Connecting Businesses & Communities

Information and Communication Technology Strategies in an Emerging Knowledge based Economy & Society

ROME – ITALY

PALAZZO TAVERNA

6TH & 7TH NOVEMBER, 2003

- PROCEEDINGS -

Organized by

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ACKNOWLEDGEMENTS

After Washington, New York, Rome, Paris, Kyoto, San Francisco, Silicon Valley, Sophia-Antipolis and Newcastle-upon-Tyne, the Global Forum returned to Rome on 6 & 7 November 2003.

The conference is over and 312 delegates from 28 different countries attended the conference sessions taking place in the magnificent and historical Palazzo Taverna. In the tradition of the past meetings, the intention of the Global Forum 2003 was to provide a platform for governmental representatives, the private sector, the users, and the academia to meet and discuss the various challenges of the evolution of our today's and future Information Society - this year under the main topic of "Connecting Communities & Businesses in a knowledge based economy".

The organization of an international networking event like the Global Forum 2003 is not possible without the help of an excellent and highly motivated team and I wish to thank all those many people who contributed to the preparation of the Global Forum. I would like to particularly thank Senator Pierre Laffitte and the staff of ANUIT for their excellent work and for showing us that physical networking knows no borders.

I sincerely thank the main sponsors and cooperating institutions of the Global Forum 2003, which are, besides ITEMS International, the Foundation Sophia-Antipolis and ANUIT, Afilias, Alcatel, CNES, Engineering Ingegneria Informatica, the European Commission, Eversheds, Fastweb, Finmatica, France Telecom, Hughes Network Systems, IBM, Microsoft, Newcastle City Council, NTT, One North East, Piper Rudnick, Smart IS Marketing, Telecom Italia Sparkle, Verizon, and XandMail, as well as the supporting sponsors, which are AFNET, AUSY, CFCE, Euro-Case, the European Institute, the European IST Prize, Fing, the French Embassy in Washington, the George Washington University, the Global Cities Dialogue, Information Futures LLC, the city of Issy-les-Moulineaux, NTCA, the Politecnico di Milano, PTI, Swidler Berlin Shereff Friedmann, Tactis, and TeleCities.

And last, but certainly not least, I would like to thank the Global Forum's principal actors, who are its moderators, speakers, and participants, for having brought their knowledge to the Forum and having actively contributed to its success.

I am already looking forward to meeting you next year at the Global Forum 2004.

Sylviane Torpokoff
President of the Global Forum

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PROGRAMME

6 November 2003

WELCOME ADDRESSES

Sergio Antocicco, President Anuit, Italy
Sylviane Toporkoff, President Global Forum, Items International, France
Senator Pierre Laffitte, President of the French Foundation Sophia-Antipolis

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Tom Cosh, Head of Economic Development and **Estelle Chatard,** Project Director Economic Development Division, Newcastle Upon Tine City Council, United Kingdom
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Sébastien Lévy, Vice-President Global Forum, Items International, France
Sergio Antocicco, President Anuit, Italy

ABOUT THE GLOBAL FORUM

The "Global Forum on Shaping the Future" is an annual, independent international event dedicated to business and policy issues affecting the successful evolution of the Information Society. As a high-profile international think tank, bringing together senior government officials, policymakers and industry leaders from Europe, North America, the Pacific Rim and Africa, the academia, and the civil society - both, from advanced and developing economies, its main purpose is to promote interaction and dialogue between the different stakeholders, to give impulses for the formulation of common visions, and to pool knowledge, expertise, research, policy analysis and networking capability.

The "Global Forum on Shaping the Future" is a not-for-profit initiative of Items International and Foundation Sophia-Antipolis. It is sponsored by organisations around the world, interested in sharing and influencing global IT-agendas, and enabling business and government leaders from all sectors of the ICT communities to meet and work with suppliers and service providers.

THE GLOBAL ROADMAP

1992 Europe / United States Meetings on Cooperation and Competition in Telecommunications – Washington / New York, USA

1993 Europe / United States Meetings on Cooperation and Competition in the Field of Communications – Rome, Italy

1994 Europe / Japan Forum on Cooperation and Competition in Communications – Paris, France

1995 The Second Europe / Japan Forum on Communications – Kyoto, Japan

1996 Smart Communities Forum - U.S. Tour of cities and regions – New York / Washington / San Francisco / Silicon Valley, USA

1997 Smart Communities Forum – Economic Development in a Global Information Society – Sophia-Antipolis, France / Rome, Italy

1998 Networked communities – French Senate, Paris, France

1999 New Satellite and Terrestrial Applications – Sophia-Antipolis, France

2000 Towards a Global e-Society – Sophia-Antipolis, France

2001 Expanding the Global e-Society – Newcastle, United Kingdom

2002 The Promise of Broadband Services – Washington DC, USA

2003 Connecting Businesses & Communities – Rome, Italy

THINK TANK SYNTHESIS REPORT

The Global Forum 2003 took place on 6 & 7 November in the historical Palazzo Taverna, situated in the heart of Rome. During these two days more than 300 high-level representatives from national and local governments, governmental organisations, the European Commission, ICT-industries, regulators, users, and the academia contributed to stimulating discussions in order to get a clearer view on the actual state(s) of the Information Society around the globe as well as on main issues to be addressed in the future.

The Forum was organised in 3 plenary sessions and 8 different panel sessions - of which two always ran in parallel - over the course of the two days.

The following synthesis report provides an overview and a summary of the discussions that took place during the panel sessions and highlights the key issues of each presentation. All presentations (PowerPoint) and speaker profiles are available on the website of ITEMS International www.items-int.com, Anuit www.anuit.it and the Politecnico di Milano www.polimi.it/.

The report is structured according to the organisation of the three plenary and the eight parallel session. Each panel session is introduced by an executive summary. The abstracts of the talks given during the Global Forum 2003 are presented by their appearance in the agenda as listed in the beginning of the present document.

As **President of the ANUIT**, co-organiser of Items International and the Foundation Sophia Antipolis of the Global Forum 2003, **Sergio Antoccio** welcomed the participants and expressed his pleasure in hosting this 13th edition of the Global Forum in Rome, especially during the period of the Italian Presidency of the European Union. The Global Forum aims at achieving a lively exchange of experiences and information between key persons having particularly important roles in defining strategies to achieve a real and effective Information Society. Within the following 2 days, a great number of speakers will present their expertise and exchange with the participants. Altogether, they represent more than 28 countries from all over the world. At this point, one can really say that "Global Forum" is the right title for this event, especially since the countries represented here are significant from the Information Society point of view. It is fascinating to note that the results of the Forum will be used at the upcoming World Summit on the Information Society.

A special thank you was given to the hospitality of Telecom Italia, who offered this outstanding Palace as well as to the other sponsors, Afilias, Alcatel, CNES, Engineering Ingegneria Informatica, the European Commission, Eversheds, Fastweb, Finmatica, France Telecom, Hughes Network Systems, IBM, Microsoft, Newcastle City Council, NTT, One North East, Piper Rudnick, Smart IS Marketing, verizon, and XandMail, because without their support it would not have been possible to organise such an event.

Sylviane Torpokoff, President of the Global Forum, welcomed the participants and stressed that it is always a pleasure and a challenge to bring together, year after year, so many impressive representatives from all over the world to shape the future of the Information Society. A great number of participants is following the Global Forum for more than ten years. The Global Forum is not just another conference, but a permanent international think tank, aiming at the identification of perspectives and possible solutions for current developments and the future Information Society. Year after year, the Global Forum brings together high-level representatives of operators, manufacturers, users, public administrations, central and local opinion leaders as well as opinion makers. The diversification of panellists and sessions enables the exposure of a variety of expertise and different points of view. During the coming two days, the Forum wants to initiate lively discussions between the panellists and the participants. The objective is to achieve real networking and to enable the attendees to prepare common projects. The Global Forum provides a great opportunity to discuss during formal and informal meetings in particular to network – during the Forum in Rome and beyond. Items International will be happy to help all participants in doing so during the coming year.

Senator Pierre Laffitte, President and Founder of the French Foundation Sophia-Antipolis, welcomed the participants. The Foundation Sophia-Antipolis is co-organiser of the Global Forum and plays a fundamental role in the development of scientific and cultural activities. The purpose of the Foundation is to encourage the ideas of and cooperation at a French, European and international level, in scientific, industrial and cultural matters in order to create a new entrepreneurial culture, thereby turning Sophia Antipolis into a laboratory for experiments of the future. Senator Pierre Laffitte thanked Sylviane Torpokoff for her engagement in the Global Forum by stressing the importance of such an international event in order to open up new views, shaping the future and especially to connect people.

DAY 1 – MORNING – PLENARY SESSION

Business & Communities – The evolving Dynamics
The Information & Communication Technology Market: Reality & Trends

Senator Pierre Laffitte, President of the French Foundation Sophia-Antipolis [www.sophia-antipolis.org/], and **chair** of the opening session summarised the focus of this opening plenary session of the Global Forum 2003: The plenary session focussed on overviews and perspectives from the Americas, Asia, Europe, and Africa on driving forces and dynamics of the market for business and communities as well as market opportunities in a competitive and convergent environment in emerging and developing countries.

Senator Pierre Laffitte, briefly referred to a recent key meeting he has organised in the French Senate, where representatives of the financial, industrial and research sector developed a political vision to solve one of the core problems for an evolving dynamic in Europe: i.e. innovation. It was proposed that the European Investment Bank should borrow 1% of the EU's GIP (€ 115 billion), to boost innovation in Europe and thus to promote growth. Special attention is given to strategies and technologies to reduce the digital divide.

When introducing the first speaker, Senator Laffitte stressed that the *e*Europe Action Plan 2005 is actually the major political initiative of the European Commission to address the challenges of an European Information Society.

As the first speaker of the session, **Pedro De Sampaio Nunes, Director for the Information Society Strategy and eEurope at the Directorate General Information Society of the European Commission**, presented

eEurope 2005: Challenges and Perspectives

The *e*Europe Action Plan 2005 is the result of the Lisbon Summit in 2000, where the Heads of the EU Member States set the ambitious target that the EU should become the world's most competitive and dynamic knowledge-based economy by 2010. As ICT is considered as an essential tool to achieve this goal, a set of actions, starting with the liberalisation of basic utilities and services, were required. *e*Europe is settled at the top of a EU policy, backed by the legislation and regulation efforts of the EU as well as its technology research programmes.

Due to the fragmentation of the European telecommunication market it was important to set up a regulatory framework which creates a stable and prospective environment for the telecom operators - smoothly preparing the transformation into a single market. The protection of content remains an important issue to be regulated and it will be the Commissions task to determine within the next 5 years, together with the industry, a position on the application of IPR and the use of content.

The role of *e*Europe is to coordinate the national strategies the EU Member States with a strong focus on the public sector, representing 40% of the GDP. The philosophy of *e*Europe

is to act on the public sector and thereby to create the conditions for the private sector. Good progress was made over the course of first Action Plan (2000-2002): The EU average on households connected to the Internet more than doubled (40.4% in Oct. 2002), Europe has the fastest research backbone network in the world (GEANT), 90 % companies and schools in the EU are connected and the legal framework for telecommunication and eCommerce are in place. The second Action Plan *e*Europe 2005 concentrates on modernizing public services, and eGovernment, eLearning and eHealth are explicit targets of the Action Plan. These targets are supported by actions related to the security and trust of networks, e.g., the proposed the creation of a European Network and Information Security Agency. In order to foster the availability of broadband access in rural areas, the EC recently approved guidelines for the use of Structural Funds to support broadband deployment in remote and rural areas. Within the period of July 2002 to July 2003, broadband penetration in Europe increased about 100%, from 9 million lines to 18 million lines, mainly through the use of DSL. Actually at least 4 EU Member States have a higher penetration than the U.S. (Netherlands, Sweden, Belgium and Denmark), although still far behind Korea or Taiwan.

Arturo Danesi, Responsible for Marketing at TELECOM ITALIA SPARKLE [www.telecomitalia.it/], Italy, one of the main sponsors of this year's Global Forum, gave a short introduction in the

New Business Models in a Competitive Environment.

Telecom Italia Sparkle was established in December 2002 to strengthen Telecom Italia's positioning in the international market of high growth/high value data and IP services. With revenues in the first 6 month of more than € 840 million and voice traffic volumes of more than 10.5 billion minutes, TI Sparkle actually has about 1000 employees worldwide. As a representative of the industry sector, Telecom Italia Sparkle appreciates the positive results of Internet and broadband penetration in Europe. Nevertheless the industrial players involved in such a process are actually facing major financial problems, due to the highly competitive situation of the telecom market and the difficulties in entering new markets. The current situation is that the industry shows slower revenue growth, falling prices and margins and a negative growth of the capital expenditure (capex reduction of 20% between 2000 and 2002). As a consequence industrial players pursue defensive strategies, trying to focus on their core business, exiting business lines and geographic markets.

Today's players have to manage a broad advanced IP & data services portfolio in order to ensure longer term revenues and margins growth to satisfy customer demands, in particular their domestic customers demand. Important success factors are marketing and customer care excellence, global coverage and direct access to content. Possible new business models concern the question whether current portfolio services and current assets are still representing the core business of the future or if diversification will be the key to competitiveness. Another approach is to decide between horizontal and vertical growth or organic or non-organic growth. A typical example for non-organic growth is the recent merge between Teleglobe, Canada, and IXTC, the biggest Voice over IP provider worldwide.

Another option is to enter new partnership models - a strategy pursued by Telecom Italia Sparkle, who recently announced a partnership with Deutsche Telekom T-Systems to jointly address the Voice & IP data market worldwide. Such commercial and visionary alliances represent a suitable mean to increase efficiency and to reduce costs. Voice over IP (VoIP) is an important driver and voice still represents a top line in the carriers and incumbents revenues – but there is a need to come up with more efficient operations, cost reductions,

and more flexibility in terms of time to the market or increased implementation speed. The objective of TI Sparkle is to remain and excel among the key players in the international Voice and IP & Data market, while increasing its presence in Africa and Middle East.
Umberto Paolucci, **Vice-President EMEA, MICROSOFT** [www.microsoft.com], one of the main sponsors of the Global Forum 2003, too, presented

Views on Communities through Partnerships.

Many of the questions raised before were subject of a forum, organised by Microsoft and the Italian Government in mid September 2003. The conclusion of this meeting was, that there is no silver bullet, but if there will be any solution, it will result from a stronger cooperation between the pubic and private sector. The industry's goal should be to make technology affordable, easier accessible to individuals and organisations, and above all to translate it into value, both, business and social value. From the business point of view, times are actually very exciting and promising because the progress in technological development allows to realise the longstanding dream of connection - connecting systems, information, devices, and finally people. The possibility of real conversion between computers and phones makes that mobile web services are becoming concrete and real. It allows to put together different features, which usually can be found on phones, easily into any PC application. This trend represents a concrete answer to the need of (mobile) team work, such as live-meetings with peoples attending remotely, and provides new levels of productivity for individuals, teams and organisations. Today, returns on those investments are so high that there are software tools amortising over a couple of weeks. This led to the concept of "costs of not doing things", which means that not the costs of investing but the costs of non-investing become high.

On the consumer's side, convergence between PC and television takes place and people capture and distribute more and more digital information. The combination of software and broadband in this increasing digital world creates a new level of digital empowerment and a new type of digitally empowered consumer. In this context it is important not only to promote technology and features but also to promote the value arising from these features and the risk of missing this value. The promotion of technology has to be accompanied by the promotion of e-Inclusion and the fight of the digital divide and discrimination.

Microsoft's business model heavily relies on partnerships. The ratio between Microsoft's revenues of a project successfully implemented on a partner's site and the revenues of the respective partner is 1:8. The general partners' configuration of a successful project follow a kind of pattern, which can be seen as a triangle between the public sector, the private sector and a NGO or voluntary organisation. As an example the company's activities is the framework of the European Year of People with Disabilities (EYPD) can be mentioned. Another component of Microsoft's activities in this area is "Partners in Learning", singed with many governments, concerning the value of software with regards to education. Furthermore Microsoft is engaged in the creation of "community technology learning centres" as local community centres for education. As a conclusion it can be stated that the ICT-industry has real opportunities and the mission to contribute to the achievement of internationally declared goals by using IT to realise potentials – potentials of individuals, organisations and countries.

Piero Corsini, Vice-President EMEA Public Sector IBM [http://www.ibm.com/], which is one of the main sponsors of the Global Forum 2003, summarized the concept of
"The On Demand Agenda".

There is a direct correlation between economic growth and investment in ICT. The comparison between the U.S., who invested much more in ICT than the EU, with the results of higher growth rates and efficiency gives a clear example (IT contribution of 52% and a productivity growth of 2,7% in the U.S. vs. an IT contribution of 40% and a productivity growth of 1% in the EU in the period of 1995-2002). It can be expected that the times of economic booms are over and that growth rates will only increase moderately. If this is right, the biggest challenge, for industries but also for countries, is to become more competitive than the competitors as there will not be enough market growth for everyone.

In order to face these realities, the vision of IBM is to become an "on-demand company". eBusiness on demand implicates more organisational flexibility, reducing costs as much as possible in a variable way and thus to cope with the dynamics of the market. Main attributes of eBusiness on demand are a) quick responsiveness to the marked demands, b) variability of costs in order to cope with the change of demand, c) resilient to whatever happened and d) the focus on the core business.

There is an increasing interrelation between ICT and business. Main characteristics of this ICT infrastructure are 1. Openness and standards in order to ensure connectivity and exchange between different devices. The governmental sector is actually the most pushing sector in this area; 2. Integration of platforms and services. This where governments actually struggle more than anyone else, because governments are vertically organized, while services are horizontally organized; 3. Virtual, meaning the employment of grid technologies for a more efficient use of existing systems; 4. Autonomy capabilities of complex systems in order to enable the system to self-repair.

IBM completely reengineered its internal processes, incl. the supply chain, what led to cost savings of 6 billion U.S.$ in the last 5 years. Becoming on-demand means moving this internal processes to the suppliers and customers and outsourcing those businesses which are not considered as core business – a vision, IBM puts into practice.

"On-demand" is also relevant for governments. Governments have to completely change the way they deliver services in order to save costs, to become more effective in the deliverance of services to their citizens and the private sector, and shall apply the above mentioned approaches, i.e. a horizontal organisation, deployment of an adequate infrastructure, and the development of a customer centric culture. Business and ICT are becoming more and more interrelated and talking about business, economies and governments moving towards e-Government, finally means talking about the competitiveness of an industry, company or a country versus another.

Shigeki Suzuki, Director of the International Economic Affairs Division Telecommunications Bureau at the Japanese Ministry of Public Management, Home Affairs, Posts & Telecommunications (MPHPT) [www.soumu.go.jp/english/index.html], presented

The Paradigm Shift – Towards Broadband and the IP Age.

The Japanese Telecom Market was liberalized in 1985. Against all expectation that ISDN will get ahead of the traditional telephone, mobile phones exceeds the number of fixed line subscribers in 2000. In September 2003 the number of subscribers of cellular phones (excl. PHS) in Japan was 78.6 million; thereof 84% mobile Internet users (66.3 million); thereof

40% users with mobile phones equipped with cameras (37.4 million); thereof 14% users of the IMT-2000 (11.3 million).

Japan has the highest number of DSL subscribers in the world and was the first country that introduced FTTH. This is mainly the result of the e-Japan Strategy, launched by the Japanese Government to foster broadband penetration. This ICT-strategy essentially based on the promortion of competition in the market, the generation of demand from the government's side via e-Government and other "e-"-Services, and the creation of a favourable environment for the business sector. Due to Japan's promotion of pro-competitive policies, Japan became the most competitive market in the world. Contrary to other countries, the incumbent operator (NTT East and West) has a market share of only about 37%, the remaining 63% are taken by competitive operators and service providers - the biggest shareholders of this market are newcomers. Concerning prices for broadband, Japan (followed by Korea) is the cheapest country in the world (price per 100 kbps: Japan 0,1$ – Korea 0,3$ – U.S. 3,5$).

Newcomers increasingly use IP-networks and thus bypass the traditional public switched networks. Many companies started their own IP-telephony services, e.g., allowing the customer for a very small lump sum he/she pays additionally to the ISP services to make free of charge calls between subscribers of the same carrier or among the affiliated carriers. Traffic over subscriber lines in Japan is declining after peaking in 2000 due to the development of broadband and IP telephony and the International Telecommunication Union forecasts international IP telephony traffic to rise up to 40% of all international traffic by 2004. The trend towards IP networks led to significant market changes concerning fees, access, services (integration of voice, data, image and video), speed and volume of the transferred data, and a diversity of connection combinations (wire and wireless).

Facing competitive markets and falling prices, the private sector should adopt new business models, such as vertical integration of infrastructure, communication services, application and contents, as well as convergence and integration of services. Consequently, governments should think about the incentives for the investment of advenced network , new competitive regulations, and the convergence and/or rebuilding of regulatory frameworks.

Bernard Mathieu, Head of Radiocommunications Programs at the Directorate for Programs and Industrial Policy of the FRENCH CENTRE NATIONAL D'ETUDES SPATIALES (CNES) [www.cnes.fr/], one of the main sponsors of this year's Global Forum, focussed on

Bridging the Digital Divide - The Space Contribution.

While terrestrial access technologies are subject to geographical restrictions, satellite technology is able to offer broadband access in rural or low density population areas, where the installation of terrestrial solutions would be too expensive, or in less favoured regions. The main advantages of satellites are a very large and simultaneous coverage, the same quality of service offered to any user, and the capability to develop very rapidly, with limited infrastructure, a solution to offer broadband access everywhere.

According to a study of the European Space Agency, there are three kinds of technologies being able to bridge the digital divide: 3G technologies, which are not deployed yet and have limited bandwidth; Satellites, but prices are still dissuasive for residential users and SMEs, and WLANs, which have to be connected to the Internet backbone via another technology.

The deployment of satellites took place in two steps: Within the first step, satellites are used in unidirectional solutions (or one way) pushing in an asymmetric way the broadband services with a terrestrial return link (e.g., ISDN). These solutions achieved a high level of maturity and many services have been developed. This unidirectional use of satellites also represents an opportunity for convergence between IP and TV. The second step refers to bi-directional solutions. These two-way use of satellites is becoming reality very rapidly and is mature from the technical point of view. Several ISP providers, such as Amariska and Satlynx, are already using satellite technologies but costs remain the main problem as they are still high and affordable only for professionals. A shared use of satellite access and mutualisation of usages. e.g., public and private, could be a mean to reduce costs.

Due to the fact, that broadband satellite access can be easily and seamlessly linked to terrestrial access networks technologies such as Wi-Fi, PLC, LMDS, Fibre etc., concepts for providing access everywhere can be put into practice easily. Such an approach has been demonstrated by CNES within the "Connected Village"-concept, which will be presented in December on the World Summit on the Information Society in Geneva.

Satellite solutions have reached a technical and operational maturity level and represent an alternative solution to reduce the digital divide worldwide. To overcome cost barriers, a set of national and European actions and initiatives, have been undertaken which will probably be part of the White Paper on the Future Space Policy of the European Commission.

Nasr Hajji, **Moroccan Congressman and Former Secretary of State, Posts, Telecommunications & Information Technologies in Morocco**, set out

The Moroccan Way Towards the Information Society.

Valuable information is one of the determining elements of our today's Information Society and the question whether the 21st century will be a world of digital divide or a world of growth and information for all should be among the main questions to be addressed by the World Summit on the Information Society on 8 – 10 December in Geneva and in Tunis in 2005. One of the failures of recent developments like UMTS may have been the lack of valuable content and in this context the disregard of user needs.

Once a technology is mature and working, the demand from the user side is the determining factor of its economical success. The launch of GSM in Morocco in 1994 provides a good example: Within the period of 1994 - 1998 only 150.000 persons subscribed to this service, between 1998-2002 the number of GSM subscribers increased to 7million. That the number of subscribers raised from 1% to 25% of the population was due to the fact that at this time it was possible to provide a financially affordable service corresponding to the users' needs.

From 23 - 28 October, 2002, the ITU Plenipotentiary Conference took place in Marrakech, Morocco, and 2000 delegates from more than 150 countries attended the meeting. As a result, a forum assembling ministers, private sector representatives and NGOs has been established in order to develop a road map to the Information Society.

Economic growth is led by the marked forces but the public sector has an important role to play. Especially in developing countries, the government has to intervene in terms of regulation and the provision of national development strategies, while at the same time stimulating SMEs and fostering social cohesion and solidarity to counteract the digital divide. As public investment is indispensable to smooth the way to an Information Society for all,

Morocco has set up two funds, financed by the revenues of telecom operators: One for education and research (1% of the operator's revenues), a second one for universal services (4% of the operator's revenues).
Alberto Tripi, President of Federcomin [www.federcomin.it], presented

The ICT-Entrepreneurs Community in Italy.

In a global economy where the U.S. has taken back the leadership showing positive signs of growth (+ 7,2% GPD in the third quarter of 2003). The last forecast of the EITO (European Information Technology Observatory) shows that for the year 2003 the estimated growth of the European ICT-market is limited to 1,0% (this is the result of -0,7% for the IT-sector and +2,6% for telecommunications). Among others, this was due to difficulties with the start of UMTS, the postponed expenses in the computer sector, the intense competition of the voice services within the mobile telephony, the slow process of SMEs' investments in ICT, and the expenses dedicated to security which growth is not significant as expected. The forecast for 2004 are more optimistic: +2,2 in the IT sector, +3,8 in the Telecommunication sector.

Those dynamics increase the interdependencies between the IT and the Telecommunication world. Networks, systems, applications and solutions are converging in a way which change the traditional barriers of those markets. Technological innovation is a structural priority in order to generate development and competition. New technologies are not only enriching the quality of the national patrimony but are also creating an increased value in the productive process. Each highly technological job creates 4 others.

The Digital Innovation Plan developed by Federcomin, in collaboration with Confindustria and the ANIE Federation and presented by the Italian government in July, aims at boosting both, employment and economic growth. The Digital Innovation Plan focuses on SMEs, families and public administrations, but 90% of the total investments should come from the private sector. The role of the government is to encourage these investments through incentives (€ 300 million/ year in the next four years). There is a need for a framing law concerning digital innovation, that should clear up the numerous existing laws, simplify the procedures and fix the annual programming instruments. This should be achieved in furtherance of the federal reform of the Italian state.

Industrial and digital policy share common objectives. Innovation is a structural factor of the economy that should generate development, employment and modernity. The Federation of the ICT organisations is optimistic regarding those objectives, i.e., considering 2004 as the "year of Innovation".

DAY 1 – MORNING – PARALLEL SESSION

Infrastructures & Services: Strategies for Success

The sessions' main focus was broadband and 3G, referring to the topics of global or selective investments for network service providers, the promise of diverse technologies and the combination of models and technologies.

Executive Summary
by

Randy Yaloz
Attorney at Law - Member of the Paris, New York and New Jersey Bars,
Euro Legal Counsel Group

The session highlighted several important issues, including broadband and broadband services; satellite interactive broadband and its present and future role; mobile phone internet in Japan; an incumbent infrastructure provider's position on entering into the "Broadband Era"; a leading Italian operator's experience in the triple play arena; infrastructure development in Italy; and broadband infrastructure and service policy and strategy of an Italian operator. The session also stressed the importance of a developing coherent broadband strategies, taking into account: universal service, rate regulation and the disparities between the industrialized and developing nations. The various actors pointed out the need to implement a hybrid approach using different infrastructures to adapt to the particularities of a given market whether it be more appropriate to use cable and satellite infrastructure.

Although advantageous from a technological viewpoint, satellite technology still appears costly for greater widespread use; however, it has been explained that if a threshold of economies of scale is met, equipment for private use can be brought down to 300 Euros and between 800 and 1500 Euros for the business sector. It should be noted that service fees are similar to those for ADSL.

An important emphasis was given on the government's need to use broadband networks for its services and, thus, encourage broadband infrastructure and service development.

Although a success with one of the highest penetration rates in the industrialized world, the Japanese experience in mobile internet service market appears to show that these figures are largely attributable to the increase of private users for their personal needs: photos, games, movies and the like. There seems to be a lack of business applications and sufficient revenue basis for mobile internet services.

Once again, the exchange of opinions and viewpoints brought to the forefront the recurrent issue of regulation in this sector with the large incumbent operators favouring a more "hands off" approach. The presentations by the principal Italian actors in the broadband market showed how a diversified approach could be successful and profitable. To conclude, it is important to stress that most broadband investment is made in the industrialized nations,

thus further enlarging the gap with the less industrialized countries. This phenomena will only create additional economical, cultural and political tensions in the future between these parts of the world.

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As **president** of the session, **Roberto Campitelli, Chairman of the Board of HUGHES NETWORK SYSTEMS Europe**, [www.hns.com/], - one of the main sponsors of the Global Forum 2003 – was responsible for preparing the session's outline and initiating a fruitful exchange between the panellists during the preparatory phase of the Global Forum. He opened the panel by posing the question

Which Strategies & Services?

Broadband is no longer a luxury but a (worldwide) need and a way to save money, and among others, to provide better education and better health services. Broadband can actually and positively change our economies and lifestyles. E.g., Internet is largely under-utilised without broadband, millions of $ are spent today in travels that in most cases could be avoided, better and cheaper education could reach everybody, large amount of information could be immediately available, if reachable in a decent time, and hospitals might exchange video, radiographs & other info in real time for consultation & mutual support.

This need of broadband is common everywhere, not only in the developed world. Hughes Network Systems recently had three problems to solve in Africa: Hospitals in the middle of remote regions, with a civil war going on, without proper broadband communications links (no real time consulting, no possibility to send radiographs & other data to major centres for consultation, no professional updating, and not even updated lists of drugs, etc.), local radio re-broadcasting in remote sites, also with addition of local news (radios in local language are just a few in Africa, most of local people do not speak, for example, English or French or Portuguese or Swahili), and Internet Access & Voice over IP (Internet today is the cheapest way of communicating with their dears for the immigrants in Europe. They cannot afford usual telecom tariffs). The solution was to install a small, affordable two way satellite terminal in a "star" network. Today this network operates about 300 broadband satellite terminals, connecting villages in remote areas, local hospitals, local radios, including broadband Internet access (with voice) for residents.

But there is still a gap between computers and communications. Computers are much more advanced than communications and even what is actually called broadband in Europe is not enough. There are a lot of technologies, each of them with pros and cons, but only a strategy assuming a combination of all those technologies, to be adopted each one where better suited, can supply broadband to all.

