



GLOBAL FORUM 2007:



“SHAPING THE FUTURE”

Opening Session: “GLOBAL CONVERGENCE 2.0 - INTEGRATION & INNOVATION”

IcT: speeding up The
SUSTAINABLE GROWTH
OF THE EUROPEAN UNION
WHAT PROBLEMS SHOULD WE SOLVE?

organizers:

Fondazione Giorgio Cini
International

Items

Italy



Main Targets:

**1. BUILDING THE KNOWLEDGE SOCIETY
FOR ALL**

**2. FIGHTING AGAINST "DIGITAL DIVIDE"
HOW?**

**1. TO FORM A NEW GENERATION OF
EUROPEAN "e –Citizens"**

**2. TO EQUIP THE NEW "e –
Citizens" WITH MOST**

ADVANCED e² TOOLS



TOOL No.1: The new affordable

“EU Citizens” **global Internet portal**

<http://citizens.europa.eu>

- Driven by its own European Search Engine
- EU Citizens! Directory
- EU Citizens! Mail





Internet Sites	Search Engines	Email Providers	IM Services	VoIP Services	Payments
MSN Unique Visitors ⁽²⁾ (420MM)	Google Search ⁽¹⁾ (218MM)	Yahoo! Mail ⁽¹⁾ (219MM)	MSN Messenger Active Accounts ⁽²⁾ (180MM)	Skype / eBay Registered Users ⁽²⁾ (54MM)	PayPal / eBay Accounts ⁽²⁾ (79MM)
Google ⁽¹⁾ (384MM)	Yahoo! Search ⁽¹⁾ (207MM)	MSN Hotmail Active Accounts ⁽²⁾ (205MM)	Yahoo! Messenger ⁽¹⁾ (95MM)		
Yahoo! Unique Visitors ⁽²⁾ (379MM)		Google GMail ⁽¹⁾ (27MM)	AOL Instant Messenger (AIM) ^(1, 3) (64MM)		
eBay ⁽¹⁾ (187MM)			ICQ ⁽¹⁾ (31MM)		
Amazon.com Active Customers ⁽²⁾ (50MM)					
AOL Subscribers ⁽²⁾ (30MM)					
MySpace.com ⁽¹⁾ (21MM)					

• Convergence is happening (~10% of Yahoo! IM sessions end in phone call). Opportunities exist for non-mobile players to leverage existing subscribers.

• Who has the most valuable customer base as transition occurs? Who will have it when it is over?

(1) Source: Unique Visitors, comScore Media Metrix (5/05).
 (2) Source: Company Reports, as of Q2:05. MSN data as of 10/12/05. Yahoo! data computed by taking total Yahoo-MSN figure (275MM) and subtracting MSN portion. Skype data as of 9/12/05.
 (3) Source: Company Web site, as of 4/04.
 (4) Note: For IM, Radicati Group cites Global IM Share as follows: AIM (56%), MSN (25%), Yahoo! Messenger (19%), versus the methodology above, which yields: MSN (53%), Yahoo! Messenger (26%), AIM (19%), excluding Skype and ICQ.

