul style="list-style-type: none"> Slow take-up of ICT by European enterprises Uncoordinated and poor e-Government 	<ul style="list-style-type: none"> High choice, quality & affordability Lower than peers end-user consumption 	<ul style="list-style-type: none"> Weak linkage between digital opportunities & welfare and citizenship
Required actions	<ul style="list-style-type: none"> Support investments & risk sharing in both fixed and mobile markets Minimise obstacles for copper-to-fibre and IP transitions Create new interoperable platforms (NFC, Digital Identity) 	<ul style="list-style-type: none"> Trust and foster a globally competitive EU industry Lift sector-specific rules / reinforce horizontal rules Support European startups via Single Market 	<ul style="list-style-type: none"> Incentivise demand for ICT services among EU enterprises Digitise government services, as a must-have 	<ul style="list-style-type: none"> Enhance safety, security & privacy of citizens Avoid that neutrality concerns reduce choice for citizens and enterprises 	<ul style="list-style-type: none"> Solve the social divide by fostering development of new applications Prioritise applications in high-impact areas such as healthcare, employment, security, education
How to achieve success	<ul style="list-style-type: none"> Develop immediate fixes to the current service-based regulatory framework Revise EU framework to match investment cycles and improve spectrum availability Allow pro-innovation coordination and harmonisation 	<ul style="list-style-type: none"> Trust scale economies & dynamic efficiencies Ensure a level playing field and align regulatory / antitrust frameworks to peers Organise EU-relevant space where startups can find investors and right skills 	<ul style="list-style-type: none"> Develop European-wide trials in critical areas (remote collaboration, automation, smart-cities, mobility) Provide incentives for early adoption 	<ul style="list-style-type: none"> Reform and simplify security and consumer protection rules by ensuring an equitable implementation across the value chain Develop policies by each industry vertical to boost innovative take-up 	<ul style="list-style-type: none"> Strengthen demand-side policies Ensure interoperability & standards Launch EU-wide trials (education, healthcare...) Dramatically improve digital literacy



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A Digital Future for Europe



We live in extraordinary times. 505 million European citizens are hoping for an economic recovery and a return to growth and prosperity. As an industry that underpins this economy, we see an urgent need to act and constructively participate in enabling recovery. European policymakers duly consider the digital industry as the pivotal driver for modernising our society and have accordingly sought to steer ambitions and targets through a dedicated policy tool: the EU Digital Agenda. Now Europe must rapidly develop a new set of public policies for the whole digital sector, recognising its globalised nature and the increasingly outdated policy distinction between communication networks and services and the Internet. A new digital strategy for Europe is needed and the European telecoms industry is ready to play its part. To this end, ETNO envisions three strategic directions:

- 1 THINK DIGITAL
- 2 REFORM
- 3 PROSPER

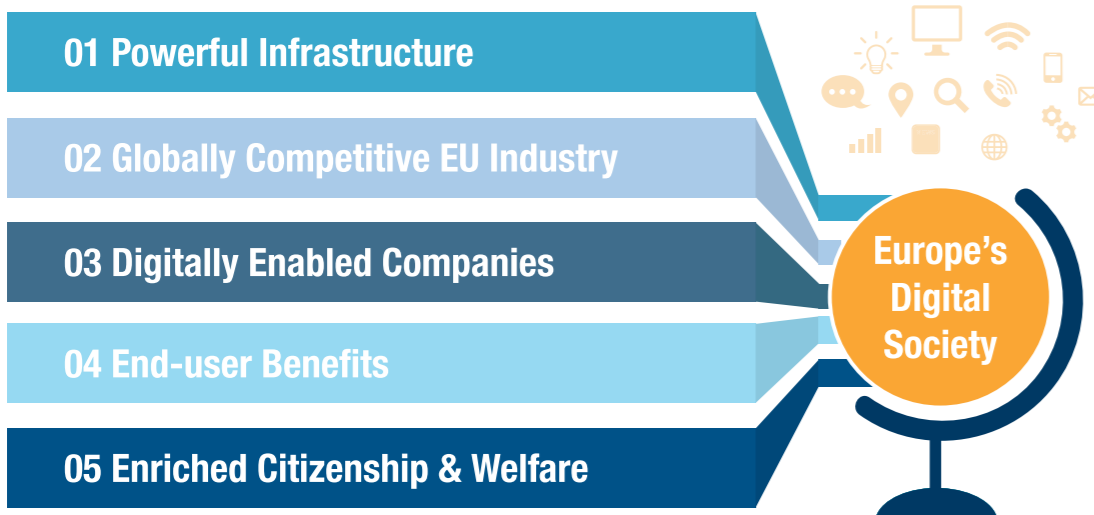
A new digital deal for a stronger Europe

