# ANNUAL REPORT 2014

Association of the German Internet Industry

WE ARE SHAPING THE INTERNET.

eco

ANNUAL REPORT 2014

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*Prof. Michael Rotert*
*Chairman of the Board*

# 1. Preface

Dear Readers,

The commercial Internet is now just a quarter of a century young, and in this time it has already brought more changes with it than any medium has ever achieved in the same period of time. Fortunately, there's eco, who keeps you up-to-date and accompanies you through the newest developments – both from the technical and the political/regulatory perspective.

The value of our work is reflected in the membership, whose number has experienced above-average growth in this reporting year. Certainly, factors like digitalization have played a role – with the preparation of the Digital Agenda 2014-2017, the German Federal Coalition presented a plan of this nature for the first time, containing important fields of action for Internet and network policy.

However, seeing as many of the intentions in the inter-ministerial coordination floundered or were never taken up in the first place, the indecision and disunity between the coalition partners on network policy became clear, and there has been a certain shortsightedness in relation to the global expansion of the Internet. This is evidenced by the fact that a new committee for the Digital Agenda was established, but it was only given an advisory function. In addition, it seems to have been forgotten that concrete results and ideas came out of the Enquete Commission. Politics has fundamentally misunderstood the fast pace of the Internet.

But politics is not the driver of the development of the Internet. The continuing technical development of the network and its applications are the driving force. Key ideas in the last year were Big Data and Industry 4.0 (cyber-physical systems), and along with these, the creeping expansion of IPv6 and the – in contrast – explosive development of mobile services. Naturally, these technical developments intersect with politics, where reactions are needed with regard to data protection, Internet security, copyright and free Wi-Fi.

If Germany is to come even close to achieving the aspired leadership role in digitalization, then clear signals are required in the areas of broadband expansion. Regulatory protection for copper retards this development, because without a sensible expansion of fiber optic cable, Germany will continue to lag behind in international comparison. At our peering point DE-CIX, the largest provider exchange point in the world, we can measure the international development very effectively and not just keep up, but set trends. But what use is one single advanced Internet location to Germany?

Our politicians preach 50 Mbit/s nationwide, other countries are striving for the Gigabit range. This represents a factor of 200. Concerted action from the Internet industry is necessary, and here, of course, eco is sought-after. The fact that the association grew strongly in the last year certainly helps in this. But perhaps the fire needs to be stoked more, or additional solutions need to be found to strengthen the voice of the Internet industry in politics.

I wish to thank all members, the eco management and of course the staff for their successful collaboration over the past year, and I wish them, and all the internal and external experts with whom we work, success and all the best for this current year.

Your

**Prof. Michael Rotert**
**Chairman of the Board**

*Harald A. Summa*
*CEO*

# 2. Report from the CEO

Looking back on the last year from the perspective of the management, 2014 stands out as quite different from the many preceding years. As in the past, eco experienced above-average growth in member numbers, but 139 new member companies in one year is something we haven't seen before! Clearly, we offer an interesting platform for the large number of engaged and interested companies and individuals that are involved in eco, and these stem from – in the mean time – all areas of the Internet industry.

With growing member numbers, more staff are naturally needed, and new staff members were employed in a range of areas in order to guarantee the maintenance of the quality and quantity of service. This also meant, in turn, a challenge for the management in terms of leadership and staff development.

As a result, last year we focused more strongly on the professional development of the management, and provided joint training for all management personnel. Our Coach and Trainer, the industrial scientist and educator Ursula Vranken, brought – along with a lot of experience and courage to embrace new ideas – her Institute for Personnel Development's Digital Leader Concept, and has integrated this into our daily business. The result was not only an outstanding team-building activity, but also corporate guidelines which we are attempting to implement long-term with our staff.

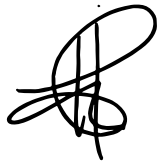
As can be seen in this report, our Expert and Competence Groups met regularly and in great number. The abundance of interesting topics that were taken up is almost overwhelming. Constant movement resulting from innovation and market changes offers a wealth of areas for joint discussions among specialists. Our objective to be not just a specialist professional association, but also to be a platform for cross-sectoral communication, can be seen clearly in the reports.

From a content perspective, it is hard to say which topics were paramount. Of course, security is something everyone is talking about, and it was taken up in all areas – but the changes to the working world, known as "new work", also had a great deal of significance among our members. In other words, in 2014 we again offered a large range of content for a widely distributed membership and for (almost) all there was enough food for thought, either a la carte or as a set menu.

As we already reported last year, DE-CIX International AG was founded in order to implement DE-CIX's internationalization strategy. This was important to minimize the risk for our regular business at DE-CIX, and it was necessary in order to respond to the international demand for consultation and service in the area of network connections. More consultation projects were taken on and this resulted in a positive financial result for the AG. DE-CIX North America Inc. is still in the development phase, and despite this, DE-CIX New York was able to surprise the market with nearly 50 connected customers in just eight months of operation. An overview of the eco companies can be found later in this report.

In conclusion, the year 2014 had, once again, the charm of challenges for people and materials. It brought us a long way forward – financially, but also in the way that we work together professionally.

We are looking forward to further challenges in the coming years.



**Harald A. Summa**
**CEO**

# The Board

## The eco Board of Directors 2014

Prof. Michael Rotert
Chairman of the Board
Managing Partner
maxspot GmbH

Oliver J. Süme
Vice-Chairman of the Board
Member of the Board Politics & Law
Attorney at Law / Specialist Solicitor for IT-Law
RAe Richter & Süme

Klaus Landefeld
Member of the Board
Infrastructure & Nets
nexiu GmbH

Thomas von Bülow
Member of the Board e-Business
Bitobito GmbH

Felix Höger
Member of the Board Online Services / Cloud Computing
Höger Management GmbH

# 3. Finances

We look back on a very successful and strong financial year in 2014, and we are pleased with the constantly growing number of members. In 2014, we were not only able to achieve growth rates of 12 percent in member numbers, but we also saw a significant growth of 24 percent in revenues from services such as the CSA and the Anti-Botnet Advisory Center. Through this considerable increase in income, we were able to compensate for the reduction in subsidies which occurred as a result of the ending of public funding for several projects.

A significantly higher increase in income in comparison to expenses helped us achieve a very positive result in 2014. The moderate growth in costs was certainly supported by the successful introduction of cost centers, which increased not only the staff awareness of costs, but also transparency throughout the entire company. The introduction of a ticket system, which had previously only been used in DE-CIX Management GmbH, proved itself to be valuable and has been generally accepted.

Almost 90 percent of the invoiced member contributions were used for personnel, projects and marketing, and flowed directly back to our members as direct services. In order to meet the requirements of our growing membership, and to be able to continue providing the services our members are accustomed to, we invested especially in personnel during 2014 and increased our eco team. Through the growth in the finance team, we were also able to make considerable improvements in our team-internal processes. We will work continuously into the future on ensuring the satisfaction of our members.