Fig. 1: Global Internet Cap Leaders

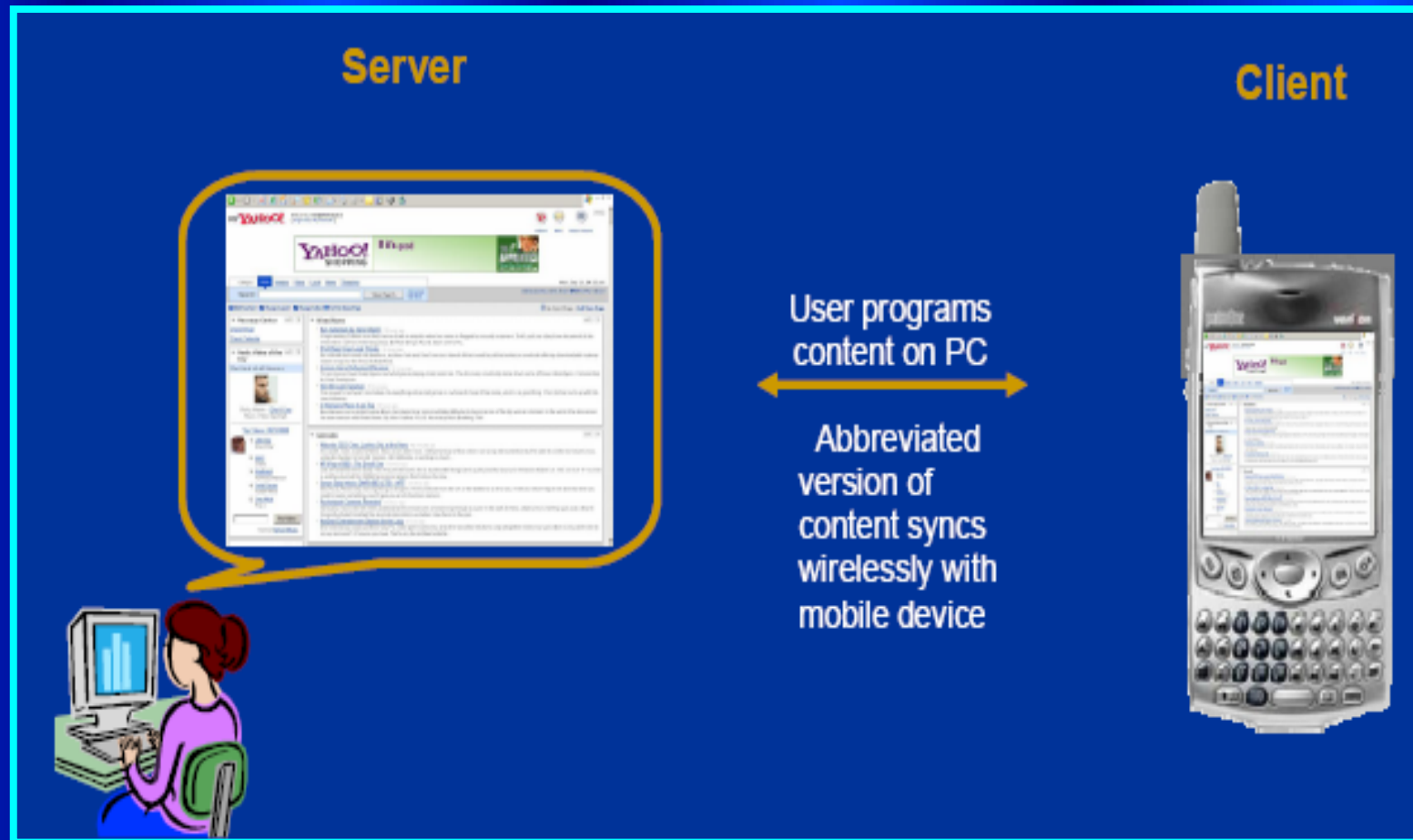




<http://citizens.europa.eu>

- providing a full range of Products & Services
- **Platform for Open Discussions (POD) between all Eu Citizens**
- **A MAJOR STEP TO REACH THE GOALS OF THE “KNOWLEDGE SOCIETY”**
- **strategic tool IN ORDER TO eRADICATE the “Digital Divide”**





***Fig.2:* Desktop or Mobile PC's become New - Client Server**





TOOL No.2: The new affordable wireless “EU Citizens’ Internet public service - cips”

- Fully Covering the Whole EU Territory
- Characteristics/Performances according to:
 - a. International Standards
 - b. General Obligations of GIPS
 - c. Specificity of the ICT Sector Services