The session's moderator, **Randy Yaloz**, **Attorney at Law and Member of the Paris, New York and New Jersey Bars, Euro Legal Counsel Group**, France, introduced the topic of the session by alluding some actual market strategies to finance infrastructure and services: Infrastructure is very costly and research and development is very expensive. Thus, an approach combining vertical and horizontal layers of the market, whether for services, developments or the business sector, is needed. At the end of the Nineties, European governments and the U.S. private sector largely promoted the development of infrastructure, but today the public sector is lacking funding and private companies in the U.S. are facing various financial problems. As a result incumbents in Europe and the private sector in the U.S. have infrastructure which they can no longer afford. Solely companies who invested in

services have a higher margin and are able to invest in this infrastructure. Consequently there is a transformation of the market place where the service providers are taking over infrastructure, i.e. they invest in those companies who initially deployed the infrastructure or take them over.

As the first speaker of the panel, **Christine Leurquin, Senior Manager for European Programs at the Société Européenne de Satellites** (SES-GLOBAL), Belgium presented her long-time experience in

Satellite Interactive Broadband Today in Europe: Reality and/or Fiction?

SES-GLOBAL, the world's leading satellite operator by revenues, EBITDA and size of fleet, was born out of the combination of SES ASTRA, Europe's number one DTH broadcast satellite system in Europe serving 92 million households in 30 European countries, and SES AMERICOM, which has a leading position in U.S. cable head-end broadcasting serving. SES-GLOBAL recently created the company Satlynx with the objective to deliver 2-way services via satellite. As far as upstream revenues are concerned, the satellite operation industry generated € 2.3 billion in 2002 in Europe, and € 6.9 billion at a global level. The satellite operation industry is a key enabler of value creation in many other industry segments and the estimate for worldwide revenues from satellite manufacturing, ground equipment manufacturing, and satellite launch services in 2002 is € 37 billion.

Satellites can be a key to bridge the digital divide, which also exists Europe: Combining DSL and cable roll-out plans, by 2006, more than 21 million European households will still not have access to standard wireline broadband options. In the longer term (to 2012), 15 million European households will continue to be denied access to wireline broadband, which corresponds to 9.5% of the total household population. The competitive positioning of satellites is that it can solve the terrestrial bottleneck by offering high-speed and the last-mile availability, ADSL-like functionality with an added value, and open standards.

At the EU level, various initiatives and actions are actually going on, e.g., the White Paper on the future of space policy, e-Europe 2005, or the decision to earmark substantial funds from Structural Funds for technology-neutral development of broadband infrastructures. As many households in Europe may not be served by terrestrial technologies soon and as satellite infrastructure is often the more cost-effective and readily available solution in remote areas, the question if this technology-neutral objective effective in practice is raised by the satellite operators.

Satellite interactive broadband is already a reality in Europe for SMEs and corporate entities. Various network and service providers deliver good quality service (Equipment prices: between € 800 and € 1500. Equipment services: 120 €/month for an ADSL-like service). Satellite interactive broadband could become reality for the end-customer, under the condition that there will be a support from the public sector, that the demand can be aggregated and economies of scale over all regions realizes (orders in quantities, drop of terminal prices about € 300) and a service fee equivalent to ADSL-like services.

Pr. Shigehiko Naoe, Professor of Information Policy at the Chuo University, Japan, gave an insight in the history of

Mobile Internet in Japan.

With about 60% of the market share, NTT DoCoMo is the leader in the Japanese mobile business; KDDI and Vodafone share the remaining 40% of the market. In September 2003 Japan had about 80 million mobile phone subscribers; more than 80% of these subscribers are mobile Internet users. 3G is an emerging but still very small market, while UMTS has not been a great success until now. Mobile phones with cameras become very popular and represent a promising market in Japan.

The development of the Japanese mobile market is characterized by the following three milestones: In 1996 Vodafone launched the low-price SMS-service. This service was extremely appreciated by young people and former pagers' customers moved to mobile phones. In 1999 DoCoMo launched the new application i-mode. Within 2 month 2.5 million new customers subscribed to i-mode services, however many customers felt disappointed due to missing content services. Indeed, i-mode was not conceived for youngsters but for business customers, who at the end were not able to use it. NTT DeCoMo then tried to foster the content service side and more than 300 content applications have been developed. Only few, such as music downloads for ringing tones and character downloads (pictures on the display), have been a success – especially within the younger population. In 2000 Vodafone finally successfully introduced the picture phones (mobile phones with cameras) on the Japanese market.

Revenues of such kind of mobile Internet services in Japan amount to only 20-26% of the total revenues, however the traffic is about 50%. Voice telephony still constitutes the most important part of the revenues (80%) from mobile phones. One of the main barriers of the development of mobile Internet services on mobile phones is their incremental costs, which are still very high.

Kathryn Brown, Senior Vice-President of Public Policy Development & International Government Relations at VERIZON, [www22.verizon.com], one of the main sponsors of the Global Forum 2003, presented

The U.S. Developments in Entering the Broadband Era.

Verizon is the third largest long distance carrier in the U.S., a local service provider in 33 states and the largest wireless provider. Within the last 10 years the U.S. marked changed from a bifurcated market, that was a long distance and local market, to one where both, voice and data, have become competitive with many different competitors. Phone competition has picked up considerably and there has been a real explosion in wireless communication. The minutes of use of the wireline networks are moving progressively to the wireless networks and traditional telephone revenues are declining while wireless revenues are increasing. On the broadband networks' side, the applications themselves are competing with traditional wireline voice telephony. The U.S. consumer is using more emails and youngsters are increasingly using text, e.g., instant messaging or chat, instead of voice to communicate. Broadband penetration in the U.S. is increasing; here the cable modem continues to dominate market share but DSL is catching up.

New business relationships are developing between the wireline and the wireless broadband providers, service providers, ISPs and the content community. The current usage trends are away from circuit switched voice and towards services that are closer to the customer -and enabled by a broadband, IP platform. The trend for consumers is away from wireline use toward wireless/portable use and distance has become irrelevant to pricing. There are competing networks and competing platforms riding those networks. In 2003, we have a

network of networks – each performing functions that bring value. The challenge is to maintain the existing networks while investing/migrating to the new networks.

The biggest threat to the existing LEC networks is "managed competition" which places below cost price controls on both wholesale and retail offerings and the biggest impediment to building new networks is old regulatory rules that result in a lack of parity among competitive platforms. The challenge for telecom and information policy makers is how to open markets without imposing government requirements on them? There is a need to maintain neutrality with respect to platforms, technology, market structure and interaction among firms. Requirements from the operators' point of view are that all broadband networks should be allowed to be developed, deployed and operated in an unregulated space and legacy telephony regulation should not be imposed on broadband networks, the applications that run over them or on content. An international "hands-off broadband" policy should prevent taxes, regulation, franchise fees or terms and conditions of service on any broadband network and service. From the demand side, governments at all levels should have a robust strategy for the deployment of broadband networks for government services and internal requirements; there should be no new taxes on new networks and a spectrum policy should allow for secondary trading and unlicensed spectrum with strict interference limitations.

Alberto Trondoli, Chief Operating Officer of FASTWEB, Italy, [www.fastweb.it/] - as one of the main sponsors of the Global Forum 2003 – raised the question of

How to Position a Telecom Company in the Triple Play Arena?

The Italian market is characterized by the absence of a cable TV infrastructure, a high density of multi-dwelling units and few facility-based competitors on the business market. In this situation, FastWeb, created in 1999, has deployed an innovative technology solution, based on a unique IP-infrastructure for the provision of broadband triple-play services (voice, Internet connectivity, data transmission and video services) to all customer segments over a dense fibre network. Focussing on service innovation and differentiation, FastWeb became the only real alternative to the Italian incumbent in the field of fixed broadband services.

The approach chosen by FastWeb is to have a unique IP-based platform for all types of services. This platform can be either supported by a fibre or a DSL infrastructure. The FastWeb network actually reaches over 2.8 million potential customers (1.4 million with fibre and 1.4 million with DSL access). Over this physical infrastructure services are delivered up to 10 Mb/s to residential costumers and up to 100 Mb/s and more to business and corporate customers. Since August 2003, DSL customers can access all video services available to fibre customers, for instance the FastWeb TV, which is a unified interface for content in all formats (terrestrial broadcast, satellite broadcast, pay-TV/pay-per-View and Video-on-Demand).

FastWeb obtained a higher percentage of Italian government allocated broadband incentives than all the other alternative carriers together, coming in just behind the incumbent, and revenues rise to € 108 million, up € 54 million year-on-year and up € 33 million sequentially. FastWeb is the largest fixed broadband competitor of the Italian incumbent in a favourable market and regulatory environment. FastWeb is based on a completely different business model, technology and economics, allowing higher revenues and lower costs. Its unique service offer is actually unmatched by competitors and welcomed enthusiastically by the market (>30% penetration in selected areas and >10% overall).

Francesco Chirichigno, President of the Italian Executive Committee for Broadband at the Italian Ministry of Communication and representing the Hon. Maurizio Gasparri, Italian Minister of Communication, highlighted the

Infrastructure Development in Italy.

A world of ICT without research is not sustainable. Investing in ICT has positive effects on the countries' growths but also on the companies' productivity. The goal of the Italian Executive Committee for Broadband is not only to foster innovation but especially to develop a real research. Given that a huge number of Italian SMEs is not able to make sufficient investments, the Committee is trying to assemble SMEs and to act as a driving belt towards scientific research in order to facilitate the use of research by companies.

The Italian government is currently working on quality standards in order to fund not only a pricing-driven competition but a also a quality-driven competition. The government is now presenting a project concerning quality, indicating the guidelines which will enable enterprises and suppliers to initiate a real quality-based research.

In order to cope with the existing digital divide, Italy is about to create two companies: one supporting the setting up of infrastructures and the other one to enhance innovation towards services. Italy does not intend neither to go back to a public investment policy nor to move towards an interventionist state. Therefore it is necessary to provide backbone infrastructures to cities and companies suffering from the digital divide. This will be done by promoting already existing infrastructures, in order to reduce the digital divide and to generate new opportunities. The project aims at creating a virtual wealth spiral, i.e., by inciting investments where there are actually none.

Stefan Nocentini, Manager Network Engineering at Telecom Italia Wireline, [www.telecomitalia.it], Italy, presented the challenges of

Infrastructure & Services Strategies: Broadband Directions Forward.

The first challenge is to pass from the telephone to flexible and intelligent devices, such as PDA, PC and laptops, set-top boxes etc., and to renew the telephone in the fixed network. The second challenge concerns the renewal and of the network by passing from a voice network to a convergent broadband network architecture, including aspects of connectivity, applications (voice as one application) and service control. The third challenge refers to the subdivision of the market in a mass market and a business market. New value adding broadband services have to be developed for the mass market in order to increase growth rates in terms of output and the number of customers. The forth challenge concerns the broadening of the potential market. Until now the large market of Internet surfers represent the main target group, however this market can be extended by taking into account broadband entertaining services, like Pay TV and video or the target group of "blockbuster boys" and console gamers. The fifth challenge is the challenge to create new value added services for the business market, such as B2C and B2B applications, basic and enhanced web services and broadband access. The sixth challenge refers to the use of different technologies combined in a broadband connectivity architecture: copper with DSL, fibre and radio. The seventh challenge concerns the geographical coverage and the reduction of the digital divide. (The customer coverage of Telecom Italia is actually 90% for ADSL with 4MB/s

downstream due to the short length of the copper net). The eighth challenge concerns the renewal of the network architecture, in order to be able to use the same network for fixed and mobile Internet. The ninth challenge is related to content: There is a need to deliver higher quality with reduced bandwidth. This can be realised by using MPEG 4.

DAY 1 – MORNING – PARALLEL SESSION

Challenges for Software & Content Providers

Main issues addressed in this session were emerging approaches of the industry and service providers, open source as an opportunity or threat, middleware as a strategic issue and the development of new content and software.

Executive Summary
by

Dr. Hellmuth Broda
Chief Technology Officer EMEA of Sun Microsystems Inc.

The session addressed a kaleidoscope of different subjects around software and content and reviewed the session's topic from very different angles.

The discussion started with open systems versus OSS. Open systems were compared to "lego bricks", which the user just buys and plugs in. There is no need for source code. Another issue was free software, whereas "free" does not mean free of charge but rather "free from …". OSS was considered as an opportunity - not a threat - deserving commitment. Even if OSS is available for free, the use of OSS causes investments. The participants stressed that politicians and businesses should be convinced that OSS is economical. More and more organisations, but also local authorities, decide in favour of OSS. OSS offers an opportunity for customizing local services (localization) but at the same time there is a strong need to exchange information about who is doing what and where in OSS in order to not re-invent wheels. There was a consensus among the panellists regarding the software trends, OSS vs. open systems vs. proprietary software, that there is room for all approaches but one has to select carefully.

Another issue discussed during the session was services architectures for the mobile world. Special emphasis was put on the fact that the future of wireless services depends on the availability of middleware that allows for swift service deployment. As time to the market becomes a crucial factor of competition, the traditional process of a company having an idea of what they can do with technologies or what kind of service they will offer and then taking years to develop it are passed. Agent technologies might be a solution for faster developments.

Mobile perspective and digital rights management is important and it seems that the MMS-market offers real business opportunities.

Another issue of the panel was identity management. The panellists stressed, that identity related information and service management is key to all network based services and that the key areas of trust and privacy. i.e., policy, privacy, business and adequate technologies, have to be managed professionally on a global level.

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The session was **chaired** and moderated by **Dr. Hellmuth Broda, Chief Technology Officer EMEA of Sun Microsystems Inc.**, Switzerland, and member of the Sun Vision Council. Dr. Hellmuth Broda introduced the topic of the session by giving a definition of Open Systems and Open Source Software and a presentation of the Liberty Alliance Project.

Regarding a computing system consisting of hard- and software, open systems enable the easy integration of middleware to enhance and extend the system's capabilities. Open Source Software (OSS) allows the user to modify her/his system when it suits and at indeterminate frequency. The main characteristics of Open Systems are defined and published Application Programming Interfaces (API's), no diving down through several layers to access kernel functions directly, no undocumented features, no insider tips & tricks, exchangeable modules (integratability) and a stable system.

Open Source Software is a) open, i.e. meaning viewable at no charge, b) extensible, i.e. it can be modified by changing and/or adding features, and b) freely distributable. OSS is often referred to as "Free Software" which does not mean free of charge but rather free to be modified and adjusted and mainly available from more than only one supplier.

The Liberty Alliance Project defines an architecture for privacy and trust management, which is one of the biggest concerns for users and citizens. Privacy is not only a technical issue, it is mainly about managing the trust of users. Trust is the highest valued part of a business relationship and are key features to be taken into consideration by software and content providers.

Prof. Dr.-Ing. Sahin Albayrak, Head of the Distributed Artificial Intelligence (DAI) Laboratory, dealing with Artificial Intelligence and Agent Software, at the Technical University of Berlin, Germany, presented

Advanced Serviceware Frameworks for the Development and Deployment of 3G and Beyond 3G Services.

Mobile software evolves and changes rapidly, integrates very heterogeneous technologies and thus requires large scale investments. These constant investments require new sources of revenues for the operators and the major source of additional revenues is the development of services with an apparent benefit and value for the user. In order to achieve high user value, next generation mobile services must adapt to the user's current needs and must fulfill a series of requirements in terms of security, intelligent behaviour, and situation awareness. In fact users are ready to pay for this kind of services and the DAI Laboratory's supports mobile operators to meet the key challenge to develop, deploy and operate those value added services in and efficient and effective way, i.e. low cost production and efficient market distribution.

One promising approach is an open serviceware framework based on agent technology. Together with T-Mobile, the DAI-Laboratory developed a Personal Information Agent (PIA).

PIA is a technology which accompanies the user in his daily life by providing the right information at the right time. The services provided by PIA are able to adapt themselves to changes in user information needs and behaviour.

Furthermore, DAI-Laboratory set up a Beyond 3G Test-bed in co-operation with Deutsche Telekom, Cisco, Motorola, Sonusnetworks and Sun Microsystems. In close co-operation with Deutsche Telekom, the DAI-Labor developed a powerful Serviceware Framework based on agent technology. Currently the Serviceware Framework is being certified by German government for security features.

Dario Avalone, R&D Director of Engineering INGEGNERIA INFORMATICA [www.eng.it] – also one of the main sponsors of the Global Forum 2003 – presented

The BRICKS Project: Building Resources to Integrated Cultural Knowledge Services.

The BRICKS project, a European project realized within the 6th Framework Programme, will start in January 2004 and is coordinated by Engineering Ingegneria Informatica, Italy. As an Integrated Project, BRICKS gathers players from the technological and scientific world, cultural content providers, among those the Vatican, and European Ministries for Cultural Heritage. BRICKS aims at designing, developing and maintaining a services-oriented shared European Digital Memory. The main goal is to set up an open infrastructure for the interoperability of digital content and the aggregation of cultural services.

The technical aspects of BRICKS include information integration, content interoperability, collaborative systems, web services, and emergent semantics. European memory as a trans-border and trans-national heritage and a common European patrimony has to be shared by all European countries and shall be accessible for every European citizen. The project meets the challenge to build a European Digital Memory - a common platform to unify and preserve the access to all these cultural data within an open, distributed and safe environment.

The European Digital Memory will base on an open source architecture to share knowledge and content and will enable interoperability of content as well as of services. BRICKS foresees four main applications scenarios: the access to culture, the management of culture, the creation of culture and the design of digital texts. The project employs a service-oriented approach and relies on a distributed open infrastructure, in order to reduce the costs of development and deployment of new services. BRICKS consider global semantics as an evolutionary process, emerging from local interactions and agreements in order to overcome linguistic and ontological barriers and to create a shared knowledge space.

Desiree Miloshevic, Advisor for International Affairs and Policy Development at AFILIAS LIMITED, [www.nic.info/gateway/index_html], which is also one of the this year's main sponsors of the Global Forum, gave an insight in Afilias' experience as

.INFO gTLD Leader

.INFO is a new Top Level Domain registry which is growing rapidly and steadily. The use of open source essentially contributed to the phenomenal success of .info. The high usage of .info also creates new challenges, such as browser compatibility and email recognition. .info motivates content providers and software providers think in a different way about promoting their services and products. Meanwhile, this TLD has attracted a wide range of registrants,

among those countries, charities, businesses, individuals, or leisure industries, an helped online communities to expand by employing bloggers or directory services.

.info contributed to new developments, e.g., in terms of standards for faster DNS. It now takes less than two minutes globally from registration to resolution. Concerning Internationalised Domain Names, .info enables local characters sets in the domain name. This option was initially launched for the German umlauts ä, ö, ü (e.g., www.österreich.info).

At its very start, Afilias took the key managing decision to use OSS. This choice implicated more work but also more freedom for the company. It was a way for Afilias to decrease its costs enabling the company to offer more competitive services. Created in 2000, Afilias is a very young company that had to face strong competitors. The use of OSS was a key factor for the company's development and helped Afilias to catch up its late arrival on the market. Afilias has chosen to use OSS in order to move the decision-making process to inside the organization and to become independent from external software vendors and providers. OSS allows the user to rely less on the software vendor's schedules and priorities, but at the same time the user has to do more in-house development work.

Timo Skyttä, Head of the team working on Strategic Architecture at Nokia Mobile Software, presented the

The Liberty Alliance Project: Setting the Standard for Federated Network Identity.

The rise of electronic networks requires stronger identity verification and authorization. Today, identity fraud is the number one complaint made by users and worldwide monetary losses from identity theft keep on growing steadily (about U.S.$ 8.75 billion in 2002, are expected to triple to roughly U.S.$ 24 billion in 2003). Identity Management is a core issue affecting businesses, communities and industries which must ensure the security and privacy of the user.

Federated Network Identity is a way to authenticate, share and manage the identity of the user. The Liberty Alliance is a business alliance set up in September 2001 with the goal of establishing an open standard for Federated Identity Management. Liberty Alliance assembles a wide range of worldwide members: consumer-facing companies, technology vendors, policy and government organizations.

The Liberty Alliance aims at setting standards for Federated Network Identity as a means of making the life of the users and services providers easier and creating a trusted and secured environment. Federated Identity Management entails greater freedom for the user: instead of numerous log-ins and other identification processes, the portal of the Federated Identity Management Network authenticates the user automatically. All the user's favourite applications, services and settings are already registered and recognised by the portal.

Hervé Rannou as **President of Items International** [www.items-int.com], France, introduced

The New Paradigm in Software.

Software represents an major part of the industrial sector. Since 2000, the ICT-sector is the sector with the highest R&D investments. Software is a growing market as much as for free as for and licensed software. Before 2000, many European countries thought that the game was over and that it was too late to investment in Software R&D. OSS to some extend

changed the rules, because all traditional software models have to be reconsidered. Today's players seek greater independence, interoperability, performance, security and maintenance. Policy makers consider OSS a way to create wealth, to boost economic growth, and to promote national and regional industries.

Just like the Internet, OSS has been adopted by research communities. Open Source is now implemented in Internet networks and used for nodes, servers and tools. OSS opened the way for more services on application servers and many leading IT-industries are already involved in Open Source.

Countries all over the world launched strategic initiatives to explore and exploit the opportunities coming along with OSS. Currently these initiatives focus either on the use of OSS in a country's defence sector (UK, Israel, USA with the MITRE Report), or on e-Administration or other government-related areas.

The emergence of OSS generates new models to explore regarding the combined use of Open Source, Proprietary Middleware and Operating Systems as well as dedicated applications and services.

Anna-Lisa Boni, **Manager of the European TeleCities Network**, [www.telecities.org/], one of the supporting sponsors of the Global Forum 2003, outlined

Local/Regional Governments and Open Source Software.

The TeleCities Network provides a platform of over 100 local authorities from 20 different European countries sharing experience and developing practical solutions to achieve an Information Society for all, through the dialog between local communities, business and scientific partners. The Network proposes activities to its members based on the priorities that they define.

The use of OSS is a strategic issue that has been raised by the members of TeleCities a few years ago. There are two major explanations for this: Firstly the Lisbon Strategy's major goal to achieve a successful European knowledge-based economy, and secondly that fact that this knowledge economy is public sector driven (the public sector is the largest employer in the knowledge economy).

In Europe, the richer administrations have created sort of IT "ghettos" meanwhile the poorer administrations were left apart of the IT developments. There was no cohesive cooperation between the most advantaged administrations and their less favoured neighbouring local governments. OSS could help enhancing such processes of collaboration between advanced ICT areas and disadvantaged local governments. The main benefit of using OSS for local and regional governments is the possibility to offer customized services to their citizens.

There is still a lack of understanding between local governments and industries, businesses and developers. Open Source offers a more flexible solution in customizing services provided by local governments. At the same time businesses do not believe the potential demand for customized services is worth increasing the R&D investments in OSS applied to the customization of services. Therefore, closer links have to be established between OSS developers and government agencies. Finally, there is a need to think about ways on how local policies can foster the development of local SMEs to support these applications.

Vincent Roger, **General Manager of mobibase**, France, presented

The Revolution Through Image Content : 4 Questions - 4 Challenges

The mobile multimedia market has changed drastically by offering new services and new contents to the user and developing new handsets for new capacities and new usage. Five business drivers are revelatory of the image-based services' success: messaging (the SMS boom), personalisation (logos and ring tones download), imaging (digital image increasingly replaces paper), e-Pictures (e-Cards, e-Greetings...) and licensing (ring tones sampling songs or compositions are providing majors and artists with unexpected incomes from royalties). The forecasts concerning the development of MMS and related turnovers are very promising with regards to the potential success of image-based services. By the year 2004, users are expected to spend 1€ per month on MMS sending and 2€ per month in 2006.

The user can access images on his mobile phone either by using mobile services through a mobile handset, Web services via a PC, or Audiotex services via a telephone number. Pictures on a mobile phone can be used as wallpapers, post cards, screensavers, animated logos, news, videos, video ring tones …

There are still challenges to overcome when referring to the mobile multimedia market. It is necessary to license the images offered to the user. The images offered have to be processed and this represents a challenge from the technical point of view. The emergence of image-based services also raises the issue of Digital Rights Management. And, as imaged-based services are very innovative, they require an innovative marketing too.

OPENING OF THE AFTERNOON SESSIONS

DAY 1 – AFTERNOON – PLENARY SESSION

The moderator, **Sébastien Lévy, Vice-President Global Forum 2003** and Associate Partner of Items International, France, introduced the first speaker of this afternoon plenary session, which mainly focussed on the Digital Divide.

Guy-Olivier Segond, **Special Ambassador for the World Summit on the Information Society (WSIS)** [www.itu.int/wsis/], Switzerland, presented

The World Summit on the Information Society – Background, Organizations and Goals.

At first, the Information Society and economic globalisation were expected to lead to a new distribution of work, jobs and wealth between North and South, which would bring economic progress, assure the further spread of democracy and promote social development. Today's reality is that 91% of the Internet users are belonging to the part of the world where 19% of the population lives. This means that about 80% of the population does not have access to Internet and knowledge.

In December 2003, the UN World Summit on the Information Society will take place in Geneva. The WISIS is the World Assembly of Heads of States and Heads of Governments and will include a series of high-level roundtables, complemented by 150 Summit events on

different subjects. These events will serve as a platform for a dialogue between Heads of States and Government, leaders from the private sector, the civil society and international organizations. One of the main outcomes of the Summit will be the adoption of a visionary political Declaration of Principles and a comprehensive Action Plan. The four main topics of the WSIS concern the technology dimension of the Information Society, its social dimension, its policy and legal environment and finally the Millennium Development Goals on policies and strategies, financing the digital solidarity, international cooperation, role of international organizations, role of local authorities, etc.

The question of the CyberSpace Treaty is one of the controversial issues of the WSIS. Today, different governments ask for an international treaty laying down the basic rules to govern CyberSpace and to deal with secrecy of communications, privacy, network security, intellectual property, cybercrime, electronic signature, etc. A further controversial question concerns the creation of a Digital Solidarity Fund. Despite all the commitments and all the efforts undertaken, national governments have never managed to achieve the 0.7% of GDP threshold for development aid in national budgets. Thus, South Africa, Brazil and India proposed a global contribution levied at source by computer and telephone manufacturers on each unit manufactured. This contribution would be paid into a so-called Digital Solidarity Fund, designated to finance actions for reducing the Digital Divide and the Contents Gap. In this context, the Summit should also take a look at the achievements of some countries of the South: For instance, India has in pre-production a simple computer, called "Simputer", costing less than U.S.$ 200, and Brazil is testing a "popular computer", which is to the PC what low-cost airlines are to conventional airlines.

The World Summit on the Information Society has high ambitions - but ones which tie in with the overall United Nations strategy for the beginning of the 21st century, and in particular the Millennium Declaration goals.

Timothy C. Finton, **Senior Counselor for International Communications and Information Policy at the U.S. Department of State** [www.state.gov/e/eb/cip/], gave

The U.S. Perspective on the World Summit on the Information Society (WSIS).

The WSIS is considered as way to reduce the digital divide. The making of freedom possible and drafting an ICT-for-development agenda at the WSIS depends on three fundamental building blocks: Firstly, countries should focus on creating a domestic policy environment that encourages privatisation, competition, and liberalization, and that protects intellectual property. Private investment is by far the largest source of funds for the development, deployment, maintenance, and modernization of the world's communications and information networks and facilities. Public policies that do not actively invite such investment simply delay development. Secondly, it is critical to build human capacity. Users must have the ability to effectively use ICT tools. Without adequate education and training, infrastructure investments will yield little. Cultural diversity is an important element of this. Thirdly, users must be able to use ICT with confidence if the economic and social benefits of these technologies are to be achieved. One way to do this, is to develop and to explore Network security ICT tools and infrastructure.

Since its approval in 1998, the WSIS shifted from a purely ITU-event to a UN-hosted event with the ITU in a more supportive, logistical role. At the same time the WSIS shifted from a more technical conference, focusing on the improvement of telecom infrastructure in the developing world, to one today focusing on information flows and how digital bits become

information which then become knowledge. That change to a knowledge-based event is reflected in those planning to attend the Summit - from Heads of State and only their communications ministers to now including ministers of education, science, culture, and research and development. During this transformation, the WSIS shifted from a three-day Summit to more than a week of activities comprised of the Summit and other conferences and events, covering the full range of knowledge-based sectors, including, e.g., a CERN's 3-day meeting, a UNESCO high-level symposium, the InfoDev symposium, and many more.

Dr. Hisham El Sherif, **Chairman and CEO, IT Ventures/IT Investments**, Egypt, outlined

Connecting Nations: Challenges for Sustainable Strategies

The population of the Middle East is 300 million, the population of Africa is 700 million - half of these people are living on less than 1 U.S.$ per day. There is lot of work to be done in terms of “info-“structure, training and educating, digitising the archives of the developing world, and overcoming the bureaucracies existing in these countries. Its not enough to buy computers and infrastructure – these countries have to be made ready.

The world is drastically changing and dividing more and more - despite the efforts undertaken by many governments or organisations. The actual economic and political situation threw back a lot of things, among those basically issues like humanity or development. It may be necessary to make a step backwards to readjust things and to create an environment in which we can advocate what we are trying to advocate – a Global Information Society and an e-world.

The use of ICT is highly correlated with development when talking about nations, with businesses when talking about institutions, and with human development when talking individuals. It is time to focus on the bottom line and to ask ourselves where are we doing well, what are we doing well and were are we not doing well. The gap is widening and there are only few countries emerging from the developing world, most of them are falling behind. There is the need to rethink the paradigm which was advocated yesterday: Is a Global Information Society a reality in an ever-continuously changing world? Is “e-” in the e-world the right abbreviated letter? Maybe better to use “k-“ for knowledge, because without knowledge it is not possible to empower people or to create competitive organisations. The provision of knowledge has to focus on and has to be adapted to young people. Half of the world population is younger than 20 years. Businesses and organisations have to improve their knowledge management and nations have to invest in the knowledge and education of their young generation to create future political leaders, which are able to collaborate in a peaceful way.

Edith Cresson, Former Prime Minister and President of the “Second Chance School Foundation”, France, introduced

The School of the Second Chance.

Launched in 1998, there are now 50 “Schools of the 2nd Chance” existing in Europe, thereof 15 in France. The gap is increasing between those how know and those who don’t know - even in developed countries. 15-18% of the young people leaving school in Europe are not able to understand what they read and are living in a very restricted social circle. Especially children from disadvantaged families often have problems in school and finally leave school without any diploma. The aim of the schools of the 2nd chance is to give those people in the

age-bracket between 18-26 an education in the main subjects (language, mathematics, history, foreign language and computer skills). Most of these young people have tremendous difficulties in expressing themselves and the School of the 2nd Chance does not have to consider these youngsters only as someone who has to learn but also as a person to be helped to get developed.