The subsidiaries also developed outstandingly in 2014, and all have experienced positive results. In conclusion, we are able to present a very healthy and well-positioned association, and in addition it is clear that the entire association is still experiencing a distinct growth trend. In order to meet the increased requirements associated with this, we plan to introduce a new CRM system and a unified billing process for all companies in 2015.

| Incomes and investments in 2014 | | | | | Budget for 2015 | |
|---|---|---|---|---|---|---|
| eco e.V. | actual value 2014 in Euro | percentage | actual value 2013 in Euro | variation to prior year in percent | planned for 2015 in Euro | percentage |
| **Incomes** | | | | | | |
| member fees | 1,376,225 | 45 % | 1,258,050 | 9 % | 1,500,000 | 56 % |
| funds | 587,178 | 19 % | 635,871 | -8 % | 311,000 | 12 % |
| generated proceeds | 835,096 | 28 % | 675,028 | 24 % | 850,000 | 31 % |
| events/ sponsoring | 192,375 | 6 % | 175,727 | 9 % | 0** | 0 % |
| others* | 57,335 | 2 % | 65,750 | -13 % | 35,000 | 1 % |
| total receipts | 3,048,209 | 100 % | 2,810,426 | 8 % | 2,696,000 | 100 % |
| **Investments** | | | | | | |
| personnel costs | 1,331,819 | 44 % | 990,121 | 35 % | 1,211,000 | 46 % |
| administration costs | 127,192 | 4 % | 126,614 | 0 % | 135,000 | 5 % |
| occupancy costs | 118,023 | 4 % | 98,075 | 20 % | 145,000 | 5 % |
| contributions | 32,718 | 1 % | 70,016 | -53 % | 53,000 | 2 % |
| travel costs | 103,797 | 3 % | 120,699 | -14 % | 98,000 | 4 % |
| investments | 16,318 | 1 % | 7,988 | 104 % | 30,000 | 1 % |
| marketing/projects | 1,145,797 | 38 % | 1,277,822 | -10 % | 848,000 | 32 % |
| administrative accounting/lawyers | 45,272 | 2 % | 49,429 | -8 % | 45,000 | 2 % |
| others/taxes | 94,925 | 3 % | 107,884 | -12 % | 85,000 | 3 % |
| total costs | 3,015,861 | 100 % | 2,848,648 | 6 % | 2,650,000 | 100 % |
| surplus/deficit | 32,348 | | -38,222 | | 11,000 | |

* other income: offsetting of benefits for vehicles, loans etc.

** from 2015 on, all events are managed by eco Service GmbH

*Prof. Michael Rotert*
*Chairman of the Board*

# 4. The Association Work

## 4.1 Reports from the Board of Directors

The reports from the Board of Directors provide an overview of what work was undertaken by the Directors and what topics were dealt with at the board-level. Noticeable this year is the increase in political interaction. While the technical development was previously the dominant topic of the association, political components have, in the meantime, become at least as important. However, this requires differentiated input from members and staff, right through to senior management. Communication with members and staff qualifications are becoming increasingly important. Along with this, the international perspective plays an important role as an indicator for national developments, especially for Internet topics. The Internet does not simply end at the national borders.

As Chairman of the Board, I focus on long-term development, taking into account international participants in Internet occurrences and the global political Internet discussion. Through my colleagues on the Board and myself, and also the senior management and international project leadership by eco staff members, we have developed into an internationally recognized discussion partner for technology and policy.

But now, the last year in a nutshell: New premises in Berlin and the increase in politically active personnel signaled early in 2014 the increase in the political visibility of eco. In the reporting year, the Internet governance discussion and the question "Who controls the Internet?" was the central focus. At the beginning of the year, the NETmundial conference was intended to accelerate the international cooperation of all Internet participants, and through this appropriate guidelines were developed. The European Internet governance discussion then got underway in the middle of the year at EuroDIG in Berlin. Europe and the Future of the Internet was discussed on the premises of the German Foreign Ministry. Over 700 international participants formed a real challenge for eco as the organizer, but this challenge was mastered superbly. The additional burden for members of staff was enormous. For this I thank them again – and the response from participants also reflected this.

Also internationally interesting was the discussion on ICANN and the USA, a discussion which began in Brazil. The current American supervisory body will relinquish supervision of the IANA functions in 2015 and hand them over to an international committee. The USA made this decision public even before the NETmundial conference. However, the topic and the organization of the stewardship will continue to occupy us in coming years. You can follow the current developments, as they occur, via our website.

The second half of the year was then determined by the international Internet Governance Forum in Istanbul. Here, there was not only discussion about the IANA successor, but also about the future of the IGF in the coming years. This important forum undertakes no direct lobbying, but it influences the international political development of the Internet through declarations of intention. In previous years it was the ITU that saw all these questions and answers as their responsibility. The general assembly ("Plenipotentiary") of the ITU, which only occurs every few years, took place at the end of the year, and there was wide interest to see how the ITU would react to Internet governance. In brief: It was accepted that the ITU, as a committee peopled purely by state representatives, is not capable of fulfilling the function of Internet supervision either from the regulatory or the technical perspective. While the situation was tense in 2012, the Plenipotentiary 2014 saw a convergence of all those involved. A new General Secretary, one with a technical background, did the rest. Of course, I was present on all these occasions as a representative of eco, and was able to contribute our perspective and ideas. More than 80 meetings and events came together during the reporting year where I had the honor of representing eco and its members. It was also pleasing to see the strengthened presence of high-level government representatives in the Internet governance discussion.

In addition to this, 2014 marked the 30th anniversary of the first German Internet mail server presented in the press as the "first email in Germany" which I took into operation at the Karlsruhe Uni, and which proved in the course of time to be the origin of the German Internet. There will be further jubilees in the coming years, and as an example I would like to mention the 20th birthday of eco in 2015. If you want to be a part of this, check our website for details.

In general, we look back on a busy and eventful year, which naturally has a corresponding influence on the entire organization – growth in personnel, expansion of the premises, improvement/adaptation of work processes and procedures, the reorganization of, for example, EuroCloud, and the expansion of DE-CIX in the international environment, just to mention a few points.

All this was set in motion and engineered expertly by the management under the leadership of Harald A. Summa, and strongly supported by all members of staff. For this, I again wish to explicitly extend my thanks.

*Oliver J. Süme, Attorney at Law*
*Vice-Chairman of the Board*

*Dr. Sandra Schulz*
*Head of Policy and Law*

*Henning Lesch, Attorney at Law*
*Manager of Law and Regulation*

## 4.1.1 Policy and Law

While the year 2013 was shaped in particular by the German Federal Election, the contents of the coalition contract, and the reorganization of the Berlin office under the leadership of Dr. Sandra Schulz, the activities of the Policy and Law Department in 2014 was focused on lobby work relating to the German Federal Government's Digital Agenda.

eco was able to position itself outstandingly with its contact people in parliament and the ministries. A complete report of the topics can be found in Chapter 5.

I am especially pleased that we were successful in accompanying our exceptional content work at the political level with an intensification of our political events in Berlin, and in particular through a restructuring of our communication and PR.

The strong growth in media requests and the ever better attention to eco positions, in particular the reporting in leading media, confirms our good work in this area.

But the number of participants in the political events in Berlin and their positive feedback showed us in the reporting year that we are taking appropriate account of the increasing importance of network policy topics and that we were again able to position eco as one of the most important associations in the Internet and IT landscape.

At both the national and international level, we were able to actively take up the topic Internet governance, especially, in 2014 and we are perceived as a highly competent contact at all levels in both the Foreign Ministry and the federal ministries responsible for this topic.

A gratifying highlight of this development in 2014 was certainly the European Dialog on Internet Governance, shaped and co-organized by eco, which was opened by the German Foreign Minister Frank Walter Steinmeier in Berlin in June. Over 700 participants from 72 countries spent two days in long discussions about European topics and positions, in order to bring these to the table at the global Internet Governance Forum in Istanbul in September.