1 THINK DIGITAL

Digital services must be at the core of daily life for both European citizens and businesses. We should encourage 'digital designers' and a 'digital mentality'. The public and the private sectors are reinventing and modernising their core processes: we need to stimulate demand and drive the implementation of advanced applications. There is substantial scope for doing more and all segments of society need to be involved. This would create considerable public value: greater productivity overall, a strengthening of competitiveness through a faster transformation of the labour market and greater sustainability of welfare measures.

2 REFORM

The current European regulation regime has outlived its useful life and is not adequate to confront the digital revolution. Lighter and less complex regulation, a level playing field among ICT and internet players and a new public policy framework for the digital industry can provide the right incentives to maximize investments, innovation and dynamism in the European digital industry, while improving European citizens' lives. ETNO proposes a new public policy vision to foster Europe's digital society, balancing five key pillars:



3 PROSPER

The telecoms industry can serve as a catalyst for a period of transformation in Europe with landmark projects and substantial investment power: an estimated € 250 billion investment is foreseen over the next five years. Such investments have a multiplying factor of up to 13x and represent a substantial opportunity for Europe that cannot be missed. Let's make Europe a magnet for private and public investments.



A new digital Europe for EU Citizens and Businesses

Re-launching growth in Europe's digital sector means opening up huge opportunities and the telecom industry can play a fruitful and positive collaborative role, helping launch a new, modern wave of digital policies.

Just like the new European Commission President, Jean-Claude Juncker, and the new Commission digital leaders – Mr. Ansip and Mr. Oettinger, ETNO believes that the current political paradigm should evolve. Policy needs to support new business models and investments and create a win-win situation for all players.

ETNO wants all players to work together to unleash a flood of new investments in network and services to benefit EU citizens, businesses and Europe's public sector. Together, let's bet on a new digital deal and work towards a shared vision for a stronger Europe.

The challenge for EU governments is therefore to improve cooperation between industry and institutions. To help the EU reach its policy goals, ETNO suggests fostering dialogue and facilitating the development of innovative industry solutions.