WIRELESS DATA TRANSMISSION STANDARDS

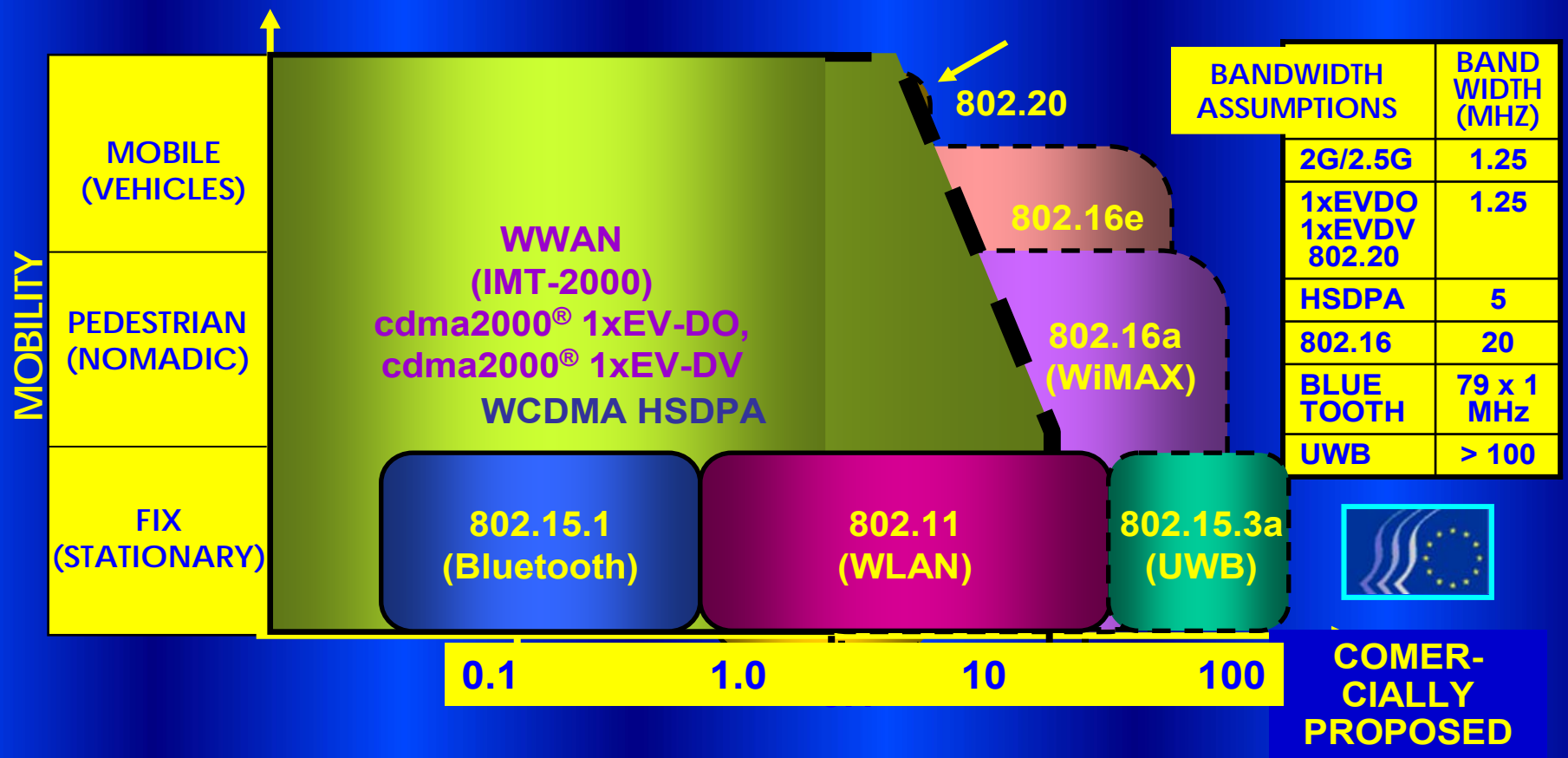


Fig.3: WIRELESS STANDARDS CHART (Data Transmission Rate - in Mbit/s)



Country	Mobile Phones (MM)	Internet Users (MM)	Mobile Phone to Internet User Ratio	Installed PCs (MM)
China	363	100	3.6 : 1	53
US	177	211	0.8 : 1	207
Japan	88	78	1.1 : 1	55
Germany	69	51	1.4 : 1	39
UK	54	37	1.5 : 1	26
Italy	54	32	1.7 : 1	16
S. Korea	37	32	1.2 : 1	27

Euromonitor, CNNIC, World Bank, Morgan Stanley Research – June 2005 estimates

Fig.4: Convergence of Internet / Mobile





Option 1: NEW EU DIRECTIVE REQUIRING TO ALL EU GOVERNMENTS TO FULLY COVER THEIR WHOLE NATIONAL TERRITORY BY WIRELESS

- **Mobile WIRELESS Internet - UNIVERSAL Service FOR all Citizens, WITHOUT ANY DISCRIMINATION - READY TO PROVIDE CONTINUOUS AND AFFORDABLE SERVICES**
- ➔ **Free Internet Services FOR THE Citizens of Social-Excluded Groups & of other Categories with Limited Affordability, like: children from rural areas, Roma ethnics, people with disabilities (motor disabled, blinds etC.), unemployed, retired seniors**





After 4 major Computing Cycles over the past 50 years: (I) Mainframe → (II) Minicomputer → (III) PC → (IV) PC incl. narrow band Internet

Today - In/Entering Vth & VIth Computing Cycles – most profound cycles ever:

(V) PC incl.. Broadband internet + (6) Large - Area Coverage wireless Internet

= Convergence between Internet and Mobile!

Fig.5: Internet become Mobile!