In 2014 we were able to continue developing the interlocking of national political topics with the European activities, which we push in Brussels especially through our umbrella association EuroISPA.

I am delighted that the EuroISPA members expressed their trust in me by voting unanimously for me as President of this important European Internet association at the end of 2013, and that eco can through this be even more effective than previously at bringing its positions to the table in the European context.

This will also be of increasing importance in the current year, given the priorities of the new EU Commission in connection with the establishment of the digital single market.

It is therefore even more important that eco positioned itself at the right time in 2014 to actively accompany and co-design the Digital Agenda at the national and international level.

*Thomas von Bülow*
*Member of the Board*
*E-Business*

## 4.1.2 e-Business

The e-Business Department at the eco Association includes all association activities that deal with electronic business processes between companies and their business partners. In 2014, those topics which were particularly important and were driven forward were connected to security in the Internet.

### e-Business as the foundation of economic activity

Security and trust are and will remain the foundation of our economy in Germany, in Europe and around the world. Germany, as one of the leading export nations, is dependent on a stable digital infrastructure. Particularly here in Germany, this is not yet adequate and certainly not satisfactory, so that this was also a focus for eco in 2014 – including in the communication of our members with other industry associations.

The creation of the requirements and the foundations for a private sector and deregulated expansion of broadband Internet infrastructure is a concern for industry, and the responsibility of politics and the authorities. These cannot simply offer hollow words! Particularly in politics, there is a lack of clear goals and available means. Therefore, it is important that the eco Association, together with other industry associations, develops a stronger awareness of the existing deficiencies and the future needs and participates in professional communication.

### Security and Trust

Security and trust also affect the – by far – most important digital communication method, the email. According to statistics, the email – at around 80 percent – is the leading communication tool, and its importance continues to increase. Other communication media, such as social networks, are ranked much lower, as rather remote possibilities. It is therefore all the more important to have continuous encryption of emails, which, for a long time, was seen as a shortcoming of De-Mail. eco members, such as the De-Mail providers German Telecom, United Internet with 1&1, WEB.DE and GMX, announced in 2014 that they are working together with German Federal Ministry for the Interior and the Federal IT Commissioner to ensure encryption. Email made-in-Germany has already ensured that emails for private and semi-commercial use were encrypted with SSL, at least.

### Secure email as the e-business communication medium

However, De-Mail is becoming an increasingly important part of e-business – ensuring not only the security, but also the legality of communication between industry, other businesses and the public authorities. This is a development process which began in 2014 and will certainly last several years. Here, many questions need to be answered, because small companies in particular stand to gain a competitive edge through digitalization, and this should not be beaurocratized.

### Internet of Services

In addition, security and trust build the foundations for the agility and flexibility of economic relationships. Here also, a great deal occurred in 2014. Cloud Computing ensures that services and data can be available on any device. This opens new business models for small companies and allows independence from the large providers. In the first decade of this century, it was expected that today, ten years later, the value chain would have changed radically. This is true. And yet we have seen no disappearance of wholesale and retail on the wider front. Rather, we are seeing how Apple has become institutionalized in every shopping center, and how one-time online shops like Zalando now have their presence on city high streets. These companies not only bring onto the market innovative concepts for consumption, they also understand how to play the supply chain more virtuosically than many established distributors.

### Mobile Apps as component of e-business

The app industry creates an ecosystem rapidly and for relatively low costs, with which niche markets can quickly be exploited. This is, in the eyes of eco and particularly EuroCloud Deutschland_eco, to be desired.

And yet, without the overall availability of data services, this benefit cannot be realized. For this reason, eco has been promoting the certification of functions and services according to an assessment developed by eco and EuroCloud. A further-reaching demand is that the requirements for security and availability are maintained not only during the certification process, but continuously. The project NGCert, from the German Federal Ministry for Education and Research and in which EuroCloud functions as a consortium partner, should develop exactly this. Requirements also include the maintenance of the strongest data protection stipulations world-wide and the avoidance of certain programming techniques (back doors, etc.), which are important elements that, along with ensuring verifiability and transparency, are functionally useful and strengthen trust.

### Trusted Cloud

In 2015, trust will also be further developed in cooperation with the Federal Ministry of Economic Affairs and Energy and the Federal Ministry for Education and Research, as will the economic collaboration in customer services and in innovative competition, with an association that supports Trusted Cloud services. EuroCloud Deutschland_eco will be a founding member, and through this a joint shaper of commercial digitalization.

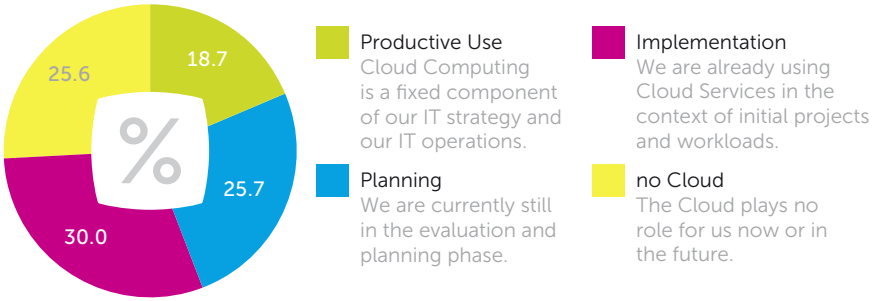
*Felix Höger*
*Member of the Board*
*Online Services/Cloud Computing*

## 4.1.3 Online Services/Cloud Computing

„Ahead of the Curve" was the title of the renowned Boston Consulting Group's study a while back on the decisive influence of IT innovations on economic success. In brief: Technology leaders worldwide are more agile and more flexible, achieve considerably greater turnover, and create more jobs than the rest of their sector. And in the center of this are Cloud-based services via the Internet which, as trailblazers and catalysts for digital business models, often form the basis of much more far-reaching and until recently almost unimaginable innovations.

Traditionally, it was hard to find early adopters in the Cloud environment among German users, as the majority of cautious German companies tend as a rule to wait and examine very carefully whether new trends have achieved the necessary level of maturity. Added to this are the legal questions, a lack of knowledge and the complexity with regard to the interoperability of the various systems within and outside of the Cloud. This has experienced a positive change recently, and above all in 2014, even though security concerns and the fear of unauthorized access to sensitive data still presents a major obstacle.

## Planning and Utilization of Cloud in Companies




Source Study: "OpenStack im Unternehmenseinsatz", Crisp Research, 2014

### Substantial Rise in Cloud acceptance

With an adoption rate of almost 75 percent, the actual acceptance of Cloud Computing in Germany has become clearly positive, according to a recent survey by the market analysts Crisp Research. Only a quarter of companies continue to shield themselves against the Cloud. In contrast, for around 19 percent of German IT decision makers, Cloud Computing is a fixed component in operations and in the use of their IT. A further 56 percent of companies are in the planning or implementation phase and are making use of Cloud services for the first time in the context of projects and workloads.

### Increase in Hybrid and Multi-Cloud approaches

Hybrid Cloud concepts, which connect an in-company private Cloud with the resources of a public Cloud and comprehensively exploit the respective advantages of both Cloud strategies, will play a leading role in the future. Multi-Cloud approaches expand the hybrid-thinking further with regard to the number of Clouds to be connected, so that depending on the starting position and requirements in the company, quite different Cloud infrastructures and services can be deployed and used.