The students are put in small groups of 10-15 persons for each level. There are two different levels and once a student has reached a certain level he/she will change the group. Learning has to be very much individualised. Each teacher is responsible for about 10-15 young people who can come to the responsible teacher whenever they want or whenever they need assistance in their daily life. And even if they left the school they can come back during almost 2 years to speak to the person who has been in charge of them. The schools maintain a close cooperation with companies, which are also members of the council of administration of these schools. During their 1-year schooling at the School of the 2nd Chance the students have to attend three training periods: the first one targets on familiarizing the students with a normal working day in a company; the third one targets on defining the area in which the young people can find a job afterwards. The results of the Schools of the 2nd Chance are very good: 65% of its students find a job after leaving the school.

Teaching methods at the School of the 2nd Chance are adapted to the special nature of its students: There is no direct judgment from the teachers in terms of the traditional assignment of marks. If a student works well he/she can reach a higher degree - the learning person can always progress but can never go backwards.

Maurizio Bruschi, **Representative of the Central Office for Informative & Automated Systems (UCSIA)**, an agency of the Italian Ministry of Interior [www.interno.it], presented

Innovate Harmonising Accessibility, Privacy and Security to Improve the Quality of Life.

Innovation policy in Italy is best illustrated by the following four examples:

An Electronic Identification Card will be distributed to every Italian citizen. It will provide each citizen with a digital identity allowing him/her to use local digital services in 56 cities. Within the current pilot phase of the project, more than 100 000 cards are already released and more than 2 000 000 Italians will be provided with Electronic Identification Card by the end of 2004.

Electronic voting is actually tested within the European e-Poll-project, which is co-funded by the EC and realised together with partners in France and Poland. e-Poll should also enable blind/ disabled persons to cast a vote electronically without any help. Within the second phase of the project, more then 180 000 citizens will be involved in real second generation e-voting (wireline and wireless) based on a secure and safe voting system. The system could be introduced all over Italy in 2009.

An Electronic Resident Permit (PSE) is tested within the framework of the actual ongoing Italian discussion to provide legal non-EU residents with full civil rights, including the right to vote. This project is anticipating EU directives.

An e-passport, containing microchips which allow to check fingerprints and a face-scan to verify if the photo on the passport corresponds to the passport-holder, is actually tested. At

the end of 2003 a real field test will be carried out to. The results will be presented during the next G8 Summit.

SESSION 3

DAY 1 – AFTERNOON – PARALLEL SESSION

International Regulatory Climate

The session focussed on the European directives transposition process, federal and local regulation in North America, Asian regulatory issues and emerging markets, as well as on the WTO Challenge in global trading.

Executive Summary
by

Andrew Lipman
Partner of Attorney at Law, Swidler Berlin Shereff Friedman, LLP

The session started with a reference to the Global Forum in Rome 1997 and the WTO. The main issue of this panel was to answer the question, if regulation is a positive or negative force, and if competition should be encouraged or not. However, there was not an unanimous view in these issues.

Looking at these questions from a historical perspective, the panellist agreed that regulation does play a positive role in terms of telecom. There was a consensus on the panel that competition is net positive.

The session brought out, that regulation is not a situation were “one-size-fits-all”, but it reflects different changes in culture, different degrees in telephone penetration, and in some instances even changes in geography and topography. It was stressed that small rural telecom companies have different needs and objectives than large urban countries. Telecommunications regulation in a state of flux and the market will even more be in a state of flux with the migration and the evolution from circuit switching to IP.

Common themes in the U.S. and in Europe exist in terms of some of the overall difficulties and in terms of regulation of IP. One of the common questions was: If IP is unregulated, to what extent does that mean circuit switching should be unregulated, too, or should be more regulation put on both.

Most of the panellists thought that there should be a push to increased deregulations, certainly for new entrance, but increasingly for incumbents. Competition develops and the incumbents themselves get into areas of competitive offerings. But it became also clear that regulation was beginning to provide net benefits by increasing penetration and lowering prices in countries such as China.

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As **chair** of the session, **Michel Huet, Senior Vice-President for International Public Affairs at FRANCE TELECOM** [www.france-telecom.com/], one of the main sponsors of the Global Forum 2003, was strongly involved in the preparation of this session in order to assure a coherent framework of the session's presentations and lively discussions between the panellists. Mr. Huet set up a number of very interesting strategic issues, formulated in a series of key questions: The EU New Regulatory Framework (NRF): Does it mean deregulation or more regulation? The intention is to stop regulation when the market shows that competition is working but is the high number of relevant market, the list of remedies, the process at National Regulatory Authority's level really going to deliver that? Are NRAs really going to roll back regulation? Will a decentralised process really deliver enough harmonisation throughout Europe? Is the NRF a good thing for new services? The intention is also not to regulate new services, but are NRAs going to micro-manage wholesale and retail broadband services? What is about 3G voice services or VoIP? What are the incentives for innovation and risk taking? Is service based competition sustainable or is infrastructure based competition more beneficial for consumers and the overall economy? Is the NRF a tool to regulate old services based on old technologies and by process always 3 years late? In order to promote innovative business models, the regulation should not hinder the promotion or valorisation of services and applications; innovative bundles should be authorised, neither should regulation prevent the creation of new viable business models, nor encourage unsustainable business models based on regulatory arbitrage or subsidised access. Is the NRF a worldwide model? Is it stable compared to the actual U.S. regulatory situation? Is it creating an environment enabling a fast roll out of broadband with real high speed connectivity as we can see in Korea and Japan? Is it the right regulatory framework for new accessing countries and developing countries?

The session's moderator, **Andrew Lipman, Partner of Attorney at Law, Swidler Berlin Shereff Friedman, LLP**, USA, [www.swidlaw.com], one of the supporting sponsors of the Global Forum, gave some opening observations by recalling the Global Forum 1997 which took also place in Rome. Its issue was the WTO Agreement, which later on passed to accelerate liberalization, permit foreign investment and adopt safeguards to ensure interconnection at reasonable terms and conditions. The Agreement has been a success from the perspective of the consumer in terms of greater choices and lower rates. From the perspective of the economy, it has been a success in-part and a failure in-part, characterized by large growth in telecommunications revenues, larger share of the economy and declining revenues of former monopolies. It has been probably a mix from the perspective of new entrants and investors seeing that hundreds of companies disappeared, hundreds of billions of dollars were lost and jobs vanished. Analysts have observed uneven regulation, some emerging grey markets like VoIP, an underestimated supply of international facilities and an exaggerated demand, competition has been established in industrialized countries and is being introduced in developing countries, switched networks are being replaced with IP-based networks. Some of the questions to be addressed by the panellists of this session are: What is the role of regulation and what is the consumer's role in these developments? What are the regulatory consequences?

Romano Righetti, Director of Public & Economic Affairs at TELECOM ITALIA [www.telecomitalia.it], one of the main sponsors of the Global Forum, outlined the

International Climate in the Telecommunications Sector.

The telecom market is actually facing four main trends, which are strictly related: The first one is innovation and in this regard access to content becomes a bottleneck and the new

regulatory challenge. The second one is related to the evolving regulation: Investors need a certain degree of predictability of the market and a certain level of freedom. Regulation can have a strong impact on the demand dynamics, both at the retail and wholesale levels. The third trend concerns competition and it will be important to distinguish fixed, mobile and broadband industry because the degree of competition is different in each of those markets. The forth main telecom-trend concerns the evolving investment climate. It is important to increase the investor's confidence after the "bubble".

The new wave of growth is related to the three main drivers "high-speed", "mobility" and "service and content". Until now the regulation of content has never been an issue. In this context two main challenges remain: Firstly, the creation of a friendly environment for new services and investments. Secondly, the shift towards a deregulated world. The NRF is a tool but it is important to apply it in a timely an proper manner.

Actually six main obstacles are delaying the migration to a deregulated environment and thus are hampering investments in the telecom sector: The Regulatory Authority is not fully exploiting the new agenda and continues to regulate according to the old framework. There is a risk of an extended and damaging transition period due to missing market analysis. There are discrepancies between the declarations to favour a facility-based approach and the policies and rules implemented following an access-based approach. At the European level there is a lack of clarity in the regulatory process and the role of the different bodies involved (ERG, CoCom etc.). Furthermore there is a risk that NRAs will regulate mobile markets (e.g. roaming) in an isolated way, reducing returns from 2G and so limiting financial resources to be invested in 3G and mobile data roll-out. The risk that pubic authorities will not address the digital divide in the right way by using Structural Funds to extend broadband availability in remote or in regions in which adequate infrastructure is already installed.

To foster investment it is necessary to have a predictable scenario and a light regulation in order to avoid a burden of obligations, and to maintain all competition safeguards.

Tom Marten, Director of Director of Regulatory Affairs EMEA, MCI, France, gave an insight in

The Future of Access.

Survivor of the WorldCom bankruptcy, MCI considers itself as a new entrant in different markets. The problem existing everywhere is access and as most operators, MCI, owning a high competitive global IP-network, has to buy the last kilometre of access to connect customers to their network from the incumbent or PTTs. This is not a competitive market, because there is generally only one incumbent where the last kilometre can be bought from. The U.S. market opened up earlier than other markets but Europe is catching up and strong decisions, e.g., in the UK and Netherlands, Spain and Italy, have resulted in substantial improvements (35% price reductions and/or improved provisioning times).

DSL bitstream is the future of access. Everything is going to IP and this is one of the major differences between the EU and U.S. It is wrong to think, Europe just has to look at the U.S., because they are ahead of Europe and what happens this year in the U.S. will happen tomorrow in Europe. The markets open in different manners and by different decisions. For instance, the U.S. is closing the doors on bitstream going foreword. There will be one incumbent and no competition. The reason for this is that bitstream is expensive in the U.S.: only the half of the U.S. copper pairs is suitable for DSL at a cheap price. (90% of the copper pairs in Europe are DSL capable).

Marie Guillory, **Vice-President for Legal and Industry Affairs at the National Telephone Cooperative Association (NTCA)**, USA, [www.ntca.org/KA/index.cfm], which is one of the supporting sponsors of the Global Forum 2003, summarised the challenge of

Preserving the Benefits of Universal Service in a Changing Regulatory Climate.

The members of the National Telephone Cooperative Association are 550 small telephone companies that serve in the rural (very high-cost and low-density) areas of the U.S., were big operators are not serving historically. Due to this very special area they are operating in, these small telephone companies have a different cost structure, have different goals and needs, and behave differently.

Contrary to other operators, regulation has been their friend: Pricing services at costs in rural areas of the U.S. is not possible if the objective is to provide ubiquitous services. Broadband does not make an exception to this: 70% of the customers of the NTCA members have access to broadband but the take rates are 7% for residentials and 10% for business customers. The reason is the cost. The remaining 30%, living in areas without any broadband infrastructure, will never going to get this infrastructure without some kind of subsidy mechanism like universal services or the continuation of a regulatory structure, like the rate-of-return regulation. The latter one was decisive for building out the infrastructure to offer ubiquitous services for telephone in rural areas. However, the future is not in telephone but in broadband and in order to maintain that future and to yield results in rural America, regulatory policies are needed which take into consideration that the consumers in these areas can not pay the services at costs.

Rural markets are different and national policies have to recognise this fact. Competition is not a substitute for universal service in rural areas, were clear and fair regulatory policies are needed to promote the public interest.

Brent M. Olson, **Deputy Chief of the Competition Policy Division**, Wireline Competition Bureau at the Federal Communications Commission (FCC), USA, [www.fcc.gov/] presented

Overseeing the Digital Migration: The Triennial Review Example

The Task of the Triennial Review was to adopt comprehensive network unbundling rules. In 2001 the Commission attempted to take up this task and to come up with new rules for the third time. The scope of the Triennial Review encompasses 3 basic network elements: Local loops - transmission facilities between an end user customer premises and the central office where switching and other routing equipment is generally housed; transport - the transmission facilities that connect central offices and send traffic through the network; and switching - the equipment that assigns circuits and routes telephone calls.

With regard to loops, the FFC made the decision to distinguish between loop technologies: Loops using legacy technology and all copper loops are unbundled with almost no limitation, while the Commission adopted a more moderate unbundling approach for loops using newer technology (e.g., fibre). For transport, the commission decided no unbundling for highest capacity transport; concerning lower capacity transport facilities, the states are asked to determine, subject to specific FCC guidance, whether competitive alternatives exist. With regard to switching, similar to the decision for transport, FCC unbundled it but required that the states engage in a process to determine the exact parameters for were switching should be available. The Commission did not unbundled packet-switching.

The major themes that underlay the decisions are: Granularity - placing new emphasis on line drawing through use of markets and more specific identification of facilities; marketplace realities - placing primary reliance on marketplace facts, but not to the exclusion of marketplace potentialities; investment incentives – distinguishing between legacy network elements and network elements requiring new investment, notably broadband-related investment; and intermodal alternatives - all potential competitors and competitive platforms, not just telephone-specific platforms, factored into unbundling analysis.

Isolde Goggin, Commissioner at the Irish Commission for Communication Regulation, [www.comreg.ie], gave some

Views From a Small Island.

The Commission for Communication Regulation (ComReg) is the NRA in Ireland. The New Regulatory Framework poses some real challenges for a regulator in a relatively small country: Ireland is a country with few large operators but with concentrated markets. Due to the county's demographics the business case for infrastructure build-out beyond the major cities may be weak. What is posing problems for regulators, but also for the operators, is that the focus of regulatory decision making may lie elsewhere: Not all of the regulators have a full time job and they may be represented by someone in Brussels or London, who deals with Ireland. The regulatory package is same "size" for all countries but all parties (regulator, incumbent, other authorised operators) have fewer staff.

Among the major longer term issues that arise with the NRF, is the question to what extend decision power is or should be centralised in Brussels and to what extend it should be delegated to the Member States to make decisions based on their national circumstances. There has been a similar process in the decentralisation of the application of the European competition law, but this was done in a softer way: Networks of national competition authorities have been working with the DG Competition in Brussels to try to ensure a harmonised application of the competition law issues. This means that everyone applies the same concept and works trough things in the same way, but it does not necessarily mean that the end-result is the same in different circumstances and different countries. There is a Commission veto over certain decisions taken by NRAs but one of the things going to come up over the next years is the provision for appeal against decisions of NRAs - in the case of Ireland, an appeals panel. There is no harmonisation of the appeals panels – it is harmonisation of the initial decisions of the regulators but not of was is coming back from the appeals panel. Its not possible to have a total harmonisation of all the decisions taken by all NRA appeals panels and national courts.

Getting the NRF in place has been a challenge for Irish regulators and for the operators. Considerable challenges are still ahead but once the transition is completed, ComReg expects framework to operate successfully.

Raffaele Giarda, Partner at Baker & McKenzie, Italy, summarised

The Implementation of the European Directives in Italy.

Italy was among the first countries which implemented the Telecoms Package in the national legislation. The Italian "Electronic Communications Code" is in force since 16 September 2003. As a consequence, a number of changes occurred. Only to mention few of them, with regard to the significant market power threshold, which before was set at a 25% market

share, the regulation became more articulated: “An undertaking shall be deemed to have SMP if, either individually or jointly with others, it enjoys a position equivalent to dominance, thus a position of economic strength affording it the power to behave to an appreciable extent independently of competitors, customers and consumers” (Section 17.2 of the Code). The new concept is based on market dominance, but despite the list of markets recently indicated by the EU, the definition of market segments in this context may prove difficult.

Before the adoption of the Code, operators in Italy needed individual licences for services like voice telephony or mobile services. Obtaining these licences could be an administrative complex process. Other services, such as Internet, only required a general authorisation which was available in very short time. Today, all services, except certain ones such as those using scarce recourses (like frequencies), simply require general authorisations. These are granted in a very fast way.

As the EU allowed Member States to provide for spectrum trading, Italy allowed spectrum trading under a number of conditions, e.g., the permission of the Ministry (after consultation with the NRA) is required.

There has been a significant focus on broadband in Italy and the spread of broadband is among the Country’s main objectives. State aids for the purchase of terminal equipment and for the usage of broadband networks are granted to foster this particular market.

Zhao Xiaohua, Partner of Holland & Knight, LLP, USA, summarized the process of

Drafting China’s Telecom Law

Drafting China’s telecom law already lasted about 23 years. The Chinese telecom market is currently governed by two comprehensive regulations: one for the entire market, the other one for the Internet. Until the early 1990s the market was still monopolised. After a first creation of competition in 1994, there are now 4-5 major players competing.

The reason why drafting the telecommunications law took so much time is the dramatic changes in the telecom market. What happened when drafting the telecom law for the Chinese market can be compared to a little child, growing very fast, and outgrowing clothes before it can wear them. The Chinese market is still changing, but it reached a relatively mature stage. The final draft of the telecom law has been finished and will be submitted to the Standing Committee of the People’s Congress for approval in March 2004 – if it will be really issued is not sure.

Major uncertainties in the telecommunications law are related to the conversion of different networks. The telecom and broadcasting industry are actually governed by 2 main regulatory bodies: the Ministry for Information Industries and the administration of broadcasting an television. Efforts are undertaken to combine these two markets, but due to rivalries between the two authorities, this is not an easy task. As a result the actual draft avoids this issue. Further issues which are not resolved yet concern the foreign investment: Certain products according to current regulations should go through a bidding process, but in reality the bidding process has not been fully enforced. Another question is, if companies from Hong Kong or Taiwan should be considered as foreign or domestic companies. It is not clear how the law will address these issues. A further uncertainty concerns the pricing: Many operators are complaining that the Government has too much influence on the pricing of services.

Nevertheless China's telecom law is expected to be issued in the near future. The telecom market in China reached a certain level of maturity and hopefully this will lead the Chinese market to become more open, more transparent and closer to international standards.

Stuart Ingis, Partner of PIPER RUDNICK LLP, USA, [www.piperrudnick.com/], which is one of the main sponsors of the Global Forum 2003, summarised the important trends in the

Legal Developments in the U.S. to Avoid Consumer Annoyance.

The excesses of telemarketing and Spam occurring in the last years became a real consumer annoyance. In 2001, the Federal Trade Commission (FTC) put forward a proposal for a national do-not-call-registry, whereby U.S.-citizens could put their name on a registry and not receive any phone calls from telemarketers. That list has been so successful that over 50 million phone numbers have been put on this list within 3 month. The direct marketing association and a second trade association each filed suit against that the FTC's list.

The 1st October was the date the list was going to affect and about 2 nights before a judge in Oklahoma issued an order saying that the FTC did not have congressional authority. Within 24 hours – faster than any time before – both, the U.S. Senate and the House of Representatives, passed a law saying that whether they have authority or not, they have authority now due to the outcry of the more than owners of the 50 million phone numbers on the list. But the legal wrangling went on, and the very next day a different court in Denver/Colorado said that the list is incompatible to the constitution of the U.S..

How to translate this paradigm to the world of commercial email and Spam? Spam is not really telemarketing and due to Spam filling the email boxes on a daily basis, there is no real market developed for commercial marketers to send emails. Actually the U.S. House of Representatives is negotiating a conclusion on Spam legislation. The general rule will be an opt-out approach as opposed to an opt-in approach, based on the principle "you can not contact me unless I will give you permission" existing in Europe.

Spam constitutes 60-80% of the email-traffic in the U.S. and threatens email, as the "killer application" of the Internet. But no legislation or do-not-email list will solve the problem. It only provides the law and force with a tool, but what really is necessary is global co-ordination, both, on the law and force side but especially on the technology side.

Christina Speck, Office of International Affairs of the U.S. Department of Commerce – National Telecommunication & Information Administration (NTIA), [www.ntia.doc.gov], USA, presented

Telecommunications and Internet Development in the Context of Connecting Businesses and Communities.

The two principal objectives of the NTIA's Office of International Affairs (OIA) are to improve access for U.S. companies in the global market, which means that OIT advocates U.S. commercial interests overseas and provides policy analyses, technical guidance, and representation in international fora, and especially to promote fair and open access to telecom services for consumers, particularly in developing countries. This is done through endorsing the need for competition and liberalization of Information and Communications Technologies policies around the world and the promotion of new and alternative ICT

deployment, to improve global communications and expand trade opportunities. OIA is engaged in various multilateral, regional, and bilateral international for a, such as APEC, the Global Business Dialogue on Electronic Commerce, ITU, OECD or Information Society Dialogues with the EU.

With regard to the growth of the digital economy, ICTs are providing significant economic benefits and the more the technology is deployed, the greater its value to society. In the new global economies, ICT capabilities and skills – or their lack – helps determine a nation's ability to compete, its economic growth, and its standard of living. Forces for chance include technological change, competition, demand and public policy. Among the policy issues that were currently pondering was the tension between efficiency versus equity, trying to achieve certain public policies and social goals, like universal services, especially in the context of a changing regulatory environment and the emergence of new actors, such as mobile providers. Complex issues and questions are related to the entry of new providers, e.g., should entry be promoted or regulated? Should regulation vary by degree of market power or should regulation vary by technology or type of platform? Other complex issues concern universal services versus universal access, and in this context the problem of defining universal services, which has been an important issue in Europe, but also price regulation and service quality. OIA addresses these issues in a couple of fora, especially in APEC's Digital Divide Working Group or the ITU-Development Sector.

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Within the session's closing **questions & answers** part, the session's chair, Michel Huet, and the moderator, Andrew Lipman, posed the question, if all communications providers, incumbents, and new entrants, circuit switch providers and IP-providers should be subjected to the same minimum degree of telecom regulation or should there be different degrees of regulation between telecom providers? As Brent Olson, FCC, stated, this is a question the FCC is currently discussing: Of cause providers of similar services should be regulated the same but there are sub-issues to consider. E.g., when talking about VoIP one of the initial arguments was that VoIP is the same like making a phone call and should be regulated as such. On the other hand parties are arguing, that VoIP is a transformation of the network and using a network which is fundamentally different from the network regulated for telephony. FCC has not came up with a clear answer, yet. Michel Huet, France Telecom, stressed that in the beginnings regulation was needed to pass from a monopolistic situation to real competition. Today, regulation is creating distortion in the market and sector-specific regulation should be withdrawn as soon as possible. It s not the role of the regulators to decide about good or bad business models, the market will decide this. Isolde Goggin, RegCom Ireland, stressed that there is an attempt in the EU-directive to isolate different regulatory issues and to treat them in different ways. Certain issues related to consumer protection are dealt in the universal service directive and they are the same for all operators. Concerning other issues, such as the one-way-access problem (the right of the competitor to have access to the incumbents facilities), an evaluation is needed in order to analyse what leads to the maximum of consumer benefits. Marie Guillory, NTCA, addressed the question of competitive neutrality by referring to the FCC's attempt to impose a competitive neutrality principle in the context of universal service: All providers of universal service in the U.S. should receive the same support as the incumbents support. In practicality, when applying that, this means regardless if a carrier has high costs or low costs, they receive the same support as the incumbent. A more fair approach would be to treat all similar situated carrier equally and to treat those which are not similarly situated in a different manner. As far as China is concerned, competitive neutrality is not really the issue stressed Zhao Xiaohua. The

government is still highly involved in the market process and there are still a lot of lacks in the regulation of the Chinese market. Stuard Ingis, from a consumer protection perspective, emphasised that it is important to recognise that the main reason for competition in the U.S. is the ability to reach customers, and the phone industry is a particular example. If one regulates marketers, one limits the ability of new entering competitors to reach customers and to offer products. Christina Speck, NTIA, concluded that technology itself as well as the legacy regulation, coupled with the common goals and visions of trying to realise a multi-provider environment while also assuring public policies, universal services, consumer protections, procedures, technological innovation, copyright protection etc., gives a lot to work on. There are a lot of extremely difficult things to surmount which sometimes can be resolved within international dialogue.

SESSION 4

DAY 1 – AFTERNOON – PARALLEL SESSION

Security & Privacy

This session focussed on different aspects related to security, trust and privacy, trying to get to the bottom of catalysts for communities and appropriate security tools, digital assets management, the trend towards a pan-European e-Identity and data protection.

Executive Summary
by

Gérald Santucci
Head of Unit D4 Trust & Security at the DG INFSO of the European Commission
&
Augusto Leggio
Professor at the ICT High School, Italian Ministry of Communications

The session was divided into different chapters. The first one highlighted main aspects of the way towards a European strategy. The items addressed were the European regulatory framework, research and development activities, European policy and relevant EU-initiatives. Another subject concerned potential catalysts for communities. The various catalysts are covering a large field, such as science, technology, knowledge, globalisation, the market, or ethical values. Globalisation was mentioned as a conflicting but strong catalyst for information exchange. Another kind of catalyst is the interconnection existing in the industrial and e-Society. There are various kinds of interconnections, e.g., functional interdependency in terms of the supply and customer chain, but also interdependencies deriving from the illegal economy and counteracting development. There are also global interdependencies and it is necessary to use them to increase interconnection and the exchange of information among communities.

Another issue addressed concerned the areas of responsibility of ICANN, which are from the security and stability point of view under the control of its Advisory Committee, and from a privacy point of view under the control of its President's Committee. Referring to public policy alternatives, it was stressed that it is necessary to help industries to coalesce consensus, by

supporting the sharing of information on best practices, while at the same time protecting sensitive information, mitigating antitrust concerns when competitors discuss joint actions that are not anticompetitive, and stimulating standards bodies to focus on relevant problems.

The question raised whether or not we have the appropriate security tools. This is a problem which is hard to be solved due to the fact that PCs were initially not designed for the Internet, that the Internet was initially designed to share information and not to protect information, and that the legacy problem of an installed computer and software base makes design changes very difficult. There is a strong need for organisations to define internal procedures and standards in order to identify efficient, effective and appropriate security policies. An essential message referring to data protection, which in general speaks about standards and best practices, was that the technology is available and the regulatory framework must follow. A presentation from the FBI gave an overview on the situation of the USA, whose legal requirements are based on 4th Amendment of U.S. Constitution "right to privacy" and the Electronic Communications Privacy Act: 18 United States Code (U.S.C.).

Key conclusions of this session are that there is no definitive solution for the challenge to identify the right break-even point between security and privacy. It is not only a technical, but a political, cultural, social and business problem and in this context there is a need to change mentalities. Drivers for potential solutions are transparency, multilateralism, international co-operation, direct foreign investments, trust and confidence, dependability, decrease of digital divide, security awareness, as well as procedures within institutions and companies. There is a need to develop R&D for security and privacy and opportunities to address this issue are given in Europe through the FP6 and the European Network & Information Security Agency.

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The **chairman** and moderator, **Gérald Santucci, Head of Unit Trust & Security at the DG INFSO of the EC**, [http://europa.eu.int/information_society/index_en.htm] introduced the Commission's point of view regarding security and privacy.

There is a real need for more international cooperation to face security matters and to ensure privacy. The policy context of the EU's R&D is mainly stated in the Lisbon Strategy: "The EU should be the largest knowledge-based economy by 2010". In this context, *e*Europe aims at fostering broadband access, e-Business, e-Government, security, skills, or e-Health. The Lisbon Strategy also introduced the ERA (European Research Area) which will lead Europe towards a single market for research. The enlargement of the EU is a unique historical opportunity but also a challenge, as it could entail new forms of vulnerability for its Member States.

Most companies still pay too low attention to security: There is an urgent need for a common effort to develop a culture of trust and security and an integrated approach between research, legislation and policy. The EC has proposed three angles for actions on security policy: to prosecute cybercrime and terrorism, to enhance prevention by ensuring network and information security, and to increase protection by ensuring privacy and data protection. "Trust and security" is one of the EC's priorities part of its 5th and 6th Framework Programme. A European Network and Security Agency, planned to open in 2004, should increase cooperation and information exchange between the EU-Member States, the communities, and the business sector. The European Network and Security Agency should become a centre for information security for Member States and EU-Institutions.

The EU has adopted a strategy towards "ambient intelligence". The vision of "ambient intelligence" is to create an interactive intelligent environment where resources would be available and shared. It is necessary for Europe to encourage R&D in order to be ready to face this new paradigm.
Augusto Leggio, **Professor at the ICT High School** - Italian Ministry of Communications, introduced the session by summarising the

Catalysts for the Development of the e-Society.

It is difficult to establish a list of catalysts for the evolution of an society and in particular the e-Society - one catalyst for instance is Globalisation. Globalisation implies many phenomena and interdependencies. One can distinguish three categories of interdependencies: Firstly, functional interdependencies, for example every institution or enterprise has interconnections and interdependencies with other subjects (energy, transportation, food...). Secondly, institutional interdependencies deriving from a legal economy (and not from a functional economy). Thirdly, interdependencies of a global nature, like the geopolitical framework. The latter ones are a matter of research, especially in terms of the availability of infrastructure.

Theresa Swinehart, **representing the Counsel for International Affairs of ICANN**, [www.icann.org], USA, introduced

The role of ICANN in the Field of Security and Privacy.

ICANN's role in the security arena is limited and focuses on the core of the Internet: the DNS and the underlaying infrastructure of the Internet's many layers. ICANN's mission is to coordinate, at the overall level, the global Internet's systems of unique identifiers, and in particular to ensure the stable and secure operation of the Internet's unique identifier systems. ICANN addresses security and privacy issues within the following two committees: ICANN's Security and Stability Advisory Committee and the President's Privacy Committee. The Security and Stability Advisory Committee is responsible for advising the ICANN Board on matters relating to the security and integrity of the Internet's naming and address allocation systems. The Committee involves ccTLD operators, registries, registrars, root server operators, and Internet security players. Its main roles are to respond to board queries and tasks and to choose topics to probe. It is also in charge of building and maintaining a perspective on Internet security, e.g., enhancing DNS root servers' robustness. ICANN's mission does not encompass privacy issues, but existing policies and proposed policies being considered by ICANN often have implications for personal privacy. The President's Standing Committee on Privacy is responsible for monitoring the implications of existing and proposed ICANN policies on the handling of personal data. Privacy rules and regulations are for respective jurisdictions to determine.

It is important to bear in mind that services outside the core of the DNS, or on the edge, are outside of ICANN's scope or mission.

J. Scott Marcus, a Transatlantic Fellow of the German Marshall Fund of the United States, presented the

Challenges to the Deployment of Internet Security Enhancements.

The deployment of Internet security enhancements poses challenges which need to be taken into consideration. The question in a free market economy is: Are commercial incentives able

to achieve the necessary change, or is there a need for public policy or regulation? Governments have to pick the issues that are the most critical.

Technology and business drivers play a key role in the deployment of Internet security enhancements. On the technological side, standards have to be mature, implementations have to be stable and there is a need for a consensus in the industry. On the business side, tangible benefits have to be taken into account, the cost/benefit-ratio has to be favourable and payback should be expected within a reasonable time horizon. The economics of network externalities are a key factor: the more people use a network capability, the greater the value of that capability.