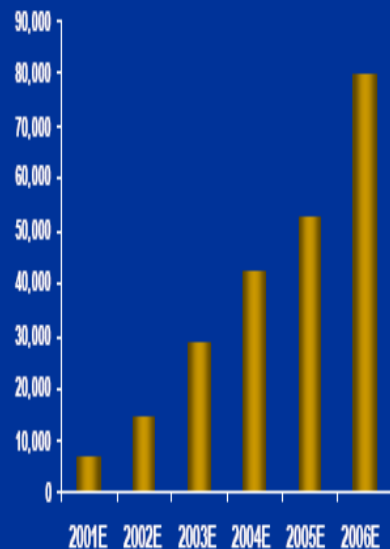


Fig.6: New VoIP Phone

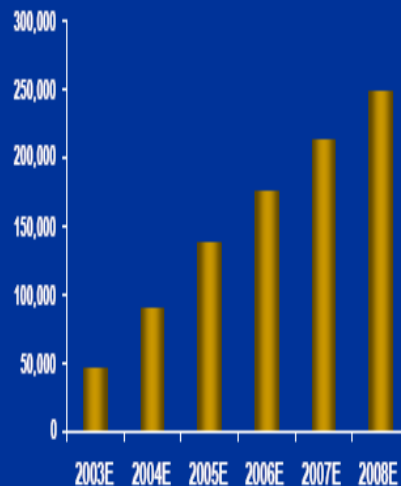
MORE: Supported by WiMAX large-scale implementation, VoIP become fully mobile due also to his new generation of dedicated phones allowing the direct connection to any existing access point. The number of people replacing the use of GSM by VoIP, especially for int'l calls and roaming - because of the insignificant tariffs of VoIP operators – is now under exponential growth!



US WiFi Access Points/Bridges,
NICs & Client Devices



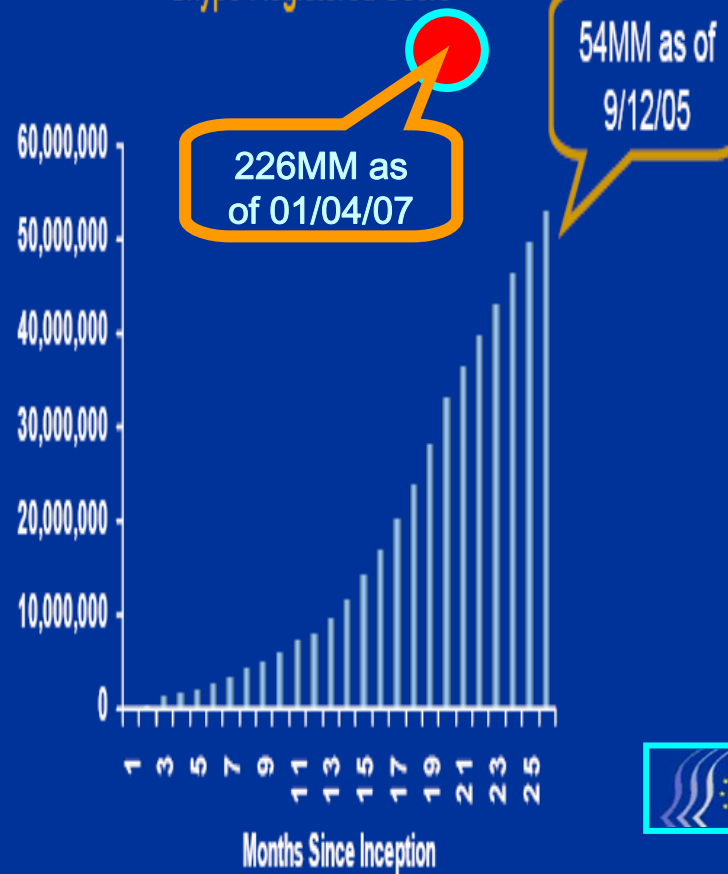
Worldwide Available Hotspots
by Region, 2003E-2008E



Left Chart Source: Morgan Stanley Research Estimates: S. Coleman, J. Marchetti. Right Chart Source: IDC (12/04)

Fig. 7: WiFi Usage Ramping

Skype Registered Users



(1) Source: Company Data, Morgan Stanley Research.

Fig. 8: Skype (VoIP) – the Fastest Growing Application Ever!



Option 2: Wireless/Broadband affordable Access to Internet for the EU Citizens – a potential second ICT Universal Service

1. Actually, the "Universal Services Directive" included as affordable ICT universal services for the EU Citizens, the unique right entitling each individual to have access to a phone line
2. During the review activities of the "Universal Services Directive", the Commission and the Committee should urge the Parliament to add - as a second affordable universal service - the wireless/broadband access to the Internet universal service to be implemented under the name of CIPS - "EU Citizens" Internet Public Service



**THANK YOU
FOR
YOUR KIND ATTENTION!**



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