As a result, many companies no longer depend on one individual provider, but increasingly on several – and still operate a sensitive part of their IT themselves. The result of this is the creation of complex multi-Cloud environments which demand a high level of standardization and integration. This is no simple endeavor for the CIO, when one thinks simply about the different operative models (Public, Private, Hosted) and the different service types (IaaS, PaaS, SaaS) which need to be coordinated and controlled. Integration and interface management will become central and challenging tasks in Cloud sourcing in a hybrid Cloud world, alongside security and governance topics.

Reliable and internationally agreed technological standards, open-source approaches and unified development of architectural concepts within the Cloud Computing industry therefore form an important prerequisite for the further evolution and actual use of multi-Cloud scenarios in application companies. There is still a lack of conclusive blueprints and durable practical examples which IT decision makers can refer to.

### eco and EuroCloud Deutschland_eco e. V.

eco and EuroCloud Deutschland_eco also undertook intensive analysis of the new developments through their variety of publications, events and initiatives, as well as carrying out educational activities and pushing the important harmonization of the technological framework conditions in the Cloud environment through the international EuroCloud network. The work there in the Competence Groups dealing with Standards and Interoperability and Legal Framework Harmonization, as well as at the level of the

EU Commission and within the ETSI initiative "Cloud Standards Coordination", are just some examples of the large variety of activities.

At the end of 2014, the research project Next Generation Certification (NGCert) started off with the support of the German Federal Ministry for Education and Research. The objective is to develop the foundations and procedures for a dynamic certification of Cloud provider companies that should ensure that in actual fact, at all times, all relevant quality and security requirements are being met – an essential requirement for a further gain in the acceptance and trust in the public sphere and in the application companies.

## No Cloud Computing without the Internet

This is true in the same way for the actual basis infrastructure of all Cloud-based services – the Internet itself. By now completely taken for granted, it is often forgotten in discussions that security, performance and user experience in the Cloud era are initially exclusively dependent on the type of Internet connection and the network quality: Without fast, worldwide connections and failsafe interconnection platforms, Cloud Computing is simply not possible.

## Revolution in the industry

Both the German application companies and the entire IT and Internet industry find themselves in a dynamic change process currently. Many markets are experiencing a fundamental transformation and are facing, to a certain extent, completely different competitive situations and challenges as a consequence of the availability of new (Cloud) technologies. Forthcoming mega-trends, such as the Internet of Things and Industry 4.0 (cyber-physical systems) will considerably accelerate this development. Individual digital strategies, on the basis of which efficiency and flexibility can be further improved and new products and business models developed, therefore appear to be indispensable for almost any company in the future.

Technological latecomers, as the Boston Consulting Group study quoted at the beginning concluded, will not have a chance in the long term.

*Klaus Landefeld*
*Member of the Board*
*Infrastructure & Networks*

## 4.1.4 Infrastructure & Networks

With the growing importance of the Internet and IT in general in modern 21st century society, the topics that need to be taken up and regulated by politics and industry are accumulating. Some of these we address voluntarily to support our industry and open up new fields of business. Other topics are brought to us by politics, the press and the civil society, and they need to be discussed – often with little or no leeway for the companies. But the fact is that the "digitalization of society" is advancing inexorably and in ever larger steps. More and more areas of life are being embraced, and an ever larger proportion of life is being spent on and with the medium "the Internet." As the association of the Internet industry, you, as our member companies, are the drivers of this development, and every day you are devising new, better applications and solutions. The objective is to provide the advantages of the networked society to as many users and companies as possible, to use the efficiency of digitalized processes for economic development, in order to retain our productivity in international competition. In politics, they say "the Internet has arrived in the center of society"; the German Federal Government's Digital Agenda and the EU's "digitizing Europe" activities are supposed to accompany this process – but can they keep pace with the development? The challenge is not to lose the social cohesion during this process and to keep an eye on the digital rifts that litter our society. In the course of ever-faster developments, significant portions of society are being left behind and are not taking part in digital life. The digital revolution is taking place at breathtaking speed: It was only in the year 2007 that the first modern smartphone, the Apple iPhone, was launched and today, more than two thirds of the population carry such a device with them more or less continuously. In the group of 14 to 29-year-olds, the development is even more dramatic: In just eight years, well over 90 percent have become users of this device. More than half admit they are unable to imagine life without a smartphone. On the list of planned purchases, the smartphone is a permanent front-runner.

This represents a colossal success for our industry, and the next logical step is to transfer more and more forerunners from the "old" analog world to the "new" digital world. The prerequisite for this is more or less the full participation of the population in the digital world – and here again, we need to meet this challenge as an industry and develop appropriate solutions. Recently, I noticed – naturally online – a short, incisive definition that I would like to make my own here: "There is no such thing as a digital society. There is only society." This raises the question of what we as an industry can do to bridge the rifts in families, companies, associations, yes, all areas of life; how we can encounter feelings of insecurity and lack of trust, and help to overcome them. Going online in the future must become just as much a matter of course as the idea that power comes from the outlet – a tool for everyman that is available always and everywhere and that penetrates all areas of life, so to speak.

As an association, we want to face these challenges together with our members, and we want to discuss solutions that would enable us to reach this goal – true to our mission, "we are shaping the Internet."

Naturally, during the year there were specific topics that require special mention:

### Surveillance

Why was it immediately called the "NSA scandal" and the "(German Federal) NSA Surveillance Committee"? More and more, it is becoming clear that the "1st Investigative Committee" is primarily concerned with the activities of its own secret service and its cooperation with other Western secret services, above all, the NSA. The global surveillance scandal has thus ultimately arrived in Germany. Our relevant laws and regulations are also in urgent need of revision and are not aligned to a modern, integrated communications landscape. Our G10 Act, a relict from the late 1960s, knows no difference between "friend" and "enemy," EU or not EU. A filtering of so-called protected traffic in accordance with the G10 Act occurs more or less completely based on fuzzy criteria. Transit traffic, meaning traffic with both

communication partners abroad, is – according to the opinion of the BND lawyers – totally without rights. Such traffic can be analyzed, exchanged and otherwise used, as it were, outside the law. Prominent constitutional lawyers disagree, seeing all activities of the German secret service as being subject to the constitution. A revision of the G10 Act in 2015 should create clarity.

The further intentions of the Federal Government with regard to unfounded surveillance and criminal proceedings should also be seen against the backdrop of this – if you can still say that today – abstract threat situation. These manifest themselves in the current debate on the reintroduction of Blanket Data Retention and the planned expansion of the rights of the Office of the Protection of the Constitution and the BND on "cyber threats."

The revision of Blanket Data Retention is one of the most controversial topics within the large German coalition, and it will also significantly shape the year 2015. This constitutes German unilateral action, and the current revision, not even covered by the EU Directive, is presumably contrary to European law. One can only speculate about the possibility of a compliant implementation in light of the German Federal Constitutional Court verdict – concrete technical measures for achieving compliance have not yet been introduced. Also new is that in the context of the shortage of IP addresses, the process "Carrier NAT" is being used, in which companies are being obligated to compile comprehensive data bases of the use of services by end customers to be able to retrieve information about the use of IP addresses. This collecting of data, which eclipses all previous documentation proposals, should in future serve the (mass) retrieval of data without judicial approval, while companies and authorities are not permitted to analyze the data themselves – a utilization ban is thus supposed to soften the obvious violation of fundamental rights. In what ways this data collection may be coveted by authorized and unauthorized positions in the future hardly requires a detailed explanation.

Companies will again carry the costs – and in light of an unavoidable new legal battle, they can place bets on whether the implementation will be necessary this time or whether instead a new round of investments will be necessary for the purposes of the immediate shutdown.