The end-to-end principle is a guiding principle of the Internet architecture. Applications happen end-to-end. This is the reason why the Internet was deployed so quickly - it only required web servers and web clients. Certain features are best implemented, not in the network but in the end systems that execute the application. It is thus counterproductive for the network to also provide those same features. It is easy to incorporate new innovations at the application layer. Innovations that are not end-to-end are harder since they require agreement among a larger number of stakeholders, which implies greater transaction costs.

Public policy initiatives can help the industry to coalesce consensus, to collect relevant data and statistics and to provide seed money to encourage research and interoperability testing. The government could support secure services through its own purchasing preferences, it could help the industry to set recognised standards, or if absolutely necessary it could fund or mandate the deployment of desired services.

Detlef Eckert, **Director of Trustworthy Computing at MICROSOFT EMEA** [www.microsoft.com], Italy, one of the main sponsors of this year's Global Forum, presented

Security & Privacy – Do We Have The Appropriate Tools?

The Internet has been the driver to a new economy while nobody would have expected so a decade ago. By 2010, it is expected that over 14 billion devices will be connected to the Internet. Yet such great developments will not keep on growing unless the user truly trusts computer systems. Attacks on PCs are increasing drastically and there are explanations for this. Initially, the PC was not designed for the Internet use and there is a fundamental design problem regarding security.

The Internet was created to permit the free exchange of information and it was not aiming to restrict information flows. Legacy problem of an installed computer and software base makes design change difficult. One attempt to overcome the legacy issue is the "Trusted Computing Group" initiative, trying to make changes to the architecture of the computer, and Microsoft's "New Generation Secure Computing Base". Hacking carries out "remote crime" and cyber attackers are difficult to identify and prosecute, especially hackers responsible for sophisticated attacks. Security is associated to costs and has been underestimated by corporations and individual users. Security problems are sometimes due to an error or a human failure and does not always imply the intervention of a hacker.

Solutions to attacks involve technology, processes and people. There is not one single solution to secure PCs and prevent "cyberattacks". The market is the best place to find security tools. Microsoft's security concept is to secure by design, by default, in deployment and through communications. "Secure by design" means to secure the architecture and the

design in order to reduce vulnerabilities. “Secure by default” means to reduce the attack surface area and to secure the configuration by default. “Secure in deployment” means configuration automation, prescriptive guidance and patch management. There is a real need for open communication by publishing security bulletins and ensuring transparency. Privacy is an increasing challenge for a variety of reasons. The Platform for Privacy Preferences is the most efficient and appropriate tool at the moment – but it is not enough. There is a real need for awareness and implication of the users to enhance security.

Andrew Robinson, Vice-President of the European Institute for eLearning, and Assistant Director of the Open University, Club Sophia of French Business Council, UK, outlined

The “e-Justice” Project.

Justice in Europe today is a deficient area especially with regards to the average time it takes for a trial to get started, for instance the "Dutroux affair" took place in 1996, the trial will start next year. IT engagement in the legal process is important for the modernisation of the judiciary system. Such a process is lead in Belgium via the Phoenix System.

The FP6 has defined two new areas in the European community policy concerning security: “soft security” regarding home affairs and “hard security” referring to defence. e-Justice is an innovative project-based initiative, co-funded by the EU, with a strong R&D dimension.

The Treaty of Maastricht as well as the Treaty of Amsterdam have set the European citizenship. e-Justice aims at providing security for Europe. The project will have a lot to say about e-learning as citizens will have to learn how to use e-Justice. It will be a platform for understanding and sharing which European citizens can trust.

Mario Sforza, **General Manager of FINMATICA S.p.A. - Advanced Technologies**, Italy, [www.finmatica.com/], one of the main sponsors of this year’s Global Forum, highlighted

Safeguarding Corporate Information Assets & Legacy.

How can a company protect its own critical information and data since cyber attacks keep on increasing and billion of devices are connected to the Internet? Inside-attacks are very important with regards to the total number of attacks. Many companies had no security policy at all until they had been attacked, and most of the today’s companies still underestimate the importance of security. Therefore, there is a strong need for “preventive positive action”. Especially since there is no need to be a genius to make a cyber attack.

Awareness on key IT security issues is essential but still low. The risk is often too underestimated even in organisations with an advanced ICT infrastructure. Security begins with sound security policies: Organisations must define internal procedures and standards in order to identify efficient, effective and appropriate security policies. These security policies set the tone and legal precedent to design an effective security programme. The key point is awareness of risk and security.

Within the following **discussion**, it was stressed that the awareness of IT-security is still very low and the question was raised how to convince users to consider security not only as a cost factor but also as a productive investment. From Finmatica’s point of view, technology is mature but there is a need to offer complete integrated security solutions to the customer. Technology providers should not sell technology but solutions, and the way this message will

be delivered to the customers, will be an important driver to raise awareness. The panelists agreed that the challenge is to make sure that the companies are motivated to make the necessary investments. Another issue discussed concerned the aspect of "ethical hacking", which means to hire hackers (those who behave correctly), who help discovering security gaps in organisations and systems. “Ethical hacking” is a concept applied by Finnmatica and IBM. Concering the question of international associations promoting standardisation, these associations are considered as helpful for promoting security and to raise awareness, but in the end it is the initiative of the entrepreneur that will bring a product on the market.

Robert Flaim, Special Agent at the Cybercrime Division of the U.S. Federal Bureau of Investigation - FBI, [www.fbi.gov/], introduced the

USA Criminal Cyber Laws.

Most victims of computer crime do not actually report it. The information and evidence of cybercrime is very fluid and can be hidden or deleted very easily and quickly. Investigation against cybercrime is difficult. The USA legal requirements concerning cybercrime are based on the 4th Amendment to the Federal Constitution ”right to privacy” as well as the Electronic Communications Privacy Act: 18 United States Code (U.S.C.) 2701 – 2712. There is a need to be very fast and efficient to fight cybercrime. and the FBI has a legal tool to "freeze" the information, meaning they have the right to follow someone's IP address.

9/11 has changed the game, the "Patriot Act" has been passed. Since then, it is a felony to hack into a computer used in furtherance of national security or national defence. The Patriot Act brought a new provision: web services providers can give information on a user if they feel they have to. The FBI would ask the provider only if there was an imminent threat (death, etc.).This is done on a voluntary basis and it is the web services provider who chooses to cooperate or not. At present, cybercrime is considered as a major threat an is the number three priority of the FBI.

On an international scale, the legal tool for the FBI to collect evidence of cybercrime is the Mutual Legal Assistance Treaty (MLAT) - an agreement between the FBI and foreign countries. In case a cyber-criminal resides in a country which signed the MLAT, this country's Department of Justice would have to do everything they can to provide the FBI with the evidence of cybercrime. It is a difficult process to collect evidence of cybercrime as that specific type of crime goes very quickly. Evidence can be deleted very easily and there is a real need to act very quickly to prevent or prosecute cybercrime. A lot of legal standards need to be reviewed regularly.

Within the following discussion the question was raised, how to tackle the fight against cybercrime while taking the privacy aspect into account at the same time? The FBI answered that the US legal requirements are not really posing a problem. In the USA, cybercrime is very seriously taken into account, especially since the whole society relies on computers. Concerning cybercrime, evidence need to be collect very fast.

Markus Gnaegi, CIO E-Prica AG, Switzerland, who unfortunately could not deliver his presentation the first day, provided a very interesting abstract on

Security & Privacy in e-Healthcare Networks.

The Swiss health sector is a relatively small market characterised by a high quality of health care system, a high degree of social security, but a fragmented IT structure with only few web-access based applications and fragmented interests between players along the path of medical treatment. According to the regulatory framework the patient is the owner of his/her medical record and data and he/she must allow any transaction and access to his record. There is no regulatory framework for the electronic signature in force (2005) but a strict regulatory framework for data protection is existing. The regulation for security and privacy follows the technological development.

The general goals (and requirements) in e-Healthcare networks are to enable the patient to use of a patient smart card with certificate (PKI), to guarantee privacy and identity (confidentiality / integrity / authentication / indisputability) without storing data on the chip or in a centralized date base, the use of open networks, based on deployed client technology and the independence of software solutions.

The challenge is to implement a nationwide technical solution without creating a centralized data base for medical records but an open network with adequate (legal) rules, to get the acceptance and the trust of citizens, to achieve a certain degree of re-financing by cost reduction and to handle the logistic of a card enrolment with a face to face authentication.

As a conclusion, one could say that the technology is available but the regulatory framework must follow. Economical incentives will lead to changes in existing behaviour of healthcare personal and patients. Privacy in healthcare is more than a technical issue – it is a cultural one.

DAY 2 – MORNING – PLENARY SESSION

The Killer Applications: Myths or Reality
The Emerging Models of Development/ Moving Forward

The moderator of the plenary session, **Sylviane Toporkoff**, **President of the Global Forum and Associate Partner Items International**, France, welcomed and introduced the panellists.

As the first speaker, **Alessandro Luciano**, **Commissioner at the Italian Regulatory Authority**, [www.agcom.it/eng/eng_intro.htm], illustrated

The Italian Regulatory Point of View.

Empirical studies show that technical evolution does not follow economic acceleration or deceleration. In fact, during the last 10 years, technology growth followed an exponential curve and according to forecasts, this trend will continue until 2010. The most important factors in this context are Internet penetration and mobile communication. The annual increase of Internet users in Italy is about 70%. Italy is the world leader in terms of experimentation of new applications.

The evolution of wireline and wireless access technologies is particularly dynamic and leads to new applications, such as video-streaming or Video on Demand, based on ultra-broadband technologies. As a consequence of this evolution, regulatory authorities have to become faster than the market operators in redefining their objectives and their own role. The EU-Member States are actually implementing the NRF in order to reach European-wide harmonisation. From a regulatory point of view, EU-harmonisation has to be an opportunity for each Member State. Each national regulatory authority has to redefine its methodology to face the market evolution, create strong alliances with other NRAs and plan coordinated actions. Attention should be given to content-transmission rather than to channel-transmission. The Italian regulatory authority has the advantage of already being convergent in terms of telecom media and the audio visual markets and is already used to interdisciplinary collaboration with other authorities in technical, jurisdictional and economical matters. National authorities have to drive the digital revolution very carefully, in order to avoid a geographical or social divide. Furthermore they have to respect the users rights to pay the lowest tariffs, by ensuring a plurality of market players and supporting a facility-based competition. In this context national authorities have to be neutral, not only in terms of technological platforms but also in terms of different business models proposed by the operators.

Maitland Hyslop, Head of Knowledge for Information and ICT at ONE NORTH EAST, UK, [www.onenortheast.co.uk/], which is one of the main sponsors of the Global Forum 2003, gave an insight in

Asymmetric Warfare - A Killer Application: Problem and Solution.

A killer application might be something one can use on a computer – but there is one other "killer application" and that is the people who are going to stop us using applications. Asymmetric Warfare can be summarised as small groups of people, trying to use the resources of large groups to deny these large groups things to do.

The world is full of differences: different histories, different psychologies, and different ideas. This is a potential source of conflict and gives big problems for states and armies, especially because of the very formal structure on one side and the different sorts of ways where organisms, nations and people compete on the other side. The delivery mechanism is essentially information technology and issues like hardware, software, security policy, Spam, hacking, but also people, cause problems if not well managed. A survey of the Executive Club of Chicago showed that over 60% of the American firms, who belong to that club, have been attacked. If this form of attack is now moving from corporate life to national life, the lessons learned by the cooperates can help nations solve these new national problems.

The European Telecommunications Resilience and Recovery Association was created in the North East of the England to address issues of resilience and recovery and to stop asymmetric warfare. At the moment this initiative is supported by the North East of the England, British Telecom, and the European Commission. It is part of the region's innovative action contribution to the EC, and the objective is to achieve standards in all forms of life, telecommunications, business management and governance, the control of information, the management of disasters and an approach to sustainable development.

Robert Morin, Deputy Commissioner – Competition Compliance, Industry Canada, [www.ic.gc.ca], presented the

Impacts on Protecting Competition in Canada.

Technology and transportation for Canada was not a question of choice: Canada is a large country and needed to evolve in those areas. Many of Canada's critical industries, such as banking and finance, travel and tourism, and telecom continue to be transformed by the latest systems and devices. The particular concern of the Competition Bureau of Canada is the impact of technology on the market place. Technology is the backbone of commerce and fundamentally affects the competitive nature of markets worldwide. The consumer behaviours changed as well as the behaviour of suppliers. Canada is a country with only 31 million inhabitants, but 71% of the Canadian citizens, every school and 80% of the Canadian SMEs are connected to the Internet. The Federal Government has a Government-Online-Programme (GOL), integrating electronic service delivery across governmental departments. By the year 2005 it is planned to provide access to the most frequently used services in Canada at any time, anywhere and in an integrated and secure manner. For the third year in row, the consulting company Accenture placed Canada as number one in the world of e-Government.

Electronic access to information and services quickens the speed and expands the range of market transactions. At the same time the potential for fraud, deception and other dishonest practices grows accordingly. Consequently the Competition Bureau of Canada has to be smarter and faster than the crooks and to fight technology with technology. Its ultimate mission is to protect competition and not competitors.

Gabrielle Gauthey, Commissioner of the French Regulatory Authority (Autorité de Régulation des Télécoms - ART), [www.art-telecom.fr], summarised

The New Regulatory Framework (NRF) in France.

The NRF will be implemented in France with a short delay. It will be transposed through the law on electronic communications and the law on confidence in digital economy, which are going to be discussed in the French Parliament. Main principals are the confirmation of the principle of sectoral regulation, with two separate authorities for audiovisual questions (Conseil supérieur de l'audiovisuel) and telecom (Autorité de régulation des télécoms), the new way of regulating through market analysis, the determination of SMPs, and the determination by national authorities of proportional obligations and remedies. Further main changes concern the modification of definitions: The term "electronic communications" replaces that of "telecommunications", there is a common definition for all networks, a new definition of radio and TV services, and a definition of public on-line communication.

Convergence means, that communications networks will be uniformly regulated, whatever the content. Therefore broadcasting activities come under the scope of market regulation by the telecom regulator, who now has the possibility to impose on SMP broadcast operators the revision of their current contracts. It also means that the legal regime for non terrestrial broadcasting of radio and television services has been simplified and harmonised. Although France retains two separate administrative regulators, there will be a strong cooperation and shared competencies.

France is among the last countries where local authorities are allowed to get into telecom. Broadband access is crucial for the national development and France still suffers from the digital divide. Thus, French local authorities are undertaking measures, both motivated by diminishing the gap but also as an incentive to competition. The French national regulator sees that positively, under certain circumstances: there must be a precise analysis of the existing networks and the strategy of the different operators. Furthermore local authorities have to act in partnership with telecom operators and must promote neutralisation of the subsidised infrastructure when they plan to set up one. The French regulatory authority is actually preparing guidelines on how to combine public action and competition.

Ranjit Makkuni, President of the Sacred World Foundation, India, presented

A Killer Application of a Different Kind: The Crossing Project - Building Bridges Between Traditional and Modern Societies.

The Sacred World Foundation combines aspects of humanity, art, and technology. Their work has to be seen in the framework of culturally appropriated product design - where culture influences notions of interfaces and hardware. The context of the Foundation's work is "building bridges between traditional and modern societies".

Within the "Crossing" project a spectrum of alternative, fixed and wireless, interfaces have been developed, which are inspired by and based on cultural forms of India's city of Transformation, Banaras. Against the backdrop of the proliferation of ICT in developing nations, this project shows how the aesthetics and visions of ancient cultures can shape both new forms of computing technology, and how "culture" can drive innovation. Installations and products of the Crossing project show culturally rooted design as well as interactions with

digital content that challenge the keyboard and mouse forms of interactions with workstations.

One of the interfaces developed within the project is the “e-Rickshaw”, which deconstructs "traditional" grey-box hardware, reincarnating the computer as an indigenous transportation vehicle. Users can access video footage of Banaras (as filmed from the back of a rickshaw) by manoeuvring the handlebars, seat and bell of the bicycle. A “mythology-browser” can be activated by pushing a lens across a flat mural depicting the sacred sites of Banaras.

The Sacred World Foundation is currently working together with craftsmen to develop new forms of electronic crafts, and with children to see if they can compose documents when not having a keyboard and mouse. Given that people today spend so much time in front of machines, interfaces have to become rich in terms of design and functionality.

Claudio Mastracci, Director of Applications at the European Space Agency, [www.esa.int/], presented

The Digital Divide and Space.

The European Space Agency (ESA) is an intergovernmental entity composed of 15 EU-Member States and Canada, which is in charge of the EU space programmes.

“Space” can not be the problem solver of the digital divide if the requirements of the problem are not defined by someone looking at the services. It should be the task of the EU to define the requirements and ESA will then be able to propose solutions based on these requirements. It is envisaged to sign an framework agreement between the EU and ESA, clarifying the roles of the two institutional entities. The roles should be the following: The EU shall be in charge of the requirement-definition of space-related needs in the context of bridging the digital divide, and ESA shall be in charge of delivering solutions for the problems defined by the EU. As far as the digital divide is concerned, contribution from space can not come from national initiatives. The problem has to be solved on a European level.

On 10 September 2003, a meeting between the Director General of ESA, and the two EU-Commissioners Erkki Liikanen, Commissioner for the Information Society, and Philippe Busquin, Commissioner for Research and Technology, was organised to eleborate a proposal for studying ways of how space can contribute to bridging the digital divide. A 6-month-work-plan was adopted during this meeting in order to start the definition of social-economic requirements and a cost-benefit analysis. The objective is to analyse the correlation between the ground-stream and space to get a better vision on the future cooperation between space and the ground-systems. Further actions have been agreed during this meeting, such as starting working groups with operators, national agencies and industries. In Spring 2004, a proposal will be delivered and submitted to the EU-Council, which defines costs and possible actions for a future space programme, which should be settled at the same level as the GALILEO I programme.

Zhuo Li Ge Tu, Second Secretary of the Science and Technology Section at the Embassy of the People’s Republic of China in the Republic of Italy, gave an overview on

The Development of the Information Industry in China.

The information industry is an essential driver for national economic development. Since 1978 China’s government gives attention to the development of its information industry. In

2002, China had 214 million fixed telephone subscribers, thereof 136 urban users and 78 million rural users, 207 million mobile subscribers and 50 million Internet users. The annual revenues from these markets represented 2.69% of the GDP. In 2003, the telecommunications revenues increased at 14.7%. China is currently the number one, respectively number 3, worldwide in terms of the total amount of telephone subscribers, annual sells revenues and the number of Internet users. China's government is abrogating monopolies and encouraging competition in the telecommunication market. According to the World Investment Report 2003, China was the largest Foreign Direct Investment recipient worldwide (U.S.$ 53 billion in 2002) and international enterprises, such as Motorola, Nokia, Ericsson, and Sony, have opened micro-electronic productions sites in China.

In order to foster the building up the Information Society, China is putting more efforts in upgrading its industrial structures, establishing micro-electronic production sites, automating current information networks, promoting the development of 3G, establishing and improving universal services, focussing on e-standards and IPR, speeding up the establishment of telecom legislations and regulations, and improving the investment environment.

China has implemented its various commitments in strict accordance with the promised time-table presented after joining the WTO. ICT essentially improved the human life's efficiency of communication and productivity and is deepening economic globalisation. This offers a historical opportunity for development and China will be more open and adopt a sincere attitude to cooperate with international communities to promote the development of the information industry.

SESSION 5

DAY 2 – MORNING – PARALLEL SESSION

Strategies and Applications for Businesses

The session focussed on the two main axes a) the creation of adequate strategies, including e-Government, dynamic communities and broadband, and b) information and knowledge management strategies.

Executive Summary
by

Jean-Pierre Chamoux
Professor, University Paris V- René Descartes

The session included presentations covering extensively e-commerce development, network services and public policies related to the growing field of business usage of online services. Broadband diffusion and generalisation of easy access to modern networks was the core topic touched upon by those presentations.

Broadband availability for businesses picks up very quickly in Europe. As a consequence, usage and access to a whole set of new services is growing faster than most experts would

have forecast. One can thus question whether this movement will continue or not on the longer term. In any case, this segment of telecommunication services may well soon appear to follow a trend similar to the one observed over the late nineties by cellular services in Europe and elsewhere in the world, i.e., a steady quick growth superseding in most places the most optimistic expectation of the market.

This strong and solvent demand seems to be linked to an unforeseen flow of information and knowledge received by the companies at a quicker pace than ever before. This huge flow of data raises unexpected problems for businesses in not only handling, storing, and digesting this broadband inflow of information, but also putting the individual data into use. Hence there is a growing necessity to take advantage of the existing tools available at the corporate and local levels, to master the information flow and to convert the data received into a competitive advantage for the firm.

The upsurge for knowledge management and heavy information handling techniques imply to revise not only the technical features of data handling and storage, but also some important aspects of human management, according to the views expressed by several speakers in this panel. Relationship with workers, clients, providers, even with competitors may be deeply modified with online broadband servicing. Some of the classical rules of business management may require a profound revision to cope with the distance relationships established over the network. Policywise, this may imply that employees training, trading practices, consumers relations etc. have to be revised significantly in the coming years in order to avoid social unease and to improve working conditions at the firm level.

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The session's **chair**, **Giorgio Prister, EMEA Sales Executive - Local Government & Health**, **IBM** Europe [www.ibm.com/us/], one of the main sponsors of the Global Forum 2003, presented an example of

Government On Demand.

VIRK, the new Danish business portal, is an initiative realised in cooperation with the Danish government. One political objective of this project is to reduce the administrative burdens of businesses (especially SMEs) by 25% before 2010. Actually, 8 to 25% of the costs of a SME are B2G related. The second political objective is to set up a digital portal for businesses assembling public sector information and services as well as a wide range of private services. VIRK is a private organization designed to group public and private entities in order to help them working effectively together. The third political goal is to incite businesses to experience the public sector as one partner that acts coordinated and is capable to work in a public/private integrated model.

The creation of VIRK is to be the focal point between the individual decision-makers of the SMEs and its public and private partners. VIRK is based on a public/private partnership involving many partners and stakeholders. The project gathers the public sector and private businesses like Tele Denmark, Accountants, Banks, and Media. VIRK is designed to be the electronic virtual desktop of the individual user. The objective of VIRK is to be an efficient virtual portal used by all Danish businesses by 2005, meaning it must become as popular for them as having a bank account.

IBM is the main technology provider of this project, and is responsible for designing, building, implementing and hosting the portal together with other partners. The portal consists of 4

major elements: a personalised front end for businesses and individuals, B2B information services, G2B information and service, and e-forms for B2G reporting. The convergence of ICT and businesses is extremely cost effective since VIRK's users only pay for the services they use. VIRK is an example of "Government on-demand". The government has completely changed its way to work, and has adapted its organisation to their SMEs. The Danish Government now deals with their SMEs as their customers.

Keith Todd, Chairman of the UK Broadband Stakeholder Group, [www.broadbanduk.org], which was formed by Prime Minister Tony Blair and gathers stakeholders from across the value chain - from content providers to telecommunication services suppliers, summarized different aspects of

SMEs and Broadband Deployment.

We now are entering the "gold rush era" of Broadband-based applications and services for businesses. Over the last year, broadband use by SMEs has more than doubled encouraging a significant increase of broadband-based applications and services. According to a recent survey, one third of the broadband non-users claim, they will acquire broadband access within one year. There are real benefits for businesses using broadband. Broadband use especially enables them to communicate faster, to improve their productivity and therefore to reduce their costs. In the mass market of business, the use of broadband allows important cost savings and is an efficient means to enhance communication. Broadband is providing businesses with a significant competitive advantage.

The deployment and development of broadband use can be described in three major phases: The first phase is "adoption" which requires software support. This phase is very basic for SMEs permitting savings of some basic amount of time and money. The second phase is "adaptation" with more perceived benefits of using broadband. In this phase broadband improves efficiency and communication (Netmeeting, instant messages to and from customers...), but it also increases productivity as well as satisfaction. The third phase is "absorption". Broadband addresses new markets and enables the exploitation of new ways of doing business this a radical change of our business models.

Broadband will introduce new ways of working. The future is for application services providers. Broadband sets the opportunity to use the Internet as one's private network, it is now possible to prioritise one's own private network traffic thanks to Virtual Private Networks. "Work where you want when you need": Broadband will enable people to work from home and there will also be an increase of satellite offices.

Tom Cosh, Head of Economic Development at the NEWCASTLE UPON TYNE City Council, UK, [www.newcastle.com] which is one of the main sponsors of the Global Forum 2003, presented

Newcastle.com

Newcastle.com is a business portal providing a wide range of services to citizens and businesses of the Newcastle greater area. Newcastle.com focuses on reducing the cost of doing business and supporting the competitive needs of businesses, improving their access to market, product and process improvement. It is a unique initiative within the UK. Newcastle.com is publicly funded but it is oriented to the private sector, too, with an expected significant return on investment.

Newcastle.com's core objectives are to support Newcastle's e-Government strategy, to create a commercially sustainable portal for G2B and B2B transactions, to provide businesses and citizens with a range of interactive electronic services and information and to generate a sustainable economic outcome in partnership with the private sector. Newcastle.com will be launched by mid-February 2004.

Newcastle.com's core services will be an electronic market place, a business cluster platform and a virtual market place. Newcastle.com will include a virtual market place as a way to connect businesses and to arrange public and private contracts. Newcastle.com will be a portal providing the community with job opportunities, student placements offers, links to specific industrial sectors and public sector organisations. The objective of the city council is to enable the creation of 800 jobs over a 2-year period. The portal aims at supporting SMEs by providing them with business applications. The objective of the city council is to have 3000 SMEs using e-Tools over a 4-year period. Newcastle.com should increase effective e-Business activity, the objective of the city council is the creation of 400 new broadband nodes within 4 years.

Estelle Chatard, Project Director Economic Development Division, NEWCASTLE UPON TYNE City Council, UK, [www.competitivenewcastle.com] one of the main sponsors of the Global Forum 2003, introduced

The TEEE-INN-Project.

European Extended Enterprise for Innovation (TEEE-Inn), is a European project considering local authorities and e-government in general as communities of interest for technology start-ups. The project was launched in December 2002 within the 5th FP and will last threeeyears. The consortium consists of - CERAM Entrepreneurs and Innovation – Sophia Antipolis Chamber of Commerce (France), Cambridge Enterprise Center (UK), Marseilles Chamber of Commerce (France), Turin Chamber of Commerce (Italy), and the Newcastle City Council (UK).

TEEE Inn aims at supporting the creation, growth and sustainability of technology-based start-ups through research and demonstration, by understanding risks and detecting early needs for action. The project aims at being an efficient means for monitoring and federating communities of interest (COIs) and being a good way to provide them with effective tools such as the coaching of start-up companies. Newcastle is in charge of e-government-related issues since it is the only local authority of the project.

The project implies an innovative use of ICT to develop and improve efficient and reliable e-Government tools. The clients of the project are communities of interests including Newcastle, especially its e-Government platform. Newcastle collaborates to the project since it perceives e-Government from a creation and growth perspective. The project sees e-Government as a community of interest. The aim of this project is not only to identify key technologies that can meet the demand, but also to define ways to use these technologies to ensure and support the creation, growth and sustainability of technology-based start-ups.

Michael Stankosky, **Associate Professor Knowledge Management, Georges Washington University,** USA, [http://smpa.gwu.edu/index.gw] one of the supporting sponsors of the Global Forum 2003, introduced

Knowledge Management: The 21st Century Currency.

Knowledge Management can be defined as a way to "leverage relevant intellectual assets (in order) to enhance organizational performance". We are living in a knowledge-based economy and a lot of people are not yet conscious of it. About 80% of the North American's GDP actually comes from Knowledge Management. Knowledge Management is about leveraging assets, corporations use Knowledge Management, 80% of a company's wealth is either in its employees' brains or in its computers. The challenge is to define the way "to leverage those assets around one's company's business". These assets are the drivers of our economy and knowledge is an infinite resource. Today, about 12 universities in the U.S. are offering courses in Knowledge Management and research in that field is growing constantly.

Knowledge is a crucial resource which has been greatly underestimated in business organizational processes. Knowledge Management enables the creation of growth as well as the realization of significant costs savings. Intangible assets account for 70% of the value of a business enterprise and they are not adequately represented in current accounting methodologies. There is increasing discrepancy between the market values of many corporations and the values of their shareholder equity when measuring their book value. Capital accumulation has more than doubled in the last 10 years and the bulk of this growth is attributed to IT. In a couple of years Knowledge Management programs will essentially focus on Information Management, this might result in improved access but also little long-term benefit. Therefore if good information management is not in place, then Knowledge Management may not be as effective as needed. Information Management cleanup should be done in tandem with Knowledge Management. The major problem is that we are not yet able to identify all of those assets and even worse we still do not know how to manage them.

Günter Koch, former CEO of the Austrian Research Centers, Austria, now with F+U GmbH, Vienna, Austria

Intellectual Capital - Successfully Measuring, Managing and Reporting Intangibles in "Brain Organisations".

The Austrian Research Centres are the largest R&D organization in Austria. 51% of the centre is owned by the Republic of Austria and 49% is owned by the public sector. The knowledge-based economy has brought new patterns of investment: investment in intangible assets (as R&D, innovation, training, software,…) have increased significantly, markets for knowledge intensive products are fast-growing and the demand for talents and skilled workers keeps on increasing. The knowledge-based economy has also set new competition rules (e.g. on electronic / internet markets), but there is still a lack of methods and instruments for measuring and valuing intangibles and knowledge-based processes. The market value of companies today is much higher than the so-called "book value" which is related to the so-called "tangible assets".

At the Austrian Research Centres, an Intellectual Capital Report (ICR) has been invented. It is called "*Wissensbilanz*" which means Knowledge Balance. This is not really a knowledge balance in the traditional sense, but a model helping to identify the knowledge potential of an organisation, based on the 3 dimensions: human capital, structural or organisational capital and relational capital. Corporate goals and strategies must be defined first as an overall framework, a process which has a huge learning effects for all employees. Project and innovation management is a precondition to IC Report. Before IC Reporting is introduced, strategy management methods such as Balanced Scorecard should already be known and established. IC Report serves excellently for external and internal communication.

The ICR-scheme became a famous model and Intellectual Capital Reports are now even a legal requirement for all the 21 Austrian Universities after which important parts of their annual budget is measured. The methodology offered through ICR helps organisations to improve in their strategic success. It is not only targeted to businesses, but also to public administrations and governments.