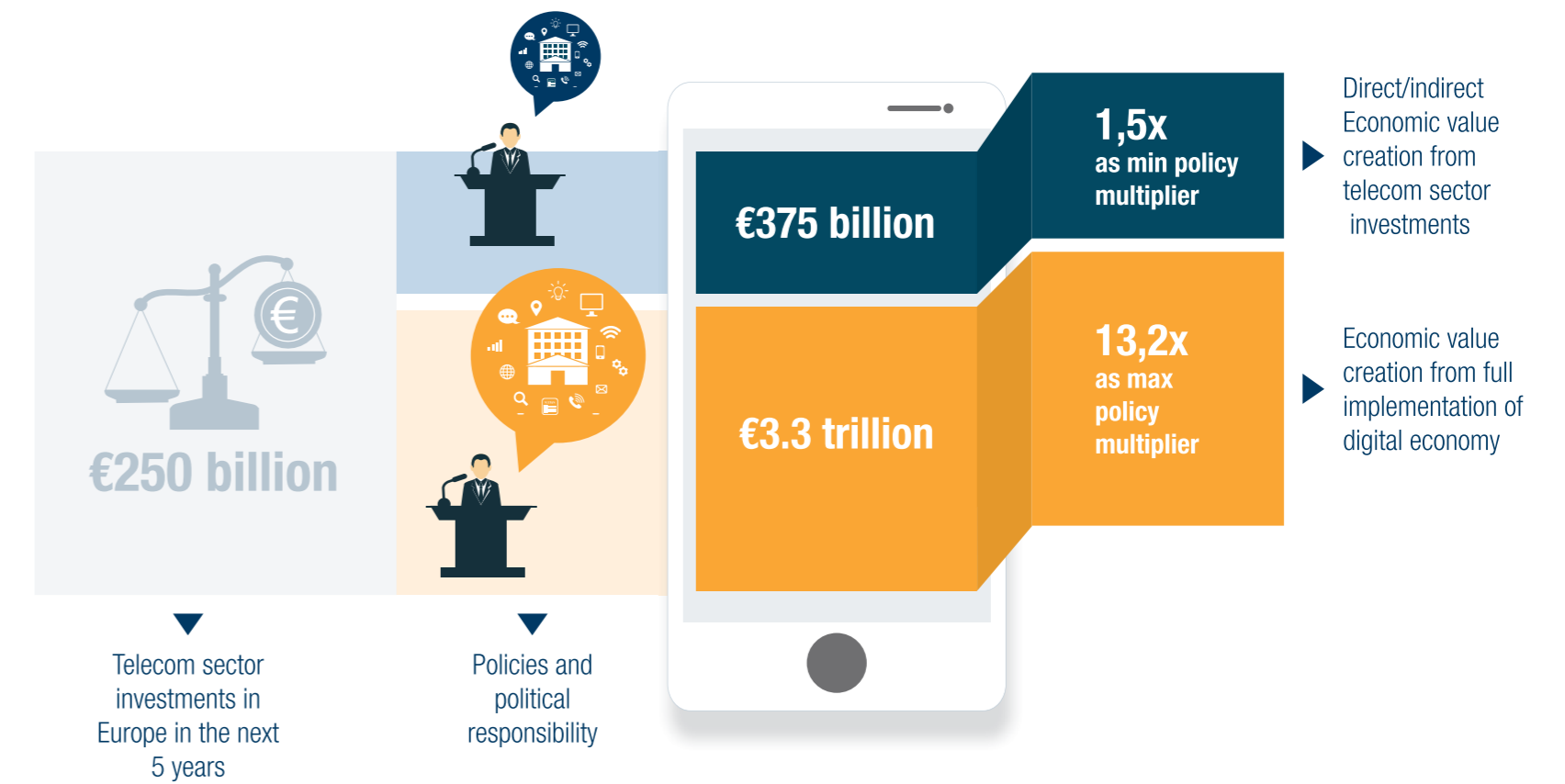
Who will embrace the €3.3 trillion ambition?

The opportunities are huge. According to estimations by Arthur D. Little for ETNO's Agenda for Europe, the European telecoms sector will contribute with an investment capacity of EUR 250 billion over the next five years. More coherent and supportive policies are key because according to ADL, the value at stake for the digital transformation of Europe would be worth EUR 3.3 trillion in the best case scenario (economic multiplier of up to 13 times the initial investment). So let's unlock the trillion-euro opportunity together!

Daniel Pataki
Director General, ETNO

Reforming Europe to unleash its huge digital potential

Telecom investment & economic value creation: The policy multiplier



A new Governance

HIGH-LEVEL EUROPEAN OBJECTIVES



LEGISLATIVE AND REGULATORY FRAMEWORKS

- ICT Regulation
- Competition law
- Industry specific law
- Trade law
- Local government law
- Consumer Protection law
- Tax law



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