In this environment, the intention to amend the Protection of the Constitution, which is expected to go through parliamentary process in early 2015, can be seen virtually as a Trojan horse. Discussed in the press mainly in connection with the agents from the Office for the Protection of the Constitution, the competencies of the Protection of the Constitution and the BND will be expanded to include "cyber dangers" through a change in the Protection of the Constitution Act and the G10 Act. These abstract dangers – including, for example, botnets, DDoS attacks and the theft of access data – will in future be put on the same level as criminal acts like human trafficking, organized crime, nuclear crimes, etc., and are, as a result, supposed to justify the surveillance of cable bundles inland and abroad, and to do this deliberately, in advance of criminal acts, as "strategic surveillance." But, cross my heart, with all these parameters, the surveillance of any and every cable path of a carrier can be justified. And there's more: The provision is made for the insights possibly gained through the services to be forwarded to law enforcement agencies for preventative measures. The separation of the secret services and the police authorities is thus effectively subverted.

## Internet Security

IT security by law – is such a thing possible? At least in the area of critical infrastructure, it should soon come to this, according to the intentions of the Federal Government, and the EU is not far behind with what is known as the NIS Directive. The "law for increasing the security of information technology systems" is expected to be passed in the German Federal Parliament in 2015 and be applied in 2017. This provides excellent material for a discussion on the merits and dangers, and on the details of the form – but the well-known, popular "hacks" in recent times have also shown how necessary a fundamental increase in the security of IT systems is and what role ICT systems play in our modern society. The telecommunication network operators have been given a special role here: Generally established, as it were, to be critical infrastructure, these should in the future monitor the incidents of their customers and should themselves provide information about the insights gained. Whether and to what extent an operator is himself subject to the classification of "critical infrastructure" is not conclusively regulated – in principle, every network operator, every data center, every service provider, whose offer is important for the general public or communal life, will fall under this ruling.

Ultimately, who exactly will be affected and to what extent is something we will discover in the course of the associated regulation – which, according to information from the Federal Office for Information Security, already exists in draft form.

## Data Protection

"Who does our data belong to?" – a question that is often posed for discussion from the ranks of politics and the civil society. And here, different answers are found on different sides of the Atlantic – a not-to-be-underestimated problem for the global Internet industry. In May 2014, the European Court of Justice determined that for users settled

within the EU, in principle the data protection law of the country of residence is applicable – what is known as the lex loci solutionis – regardless of the location of the executing service provider. The long-discussed Basic Regulation on Data Protection gains in relevance through this verdict. It is, however, not practical in a unified EU single market to implement 28 different data protection standards from 28 member states.

But the scope of the verdict goes far beyond the EU borders: It is debatable to what extent Big Data models from American providers could endure in the EU in the future. The existence of the Safe Harbor Agreement is also seen as endangered. German providers can be relatively relaxed in facing this discussion, given that our data protection requirements continue to be leading, and the level of data protection achieved should certainly be sufficient.

The creation of a unified regulation in the EU single market is now even more immediately necessary to finally give providers and users legal and planning certainty and to enable negotiations for a revision of Safe Harbor or an equivalent agreement.

## Wi-Fi

Triggered by the political debate about reforming the third-party liability (Störerhaftung) in the area of network access via Wi-Fi, eco carried out a study on Wi-Fi use in Germany and in international comparison in autumn 2014. The study, which gained a lot of attention, shows clearly that the current form of liability massively hinders the availability of open hotspots in Germany – yes, only a fraction of the usual provision in other counties is available here in Germany. Especially in the context of hotels, restaurants and tourist attractions, there is a strong need to catch up. The differences are also striking in the area of Wi-Fi in stores, public buildings and similar institutions.

Against this backdrop, the Federal Government's planned changes to the Telemedia Act are very surprising – in principle, this attempts only to perpetuate the existing regulation and established case law and to anchor these in law. There is nothing to see of the unambiguous clarification for operators that had been hoped for. Instead, new, undefined terms, ones that have previously not been used in this context, are introduced, and can be expected to cause years of legal uncertainty. It remains unclear why, specifically in Germany, a liability exclusively stemming from intellectual property law should remain established, one which does not exist in this form in any other nation in the world. Not even in the mother country of the overwhelming majority of the rights owners, the USA, is there a construction comparable to this German form of liability.

In addition, the planned changes are in no way technically justifiable. Especially the classic hotspot with existing user identification is currently not encrypted and will not be in the foreseeable future. In comparison, the networks without user identification are encrypted as a rule, and are, as a result, dependent on a "shared secret" that is generally made known by means of a placard or something similar. Obviously, the recent case of encrypted SSID "Internet" network access for visitors in the Federal Parliament, with the password "Internet 2015" announced on a placard, could be rated as "sufficiently secure" – presumably its operation was considered sustainable and therefore privileged in the sense of the law. According to current understanding, all operative concepts of commercial operators should remain permissible, even if they do not implement encryption, in contrast to the literal reading of the law. It is to be hoped that a clarification can be made in the legislative text in the further course of the process.

## Net Neutrality

The discussion about net neutrality was also constantly carried forward in 2014, notably through the European Parliament resolution on the planned "Single Market Package" and the "strong" net neutrality laws contained therein, as well as the FCC consultation on the proposed new regulation, with a record-breaking four million comments. This led to a radical change in the USA at the beginning of 2015: The complete reclassification of network access as a Telecommunication service and no longer as an Electronic Communication service.

In this context, eco welcomes the position of the Federal Government – developed over a range of events – for the negotiations in the EU Council; unfortunately, however, this could not be pushed through for the current tri-partite negotiations.

## Broadband, Network Access and "Intelligent Networking"

The hot favorite "broadband" has also not lost its relevance in the last few years. Unfortunately, today – only three years from when the Federal Government's broadband objective is meant to have been achieved – there is still no clear concept for a nationwide expansion. Neither politics nor industry have, in conjunction with the Network Alliance, delivered something even close to convincing and sustainable concepts for the last (up to) 20 percent of households. As a result, the increase in frequencies in the Digital Dividend II can only offer a small contribution to the attainment of the broadband objective. In addition to this, the balance of accounts is, from an industry perspective, neutral. To use money from one sector in order to financially support that same sector can at best represent a redistribution among the market participants, but it is not what we could call a great success.

It is also problematic that a lot of investment is in areas that have been opened as a result of further technologies, and is not being put toward the Federal Government's broadband objective of 50 Mbps for all. The gaps that need to be closed can be estimated at around 25 percent of all households, and for these there is simply no concept. Regulatory uncertainty exists for almost all market participants, taking, for example, the current process "Vectoring from MDF" or the anticipated contention about G, which also limits the preparedness to invest.

Against this backdrop, it is surprising to see occasional success stories, such as confirmation that the state Schleswig-Holstein says it has achieved a coverage of 25 percent of households connected via FTTH. Could there therefore actually be successful concepts that allow fiber optic expansion in Germany to be designed profitably? Because we mustn't delude ourselves: an expansion to 50 or 100 Mbps by 2018 is only the first step; it will not provide a long-term solution to the problem of network expansion. Rather, we require concepts for the realization of nation-wide fiber-optic expansion by 2025 – in the next 10 years – to ensure Germany's entry into the Gigabit society.

In one area, there are advances that deserve to be mentioned: The initiatives for Industry 4.0 (cyber-physical systems), "intelligent networking," are taking off. Definitions for the use of networked systems in industry, trades and government agencies are taking shape. All of this will increase network usage, and therefore the profitability of the networks, and will do this completely independently of the forecast increase in economic value creation.