Denis Ettighoffer, President Eurotechnopolis Institut, France, presented

Networked Added Value: e-Fertilization.

The "Netbrain" concept aims at enhancing the "e-fertilization" of networks. A good way to make benefits is to use networks. Such a strategy reduces costs, saves time and enhances productivity. There are two strategies to create value: the cost-savings strategy for which technical networks are the most important, and the innovation strategy for which human networking is the most important feature for the creation of value.

European companies now tend to understand that they can not only focus on a cost saving strategy, but that they have to include new strategies such as innovation. Netbrain is the network of "e-fertilisation": as a strategy focusing of the spreading of ideas, know-how and knowledge, it is as important as the cost-saving and productivity-oriented strategy. Companies have to develop their relationships with as many partners from various backgrounds and of different kind as possible. The e-fertilisation process consists in the transition from a cost-saving and productivity-oriented strategy towards a strategy of creating a combined value (mainly by encouraging the intensification of exchanges as well as the intensification of the use of ICT). The competitiveness of nations mainly depends on the ability of their companies to access knowledge. Today's companies shift from a logic of capital management to a logic of intangible assets management. The concept of "e-fertilisation" is moving from a logic of productivity towards a logic focused on the spreading of ideas and know-how. The creation of combined value requires a strong will to lead dynamic partnerships aiming at finding new ways to enhance competitiveness.

Ing. Giuseppe Tilia, Marketing Manager of TELECOM ITALIA Wireline [www.telecomitalia.it], Italy, one of the main sponsors of the Global Forum 2003, presented

Facing Disruptive Innovation: The Italian Incumbent Experience with Emerging Technologies.

In the past few years most Internet access in Italy was narrow band. Today Broadband is an economic reality in the Italian market: broadband access is growing by 45% per year and 2004 is expected to be the year of the overcome for Broadband.

From a technological point of view, there are two ways to provide broadband access: either with copper cable or with optical fibre. Using copper wire provides a technological facility: it is available in every household, it is cheap, easy to maintain and to develop. Telecom Italia focused on the xDSL technology approach in order to leverage its ability to maintain a dominant position in Italy, not only as a telecommunication operator but also as a broadband Internet access provider.

Broadband is a substitute to older technology enabling the access to the Internet but it is also a way to develop new applications. There is room for the development of new applications for data transmission, web applications etc. Telecom Italia's penetration rate of broadband

data services in 2003 is very high for top and large market segments. There is space for additional growth especially in the SME market segment (only 25% has yet been penetrated). Today, SMEs use the Internet mainly for electronic mail and information retrieval – which is a very basic use of the Internet. There are many services to deploy such as videoconferencing, Internet Phone, Utility Services, Internet purchasing…. The first step for Telecom Italia is to deploy and develop large broadband access in every segment of the Italian market. Telecom Italia provides a large offer targeted to a wide range of users (from big companies to SMEs and consumers).

Vittorio Daniore, Science Attaché, Embassy of Italy in Washington DC, USA, presented

The Importance of Information Sharing for Effective Cooperation.

Effective and efficient communication is of crucial importance for achieving bilateral co-operation. Mr. Daniore gave a personal example: When coming to Washington he encountered a lack of information as well as a lack of communication. And without information there is no communication. Thus, he started talking and giving information to his U.S. counterparts. This first step enabled them to start communicating in a more efficient way and they started talking about common strategies. Within one year, they had signed a bilateral co-operation agreement between Italy and the USA concerning the biomedical sector, and this was a great achievement. After that, both counterparts started thinking of raising funds for this agreement, both of them suggested that 35 million dollars should be included to the agreement in order to promote cooperation between Italian and American scientists. Then, an agreement was made between both national medical institutions and three months later another agreement was signed. They were not fully satisfied yet so they made a third agreement at the governmental level in order to raise more funds from other public bodies representing both the Italian government and the US Department of State. Once again, they thought this was not sufficient and they started talking about involving private partners (such as pharmaceutical enterprises, biomedical enterprises...) in that bilateral agreement in order to set up a public-private partnership. This is the history of one year and what one can learn from this is that information must be shared to create communication and that communication is the best way to achieve effective co-operation.

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Within the concluding **question and answer** part of the session, it was stated that some years ago when e-business started, the technological and market opportunities were not as wide as they are getting now in terms of e-Health, e-Learning, etc. Broadband seems to grow constantly, and the question was posed where are we actually stand in the three-phases process of broadband deployment. Today, 85% of the whole world of SMEs is in phase one or phase two of this process and are still at the very start of the Broadband deployment. It might take a little longer for SMEs to enter the absorption phase because the impact that ICT and broadband have on companies' organization is very serious and we are still in the adoption phase. Broadband is growing exponentially. When e-Business started, technology was not ready for the processing of the great flow of information. Broadband will enable closer public/ private integration.

DAY 2 – MORNING – PARALLEL SESSION

Consumer Oriented Applications

The main issues discussed within this session concerned the convergence and new applications for TV and broadband Internet, consumers facing the complexity of technologies, standards and prices, citizen-oriented applications, and e-Commerce.

Executive Summary
by

Sergio Antocicco
President of ANUIT

The session started with an introduction in the basics of communication and on how societies in different areas used the same logic of signs and icons. Communication refers to a set of different means in which the role of new technologies is very important. It allows to enable new communication methods, among those Internet and virtual reality. The main challenge today is related to content. As far is content is concerned, our today's society is living in a "digital dark age".

Convergence was considered as a "win-win" strategy. For instance the year 2004 represents a millstone in France when digital terrestrial TV and TV on DSL will be launched. Regulation becomes more and more important in such an environment. Both local and national administrations are currently undergoing a major cultural revolution: services are becoming citizen-oriented and administrations are being modernised. At the same time our e-Societies are at the end of the 2nd Internet generation and are now entering the 3rd generation of Internet, characterised by more Internet terminals and wireline/ wireless broadband connection. Internet became a part of the daily life.

As far as the question about what is the killer application is concerned, email is still considered as the key and killer application. Email is responsible for over 70% of Internet traffic and new messaging applications are emerging. Broadband increases online usage across the world. It was stressed that the success of broadband does not depend on professionally produced content, but that broadband provides huge opportunities for the content industry.

The example of a local authority showed, how the use of telecommunication and applications can improve the daily life of the citizens and support capacity building. The idea of creating a local depot for a geographically limited area for a certain number of households and enterprises, with the objective to increase the use of e-Commerce, in particular for physical products, was presented.

FCC presented its mission to protect U.S. customers and to reveal the increasingly complex industry for consumers, in part to aid them in their commercial choices, and also to protect them from anti-competitive behaviour.

Broadband Entertainment services significantly broaden the potential market and there are good prospects for an increasing distribution of these kind of services. The competition will be no longer based on connectivity, but on innovative services.

The last intervention referred to the *e*Europe objective to stimulate secure services, applications and content based on a widely available broadband infrastructure. The value of broadband lies in the applications that it facilitates, the content that can be accessed, and how users embrace it. Interoperability plays a crucial role.

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The session's **chair Maitland Hyslop, Head of Knowledge, Information and ICT at ONE NORTH EAST**, UK, [www.onenortheast.co.uk/], one of the main sponsors of the Global Forum 2003, welcomed the attendees of the session.

Sergio Antocicco, President ANUIT, Italy, and moderator of the session announced the signatory session of the Global Cities Dialogue.

Eric Legale, representative of the **Global Cities Dialogue**'s Vice-chair City Issy-les-Moulineaux, briefly introduced the Global Cities Dialogue (GCD) as an international network of mayors working together in the promotion of the Information Society. The GCD is strongly supported by the European Commission. Mr. Legale introduced Mr. **Antonio Vasquez Jimenez**, Mayor of the city of Zamora in Spain, which is very well known for its efforts in providing Wi-Fi for its inhabitants. The Mayor of Zamora signed the Helsinki Declaration and through this, the city of Zamora joined the GCD [www.globalcitiesdialogue.org/].

As the first speaker of the session, **Jean-François Tournu, Technical Director Information and Communication Technologies at the CSA - Conseil Supérieur Audiovisuel**, [www.csa.fr/], France, presented

Television: Time to Converge?

The development of applications is a priority due to the fact that the user is becoming an actor and will not remain a simpe consumer. Today, individuals generally do not use more than 20% of their communication tools. Making them discover further ways of use has to be realised within a win-win strategy in order to offer people services that they will really use.

Users generally dispose of the technical equipment needed for convergence. The way of living is reflected by the multimedia equiment regularly used in the daily life of a family. In this context the year 2004 represents a milestone for the French television: DTT will be launched and TV and telecommunications are going to merge with TV over DSL. TV over broadband leads to an important change, which is characterised by the individual access to information. The viewer is no longer a passive user but an active "surfer" who is able to select information out of a pool of recources, probaply by the help of a search tool. The shift from broadcasting to active surfing is one of the principal aspects repsonsible for the succes of TV over broadband. ADSL is only the first step towards online TV, that - in the beginning - will bring together the offers available via satelites and cable. The real revolution will come with the complete fusion of TCP/IP with DVBT, allowing to connect just one medium and to use the PC as TV.

A first experience with digital TV will be launched in Lyon (France) by the French telecom operator France Télécom and the TV broadcaster TPS. The task of the CSA will be to adapt and to harmonize the actual legal framework. The current law of 30 September 19986 mainly adresses hertzian channels.

Alfredo M. Ronchi, Politecnico di Milano, Italy, [www.hmg.polimi.it/ | www.medicif.org], one of the supporting sponsors of this year's Global Forum, gave an insight in the problem of

Digital Communication – The Long Way towards a Proper "Format".

Digital communication is the most recent ring in a long chain, starting from non verbal communication and gesture, over languages, signs and writing, to print, broadcasting and other media and formats. The idea is to look at the past in order to find out a proper format for the new digital media. New technologies enabling new media and formats, such as virtual reality or multimedia, provide a good opportunity to find out new ways of communication and especially to bring to new life some "lost" formats.

Some technologies are (re)enabling (new) communication formats. Today people have the possibility to create digital objects, which is a new class of objects from the ontology point of view, and they can use multimedia technologies and Internet, both providing some powerful tools for communication, but which are not yet very well developed and used. Virtual & enhanced reality also represents a powerful tool for the transfer of information and knowledge, because it allows to transfer information from the usual symbolic way (i.e. reading books) to the possibility to touch nonmaterial things or concepts. By doing so, we will transfer our way to approach information from symbolic to experimental, hands-on.

Nowadays, there are different models, different opportunities, and various kinds of communication, e.g., asynchronous and synchronous, mono- and bi-directional, one to one and one to many, many to many, location dependent and independent, immersive and non immersive, interactive and non-interactive, with log and without log, wired and wireless. It is a mixture of different ingredients and we have to reassemble new recipes in order to develop more effective communication. Up to now there is not a proper way to use technological tools, in order to exploit the real advantages of ICT in communication. The only sector, that has probably developed a proper way, is the entertainment and video game sector. This sector found the best way to use technology in order to entertain and to transfer content. The situation we found : a digital world completely empty and dead, looking at some technologies our society is still facing a "library without books".

Eric Legale, **Director Issy Média, Issy-les-Moulineaux**, France, [www.issy.com/], one of the supporting sponsors of the Global Forum 2003, presented an example of

A CyberCity.

Local and national governments are currently undergoing a major cultural revolution: services are becoming citizen-oriented and administration is being modernised. With almost 60% of the population connected to the Internet, Issy is one of the cities with the highest broadband penetration in France.

In January 2000, Issy.TV became the first local web TV. It allowed local communication to be modernised at minimum cost, and provided Issy's inhabitants with access to audiovisual information on local life. The inhabitants of Issy have also the possibility to virtually attend the

interactive town council's meetings, which are broadcasted via cable TV and Internet. Citizens can phone or send an email to ask questions. The representative's reply will be either broadcasted live or they will answer by e-mail.

e-Government applications allow Issy's citizens to carry out administrative processes online, e.g., ordering a birth, marriage or death certificate, reserving a parking spot in case of relocation, indicating a change of domestic situation for the school file, reserving books, discs, DVD at the media library or a game or a CD-ROM for the game library, constituting a wedding file, etc.

A Cyber kindergarten enables parents to follow the early-learning games of their children online. Issy was not spared from the health care crisis caused by the heatwave in France this summer, but none Issy's senior citizens, who was equipped with the Biotel telealarm system, died. They were able to raise the alarm and ask for medical help at the first signs of weakness. Furthermore, a "Cyber Tea Room" allows elderly people to familiarise with the use of Internet and email. A club of "cybaer seniors" has been created to allow these elderly Internet surfers to meet and to exchange their experiences and know-how with others.

In 2003 several Wi-Fi hotspots have been installed in the city and a SMS portal enables Issy's citizens to be informed about local activities and to receive weather or pollution alerts directly via their mobile phones. Since spring 2003, Issy's citizens can pay their parking places by mobile phone.

The role of a city like Issy is neither to take technological risks nor to take financial risks using taxpayers' money. The task consists of offering valuable services to the citizens and making them aware of their advantages. Strong public-private partnerships are indispensable in this context.

Finn Petersen, Deputy Director General at the National IT and Telecom Agency (NITA), [www.si.dk/mainpage.asp], Denmark, presented

"Supply-Push – Demand-Pull" – The Danish Approach.

The idea in Denmark was to foster broadband penetration by a supply push. The vision was competition leads to wide broadband access, without financially involving the government. The regulatory philosophy followed in Denmark is the so called "several pipes to the home" approach, which is based on the promotion of competition and real choices between technologies. It is important to have as many platforms and technologies competing in order to get access to the consumers. Competition has brought broadband to the Danish population and Denmark is characterised by a high availability of high-speed services all over the country. Actually more than 95% of the population can access broadband; this figure will be increase to 98% by the year of 2005.

However, broadband itself is not the most important aspect. Much more important than technical platforms are the applications and this was the reason for Denmark to shift its policy and to focus on applications, services and valuable content. In this context e-Government is extremely important for a country's prosperity. As far as e-Government is concerned, Denmark is currently starting the full automation of services, and 81% of the Danish population, who has access to the Internet, uses e-Government services. The strategic areas of Denmark in the field of e-Government are to increase productivity and

efficiency, to provide a well-connected infrastructure and to provide digital contact and access and direct services for all.

Denmark is working hard on the legal model: Computers within governments and public administrations should share the same network and should use SMIL as an enabler to transfer data between governments. Denmark started with a broadband and information supply push, where the focus was to have best, fast, cheap, secure infrastructure and usage, Today the polica moved to a content and transactions demand pull. In this context, the Government should be the leader in putting content on the net. Key facilitation challenges are to get desirable results and to motivate others, e.g. via e-Government and collaboration.

Ky-Ming Jen, General Manager, XANDMAIL, France, [www.xandmail.com/]one of the main sponsors of the Global Forum 2003, presented

Generating Incomes with Messaging Applications.

The e-Crash finished the 2nd generation of Internet, which was characterised by PC-based Internet terminals, dialup connections, Internet Explorer and Outlook Express for everyone. Everything was free and Internet was a "fashion toy" for early adopters and technophiles. Today the 3rd generation started, with more Internet terminals, broadband connections, wireless and mobile access and paying services. Internet became part of our day-to-day life and a productivity tool for enterprises.

Email remains the main application on the fixed or mobile Internet and is the first reason for people to subscribe to the Internet. Today an email-address represents an Internet ID and email is responsible for 70% of the Internet traffic. As there are more and more beginners from different segments of the population starting to use Internet and e-mail, such as children or seniors, the "one-fits-all" product strategy does not work anymore.

Messaging applications must be "rethought" for each user segment and new applications must solve an end-user problem or need, be easy to use, save time and be easy to charge. A recent study showed that 76% of kids have one or more email accounts, that more than 50% of the kids check emails without their parents' guidance and 80% of the kids using email receive inappropriate Spam. Children want to use appropriate tools and parents are willing to protect their children from Spam and others. Thus, one idea is to develop specific applications for kids, having a look and feel, which is adapted to them. This mail for kids is designed for the user segment "family", allows parental control, kids can only send an receive messages from people in his/her address book, and is easy to use, because the interface is designed for kids.

Another example is a mail for beginners. The idea is not only to have a very simple and basic user interface, but also to provide messaging functions, such as to automatically extract and store attachments, or to automatically update the address book. Further examples of advanced messaging applications concern the storage of SMS or MMS and a mobile Web-blog. Revenues can be generated directly through the storage or indirectly through SMS and MMS traffic.

Daniel Kaplan, General Delegate of Next Generation Internet Foundation – FING, France, [www.fing.org/], which is one of the supporting sponsors of the Global Forum 2003, posed the question

Broadband and Consumer – In Need of Applications?

The role of the non-profit Next Generation Internet Foundation is to stimulate research and innovation in new services and uses of the Internet. Problems, such as the provision of access to good services and content in order to feed the broadband, have never been a problem for any kind of network in the history of networks. Basically, networks are for people to communicate with each another.

It seems that we are actually trying to match applications in order "to feed the pipes" and we should ask ourselves if we are not looking at things the wrong way. The purpose of administration is to serve the citizens – today its purpose seems to feed pipes. Launching administrative, educational and other services with the goal to create the demand for broadband networks, is doing a bad service to public policy making.

Broadband does create challenges and opportunities for commercial content, but the reverse is not really true. The demand for broadband is growing at an incredible rate – while we still suppose to not have the services to increase demand. What is boosting broadband – as it was for any kind of networks before – is networking and communication with people. The administrative, health-care and other online-services actually discussed are important, but they will not create demand – they are going to be enabled because people will use the networks. And people will begin using these networks in order to communicate with each another. The killer application of broadband is networking, communication and the sharing of uses between different terminals and people.

The possibility of self-expression is an important and underestimated aspect. Technology is a way of empowering people to express themselves, to create websites etc. There are million of personal websites and weblogs – and there is no commercial services behind this. It could be worth looking at those "non interesting" personal communications.

Helena Lindskog, **CEO of Hel-Dag AB**, Sweden, presented

Local Depot – Solution for e-Commerce Distribution.

When looking at the part of e-Business which is e-Commerce, broadband is not the problem. The main problem concerns the logistic and the distribution of products to the consumers. From the engineer's point of view, distribution in e-Commerce is a network and it has the same problem as every kind of large network: the last mile problem of distribution, which is the most expensive part.

In traditional B2C-commerce, goods are produced for unknown buyers. The goods are then distributed to shops, where the consumer buys and pays the product and takes it back home. In e-Commerce, the consumer orders first, and in general also pays first. The product is then sold to a known buyer, what means that the product, which can be tangible or intangible, is sold before being distributed.

One approach to solve the problem of distribution in e-Commerce is the "local depot". Local depot is the proposal to set up a distribution and service centre for a geographically limited area for a certain number of households and enterprises. Local depots should be physically located in the community they are serving. In order to make such an approach profitable, a combination of the distribution of goods with some other services on the local level is necessary. For instance, the core services of a local depot could be the distribution of goods, the collection from the different manufactures, the storage of goods, and maybe the

conversion from tangible to intangible products (e.g. CD with different music formats, photos, etc.), which are combined with add-on services, such as a local meeting place or a coffeehouse.

Massimo Intorella, Vice-President for Strategic Marketing at TELECOM ITALIA Wireline [www.telecomitalia.it], Italy, one of the main sponsors of the Global Forum 2003, presented

Consumer Applications for Broadband Entertainment.

The four main constraints in the adoption of broadband in Italy have been a) a lack of knowledge and the difficulty of use. ADSL in the beginning was a kind of "techno fan" segment, introducing a new complexity in the home: Ethernet, PPPoA, WiFi etc. B) Pricing, as ADSL is relatively expensive compared to other technologies. C) Geographical coverage, characterised by the need to expand the service availability and d) the lack of distinctive content and services.

In 2002 Telecom Italia launched a new brand for ADSL, called "Alice", which was supported by a strong advertising campaign. Alice is very easy to install and customers can choose among several different solutions, which are continuously increasing in order to satisfy the different needs. Telecom Italia broadband internet access today reached 100% of population.

However, there is another target group, such as the console gamers, blockbuster boys, or Pay TV and video driven customers, which are all new customers for broadband services. Expanding the applications from Fast-Internet to other entertainment services, offers large opportunities to further penetrate the market. The competition in broadband will no longer be based on connectivity but on innovative services. Peer to peer communication will remain the main driver, but the second driver will be entertainment.

Patricia Cooper, Chief of the Regional & Industry Analysis Branch of the Federal Communications Commission – FCC, [www.fcc.gov], USA, outlined the

The U.S. Experience With an Increasingly Competitive Environment.

Competition brings multiple options for consumers – new applications and services, new providers, and increasingly aggressive marketing. The result is often a confused consumer, who do not know what to chose, and FCC has become thrown into the role of a information service. As a regulator, the FCC arms consumers with knowledge and tools to make essential decisions and protects consumers from anti-competitive behaviour. Questions asked by the consumers concern for instance, why their phone bill costs so much, cost of new applications, how to use these new applications in the context they are familiar with, etc.

The FCC regulated portion of the regulated market is becoming smaller. There are many services that are not regulated by the FCC or completely unregulated in the U.S. The role of FCC in those instances, is to try to point the bewildered consumer to the many other consumer protection alternatives.

The FCC has about 75 people in two call centres that answer telephone calls and email from the consumers. A typical week includes almost 6 000 inquiries and nearly 2 000 complaints to the call centres, plus 5 inquiries from the Congress, as well as nearly 12 000 telephone and/or email inquiries to the FCC Chairman or Commissioners.

This service is also used proactively, when developing a new policy, when addressing services, that are familiar in new ways or discussing new technologies. As a regulatory agency, this active dialogue with U.S. consumers may demand time and resources, but leads to considerable benefits. FCC gets a virtually instantaneous feedback to policies and decisions, in order to quickly know whether they are understood by the public. By tracking consumer complaints and concerns relating to new technologies and services, FCC can incorporate more effectively the public's interest in its policy agenda, making regulations more responsive to the citizens needs. And finally, with a free flow of information between communications users and the regulator, the FCC can more effectively enforce the rules issued to shield against anti-competitive behaviour.

SESSION 7

DAY 2 – AFTERNOON – PARALLEL SESSION

Developing Communities: Opportunities for Local & Regional Authorities

The main issues discussed within this session concerned the political visions in developing communities with IT, the way from accessing the Information Society to integrating in a Knowledge Society, current priorities for improving infrastructures and services, local and regional e-Government approaches and the different approaches of bridging the digital divide.

Executive Summary
by

David Wood
Councillor and Cabinet Member for e-Government and Modernisation
of the NEWCASTLE UPON TYNE City Council

A few things have been coming out of this session: First and foremost that local and regional authorities have to play a leading role to deliver services to their citizens. They all have to adopt the concept of getting involved with partners and the idea of change. Examples were given, that it is possible for regional governments to invest in ICT-infrastructure inexpensively.

New ICT-infrastructures, such as broadband, present the opportunity for authorities to improve efficiency and competitiveness and also provides the opportunities for citizens to access public services over a variety of channels. But the infrastructure must be fit for purpose and must be secure and with sufficient capacity and ease of access. Tools such as CRM will provide the knowledge to enable public and private organisations to modernise and to compete.

But most of all we have to realise that ICT is an enabler and its not just technology for technologies sake.

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The session's **chair** and moderator, **David Wood**, **Councillor and Cabinet Member for e-Government and Modernisation of the NEWCASTLE UPON TYNE City Council**, UK, which is one of the main sponsors of the Global Forum 2003, introduced the session by giving an example from Newcastle upon Tyne.

Newcastle upon Tyne is a city in the North East of England. It can be considered as the birth place of the industrial revolution and is now playing a major part in the technological revolution. Any sort of evolution or revolution can not be done by individuals, it has to be done by people working together – communities, public administrations and businesses. In 1999 the North East Regional Smartcard Consortium (NERSC) was founded in order to initiate different smartcard based projects in the region. The infrastructure which was put in place can also be used for lots of other initiatives and the result is a unique programme for interworking and information sharing in the North East region of England. The outcome of this investment programme leads to a range of benefits, e.g., the creation of jobs, skills, and investments. A coordination of e-Government and e-Business has been established in the North East of England, which is actually bringing about a "Smart North East".

Samir Naessany, Senior Vice President for Strategy and Business Development at ALCATEL Private Communication Group, France, [www.alcatel.com/], which is also one of the main sponsors of this year's Global Forum, presented

Broaden Your Life.

Alacatel is one of the major suppliers of telecom equipment and networks for telecom operators and businesses. Alcatel recently concluded, that the company should be more present on the vertical markets, i.e., the governmental sector (national and regional), the learning and health sector.

Bridging the digital divide is considered as a key economical and political issue for territorial management and many initiatives are undertaken on a national level. According to Alcatel's understanding, local authorities try to attain the following 3 goals: bridging the digital divide, boosting (and to some extend maintaining) economic development, and enhancing services for the citizens. Bridging the digital divide is a must, because e-Government applications can not be deployed on a large scale, if not almost 100% of the citizens have Internet access. Boosting economic development is a crucial issue, e.g., SMEs will not survive in many areas if they do not have broadband access. Without broadband access they either have to close down or to move to another region. Services for the citizens can be improved by the employing classical tools, such as CRM, developed in the private sector.

Generally, local authorities can select between different broadband policy models: 1) Communities can operate a network and provide services exactly as an operator. 2) Application of a "carriers – carriers" model, where the local authority, directly or indirectly, builds the infrastructure and wholesales capacity to operators. 3) Adoption of a passive infrastructure model, in which the local community can do nothing more than build dark fibre (passive infrastructure) and put it at the disposal of operators. 4) "Aggregation of public demand", what means that the local community aggregates the needs of all public agencies, combined with the needs of some local industries, in order to reach a significant number of demand, in order to either better negotiate with the existing carrier or to develop an own network.

Maurizio Caruso, Director of Marketing & Business Development, HUGHES NETWORK SYSTEMS Europe, Italy, [www.hns.com/] – one of the main sponsors of the Global Forum 2003 – presented

Bridging the Digital Divide – The Role of Broadband Satellite Communications.

The UN Secretary-General Kofi Annan recently stressed that the IT-industry has a role to play in supporting the efforts of reducing the global digital divide. The digital divide is not just a problem for developing countries; it is also a problem in rich nations. Computers' availability and computer literacy is still an issue, but new challenges are now related to broadband access. Broadband access is available in many nations. However, even where broadband access is widely available, there is a large chunk of the population that is "out of reach" (Examples for broadband penetration: U.S. 7.2%, EU 5%, South Korea 22%, Czech Republic 0.004%.)

What are local authorities doing? An example was given for the UK: Local authorities in the UK have a major role to play in developing the economy in their regions. In England, non-departmental public bodies, called Regional Development Agencies, were created in 1999 to act as strategic drivers of regional economic development. Each Agency has 5 statutory purposes, which are to further economic development and regeneration, to promote business efficiency, investment and competitiveness, to promote employment, to enhance development and application of skill relevant to employment and to contribute to sustainable development. Most of them have identified broadband availability as an indispensable tool to promote economic growth in their region.

Today terrestrial broadband is not available everywhere and will not be available everywhere in the near future. Gaps in terrestrial coverage provide opportunities for satellite: This holds true both in developed countries (e.g., the UK) and, even more so, in developing nations where otherwise the cost of terrestrial infrastructures could be prohibitive. Satellite broadband is available anywhere, can be deployed in matter of days, it is easily scalable to meet demands, and offers high availability and quality of service.

Nicholas Giordano, Senior Advisor and Telecommunications Strategist at the Affinity Group of Harrisburg, LLC, USA, introduced the

Commonwealth of Pennsylvania – "The Anchor Tenant".

In 1993 Pennsylvania deregulated portions of its telecommunications industry in exchange for broadband deployment commitments by the incumbent providers in order to equally deploy T1-access in urban, suburban and rural areas by the year 2015. Nevertheless the very high cost for T-1 access ($1000 - $3000 in rural areas) build the understanding, that this goal is not being met by the incumbents.

The Commonwealth of Pennsylvania, as many other local governments, is a large consumer of telecommunication services and recognised a few years ago, that its role as consumer could be used to influence the behaviour of providers and that its purchasing power can be used to make broadband services more affordable and available. Pennsylvania leveraged its buying power for public networks and established the principle of the State Government as the "Anchor Tenant" for a broader broadband network. As a result the deployment of fibre, especially in rural Pennsylvania, increased by 5 000 route miles.

Through the Pennsylvania Department of Education, funding is provided to local school districts to develop Digital School Districts – a combination of fibre and wireless technologies that link parents and students to the schools from their homes. In Schuylkill County, the Affinity Group helped bringing together national providers and local ISPs with a clear understanding of the local market, to convince national providers, that there was a business case for providing services. As a result a network was created which drastically reduced pricing for T-1 access. As one of only a few municipalities in Pennsylvania that is also its own public utility provider, Kutztown combined its utility rights-of-way and the state government telecommunications contract to make T-1 Internet service available and affordable to every home and business at about the price usually paid for dial-up Internet service. As an example of public-private partnership, the KeyNet Alliance leverages already-committed federal and state government economic development or local government infrastructure funding as matching funding to augment private-sector company investment in the extension of public network fibre to more under-served communities.

Giangaleazzo Cairoli, **Head of Unit for "Regional and Societal Aspects" of the DG-Information Society of the EC**, [http://europa.eu.int/information_society/index_en.htm] gave an insight in

The DG Information Society of the European Commission.

The *e*Europe initiative has the objectives to bring each citizen, each household, each school, each company, each administration to the digital era by developing administrative, distance and healthcare services and creating a favourable context for businesses and e-Commerce, to provide broadband access with a secured infrastructure, and to provide remote areas with access to the Information Society. In this context the DG Information Society has to accomplish the regulatory framework in liberalising the telecommunications sector, maintain research and development within the IST program, which is one of the major Information Society programmes, and to promote and maintain relevant projects, such as the **Global Cities Dialogue** or the upcoming World Summit of Cities and Local Authorities, as well as to coordinate the efforts with other EU-policies, such as the structural funds.

Over € 12 billion have been distributed within the first phase. The priorities are to reduce the digital divide and to support the development of e-Commerce especially for SMEs. However, the most recent report of the European Commission on economic and social cohesion shows, that there is a widening gap in the development of regions. The different regions have to be aware of the fact that the Information Society is the key to their development. The European Commission can only raise awareness about the fact that the development of the Information Society is important and requires public-private partnerships focused on specific needs. In remote regions, where the development of broadband is very expensive and not profitable for telecommunication companies, there should not be a focus on commercial but on political objectives. This is why the European Commission should support the development of the Information Society, including ultra-peripheric regions – if necessary with structural funds and financial incentives. The seven regions, which are outside the European territory, the Reunion, Martinique, Guadeloupe, the Canaries, the Azores, Madeira, and Guyana, must be completely integrated in this process.