## DE-CIX Management GmbH, DE-CIX International AG and Subsidiaries

"Stable growth" – this is a good summary of the activities of DE-CIX Management for the year 2014. Now with more than 600 participants, more than 10 Tbit of connected capacity, and a peak traffic throughput of 4 Gbps, DE-CIX was able to claim the leading position in the IX market. The turnover also increased to 23 million Euros. Around 60 staff members are now working for the exchange points – with a tendency to continue growing.

In the international environment, the first financial year for DE-CIX International AG was also successful. The expansion to North America with the subsidiary DE-CIX North America was an outstanding success: Around 70 carriers are now on contract. In the course of this year, we expect to have reached the 100th customer. Accompanied by rapid growth in traffic, we can say that DE-CIX New York was placed successfully in the market. From a standing start, so to speak, this even outshone the success of the Dubai project which, with currently 30 carriers and a data throughput of

32 Gbps, has established itself as the leading exchange point in the Gulf Region.

For the year 2015, there are further exchange points in Palermo/Italy and Marseille/France to be implemented. Solutions for other flashpoints for international connectivity are in planning. So it will remain fascinating for the next few years.

Further details of the extensive activities of the exchange points can be found in the report "DE-CIX."

Information about the Competence Groups for this area of the Management Board, such as Data Center, Email, IPTV, VoIP, IPv6, Names and Numbers and Security can be found, as always, in the reports from the Competence Groups.

*Roland Broch*
*Coordinator of Datacenter Expert Group*

*Monika Graß*
*Leader ecoTrialog*

# 4.2 Competence Group Reports

The following is a summary of some of the highlights and the issues dealt with by the eco Expert and Competence Groups. More information about each of the Competence Groups can be found respectively at the website address listed.

## 4.2.1 Datacenter Expert Group

### Event overview

| Date | Venue | Title |
|---|---|---|
| 22.01. | Berlin | Services für Service Provider |
| 06.–07.03. | Rendsburg | ecoTrialog #11 – Wohlfühlklima |
| 18.03. | Frankfurt | ecoTrialog #12 – We are all customers |
| 01.–03.04. | Rust | WorldHostingDays 2014 |
| 15.–16.05. | Genf | ecoTrialog #13 – CERN |
| 26.–28.05. | Monaco | DATACENTRES EUROPE |
| 05.06. | Köln | eco Awards – Kategorie Datacenter |

| Date | Venue | Title |
|---|---|---|
| 17.06. | Berlin | Schutz vor Datenspionage |
| 24.06. | Frankfurt | 5 Sterne Rechenzentrum plus |
| 02.07. | Nürnberg | ecoTrialog #14 – DCIM ≠ DCIM |
| 08.07. | Berlin | Energiemanagement im Rechenzentrum |
| 04.–05.09. | Norderstedt, Timmendorf, Bad Oldesloe | ecoTrialog #15 – Moin Moin |
| 11.09. | Frankfurt | Energiemanagement im Rechenzentrum |
| 17.09. | Frankfurt | Evolution des Rechenzentrums |

*Dr. Béla Waldhauser*
*Leader of Competence Group*
*Datacenter Infrastructure*

*Marc Wilkens*
*Leader of Competence Group*
*Datacenter Efficiency*

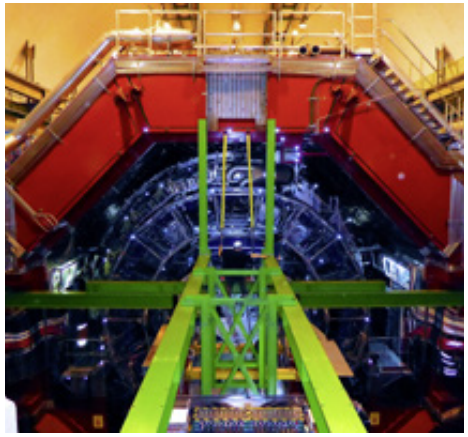
| Date | Venue | Title |
|---|---|---|
| 18.09. | Frankfurt | Schutz vor Datenspionage |
| 19.09. | Berlin | Schoko & Sushi (Hosting) |
| 08.10. | Nürnberg | Roundtable „Das perfekte Rechenzentrum" (it-sa) |
| 16.10. | Frankfurt | IT-Notfall-Management im Rechenzentrum |
| 21.10. | Frankfurt | Rechenzentrums-Planertag |
| 06.11. | Hamburg | ecoTrialog #16 – Nachlese |
| 12.11. | Köln | IT-Notfall-Management im Rechenzentrum |
| 19.11. | Köln | eco Kongress „Treffpunkt Zukunft" |
| 04.–05.12. | Dresden | ecoTrialog #17 |

The Data Center Expert Group was able to offer a large range of meetings, workshops, event cooperation possibilities and trade fair and congress participation in 2014, and can look back on more than 20 successful events. Along with events at eco locations in eco (3), Frankfurt (7), and Berlin (4), our experts could also be found in Nuremberg, Rendsburg, Rust, Norderstedt, Timmendorf, Bad Oldesloe, Hamburg and Dresden. International events took place in Geneva and Monaco.

On 15-16 May during the ecoTrialog #13, close to 50 IT experts visited what is both the hottest and coldest location in our solar system, the particle accelerator at the European nuclear research institute CERN in Geneva. On this occasion, the participants were able to celebrate three birthdays in one: CERN, on the border between France and Switzerland, was celebrating 60 years, and CERN itself is the location at which, 25 years ago, the World Wide Web was brought into being. Added to this, eco Chairman Prof. Michael Rotert joined the event to celebrate receiving the first email in Germany 30 years ago. The specialist presentations were enriched with a tour of the CERN data center and the ALICE Experiment, a part of the Large Hadron Collider.

On 30th May, at the DATACENTRES EUROPE event in Monaco, Monika Grass presented the new eco White Paper DCIM ≠ DCIM to an international audience for the first time. With the market overview, eco wanted to offer market participants a guide to decision-making, in order to be able to increase the efficiency of data centers through the introduction of Data Center Infrastructure Management (DCIM) software.

On 8th July, the Competence Group Datacenter Efficiency, under the leadership of Marc Wilkens, invited participants to the first event of an information series in the Berlin Capital Office. The focus of the event was energy management in data centers. Participants took the opportunity to discuss the topic directly with the Competence Group experts. Wilkens introduced a new concept that describes step by step the road to energy efficiency in DC



operations. The second event in the series took place on September 11, when Marc Wilkens introduced Dr. Béla Waldhauser, leader of the Competence Group Datacenter Infrastructure, who provided clear and practical examples from the perspective of a DC operator.

On 8th October, in conjunction with the international IT security fair it-sa, Dr. Béla Waldhauser welcomed four experts to a round-table discussion on "the perfect data center." Following this, on 16th October, four specialists explained different aspects of IT emergency management during an event initiated by the DC planning specialists PRIOR1 in the DE-CIX MeetingCenter in Frankfurt.

Close to 50 DC experts took part in the premiere eco DC Planner's Day on 21st October, moderated by Monika Grass.

The eco Data Center Expert Group wants to use this new format as a platform for cross-sector information exchange and knowledge transfer in the area of facility management. Karl-Heinz Otto, publically appointed and sworn-in expert for low-voltage equipment, power electronics and IT electronics, gave a practical live demonstration on how weaknesses and possible defects in electrical IT components can be detected.