The socio-economic development of remote areas is a priority of the European Commission. The Information Society changes our ways of thinking and living and requires the mobilisation of politicians and administrations. The EC can support but can not substitute regional politicians and administrations. It is up to the regions to make the choice to get involved in this unavoidable revolution by defining their appropriate strategy.

Ellwood R. Kerkeslager, Mayor of Madison, New Jersey, [www.rosenet.org], **and CEO of Information Futures LLC.,** USA, one of the supporting sponsors of the Global Forum 2003, gave an example for the

IT & Communities – 20 Years of Experience.

Local authorities must take responsibility for the status of their ICT-infrastructure, but also to make sure that it is appropriate and that businesses, governments and individual users know how to use these tools. It is a personal and political responsibility of the elected officials. However, this is a new kind of responsibility for elected officials and since many of them are not comfortable with these technologies themselves, it is a double challenge. But any city that does not meet these requirements in terms of availability of the infrastructure will fall behind, will be less competitive and will be marginalized economically. Typically broadband is not yet available and cities does need initiatives and organisations helping to convince politicians at a state or local level that it is appropriate.

7 years ago the city of Madison/ New Jersey began an inventory of what broadband was available in the community. The intention was to provide broadband access to the library in order to initiate training courses for the public and provide free access to the Internet. Offers from several providers were available but the price of T1-services was unaffordable. As it was not possible to solve this problem individually, the local government, public institutions and schools decided to address the problem jointly. As a result a fibre-optic network within the town was constructed. It was not the intention to become a service provider for the public, but simply to connect all schools, government buildings, the library, and all universities to a fibre-optic network. The Internet services were then bought from the commercial market place and the use of this broadband was shared between 17 buildings. When dividing high cost by 17, the price became quite affordable. The success was enormous.

Michel Carpentier, Honorary Director General of the European Commission, presented the

Availability of Online Access to Public Services at Regional and Local Level.

The public services have a boosting effect on the economy. They represent, according to the different EU countries, between 20% and 60% of the GDP. e-Governance cannot be obtained only by the use of ICT but must be combined with organization changes, new kinds of relationship with citizens, associations and industrialists, in order to improve public services and democratic process. It requests new skills and new systems of education and training. However, it is very difficult to make understood the importance of ICT, because one has to change minds first. People have to understand that they have a new responsibility, that they have to work differently, within a new working environment and organisation. Strong political leadership is needed to overcome resistance and barriers, to change mindsets, to push through organizational change, to sustain investment and to keep long perspective in mind while insisting on concrete deliverables in the shorter term.

There are difficult issues to resolve for obtaining a full scale implementation of e-Governance. These include safeguarding trust and confidence in online interaction with the public services administrations, widespread access to online services to avoid a digital divide, and interoperability for information exchange across organizational and political borders. e-Governance services cannot be delivered without new telecom networks

(broadband networks whichever they may be) which remain rather costly. Moreover the financial efforts requested from public administrations may be important when, at the same time, they have to cope with tighter budgets.

eEurope 2005 has been very important, not only to benchmark the results of different Member States, but also because it points on constraints which still remain on all levels, e.g., interoperability or security. IPR is probably missing in eEurope 2005.

Luis Lozano, Consultant of the Foundation For Science and Technology of Extremadura (FUNDECYT), [www.fundecyt.es], Spain, presented

Extremadura, the Outcomes from a Political Commitment:
From Regional Strategy to Practice.

Extremadura is a region situated in the Southwest of Spain, in the frontier with Portugal. With about 1 million inhabitants and 382 municipalities Extremadura is one of the lower income regions in Spain and in the EU. Due to a strong political leadership and a clear vision, the regional government of Extremadura committed in playing a leading role as promoter and stimulator of the process of establishing the Information Society.

In 1997 Extremadura was one of the 22 regions profiting from the European Regional Information Society Initiative supporting the development of a strategic framework for the region's Information Society. In 2002 Extremadura participated in the European Regional Programme of Innovative Actions, which also contributed to the setting of a clear strategic vision in the region. However, there might be a vision and the political will but without infrastructure, it will be impossible to realise the vision. Thus, Extremadura developed a Corporative Telecommunications Network, based on public-private partnerships, connecting 1 478 points in the regional administration, thereof more than 700 schools in order to have at least one public access point in every public school in Extremadura. Schools are used as the motor for digital literacy and in less than 4 years all public secondary centres of education will teach with computers in all the classrooms, with one computer for every two pupils. More than 66 000 PCs are being installed in secondary centres and more than 21 000 in primary schools.

In 1999 the Regional Administration launched the project of the New Knowledge Centres, in order to create social dynamics, to promote free access to ICT to every citizen, to extend the local culture by making people participate in the Information Society, to develop local capacity, such as entrepreneurship to build a new region, to create a social and virtual space to commit people in the transformation of the region and to create guidelines to best practice to favour the transfer of knowledge between communities and regions. The VIVERNET project, providing business centres for new age entrepreneurs, aims at the creation of physical and virtual spaces to facilitate the development of new business in Information Society fields. The project offers entrepreneurs continuous training, personal advice and access to shared resources in order to develop their activities without having to face the initial difficulty of access to technological and financial resources.

The strategy of Extremadura is to use OSS in order to assure sustainability of the educational system, of the regional strategy, the independence of the public administration and the independence of the users.

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Within the closing **questions & answers** part of the session, the question was raised, whether or not there exists anything similar to the *e*Europe imitative on a regional level in terms of an overall policy umbrella framework including an benchmarking aspect of efforts, best practices and policies. Actually Member States have two 2 ways to intervene on a Community level, either directly through the Community by being part of the EU, adopting decisions etc., or to accept to be benchmarked on various issues, which includes the possibility to be told, that a Member State was not as good as expected. Both ways are necessary and complementary and it will be important for to implement such methods on a regional level, especially regarding the upcoming enlargement of the EU. Another question concerned the OSS-based software package developed in Extremadura. Extremadura is more than willing to cooperate with other regions and to provide and to share its knowledge – local authorities should collaborate, not compete.

SESSION 8

DAY 2 – AFTERNOON – PARALLEL SESSION

e-Relationship With Citizens

The session focussed on communities providing new services to citizens and businesses, healthcare, education and learning, and e-Government services based on smartcards and multi-application cards for citizens.

Executive Summary
by

Gilles Polin
Manager Government Sales and Solutions Group, MICROSOFT EMEA

The session was divided into the following four general topics: e-Learning, security, development of applications, and concrete government applications trough regional and national governments.

The School of the 2nd Chance was presented within the context of e-Learning. It is striking that alone in the French region Marseille 4 000 people attend this kind of school each year.

Smartcards have been discussed within the context of security; and especially the fact, that it is possible to store different applications and different security levels for different government agencies, but also for the private sector, on one card.

The session also included a presentation about e-Health, stressing the basic advantage that now the patient's record is really in possession of the citizen and no longer the property of the doctor. The second important advantage stressed was, that patients now can get a second opinion quite easily.

Within the context of government applications, which have been all about shrinking the distance between citizens and government, it was stressed that systems, such as kiosks, and interfaces have to be very easy to use.

As a conclusion on the e-Heath, e-Education and e-Government aspects, it was given evidence to the hope, that the "e-" becomes redundant one day, because the technology will be so pervasive and integrated in all the different aspects of our daily life, that it will no longer necessary.

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The session's **chairman** and moderator, **Gilles Polin, Manager for Government Sales and Solutions at MICROSOFT EMEA**, UK, [www.microsoft.com], one of the main sponsors of the Global Forum 2003, revealed the basic problem of the relation between governments and citizens.

The relationships between governments and their citizens are very complex and public authorities do not act coordinated in the way they interact with their citizens. The problem is that citizens nowadays are receiving a lot of information from everywhere (local government, regional government, national government, the European Union, etc.) and it is important to help the citizens dealing with all these information. The challenge is to find a way to pool all those different sources of information and this implies a lot of R&D.

Technology can offer efficient tools to reduce the distance between governments and their citizens. The solution is to collect the different information in order to make it easier for the citizens to manage all the information they receive. This should be done through integrated innovation. Investments in R&D have to be significant, as they enable governments to cut their cost spending while enhancing the efficiency and security of the services they provide to their citizens. The role of industries is to innovate and to find solutions to ease the current process.

We keep using the character "e-" for anything. But what will this overused "e-….." bring about? Will it be more quality, more trust, or more speed? Electronic services are likely to bring higher quality, greater trust of the users while at the same time enabling savings of time and money. The present session offers the great opportunity to exchange with key players of the Information Society, including policymakers, companies working in the trust area, content providers and integrators, and actors, who help citizens learning to use e-services by proposing them user-friendly solutions.

Maruja Gutierrez-Diaz, Head of Unit Multimedia at the DG Education & Culture of the European Commission, [www.elearningeuropa.info/], outlined

The European Commission's Strategic Policy: e-Learning Designing Tomorrow's Education.

The Lisbon Council in 2000 marked a watershed for the European Information Society and education policy. After Lisbon, the EU started re-thinking its education policy and the Commission defined future objectives for the European education and training systems. It is an historical document since education and culture are subsidiarity domains. The Lisbon Strategy has set three main objectives: enhance the quality, access and sustainability of education.

In the beginnings, e-Learning was merely seen from a technological point of view and e-Learning initiatives focused on the ability of citizens to use computers. Today, the Commission considers e-Learning as a catalyst for change. A knowledge-based economy needs a work force which is qualified, well-prepared, and responsive to change. e-Learning is a way to create added value and to enhance competitiveness. The Commission considers and supports e-Learning as a cultural, an individual, and a social process.

The role of the EU is to provide a favourable environment for the development and deployment of e-Learning (mainly through its programmes 2001 e-Europe / e-Learning initiative, the 2002 e-Learning Action Plan, the 2003 e-Learning Programme). Main areas for actions are a) infrastructures and equipment, which are still a problem to be dealt with, b) the skills and competencies of the European citizens, which have to be improved through training and the motivation to use ICT for education, and c) the quality and content of e-learning services, which have to be clearly defined and maintained.

The objective of the e-Learning programme is to set a fast, efficient and good framework for ICT in education and training systems, especially concerning life-long training. e-Learning is the way to design tomorrow's education and it should be considered as the process of acquiring knowledge for a life-long period.

David Ankri, co-Chairman of e-Europe SmartCards TB10 & CEO of SMART IS MARKETING, France, one of the main sponsors of this year's Global Forum, introduced

A Security Approach Applied to e-Relationship with Citizens.

Nowadays, citizens often have to adapt to their public services, they have too many information to deal with and they are the ones in charge of co-ordinating all these information. Public administrations should enable their users to interact with them through multi-access channels (e.g., mobile phones, Internet, kiosks...). Electronic access to public services gives more flexibility to the citizens since those services are accessible 24 hours a day. Industrials and public administrations can provide citizens with electronic information and services and thus offer more customized services to their citizens. One way to provide electronic services could be to use electronic ID cards/ smart cards integrating citizen-fit services.

The e-Europe Smart Card TB10, a European working group gathering representatives of the Ministries of Interior of 25 countries, has defined the following security standards: The e-ID card should use 2 PKI certificates: one to establish the transaction, another to authenticate the citizen. 3 biometrics have been chosen: face, iris and fingerprint recognition. Defining authentication standards for 25 countries is a difficult task since each country has its own legislation. In order to set a framework for authentication, the European Commission has collaborated with various working groups. Europe is moving forward in the field of e-Identity: Today, 16 countries are realising their own pilot in which PKI certificates and biometry are key authentication standards. The European project e-Epoch aims at demonstrating the interoperability of PKI based smart cards in Europe.

Projects related to e-Identity are of crucial importance: outside Europe several countries are working in this area and Japan and the USA are carrying out their own e-ID card projects. Both countries hold annual conferences on PKI certificates. The Malaysian Government Multi-Purpose Card (GMPC), it is a smart card containing a photograph and biometric data. This multipurpose card serves as national identity card, driving license, immigration fast

pass, health card, and electronic purse. The requirements definition phase of the project is completed and the project entered the design and development phase.

As a conclusion, it can be stated, that standards for e-Identity are on the way, there are already 2 yearly conferences on PKI certificates. Smart cards and e-Identity management are mandatory to develop e-Services for citizens. The provision of e-Services also requires a greater proximity of public administration that has to move from a global to a local approach and offer customized services to their citizens.

Claudia Pavoletti, Regional Manager, Compliance Anti-piracy EMEA, Network Associates, Italy, presented

Stopping the Evolving Threats of Security.

The pathological side of e-Government opportunities has to be taken into consideration. Moving the citizen's life from a material world to a virtual one implies important threats. Intrusion prevention policy and data privacy are required. Unfortunately, the speed of attacks accelerates: today it takes three minutes for a virus to be global and 450 viruses are detected every month. Citizens as well as companies are becoming more and more "porous" since we all use more and more devices connected to the Internet. The deployment of Wi-Fi and Web Service Applications are also factors fostering this process: By 2006, 500 million people are supposed to use smart phones.

The growing use of broadband increases the risk of getting attacked and receiving viruses. There are different levels of intrusion prevention, the most wide-spread being SPAM. It is estimated that 30% of an employee's day at work is spent to clean his/her PC from SPAM. CIOs and IT-security staff have to balance business needs (availability) with security (risk management) and investment (budgets, resources).

Network Associates' philosophy is to prevent both known and unknown viruses and attacks. When a hacker is able to access a PC, he/she can access all data of a professional or an individual PC and therefore gets access to personal data like ID card, security numbers.... There are real benefits of preventing attacks. From both a company and an individual perspective, security is a core issue. In our contemporary world, working at home is increasing and this fact is just making things worse with regards to security issues. The big challenge for security providers is to ensure a top-level security environment for users while at the same time maintaining a satisfactory level of privacy.

Patrice Cristofini, Healthcare Director at Schlumberger – IT Services, France, introduced

e-Health and e-Citizen: e-Health for Quality and Efficiency of Healthcare System.

Today, healthcare is the property of the citizen and this is a real social evolution. The healthcare system is a very specific product as there is an ethical content related to it and a serious dialog with political authorities is needed before it changes. The European Member States have different healthcare systems, and it will be difficult to harmonise all of them. Expenses for health are very different in every European State, the only similarity is that these expenses are growing constantly and it seems that these costs can not be controlled. With regards to this fundamental issue, e-Health is an extremely cost-effective solution for citizens.

Healthcare involves many stakeholders of the public and private sector and the link between the different stakeholders is the patient. In the context of e-Health, the patient's electronic medical record will be managed by the patients themselves. This medical record will be accessible from everywhere via the Internet. The benefits for the patients are that they will be able to access their own medical record but they will also have the choice to allow a general practitioner or any other specialist to access the records. e-Health allows the doctors to access more information and to spend more time with the patients, and enables public authorities to get real time information about the population's health. Online services and prescriptions would be available and the patient would really be the manager of his/her healthcare. Of course, security and privacy are top level priorities in the field of e-Health. Schlumberger has a significant experience in the field of e-Health smart cards, (more than 60 million cards are issued in France). At the moment, an e-Health card is one of the best tools to secure the exchange of information.

Schlumberger is currently working on the European Mona Lisa project which is a dedicated portal and a prototype for online prescriptions. Using online services would bring advantages for the citizen (e.g., tracking of the prescriptions) and other stakeholders could decrease their costs significantly. In France, Schlumberger works with “Allodoc” in order to set up a service enabling the users to select to whom they will allow to access their medical records. In the future, the patient will manage his/her own medical record. ICT provides the best solution to cope with the financial problem related to the management of healthcare and is a good means to secure the exchange of information.

Paolo Bernardini, Strategies & Special Projects Manager, FINMATICA S.p.A. - e-Government, Italy, [www.finmatica.com/], one of the main sponsors of the Global Forum 2003, presented

Providing Quality to the Everyday Life: New Solutions to New Problems.

Improving the citizen's quality of life is a major issue for every government. New technologies are assuming a strategic role in both developed and less developed countries. These technologies promote efficiency and self-government while implicating organization and culture changes. Such changes have an impact at the central, regional and local government levels. New technologies allow citizens to play an active role in governmental processes if they manage suitable interaction levels and reticular models. They are also an efficient tool for putting federalism into practice. ICT enables to validate reticular systems and federal systems through modular, graduated, inter-usable, flexible and secure solutions.

Yet, open and shared standards are required. The Internet can make available its own technological standards but investment in “training” is necessary in order to promote suitable cultural standards. The technology adopted to achieve open organisational models must allow dynamic, simple and efficient interaction between the citizen and the administration. Finmatica produces applied solutions to control, order and manage information. With regard to Finmatica’s strategy, social issues assume an important role. Quality improvement is the inspiring theme of the integrated platforms created for environment, territory, health, and mobility information. Improving the quality of life is synonymous with attention to the true needs of the citizen. In order to activate such process, Finmatica has studied and developed a modular approach along two guiding lines: firstly, to meet the needs of the local territory, up to the decision support, and secondly, to allow shared use and applied cooperation through a domain logic.

Sylvain Aymard, IT-Manager, School of the Second Chance, France, presented

Marseille's School of the 2nd Chance.

The School of the Second Chance is an initiative, created by Edith Cresson, former EU Commissioner, within the context of the White Paper on Education "Teaching and Learning: Towards the Learning Society", which was adopted by the European Commission and by all the Ministries for Education the 15 Member States in November 1995. The school is open to young people aged between 18 and 25 who have no diploma or relevant skills and who have been out of the national school system for at least one year. The objective of the Second Chance School is to fight social exclusion by integrating these young people back to society, through education and training.

The Second Chance School of Marseille is an European pilot project which was inaugurated in 1997. It has been supported since 1995 by the Mayor of Marseille, Jean-Claude Gaudin, and by local institutions. Marseille's Second Chance School welcomes 300 students per year. The "success rate" of the school rises up to 61%, either the students find a job or they go back to the traditional learning or training systems. Such a rate is impressive with regards to the difficult social background of the students.

The school's project aims at combining both classroom and distance learning. In order to do so, the school has realised a partnership with IBM to develop e-learning solutions. Three types of learning content have been developed (French, maths and information technologies), which are always applied to real life situations. The Second chance school's e-learning programme's philosophy is "I show you, I guide you and then it is your turn to do the exercise by yourself". This way the students are responsible and will improve their self-confidence. At the school, the students also develop social skills that will help them in their social life (e.g., job research techniques). They can rely on their tutor to support them and help them succeed.

The Second Chance school meets a real demand and addresses a core issue by reintegrating young people who could not succeed in the traditional system.

Tracey Pitt, Head of e-Business – e.Business Center, North Umbria University, [http://ebusiness.unn.ac.uk/], United Kingdom, presented

Learning and Opportunity for All – Joining Business and Community.

The e.Business Centre was created two years ago as part of the e-Commerce initiative of the University of Northumbria. The Northumbria University (although it is a fairly new University compared to more traditional Universities) is way ahead in its approach to e-Commerce. Everything that is done with respect to staff and students is done online. The main objective of the centre is to raise awareness about e-Business within the Northeast of England since the centre is based in Newcastle-upon-Tyne. It soon appeared that the centre was not only about educating businesses but also people by providing them with ICT-skills before they go into businesses.

The centre is a communication channel for the University attracting businesses that can help or be helped by the University. This initiative aims at joining businesses and communities and approaches them as jointly instead of separately. An advisory board makes sure that the

centre addresses the most relevant issues. The first aim of the e-business centre is to raise awareness around e-Business and this is achieved through a network of more than 500 partners ranging from local authorities to businesses or any other institution that can help SMEs.

The e.Business centre is also involved in the city portal initiative which helps SMEs develop sustainable e-business strategies. The centre also participates in the e-Learning projects and by the end of the year 2003, the e-business centre intents to give the "European Computer Driving License" to at least 200 learners. The e-Business centre is also involved in initiatives like ETR2A, the European Telecommunications Resilience and Recovery Association.

The e.Business centre is currently setting up an e-Learning foundation within the North East Region of the UK. This foundation aims at enabling every child in school age to use a laptop during school time. Research has shown that e-Learning can be an efficient tool to accelerate any kind of learning. The centre has identified 3 major barriers to e-Learning: time, money and access. Because time is the first barrier to e-Learning, especially for SMEs, the centre has given them a Personal Storage Device, that they can plug in the centre or almost everywhere in the University and store their work in. In order to address the financial issue, the e.Business centre is doing its best to offer courses at very affordable prices. And finally, two Internet cafés have been set up in order to provide learners with an easy access, one is fixed and is located within the University and the other is mobile and can be brought all over the region.

Shaun Topham, Co-ordinator of the EU-IST initiatives of the Sheffield City Council, United Kingdom, presented

Sheffield's Experience in e-Relationship with Citizens.

Sheffield is the 4th largest city of the UK. Just like many other cities in Europe, Sheffield wants to move from giving information to its citizen to developing interactivity through the use of multi-applications smart cards. The approach of the city was to provide easy access for the citizens so that they would actually use e-Services. The city has installed kiosks with touch-screens, which is a very intuitive system. Citizens want information about everything that interests them, and this goes far behind the information related to local authorities. Therefore, Sheffield's kiosks provide a wide range of information from football results to the movie theatre program, etc.

In order to ensure that the kiosks would be used by the inhabitants of Sheffield, they have been designed to be as intuitive and user-friendly as possible since lots of people still do not have a computer at home. The user simply has to touch the screen to move from one information to the other - it is therefore fit to people who are not familiar with ICT and computer use. The city is involved in the development of a multi-application smart card. The city council also works on an e-Signature project as well as an e-Voting project.

As part of the e-Epoch project (a project aiming to achieve the interoperability of smart cards in the European cities participating in the project), the citizens of Sheffield received a card that they could use to vote. They could vote during a whole week before the elections. The aim of the project was to encourage citizens to use that card and trust in it as a secure way cast a vote. There where electronic polling stations and kiosks all over the city, people could also vote through the Internet by using a password. The trial was a real success and most of

the people who voted electronically said they would do it again if they would get the possibility.

Jacques Pomonti, Information Technologies General Advisor, French Industry Secretary of State & President Sorbonne Radio, France, introduced

Modernising Public Administrations in France.

The CGTI (Conseil Général des Technologies de l'Information) is an organisation consulting the French Government in all areas related to information technologies. Concerning the modernisation of the relation between public administration and citizens, France had a difficult starting point but is now on the road – even if there is still a longer way to go to catch up with the most advanced societies.

The creation of the governmental agency ATICA (Agence pour les Technologies de la Communication et de l'Information dans l'Administration – Agency for ICT in Administrations) in 1998, dedicated to modernise French public authorities, was an important first milestone. This agency essentially contributed to the modernisation of administrations and to the simplification of administrative procedures. With the new government in 2002, a Secretary of the State has been created which depends on the Ministry in charge of civil service, government reform and decentralization. Under the responsibility of this Secretary of State, three action lines have been defined: a) the computerisation of public administrations, b) the computerisation of goods and services delivered by public administrations to externals, and c) the modernisation (Internet access) of the capacity and the tools of intervention as well as of the relation of public administrations and their citizens and businesses.

Currently, there are two main barriers to this general shift towards a modern way of information and service delivery, which are 1) the vertical and secular organisation of public administrations and their bureaucratic functioning. The introduction of a horizontal organisation, which is necessary for a better delivery of public services, is very difficult and requires a strong political will and sometimes pressure. 2) The administrative reforms in terms of organisation and structures needed to modernise public authorities. Resistance is related to habits and bureaucratic regulations, but also comes from the trade unions (especially in some sectors like finance and education) and sometimes even from the political leaders and from leading civil servant technocracy rigidified in powerful corporations defending their territory.

By recognising the necessity to improve public service delivery towards citizens and enterprises, a real progress has been achieved. At the same time an internal modernisation process within public administrations started, without calling into question organisation or authority. Today, speaking about productivity or efficiency of the staff and actors is quite normal – while this has been a completely out of bounds some years ago. The fact that France is often compared to its neighbours, represents an additional motivation.

France has needed some time to mark the start of adapting the heart of its organisational system to the restrictions and requirements of a new world. Today this sound change is going on irrevocably.

Miriam Sapiro, President of Summit Strategies International, Washington DC, who was responsible for the overall co-ordination of the four parallel afternoon sessions on the Forum's second day, concluded the session by reminding the focus the 13th Global Forum,

which has been on connecting businesses and communities – businesses, ranging from infrastructure to hardware, to software, to services, and content, and communities, as broad as national communities, but also regional, local, professional and educational communities.

The discussion of these issues could not be taking place at a better time than now because in 4 weeks the World Summit on the Information Society will convene in Geneva and agree on declaratory principles and a common action plan. The Global Forum was a unique opportunity to try to work together to harness the new technologies and innovation in order to improve access to infrastructure, basic services, and value added services in communities around the world.

The promise of wide availability and universal connectivity should not get lost in bureaucratic debates. Traditional telephony has been regulated by governments nationally and internationally by the ITU. But the Internet has flourished without regulations and many believe, that this absence is responsible for much of its success. Technically, co-ordination is provided by ICANN and a strong private-public sector partnership has emerged to address related policy issues. This delegate balance and the distinction between telephony and the Internet must continue. This Global Forum is a great example of why and how a partnership between the private sector and the public sector works.

CLOSING SESSION

DAY 2 – AFTERNOON – PLENARY SESSION

Before closing this year's Global Forum, **Sylviane Toporkoff, as President Global Forum**, Items International, France, thanked the chairmen and moderators for their great work and their reports, as well as the sponsors of the Global Forum, who made the Global Forum possible, as well as Senator Laffitte, President of the French Foundation Sophia-Antipolis, and Sergio Antocicco, President of Anuit, for their valuable support. Special thank was given to the participants, especially to those who put up with a long travel to Rome in order to support and participate in this international networking event.

Sébastien Lévy, as **Vice-President Global Forum**, Items International, France, thanked all the participants for having been in Rome for the Global Forum 2003 and for making a go of it. The 13th Global Forum has been a lively and successful event and the team of Items is already looking forward to the Global Forum 2004.

Sergio Antocicco, President of Anuit, Italy, co-organiser of the Global Forum, closed the Global Forum 2003 by thanking the participants on his part. The Global Forum was an interesting and successful event. The results of the Global Forum are now communicated to the press [*see annex: press review*] and the conclusions of the Global Forum have been provided to the World Summit on the Information Society. The involvement of the media is an essential way of spreading the ideas raised in the Global Forum in order to reach the political world and the general public. The work done within the Global Forum is not a technical but rather a think-tank work.

CONTACT

All PowerPoint-presentations, speaker profiles and press reviews of the Global Forum 2003 are available on the website of ITEMS International www.items-int.com.

Please do not hesitate to contact ITEMS International for any help you may need in getting in touch with the participants of the Global Forum 2003.

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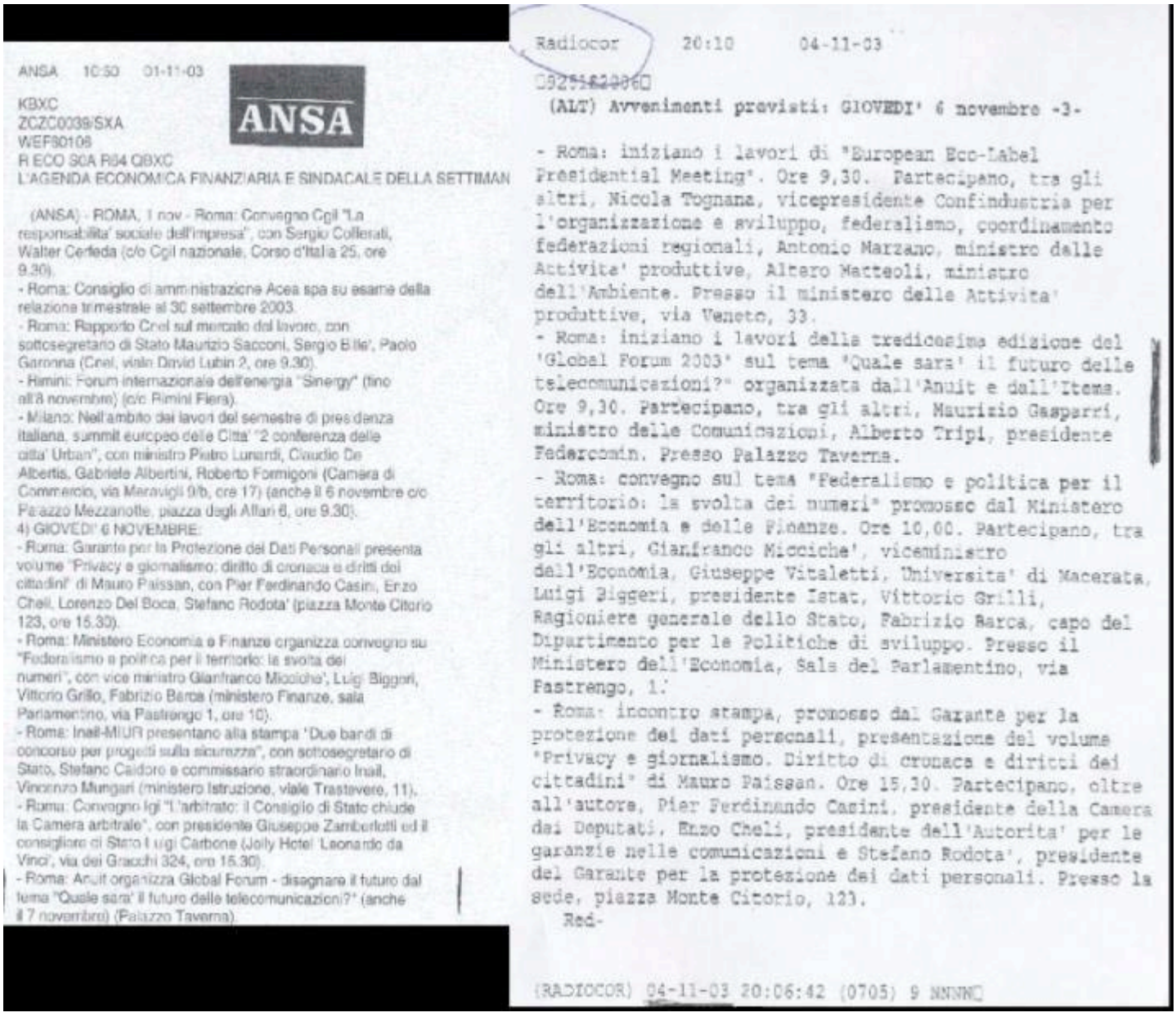
The team of ITEMS International will be pleased to give you all information on the upcoming Global Forum 2004.