Further information
https://datacenter.eco.de
https://www.dcaudit.com

*Prof. Dr. Georg Rainer Hofmann*
*Leader of Competence Group E-Commerce*

## 4.2.2 Competence Group e-Commerce

### Event overview

| Date | Venue | Title |
|---|---|---|
| 27.03. | Wiesbaden | KG-Meeting – Digitale Identitäten |
| 05.06. | Köln | eco Awards – Kategorie E-Commerce |
| 08.07. | Frankfurt | KG-Meeting – Verbraucherrechte |
| 28.10. | Köln | KG-Meeting – Payment im Online-Handel |

The eco Competence Group e-Commerce continued its successful work in 2014 under the leadership of Prof. Dr. Georg Rainer Hofmann. The first event of the year took place in Wiesbaden on 27th March, hosted by SCHUFA Holding AG, where the topic "Digital Identities" was handled. Dr. Frank Böker, Head of the Solutions Division for the host company, demonstrated how to prevent identity abuse – a service particularly for e-shop operators – to counter false identities. In June, the Competence Group met in Frankfurt to gain information about the new Consumer Rights Directive, which had just come into force. A range of questions were addressed here: What are the experiences so far with the directive and the guidelines? What are the lessons learned? Is there a need in e-commerce for a standardized payment system to enable a rational price comparison? Manuela Finger, Lawyer at King & Wood Mallesons LLP, gave an overview on implementing the directive.

On 12th September, the Competence Group met in Cologne to discuss how a rational price comparison system could be realized among the payment providers. Balduin Müller-Platz from How2Pay Consulting and Solutions GmbH & Co KG explained that fundamental to the standardization process would be defining the terminology. Prof. Dr. Hofmann therefore proposed the compilation of a Working Draft with corresponding glossary by the summer break in 2015.

In September, eco published its Trend Report, which measured the increasing importance of the comprehensive analysis of personal data of the "digital customer." "The customer expects precise delivery times and reliable payment

systems," Hofmann said. "Given the strong competition in e-commerce, it is important for online shops to create long-term customer satisfaction and, associated with this, customer loyalty."

Further information
https://e-commerce.eco.de

*André Görmer*
*Leader of Competence Group E-Mail*

*Sven Krohlas*
*Leader of Competence Group E-Mail*

## 4.2.3 Competence Group Email

The Competence Group Email is a fixed component of the German Internet industry with regard to the development of common standards for the sending and receiving of emails. In the group, technical problems of all kinds are solved via short chains of command, and new developments are discussed.

The Competence Group Email is a closed group because email traffic is particularly in need of protection and the participants need to speak openly about their systems to find solutions to new challenges. Participation in the group is possible for all ISPs that are members of eco. In addition, invitations for further qualified participants can be given. In this way, guest presentations from PayPal and the German Banking Association have enriched meetings with their content.

The group is led by acknowledged experts: André Görmer (Teradata) represents the senders (ESPs), Sven Krohlas (1&1 MailSecurity) the ISPs. Krohlas took over this leadership position in 2014 from Mario Perlwitz (abusix, previously 1&1 MailSecurity). The reduction of Phishing remained a major topic for the group in 2014. The content of a legal opinion on Domain-based Message Authentication Reporting and Conformance (DMARC) according to German law was finalized, and the preliminary results were presented.

The revelations from Edward Snowden with regard to the surveillance methods particularly of the NSA led to further discussions about increased security standards like TLS, DANE and solutions for secure end-to-end encryption.

But classic topics like the reallocation of old email addresses to customers, and the associated suggestions for improvements like "The Require-Recipient-Valid-Since Header Field and SMTP Service Extension" (RRVS), were also discussed.

The Competence Group was restructured from an organizational perspective in 2014. Working groups on particular topics and a forum archive should simplify work in future.

For 2015, the Competence Group expects the finalization of several documents. The finalized DMARC legal opinion will be released in the first half of the year. The newly formed working groups will address Best Practices for the choice of DNS-based Blacklists (DNSBLs) and the configuration of DomainKeys Identified Mail (DKIM), and these results will also be published.

Further information at:
https://e-mail.eco.de

*Ibrahim Mazari*
*Leader of Competence Group Games*

*Michael Westphal*
*Leader of Competence Group Streaming Media*

# 4.2.4 Competence Groups Games/ Streaming Media

## Event overview

| Date | Venue | Title |
|---|---|---|
| 27.03. | München | KG Streaming Media – Trends bei Ultra HD |
| 19.05. | Köln | KG Games – Warum scheitert Gamification? |
| 21.05. | Köln | ANGA COM – Networking am Messestand |
| 05.06. | Köln | eco Awards – Kategorie Entertainment |
| 13.–15.08. | Köln | gamescom |

| Date | Venue | Title |
|---|---|---|
| 04.–05.09. | Norderstedt<br>Timmendorf<br>Bad Oldesloe | ecoTrialog #15 – Gamification/Netzneutralität |
| 10.12. | Köln | KG Games – Umsatzsteuerneuregelung |
| 19.12. | Köln | Mitgliederversammlung Bundesverband GAME e.V. |

## Competence Group Games

The eco Competence Group Games started 2014 with a joint press release with the GAME Bundesverband e. V., to raise awareness for security vulnerabilities in game apps. At the same time, the cooperation of the two associations was renewed. With almost 80 members, GAME is the largest industry association for the German Games industry and is an ideal partner for the eco Competence Group Games.

The first meeting of the Competence Group took place on the 19th May under the title "Why is Gamification failing – or how can we do it right?" The event shed light on the current status of the hype-topic Gamification, and misunderstandings and false ideas about the term were dealt with.

From 13th to 15th August, the eco Competence Groups Games was represented along with the GAME Association at the communal booth at gamescom. In advance of the world-leading fair for the digital entertainment industry, eco carried out its established Trend Barometer to record market developments and the goals and trends of the industry. Here, in comparison to the previous year, there was a considerably greater acceptance among users of Free-to-Play and subscription models.

Foto: D-Kuru/Wikimedia Commons

The year 2014 closed with the GAME Association AGM, which took place in the eco Kubus in Cologne on the 19th December. The fruitful and close cooperation between GAME and eco will be continued and intensified in the next year.

Further information
https://games.eco.de

## Competence Group Streaming Media

The eco Competence Group continued its work in 2014 under the name Streaming Media and under the new leader, Michael Westphal. The Managing Director of TV1 GmbH thus continues the work of the previous Competence Group IPTV. The group deals with all topics relating to Streaming Audio and Streaming Video. In focus are e-publishing, content distribution and production, as well as entertainment technology and the hardware and infrastructure for streaming and IPTV services. Here, light should be shed not only on the technical and economic trends and developments, but also on the social framework conditions.

The re-positioned eco Competence Group Streaming Media had its kickoff on 27th March in Munich under the title of "Digital Film Production and Distribution in 4K – Status and Trends in Ultra HD." Under the leadership of Michael Westphal, participants discussed what challenges for technology and infrastructure needed to be solved in order to supply the end-consumer with extensive coverage of Ultra HD. Ultimately, with Ultra HD – the successor to the current HDTV standard with 4 times the resolution – the demand for bandwidth will increase enormously.

The Competence Group Streaming Media was in the press in June 2014 with the news that for the first time, more than a billion music streams per month were measured in Germany. The streaming services for films and series also is becoming increasingly attractive in Germany – more than 50 percent of all German citizens already use these regularly. Games are also increasingly being played delay-free on central servers and transported to the home screen.