LIST OF ABBREVIATIONS

ADSL	Asymmetric Digital Subscriber Line
APEC	Asia Pacific Economic Cooperation Forum
API	Application Programming Interface
B2B	Business to Business
B2C	Business to Customer
B2G	Business to Government
ccTLD	Country-Code Top-Level Domain
CERN	European Organisation for Nuclear Research
COCOM	EU's Communications Committee
CRM	Customer Relationship Management
DG	Directorate General
DNS	Domain Name System
DSL	Digital Subscriber Line
DTH	Direct to Home
DTT	Digital Terrestrial Television
DVBT	Digital Video Broadcasting Terrestrial
EBITDA	Earnings Before Interest, Taxes, Depreciation, and Amortization
EC	European Commission
EITO	European Information Technology Observatory
EMEA	Europe, Middle East and Asia
ERG	European Regulators Group
EU	European Union
EYPD	European Year of People with Disabilities
FP	Framework Programme
FTTH	Fibre to the Home
GDP	Gross Domestic Product
GIP	Gross Interior Product
GSM	Global System for Mobile Communications
G2B	Government to Business
ICT	Information & Communication Technologies
ID	Identification/ Identity
IMT-2000	International Mobile Telecommunications-2000
InfoDev	Information for Development Program of the World Bank
IP	Internet Protocol
IPR	Intellectual Property Rights
ISDN	Integrated Service Digital Network
ISP	Internet Service Provider
IT	Information Technologies
ITU	International Telecommunication Union
LEC	Local Exchange Carrier
LMDS	Local Multipoint Distribution System
Mb/s	Megabit per second
MMS	Multimedia Message Service
MPEG	Moving Pictures Experts Group
NGO	Non-Governmental Organization

NRA	National Regulatory Authority
NRF	New Regulatory Framework
OECD	Organization for Economic Cooperation & Development
OSS	Open Source Software
PC	Personal Computer
PDA	Personal Digital Assistant
PHS	Personal Handy-phone Systems
PIA	Personal Information Agent
PKI	Public Key Infrastructure
PLC	Power Line Communication
PPPoA	Point to Point Protocol over ATM
PTT	Post Telephone and Telegraph
R&D	Research and Development
SME	Small and Medium Sized Enterprise
SMIL	Synchronized Multimedia Integration Language
SMP	Significant Market Power
SMS	Short Message Service
TCP/IP	Transmission Control Protocol/Internet Protocol
TLD	Top Level Domain
TV	Television
UMTS	Universal Mobile Telecommunications System
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
U.S.	United States
VoIP	Voice over IP
Wi-Fi	“Wireless Fidelity”
WLAN	Wireless Local Area Network
WLL	Wireless Local Loop
WSIS	World Summit on the Information Society
WTO	World Trade Organisation
2G	2nd Generation
3G	3rd Generation

ANNEX: PRESS REVIEW



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L'AGENDA ECONOMICA FINANZIARIA E SINDACALE DELLA SETTIMAN

(ANSA) - ROMA, 1 nov - Roma: Convegno Cgil "La responsabilita' sociale dell'impresa", con Sergio Cofferati, Walter Cerfeda (c/o Cgil nazionale, Corso d'Italia 25, ore 9.30).
- Roma: Consiglio di amministrazione Acea spa su esame della relazione trimestrale al 30 settembre 2003.
- Roma: Rapporto Cnel sul mercato del lavoro, con sottosegretario di Stato Maurizio Sacconi, Sergio Billa', Paolo Garonna (Cnel, viale David Lubin 2, ore 9.30).
- Rimini: Forum internazionale dell'energia "Sinergy" (fino all'8 novembre) (c/o Rimini Fiera).
- Milano: Nell'ambito dei lavori del semestre di presidenza italiana, summit europeo delle Citta' "2 conferenza delle citta' Urban", con ministro Pietro Lunardi, Claudio De Albertis, Gabriele Albertini, Roberto Formigoni (Camera di Commercio, via Meravigli 9/b, ore 17) (anche il 6 novembre c/o Palazzo Mezzanotte, piazza degli Affari 6, ore 9.30).
4) GIOVEDI' 6 NOVEMBRE:
- Roma: Garante per la Protezione dei Dati Personali presenta volume "Privacy e giornalismo: diritto di cronaca e diritti dei cittadini" di Mauro Paissan, con Pier Ferdinando Casini, Enzo Cheli, Lorenzo Del Boca, Stefano Rodota' (piazza Monte Citorio 123, ore 15.30).
- Roma: Ministero Economia e Finanze organizza convegno su "Federalismo e politica per il territorio: la svolta dei numeri", con vice ministro Gianfranco Micciche', Luigi Biggeri, Vittorio Grilli, Fabrizio Barca (ministero Finanze, sala Parlamentino, via Pastrengo 1, ore 10).
- Roma: Inail-MIUR presentano alla stampa "Due bandi di concorso per progetti sulla sicurezza", con sottosegretario di Stato, Stefano Caldoro e commissario straordinario Inail, Vincenzo Mungari (ministero Istruzione, viale Trastevere, 11).
- Roma: Convegno Igi "L'arbitrato: il Consiglio di Stato chiude la Camera arbitrale", con presidente Giuseppe Zamberletti ed il consigliere di Stato Luigi Carbone (Jolly Hotel Leonardo da Vinci', via dei Gracchi 324, ore 15.30).
- Roma: Anuit organizza Global Forum - disegnare il futuro dal tema "Quale sara' il futuro delle telecomunicazioni?" (anche il 7 novembre) (Palazzo Taverna).

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(ALT) Avvenimenti previsti: GIOVEDI' 6 novembre -3-

- Roma: iniziano i lavori di "European Ecc-Label Presidential Meeting". Ore 9,30. Partecipano, tra gli altri, Nicola Tognana, vicepresidente Confindustria per l'organizzazione e sviluppo, federalismo, coordinamento federazioni regionali, Antonio Marzano, ministro delle Attivita' produttive, Altero Matteoli, ministro dell'Ambiente. Presso il ministero delle Attivita' produttive, via Veneto, 33.
- Roma: iniziano i lavori della tredicesima edizione del 'Global Forum 2003' sul tema 'Quale sara' il futuro delle telecomunicazioni?" organizzata dall'Anuit e dall'Itema. Ore 9,30. Partecipano, tra gli altri, Maurizio Gasparri, ministro delle Comunicazioni, Alberto Tripi, presidente Federcomin. Presso Palazzo Taverna.
- Roma: convegno sul tema "Federalismo e politica per il territorio: la svolta dei numeri" promosso dal Ministero dell'Economia e delle Finanze. Ore 10,00. Partecipano, tra gli altri, Gianfranco Micciche', viceministro dell'Economia, Giuseppe Vitaletti, Universita' di Macerata, Luigi Biggeri, presidente Istat, Vittorio Grilli, Ragioniere generale dello Stato, Fabrizio Barca, capo del Dipartimento per le Politiche di sviluppo. Presso il Ministero dell'Economia, Sala del Parlamentino, via Pastrengo, 1.
- Roma: incontro stampa, promosso dal Garante per la protezione dei dati personali, presentazione del volume "Privacy e giornalismo. Diritto di cronaca e diritti dei cittadini" di Mauro Paissan. Ore 15,30. Partecipano, oltre all'autore, Pier Ferdinando Casini, presidente della Camera dei Deputati, Enzo Cheli, presidente dell'Autorita' per le garanzie nelle comunicazioni e Stefano Rodota', presidente del Garante per la protezione dei dati personali. Presso la sede, piazza Monte Citorio, 123.
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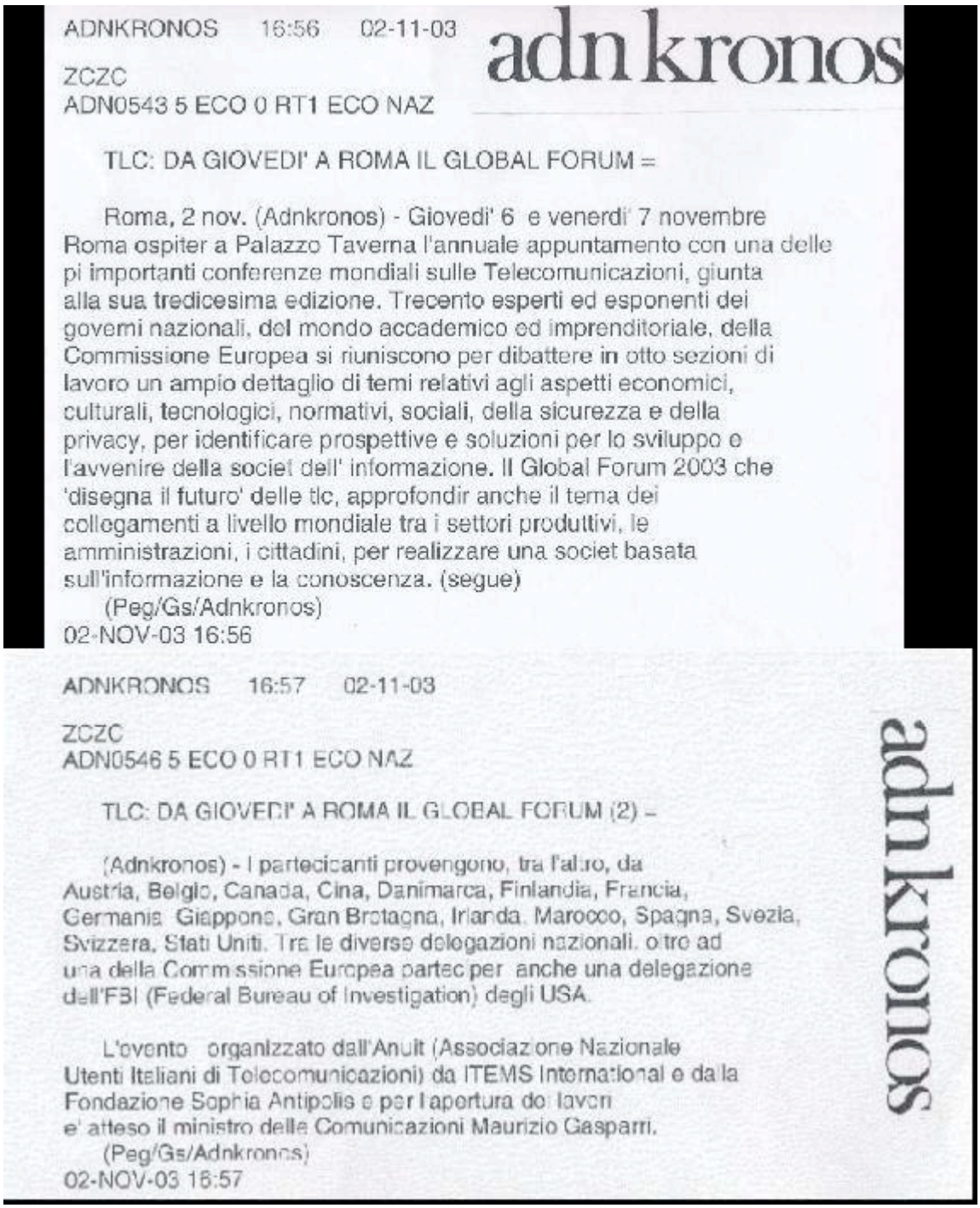

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TLC: DA GIOVEDI' A ROMA IL GLOBAL FORUM =

Roma, 2 nov. (Adnkronos) - Giovedi' 6 e venerdi' 7 novembre Roma ospiter a Palazzo Taverna l'annuale appuntamento con una delle pi importanti conferenze mondiali sulle Telecomunicazioni, giunta alla sua tredicesima edizione. Trecento esperti ed esponenti dei governi nazionali, del mondo accademico ed imprenditoriale, della Commissione Europea si riuniscono per dibattere in otto sezioni di lavoro un ampio dettaglio di temi relativi agli aspetti economici, culturali, tecnologici, normativi, sociali, della sicurezza e della privacy, per identificare prospettive e soluzioni per lo sviluppo e l'avvenire della societ dell' informazione. Il Global Forum 2003 che 'disegna il futuro' delle tlc, approfondir anche il tema dei collegamenti a livello mondiale tra i settori produttivi, le amministrazioni, i cittadini, per realizzare una societ basata sull'informazione e la conoscenza. (segue)
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TLC: DA GIOVEDI' A ROMA IL GLOBAL FORUM (2) -

(Adnkronos) - I partecipanti provengono, tra l'altro, da Austria, Belgio, Canada, Cina, Danimarca, Finlandia, Francia, Germania, Giappone, Gran Brotagna, Irlanda, Marocco, Spagna, Svezia, Svizzera, Stati Uniti. Tra le diverse delegazioni nazionali, oltre ad una della Commissione Europea partec per anche una delegazione dell'FBI (Federal Bureau of Investigation) degli USA.

L'evento organizzato dall'Anult (Associazione Nazionale Utenti Italiani di Telecomunicazioni) da ITEMS International e dalla Fondazione Sophia Antipolis e per l'apertura dei lavori e' atteso il ministro delle Comunicazioni Maurizio Gasparri.
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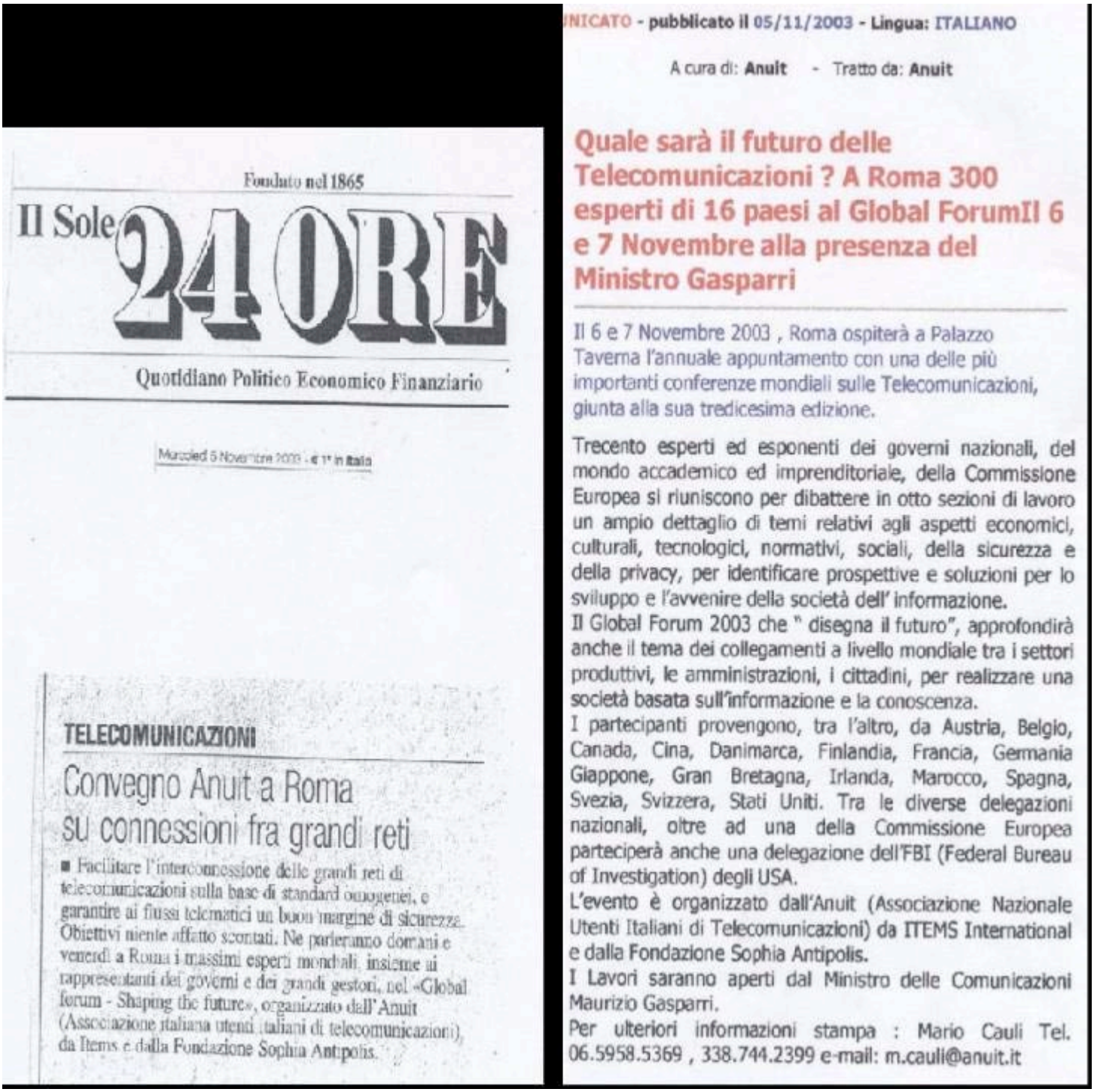

Fondato nel 1865

Il Sole 24 ORE

Quotidiano Politico Economico Finanziario

Mercoledì 5 Novembre 2003 - € 1* in Italia

TELECOMUNICAZIONI

Convegno Anuit a Roma su connessioni fra grandi reti

■ Facilitare l'interconnessione delle grandi reti di telecomunicazioni sulla base di standard omogenei, e garantire ai flussi telematici un buon margine di sicurezza. Obiettivi niente affatto scontati. Ne parleranno domani e venerdì a Roma i massimi esperti mondiali, insieme ai rappresentanti dei governi e dei grandi gestori, nel «Global forum - Shaping the future», organizzato dall'Anuit (Associazione italiana utenti italiani di telecomunicazioni), da Items e dalla Fondazione Sophia Antipolis.

NICATO - pubblicato il 05/11/2003 - Lingua: ITALIANO

A cura di: **Anuit** - Tratto da: **Anuit**

Quale sarà il futuro delle Telecomunicazioni ? A Roma 300 esperti di 16 paesi al Global ForumIl 6 e 7 Novembre alla presenza del Ministro Gasparri

Il 6 e 7 Novembre 2003 , Roma ospiterà a Palazzo Taverna l'annuale appuntamento con una delle più importanti conferenze mondiali sulle Telecomunicazioni, giunta alla sua tredicesima edizione.

Trecento esperti ed esponenti dei governi nazionali, del mondo accademico ed imprenditoriale, della Commissione Europea si riuniscono per dibattere in otto sezioni di lavoro un ampio dettaglio di temi relativi agli aspetti economici, culturali, tecnologici, normativi, sociali, della sicurezza e della privacy, per identificare prospettive e soluzioni per lo sviluppo e l'avvenire della società dell' informazione.

Il Global Forum 2003 che " disegna il futuro", approfondirà anche il tema dei collegamenti a livello mondiale tra i settori produttivi, le amministrazioni, i cittadini, per realizzare una società basata sull'informazione e la conoscenza.

I partecipanti provengono, tra l'altro, da Austria, Belgio, Canada, Cina, Danimarca, Finlandia, Francia, Germania Giappone, Gran Bretagna, Irlanda, Marocco, Spagna, Svezia, Svizzera, Stati Uniti. Tra le diverse delegazioni nazionali, oltre ad una della Commissione Europea parteciperà anche una delegazione dell'FBI (Federal Bureau of Investigation) degli USA.

L'evento è organizzato dall'Anuit (Associazione Nazionale Utenti Italiani di Telecomunicazioni) da ITEMS International e dalla Fondazione Sophia Antipolis.

I Lavori saranno aperti dal Ministro delle Comunicazioni Maurizio Gasparri.

Per ulteriori informazioni stampa : Mario Cauli Tel. 06.5958.5369 , 338.744.2399 e-mail: m.cauli@anuit.it

TLC: ANUIT, CODICE SICUREZZA CELLULARI CONVIENE ANCHE A GESTORI =
(ASCA) - Roma, 6 nov - Basta con la "guerra" tra gestori sul codice di sicurezza dei telefonini. Scambiarsi le informazioni ed attivare il meccanismo denominato IMEI conviene anche alle societa' di tlc. Non solo in termini di sicurezza ma anche sul versante piu' strettamente economico. E' l'"appello" lanciato dal presidente dell'Anuit (Associazione nazionale utenti di telecomunicazioni), Sergio Antocicco, conversando con i giornalisti a margine dei lavori del global forum, la 13ma conferenza mondiale sulle tlc, a cui partecipano oltre 300 esperti di 28 paesi.

Il ragionamento di Antocicco e' questo: la media annue di furti o smarrimenti di cellulari e' di circa un milione di apparecchi. "Ogni giorno di silenzio di un cellulare - ha stimato - costa un milione di euro ai gestori, dal momento che l'Arpu (Avarage reveniuw per user), cioe' l'introito medio per utente per l'utilizzo del mobile, e' di un euro giornaliero. In linea ipotetica, si puo' supporre che un telefonino smarrito o rubato non venga usato per 10 giorni con una perdita per i gestori di 10 milioni di euro. Sono cifre altissime". Per questo, Antocicco ha esortato le societa' telefoniche a realizzare "questo sistema di sicurezza che, seppure oneroso, conviene come ritorno economico. Occorre un accordo per lo scambio dei codici tra i gestori nazionali e con quelli internazionali. Come gia' si e' cominciato a fare in Inghilterra, Francia e Australia".
ri/cam/rs (segue)
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TLC: ANUIT, CODICE SICUREZZA CELLULARI CONVIENE ANCHE A GESTORI (2) =
"Un regalo a chi riporta un telefonino smarrito"
(ASCA) - Roma, 6 nov - Antocicco ha sostenuto anche la necessita' che il codice di sicurezza protegga il telefonino non solo dal furto ma anche dallo smarrimento. "Molto spesso - ha affermato - il valore delle informazioni contenute nel cellulare superano di gran lunga il valore commerciale dell'apparecchio stesso". Da qui, la proposta del presidente dell'Anuit di dare "un piccolo regalo" a chi riporta un telefonino rubato. Come? "Inviando da parte dell'operatore - ha spiegato Antocicc - un messaggio sul cellulare perduto con l'indirizzo del centro della societa' di appartenenza piu' vicina".

Sviluppando appieno le potenzialita' del codice Imei, cioe' "il numero di telaio dei telefonini - ha concluso Antocicco - sara' inutile rubarli. L'unica cosa riciclabile diventera' la batteria. Ma diciamocela tutta, con una batteria non si compra una dose di droga".
ri/cam/as
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ITEMS INTERNATIONAL

GLOBAL FORUM 2003
Shaping the Future

adnkronos

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ICT: GLOBAL FORUM CHIEDE INVESTIMENTI CONTRO DIGITAL DIVIDE = ALMENO L'1% DEL TOTALE NEL SETTORE

Roma, 7 nov. - (Adnkronos) - Destinare almeno l'1% degli investimenti in Information and Communication Technology (ICT) all'alfabetizzazione delle grandi masse di giovani che, altrimenti, rischiano un futuro da "esclusi". E' la richiesta giunta dal Global Forum 2003, in particolare dai paesi in via di sviluppo. L'evento ha visto riuniti a Roma 300 esperti provenienti da 28 Paesi che si sono incontrati a Palazzo Taverna ieri e oggi per approfondire un ampio ventaglio di temi legati allo sviluppo della Societa' dell'Informazione. Giunto alla tredicesima edizione, il Forum ha dibattuto, in otto sessioni, le principali problematiche alla quali occorre dare risposte concrete in tempi brevi per attivare gli strumenti che sono il fondamento della Societa' basata sull'informazione e la conoscenza.

Le infrastrutture, i servizi, i problemi di sicurezza e privacy, gli scenari regolamentari, le relazioni con i cittadini, i collegamenti tra autorita' centrali e locali e gli organismi internazionali, sono state oggetto di approfondimenti e di confronti tra le situazioni esistenti nelle varie parti del mondo. (segue)
(Peg/Pri/Adnkronos)
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adnkronos

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ADN0757 6 ECO 0 RT1 ECO NAZ

ICT: GLOBAL FORUM CHIEDE INVESTIMENTI CONTRO DIGITAL DIVIDE (2) =

(Adnkronos) - Sylviane Toporkoff, Presidente del Global Forum, ha messo in evidenza che dai lavori, emerge la necessita' di adeguare la politica industriale ai nuovi bisogni dei cittadini e delle imprese per colmare il digital divide, soprattutto in quei Paesi in cui il processo di liberalizzazione si sviluppato in un arco temporale breve, dando seguito a un profondo cambiamento dello scenario socio-economico.

Sergio Antocicco, Presidente dell'Anut, che organizza con Items e la Fondazione Sophia Antipolis ogni anno il Global Forum, ha sottolineato che dai lavori e' emersa l'esigenza di far convivere le diverse soluzioni tecnologiche e che, per gli utenti, e' preferibile trovare soluzioni regolamentari "aperte", sia per il software che per le infrastrutture.

Le conclusioni emerse dai lavori forniranno un contributo al World Summit on Information Society, rappresentato al Convegno di Roma dall'Ambasciatore Guy-Olivier Segond.
(Peg/Rs/Adnkronos)
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Il Sole 24 ORE

Quotidiano Politico Economico Finanziario

Venerdì 7 Novembre 2003

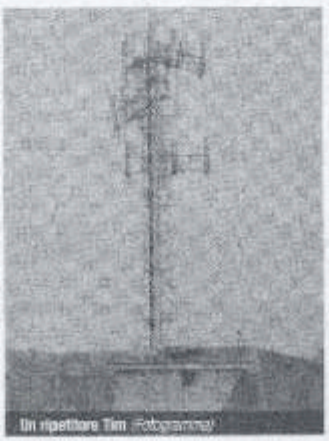
Contro i ladri di cellulari banche dati e ricompense

ROMA Braccati, "tracciati" e comprensibilmente preoccupati. Ma usare le tecnologie della telematica e dei cellulari tutelando non solo la privacy ma il nostro stesso patrimonio di informazioni personali non è impossibile. È certamente difficile. Tutt'è che di privacy e di corretto uso delle tecnologie da parte dei gestori ne parlano i massimi esperti mondiali nel «Global Forum - Shaping the future» in corso a Roma.

Promesse e impegni, ma anche ricette. I telefonini, ad esempio. Sono l'arma emblematica della nuova invasione della privacy. Ma «dipende da come si manovrano», incalza Sergio Antocicco, presidente dell'Anuit, l'associazione per gli utenti delle tlc che ha co-organizzato il forum. «I gestori superino le polemiche — chiede Antocicco — e attivino subito la banca dati comune dei codici imei», l'identificativo seriale che distingue ogni singolo apparecchio cellulare. Per farne un efficace antifurto: la disabilitazione del codice in rete blocca l'uso del telefonino a prescindere dalla scheda Sim usata. Ma anche — chiede Antocicco — per tracciare e tentare di recuperare i telefonini di cui il proprietario ha denunciato lo smarrimento. Come? Con la stessa tecnologia di localizzazione insita nel sistema cellulare e con qualche incentivo al "ritrovatore", propone Antocicco. La triangolazione tra i segnali delle celle dei ponti radio permette di individuare l'apparecchio acceso con un'approssimazione, in città, di poche decine di metri. «E si potrebbe mandare un sms all'apparecchio invitando chi lo ha ritrovato a recarsi, ad esempio, al negozio più vicino del gestore d'origine, indicato direttamente nel messaggio, in cambio, magari, di un piccolo omaggio». Ipotesi suggestiva e tecnicamente fattibile, giura Antocicco. Garante della privacy permettendo.

Per gli utenti il vantaggio sarebbe crescente, visto che «le informazioni contenute nei sempre più sofisticati telefonini superano spesso il valore dell'apparecchio». Ma gli stessi gestori ne avrebbero il loro tornaconto, e non solo in termini di immagine.

Ogni giorno di silenzio di un telefonino rubato costa un euro al gestore



Un ripetitore Tim (Fotogramma)

Così ragiona Antocicco: la media annua di furti o smarrimenti di cellulari è di circa un milione di apparecchi e «ogni giorno di silenzio di un cellulare si stima che costi un euro di mancato Arpu (Average revenue per user, l'indice sull'introito medio per utente che rappresenta il fattore critico per la redditività delle compagnie, ndr) e si può supporre che un telefonino smarrito o rubato non venga usato in media per 10 giorni con una perdita per i gestori di 10 milioni di euro: sono cifre altissime».

Via dunque alla piena operatività della banca dati internazionale (la cui sede è stata da tempo individuata a Dublino), «i cui costi saranno sicuramente compensati dal ritorno economico conseguente». In Giulietta, Francia e Australia «sono più avanti di noi, e non se vedo la ragione», esorta il presidente dell'Anuit.

F.RE.

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AGENZIA DI STAMPA QUOTIDIANA NAZIONALE

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TLC: ANUIT, POCA PRIVACY UN'ESIGENZA' DEL PROGRESSO

(ASCA) - Roma, 6 nov - Privacy e sviluppo tecnologico, specie nel settore delle tlc, non vanno a braccetto. Con la crescente innovazione siamo sempre piu' localizzabili, piu' "intercettabili". Ma questa e', in fin dei conti, una "esigenza" del progresso.

Sergio Antocicco, presidente dell'Anuit (associazione nazionale utenti di tlc), a margine del 13mo global forum, in corso a Roma, affronta con i giornalisti questo delicato problema. E precisa che attualmente il raggio di localizzazione di una persona che sta usando il telefono cellulare e' di circa 100 metri ma "con i sistemi piu' sofisticati si arrivera' a qualche decina di metri". Il problema, ha detto Antocicco, e' "comprendere i vantaggi dell'innovazione a fronte dei disagi dovuti alla mancanza di privacy. Con il telefonino o con la carta di credito la questione e' la stessa: devo accettare di essere localizzato in cambio di un servizio utile, pratico e innovativo".

Senza dimenticare, ha aggiunto, il tema della sicurezza che grazie alle nuove tecnologie e' indubbiamente aumentata.

Il problema dell'innovazione e' semmai un altro, ed e' di carattere culturale. "Riguarda - ha spiegato Antocicco - come coinvolgere le persone in un processo, quello tecnologico, che ha tempi molto piu' brevi del normale ricambio generazionale nel mondo del lavoro. Occorre fare uno sforzo condiviso (datori di lavoro, parti sociali, lavoratori), anche attraverso l'uso di metodologie ad hoc che facilitino l'aggiornamento e la formazione professionale".

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Inizia giovedì il Global Forum 2003 sulle tlc

Giovedì 6 e venerdì 7 novembre Roma ospiterà l'annuale appuntamento con una delle più importanti conferenze mondiali sulle Telecomunicazioni, giunta alla sua tredicesima edizione. Trecento esperti ed esponenti dei governi nazionali, del mondo accademico ed imprenditoriale, della Commissione Europea si riuniscono per dibattere in otto sezioni di lavoro un ampio dettaglio di temi relativi agli aspetti economici, culturali, tecnologici, normativi, sociali, della sicurezza e della privacy, per identificare prospettive e soluzioni per lo sviluppo e l'avvenire della società dell' informazione. Il Global Forum 2003 approfondirà anche il tema dei collegamenti a livello mondiale tra i settori produttivi, le amministrazioni, i cittadini, per realizzare una società basata sull'informazione e la conoscenza. I partecipanti provengono, tra l'altro, da Austria, Belgio, Canada, Cina, Danimarca, Finlandia, Francia, Germania Giappone, Gran Bretagna, Irlanda, Marocco, Spagna, Svezia, Svizzera, Stati Uniti. Tra le diverse delegazioni nazionali, oltre ad una della Commissione Europea parteciperà anche una delegazione dell'FBI (Federal Bureau of Investigation) degli USA. L'evento è organizzato dall'Anuit (Associazione Nazionale Utenti Italiani di Telecomunicazioni) da ITEMS International e dalla Fondazione Sophia Antipolis e per l'apertura dei lavori è atteso il ministro delle Comunicazioni Maurizio Gasparri.

La Republica

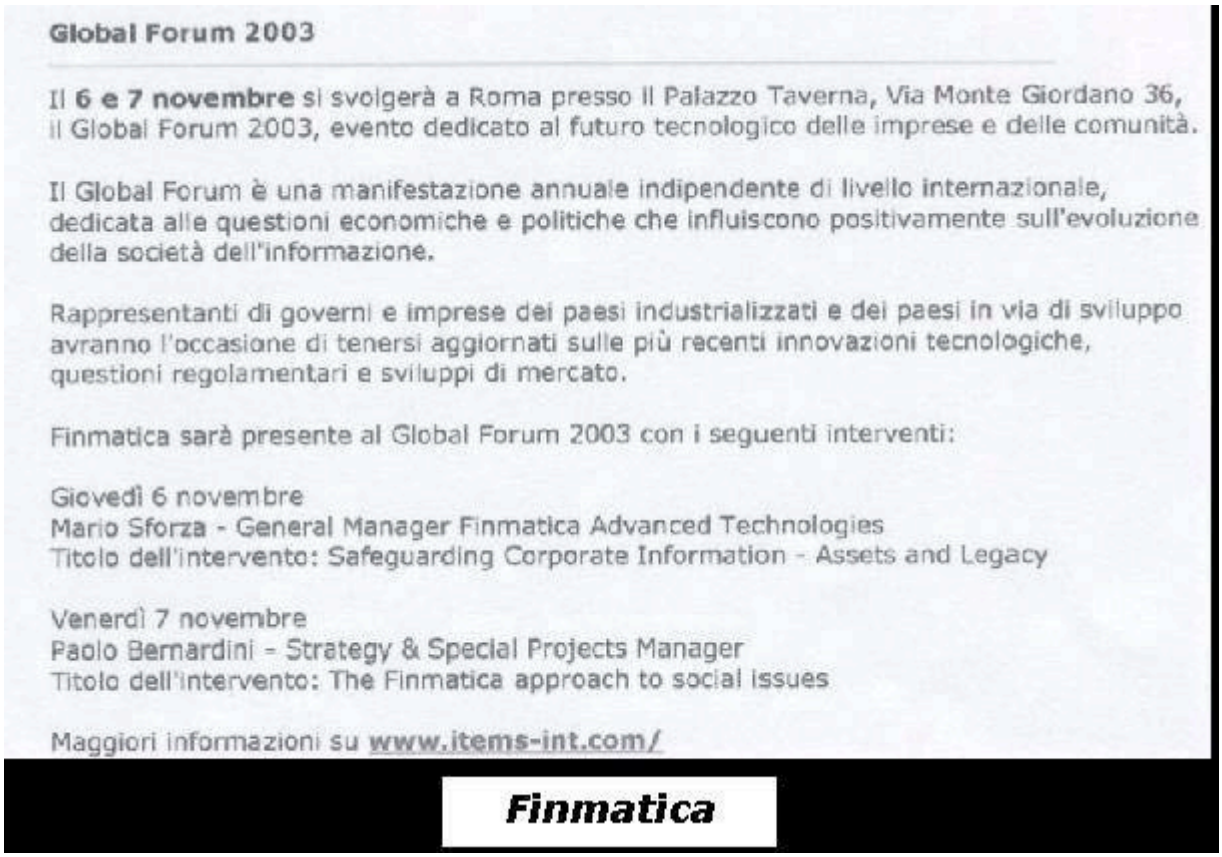
Media Information

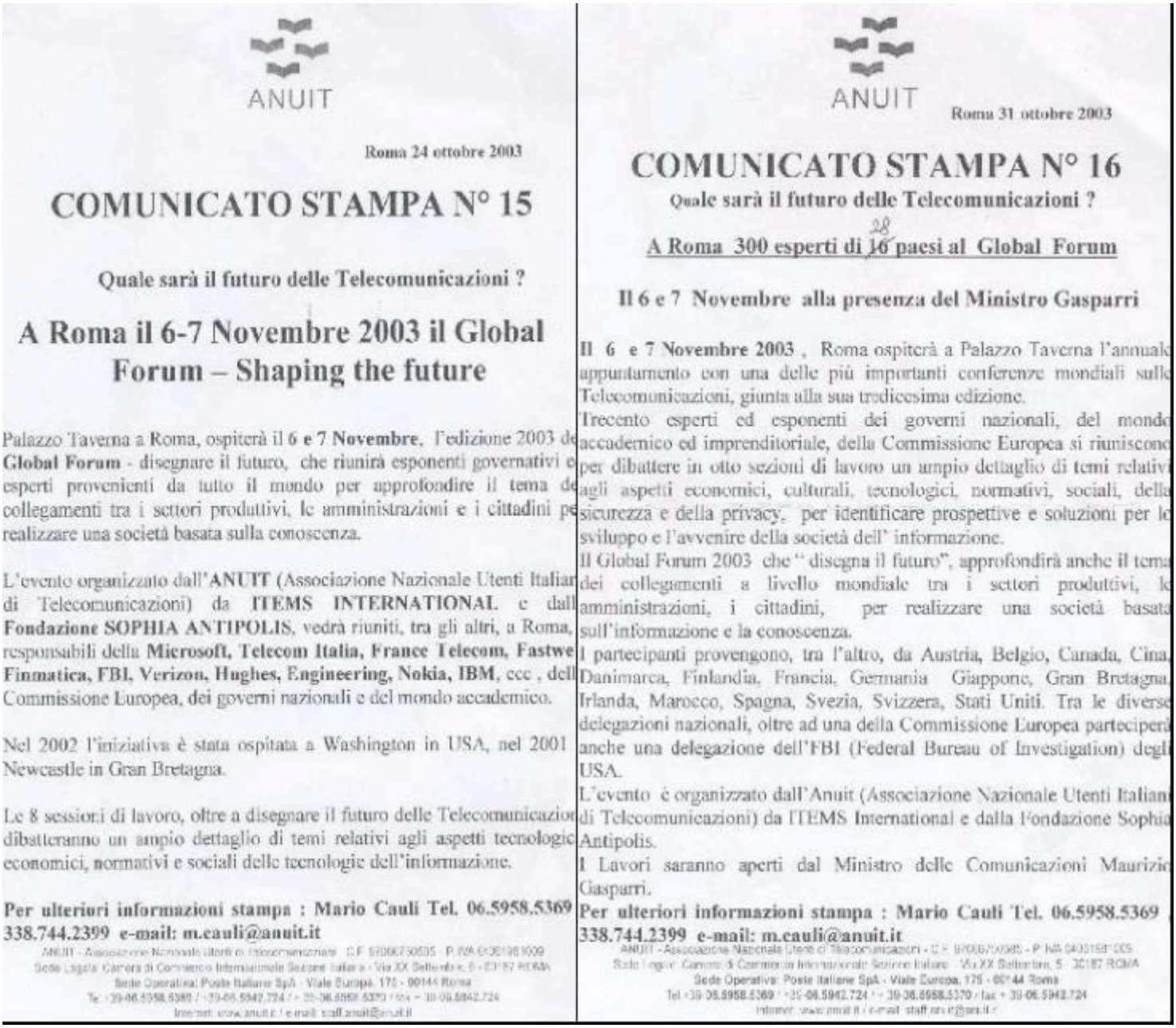
IBM

IBM al Global Forum 2003

Dall'e-government l'impulso allo sviluppo delle piccole e medie imprese

Roma, 6 novembre 2003 – "Il processo di trasformazione dell'e-Government in Europa e nel mondo, si sta rivelando anche come uno dei più importanti fattori di sviluppo economico del settore privato e, in particolare delle piccole e medie imprese" ha commentato Piero Corsini, Vice president EMEA Public Sector, IBM Europe, durante la sessione di apertura del Global Forum 2003 di Roma, l'esclusivo appuntamento internazionale centrato, quest'anno, sul tema delle *business community* in un contesto economico basato sulla condivisione della conoscenza.


Global Forum 2003
Il 6 e 7 novembre si svolgerà a Roma presso il Palazzo Taverna, Via Monte Giordano 36, il Global Forum 2003, evento dedicato al futuro tecnologico delle imprese e delle comunità.
Il Global Forum è una manifestazione annuale indipendente di livello internazionale, dedicata alle questioni economiche e politiche che influiscono positivamente sull'evoluzione della società dell'informazione.
Rappresentanti di governi e imprese dei paesi industrializzati e dei paesi in via di sviluppo avranno l'occasione di tenersi aggiornati sulle più recenti innovazioni tecnologiche, questioni regolamentari e sviluppi di mercato.
Finmatica sarà presente al Global Forum 2003 con i seguenti interventi:
Giovedì 6 novembre
Mario Sforza - General Manager Finmatica Advanced Technologies
Titolo dell'intervento: Safeguarding Corporate Information - Assets and Legacy
Venerdì 7 novembre
Paolo Bernardini - Strategy & Special Projects Manager
Titolo dell'intervento: The Finmatica approach to social issues
Maggiori informazioni su www.items-int.com/
Finmatica



ANUIT

Roma 24 ottobre 2003

COMUNICATO STAMPA N° 15

Quale sarà il futuro delle Telecomunicazioni ?

A Roma il 6-7 Novembre 2003 il Global Forum – Shaping the future

Palazzo Taverna a Roma, ospiterà il **6 e 7 Novembre**, l'edizione 2003 del **Global Forum** - disegnare il futuro, che riunirà esponenti governativi e esperti provenienti da tutto il mondo per approfondire il tema dei collegamenti tra i settori produttivi, le amministrazioni e i cittadini per realizzare una società basata sulla conoscenza.

L'evento organizzato dall'**ANUIT** (Associazione Nazionale Utenti Italiani di Telecomunicazioni) da **ITEMS INTERNATIONAL** e dalla **Fondazione SOPHIA ANTIPOLIS**, vedrà riuniti, tra gli altri, a Roma, responsabili della **Microsoft, Telecom Italia, France Telecom, Fastweb, Finmatica, FBI, Verizon, Hughes, Engineering, Nokia, IBM**, ecc , della Commissione Europea, dei governi nazionali e del mondo accademico.

Nel 2002 l'iniziativa è stata ospitata a Washington in USA, nel 2001 a Newcastle in Gran Bretagna.

Le 8 sessioni di lavoro, oltre a disegnare il futuro delle Telecomunicazioni, dibatteranno un ampio dettaglio di temi relativi agli aspetti tecnologici, economici, normativi e sociali delle tecnologie dell'informazione.

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ANUIT

Roma 31 ottobre 2003

COMUNICATO STAMPA N° 16

Quale sarà il futuro delle Telecomunicazioni ?

A Roma 300 esperti di ~~16~~ 28 paesi al Global Forum

Il 6 e 7 Novembre alla presenza del Ministro Gasparri

Il 6 e 7 Novembre 2003 , Roma ospiterà a Palazzo Taverna l'annuale appuntamento con una delle più importanti conferenze mondiali sulle Telecomunicazioni, giunta alla sua tredicesima edizione.
Trecento esperti ed esponenti dei governi nazionali, del mondo accademico ed imprenditoriale, della Commissione Europea si riuniscono per dibattere in otto sezioni di lavoro un ampio dettaglio di temi relativi agli aspetti economici, culturali, tecnologici, normativi, sociali, della sicurezza e della privacy, per identificare prospettive e soluzioni per lo sviluppo e l'avvenire della società dell' informazione.
Il Global Forum 2003 che " disegna il futuro", approfondirà anche il tema dei collegamenti a livello mondiale tra i settori produttivi, le amministrazioni, i cittadini, per realizzare una società basata sull'informazione e la conoscenza.
I partecipanti provengono, tra l'altro, da Austria, Belgio, Canada, Cina, Danimarca, Finlandia, Francia, Germania Giappone, Gran Bretagna, Irlanda, Marocco, Spagna, Svezia, Svizzera, Stati Uniti. Tra le diverse delegazioni nazionali, oltre ad una della Commissione Europea parteciperà anche una delegazione dell'FBI (Federal Bureau of Investigation) degli USA.
L'evento è organizzato dall'Anuit (Associazione Nazionale Utenti Italiani di Telecomunicazioni) da ITEMS International e dalla Fondazione Sophia Antipolis.
I Lavori saranno aperti dal Ministro delle Comunicazioni Maurizio Gasparri.
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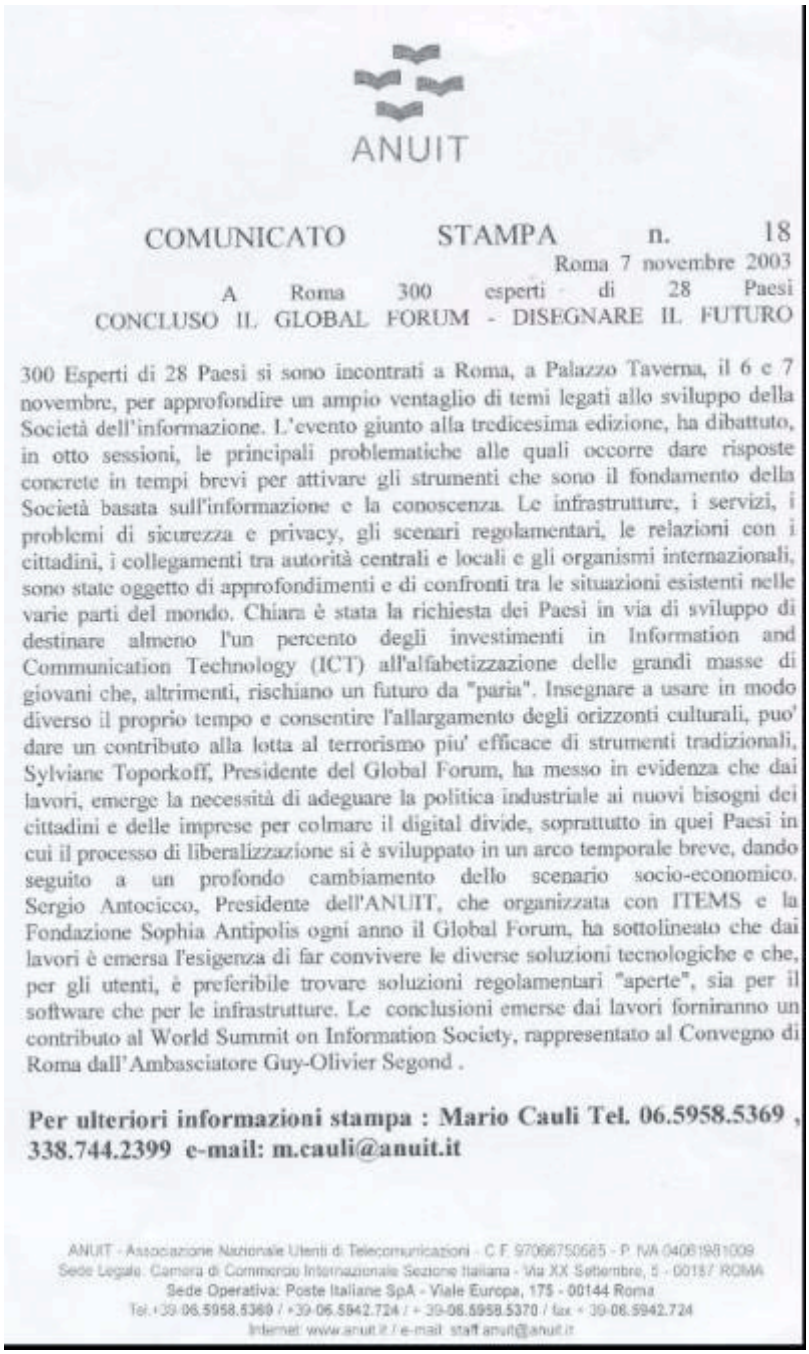

ANUIT

COMUNICATO STAMPA n. 18

Roma 7 novembre 2003

A Roma 300 esperti di 28 Paesi
CONCLUSO IL GLOBAL FORUM - DISEGNARE IL FUTURO

300 Esperti di 28 Paesi si sono incontrati a Roma, a Palazzo Taverna, il 6 e 7 novembre, per approfondire un ampio ventaglio di temi legati allo sviluppo della Società dell'informazione. L'evento giunto alla tredicesima edizione, ha dibattuto, in otto sessioni, le principali problematiche alle quali occorre dare risposte concrete in tempi brevi per attivare gli strumenti che sono il fondamento della Società basata sull'informazione e la conoscenza. Le infrastrutture, i servizi, i problemi di sicurezza e privacy, gli scenari regolamentari, le relazioni con i cittadini, i collegamenti tra autorità centrali e locali e gli organismi internazionali, sono state oggetto di approfondimenti e di confronti tra le situazioni esistenti nelle varie parti del mondo. Chiara è stata la richiesta dei Paesi in via di sviluppo di destinare almeno l'un percento degli investimenti in Information and Communication Technology (ICT) all'alfabetizzazione delle grandi masse di giovani che, altrimenti, rischiano un futuro da "paria". Insegnare a usare in modo diverso il proprio tempo e consentire l'allargamento degli orizzonti culturali, puo' dare un contributo alla lotta al terrorismo piu' efficace di strumenti tradizionali, Sylviane Toporkoff, Presidente del Global Forum, ha messo in evidenza che dai lavori, emerge la necessità di adeguare la politica industriale ai nuovi bisogni dei cittadini e delle imprese per colmare il digital divide, soprattutto in quei Paesi in cui il processo di liberalizzazione si è sviluppato in un arco temporale breve, dando seguito a un profondo cambiamento dello scenario socio-economico. Sergio Antocicco, Presidente dell'ANUIT, che organizzata con ITEMS e la Fondazione Sophia Antipolis ogni anno il Global Forum, ha sottolineato che dai lavori è emersa l'esigenza di far convivere le diverse soluzioni tecnologiche e che, per gli utenti, è preferibile trovare soluzioni regolamentari "aperte", sia per il software che per le infrastrutture. Le conclusioni emerse dai lavori forniranno un contributo al World Summit on Information Society, rappresentato al Convegno di Roma dall'Ambasciatore Guy-Olivier Segond .

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Conto alla rovescia per la ripresa

Il 2004, annunciato come l'anno della fine della crisi dell'Ict, è ormai alle porte. Le aspettative sono alte, ma le criticità non mancano. I rappresentanti del settore sono comunque ottimisti e si preparano per le nuove sfide.

di MILA FIORDALISI

Il conto alla rovescia è iniziato. E manca ormai poco più di un mese allo **scoccare del 2004**, l'anno che dovrebbe mettere fine alla crisi dell'Ict. Ma il condizionale è d'obbligo: nonostante le previsioni ottimiste da parte di analisti e protagonisti del settore, le **criticità sono ancora numerose** e con l'avvicinarsi del nuovo anno i dubbi si moltiplicano. Il nodo più intricato resta quello delle **risorse finanziarie** e la conseguente **contrazione degli investimenti** da parte degli operatori. Come fare ad affrontare le nuove sfide? Esistono delle soluzioni?

PUNTARE SUI FONDI PUBBLICI

"Da qui a 5 anni assisteremo ad **una nuova rivoluzione** nell'ambito delle nuove tecnologie. E sarà l'Ict a fare da leva ad una nuova **stagione di produttività**", sottolinea il presidente della Fondazione **Sophia-Antipolis** (Francia), **Pierre Laffitte**. "Dopo tre anni di crisi è arrivato il momento di prendere **decisioni importanti** per fare in modo che il Piano **E-Europe 2005** possa davvero concretizzarsi. I maggiori interventi dovranno riguardare il settore pubblico, che rappresenta **il 40% del Pil**. Per questa ragione i fondi pubblici dovranno essere utilizzati per favorire soprattutto la **diffusione del broadband**, anche nelle **aree rurali**". Parallelamente, aggiunge Laffitte, sarà necessario creare le condizioni affinché il comparto privato utilizzi sempre di più la Rete soprattutto in ottica **e-commerce**.

"E poi ci sarà da risolvere il problema dell'**E-confidence**: i cittadini europei si fidano ancora poco del web ed è per questo che l'Europa sta lavorando soprattutto sul fronte della sicurezza delle applicazioni. Il **20 novembre** è la data fissata per l'inaugurazione della nuova **Agenzia europea per la sicurezza**".

CONCENTRARSI SUL VALORE

Gli operatori si stanno concentrando da tempo sul **taglio dei costi**. Una "politica" che dà i suoi frutti da un punto di vista del riequilibrio delle casse aziendali, ma che, al contempo, "**non crea valore** a livello di infrastrutture", sostiene il vice presidente marketing di **Telecom Italia Sparkle**, **Arturo Danesi**. "Non ci sono più grandi certezze e quindi si tende a razionalizzare l'industria. È una **strategia difensiva**, ma è arrivato il momento di **passare all'attacco**". Danesi individua nell'utilizzo del **protocollo Ip** e nelle **partnership** le due soluzioni per consentire agli operatori di tornare a fare profitti. "I nuovi servizi a banda larga, le applicazioni multimediali, l'accesso ai servizi sempre di più in modalità wireless, l'utilizzo di Ip-Vpn da parte delle aziende e la crescente domanda delle applicazioni **Voip** devono farci riflettere sull'evoluzione tecnologica. Gli operatori di telecomunicazioni devono quindi assolutamente e necessariamente concentrarsi su questi elementi e modificare di conseguenza anche l'**approccio strategico**".

VIA ALLA COOPERAZIONE

Di qui la necessità di stringere partnership e accordi, una strategia "**orizzontale**" che permette di condividere esperienze e know how "consentendo a ciascuna azienda di focalizzarsi al meglio sul proprio core business e allo stesso tempo di offrire ai propri utenti servizi sempre più evoluti". Concorda sul valore delle partnership il Vice Presidente Emea di **Microsoft Italy Umberto Paolucci**, il quale propende per una maggiore cooperazione fra il comparto pubblico e quello privato e riporta l'attenzione sugli "obiettivi". "Abbiamo almeno **due compiti**: da un lato quello di **far evolvere la tecnologia** e tradurla in valore, dall'altro quello di **realizzare la convergenza** offrendo servizi concreti. Bisognerà quindi rafforzare il **lavoro di squadra**". Paolucci mostra preoccupazione sulla flessione degli investimenti da parte di numerosi protagonisti del settore. "Si sono ridotti i costi aziendali ma stanno aumentando i costi di non investimento", ovvero si è rallentata in parte la crescita tecnologica e di conseguenza si riflette sulla velocità di erogazione di nuovi servizi.

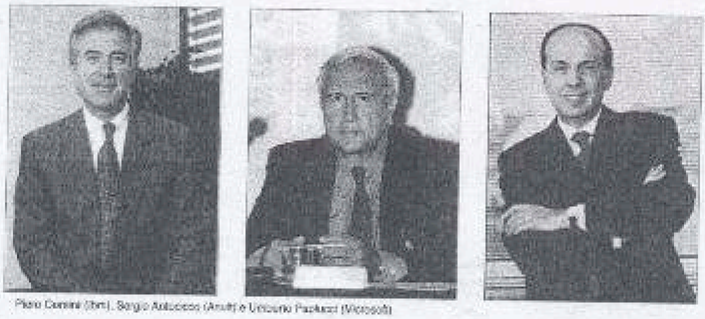
D'accordo con Danesi, Paolucci rivaluta dunque l'attenzione sul "**valore che deriva dal progresso**. E per assistere a un reale progresso è indispensabile una più stretta collaborazione fra pubblico e privato".

ATTIRARE INVESTIMENTI

Sulla questione interviene anche il Vice Presidente Emea Public sector di **Ibm Europe**, **Piero Corsini**. "La continua attuazione dei programmi di **e-government** nei singoli Paesi sta creando i presupposti per attirare **nuovi investimenti dall'estero** e per rendere più snelle le relazioni fra le pmi e la pubblica amministrazione. Si tratta di uno scenario assolutamente in linea con il nuovo modello di **e-government on demand**, un modello globale che deve integrare i processi delle varie istituzioni pubbliche e deve rispondere in modo rapido e flessibile alle esigenze delle imprese e dei cittadini, favorendo in questo modo lo sviluppo economico e sociale dell'intero sistema Paese".

LA SVOLTA NEL 2004?

Il 2004 sarà davvero l'anno della ripresa? "Le condizioni ci sono, almeno quelle che riguardano attese e aspettative", risponde **Sergio Antocicco**, il Presidente dell'**Anuit**. "I tassi di crescita attuali sono sufficienti a garantire lo sviluppo e non bisogna certo rincorrere tassi da record come è avvenuto nella fase iniziale dello sviluppo della new economy. L'Italia, inoltre, è in una posizione di forte recupero: non siamo più considerati l'ultima ruota del carro e, anzi, siamo più che in grado di reggere il confronto con gli altri Paesi".



Piero Corsini (Ibm), Sergio Antocicco (Anuit) e Umberto Paolucci (Microsoft)

> Paolucci: «C'è bisogno di lavoro di squadra per favorire lo sviluppo della convergenza»

> Antocicco: «Gli attuali tassi di crescita sono già in grado di rilanciare il comparto»

Sulle Alpi la valle del wi-fi

La sfida di due trentenni: mettere in Rete contrade irraggiungibili
Così la Val Sangone è oggi il più esteso network wireless d'Italia

Non c'è bisogno di essere nella Silicon Valley californiana per essere dei pionieri dell'hi-tech. Lo possono essere anche un manipolo di giovani informatici nostrani nascosti fra le verdi pieghe di una vallata molto meno nota, anzi ai più sconosciuta: la Val Sangone, adagiata alle falde delle Alpi Cozie, a 35 km da Torino. È qui, in questa conca un tempo contesa fra Carlo Magno e i Longobardi, fra i Savoia e i francesi, fra i nazisti e i partigiani, che Marco Pial e Claudio Ostorero, entrambi trentenni e rispettivamente presidente e technical manager della piccola Ica Net (www.icanet.it), hanno lanciato la loro sfida: connettere a Internet via wi-fi tutti gli abitanti della valle, a partire da Giaveno, il comune più importante della valle (14mila abitanti). E tanto hanno fatto che ci sono riusciti. Oggi la Val Sangone rappresenta la più estesa rete wireless d'Italia, coprendo una superficie di 250 km quadrati e potenzialmente fornendo connettività a 57mila persone.

"Già", racconta Ostorero, "questa è stata la nostra pazzia, portare tecnologia in termini di connettività là dove non c'è alcun interesse a portarla. Abbiamo cioè puntato molto sulla sperimentazione in ambiente esterno, per portare il wi-fi, e la banda larga, fin dentro le case, coprendo il cosiddetto 'ultimo miglio' ('wi-fi last mile'). Mentre altri operatori decidevano di installare hot spot wi-fi in stazioni, aeroporti, centri commerciali, noi copravamo scuole e contrade." Ecco il vero wi-fi all'italiana, quello grazie al quale tutti quei piccoli comuni e quelle aree di provincia finora rimasti tagliati fuori dal grande avvento dell'Internet veloce potrebbero colmare il loro divario tecnologico. "Si fa tanto parlare di digital divide", dice Pial, "ma finora nessuno si era preso la briga di sperimentare una tecnologia che effettivamente potesse colmare questo divario con investimenti assolutamente contenuti, e quindi potenzialmente accessibile a tutti". Loro lo hanno fatto.

E per farlo i ragazzi hanno escogitato di tutto, anche la possibilità d'installare i ripetitori del segnale all'interno dei campanili delle chiese. Quello della chiesa parrocchiale di Coazze, per esempio, viene utilizzato per distribuire la connessione alla parte più alta della Val Sangone. Coincidenza o ironico segno del destino, sulla parete sud del campanile vi è inciso il motto 'Ciascuno a suo modo', quello da cui trasse ispirazione Pirandello nel 1924 per la sua opera teatrale. E i ragazzi di Ica Net hanno cominciato a fare le cose a modo loro già nel 1998, quando decisero di creare il primo ISP nella valle. Poi sono arrivati gli ingenti investimenti nelle aree metropolitane fatti dalle grandi aziende nazionali e internazionali per fornire fibra ottica, banda larga, servizi dedicati. "Ma qui nella valle rimanevamo costantemente tagliati fuori da tutto questo avanzamento tecnologico. Per noi la connessione via telefono rimaneva l'unica opzione. Per questo abbiamo cominciato a guardare con interesse a cosa stava accadendo negli Stati Uniti e in Nord Europa, dove stavano implementando nuove tecnologie di connessione a Internet via onde radio". E finalmente, nell'ottobre 2002 (dopo due anni di ripetute e insistenti richieste per un'equiparazione europea), è arrivata l'autorizzazione dal Ministero delle Comunicazioni per poter avviare una prima sperimentazione di rete wi-fi "ultimo miglio".

"La normativa europea prevede una potenza di trasmissione di massimo 20 dBm (decibel su milliwatt)", spiega Ostorero. "Abbiamo ottimizzato la trasmissione di una potenza così limitata (si pensi che un cellulare arriva a 30-32 dBm) utilizzando delle antenne direzionali." È grazie ad esse che anche il rifugio C.A.I. Alpe della Balma (www.alpedellabalma.it), situato a quota 1986 metri, nel cuore del Parco Orsiera-Rocciavrè, oggi può disporre di una connessione Internet veloce (prende il segnale dal ripetitore installato nel campanile della chiesa di Coazze, a fondo valle), con due webcam per il monitoraggio del territorio; l'alimentazione viene fornita da una centralina idroelettrica e da pannelli fotovoltaici.

Arianna Dagnino

Il Corriere delle Telecommunicazioni