The eco Competence Group Streaming Media will continue to accompany this extremely dynamic market. Michael Westphal will inform eco members about current developments through events and press work further in 2015.

Further information
https://streaming-media.eco.de

*Dr. Bettina Horster*
*Director Mobile,*
*Leader of Competence Group Mobile*

## 4.2.5 Competence Group Mobile

Again in the year 2014, the Competence Group Mobile continued its successful work. The focus of activities was in the areas Industry 4.0 (cyber-physical systems) and Machine to Machine Communication (M2M).

The 7th Mobile Business Trends at the Chamber of Commerce in Düsseldorf can now be seen as a tradition and real highlight of the year. This event differentiates itself strongly from other B2B events, as the users (members of the Chamber of Commerce) can speak with the providers at eye-level.

At the Internet Security Days on 24th to 25th September, the Competence Group Mobile was represented with the track "The fridge is calling – Internet of Things meets production." The content focused on and explained security aspects for the Internet of Things and the increasingly popular Smart Home.

On the 12th December, the Competence Group Mobile presented a view of "M2M Future Trends and Digitalization – Users Meet Providers." As the title suggests, the focus was on growth chances as a result of new business models. Thus, there were new insights from Nokia as a prominent representative on the provider side and a legal overview by the lawyer Christian Solmecke from the chambers WILDE BEUGER SOLMECKE on reports of the successful implementation of M2M projects.

Further information
https://mobile.eco.de

*Attorney at Law Thomas Rickert*
*Director Names & Numbers,*
*Leader of Competence Group Names & Numbers Forum*

# 4.2.6 Competence Group Names & Numbers Forum

## Event overview

| Date | Venue | Title |
|---|---|---|
| 23.–27.03. | Singapur | ICANN 49 – GNSO Council |
| 05.06. | Köln | eco Awards – Kategorie Domains & DNS |
| 22.–26.06. | London | ICANN 50 – GNSO Council |
| 05.08. | Köln | Geschl. Workshop für geoTLD-Registries |
| 04.–05.09. | Norderstedt, Timmendorf, Bad Oldesloe | ecoTrialog #15 – Stand der new gTLDs |
| 30.09. | Brüssel | 52nd CENTR GA – EPP-Standardisierung |
| 01.10. | Berlin | eco Zukunftsdialog I – IANA Transition |

| Date | Venue | Title |
|---|---|---|
| 12.–16.10. | Los Angeles | ICANN 51 – GNSO Council, Co-Chair CCWG |
| 19.11. | Köln | eco Kongress – gTLD-Panel-Diskussion |
| 01.12. | Kopenhagen | ICANN Accountability Workshop |
| 04.12. | Dresden | ecoTrialog #17 – New gTLDs in der Praxis |
| 09.12. | Berlin | eco Zukunftsdialog II – IANA-Transition |

The eco Competence Group Names & Numbers Forum can look back on many interesting meetings, activities and press work in 2014, which received a good response from members and the public alike. In addition to this, Thomas Rickert, Leader and Director of the eco Names & Numbers Forum, represented and supported the interests of members at the national and international level. For this, two topics determined the agenda in 2014: The new generic Top-Level Domains (new gTLDs) and the IANA Stewardship Transition.

## New Top-Level Domains

In the year 2014, the new Top-Level Domains were again a focus for the eco Names & Numbers Forum in the context of the Internet Corporation for Assigned Names and Numbers (ICANN) "New gTLD Program," which has been

ensuring a wider range and more competition on the Domains market since the end of 2013. On the 21st January, for example, the first German geographical TLD, .ruhr, started off, followed through the year by .berlin, .koeln/ .cologne, .hamburg , .saarland and .nrw.

In order to support as well as possible the development of the German geoTLDs in the network, the Competence Group Names & Numbers Forum organized a dedicated workshop for the relevant registries on 5th August in Cologne, under the title of "Status and Perspectives of the new gTLDs – lessons learned and future planning." In a confidential context, the participants exchanged information about planned and already undertaken activities for the marketing of the Domains. Here, a central question was how the Competence Group could provide optimal support for its members.

## IANA Stewardship Transition

On 1st October, in cooperation with the eco Competence Group Policy and Law, the first eco Dialog on the Future took place on the realignment of Internet Administration. The discussion event on Internet governance in the post-IANA era was held in the Berlin Capital Office. Participants from politics, the press and industry informed themselves about the current status of the IANA Stewardship Transition. The US Government announced in 2013 that it wanted to give up its supervision of the IANA functions of ICANN in September 2015. The IANA administers the Root Zone of the Domain Name System (DNS) and operates 13 root servers which form the starting point for name resolution in the Internet.

Analogous to the Dialog on the Future, Thomas Rickert took part, in his role as Co-Chair of the CCWG, in an event in Copenhagen on 1st December, organized by the Danish Business Authority, ICANN and the Danish Internet Forum (DIFO), titled "IANA Transition and ICANN Accountability Workshop," to represent the interests of eco.

As a result of the good resonance and the continuing developments in the IANA Stewardship Transition, a second Dialog on the Future took place on 9th December. Along with eco, ICANN was also an official host for the event. The day was led by the eco Directors Prof. Dr. Michael Rotert and Oliver Süme, ICANN Vice-President Europe Jean-Jacques Sahel and Thomas Rickert, Leader of the Names & Numbers Forum.

Representatives of the technical community, Axel Pawlik (Managing Director RIPE NCC) and Hans Peter Dittler (Director ISOC Germany) made clear at the very beginning of the Dialog on the Future that the supervision of the protocols and IP addresses is far less politically explosive than the allocation of web addresses. Ultimately, a lot of interests collide in the allocation of Top-Level Domains, as was

demonstrated recently in the discussion on the extension .vin or .wine. Further German representatives on the 20-strong ICANN Board along with Kleinwächter included Erika Mann, who discussed the questions of the transition and accountability with Hubert Schöttner from the German Ministry for Economics – who sits in the ICANN in the Governmental Advisory Committee (GAC) – and Dr. Jörg Schweiger, from DENIC eG (.de), as the Technical Operator of one of the Top-Level Domains.

The eco Names & Numbers Forum will organize further events in the Dialog on the Future series in collaboration with the area Internet governance in the Berlin Capital Office in 2015.

## ICANN, EuroDIG, CENTR ...

Thomas Rickert, Director Names & Numbers, was elected in 2014 as Co-Chair of the Enhancing ICANN Accountability Cross Community Working Group (CCWG), alongside his long-standing function as a member of the Generic Names Supporting Organization (GNSO) Council. Thus, eco is represented at ICANN with Wolf-Ulrich Knoben as Member of the IANA Stewardship Transition Coordination Group and Thomas Rickert in the central committees for the IANA Stewardship Transition.

The ICANN conferences in Singapore (23rd-27th March), London (22nd-26th June) and Los Angeles (12th-16th October) were dominated by the topics of the IANA Stewardship Transition Coordination Group and

Enhancing ICANN Accountability. eco has been actively involved in ICANN for many years on behalf of its members, and advocates strengthening the multi-stakeholder model. This was emphasized by the association last year in its role as host of the 7th European Dialogue on Internet Governance (EuroDIG) in Berlin in June, which more than 700 participants from 67 countries attended.

Thomas Rickert and Lars Steffen from the eco Names & Numbers Forum made use of the 51st ICANN Meeting in Los Angeles to position the eco Association as a platform for an initiative for the standardization of extensions for the Extensible Provisioning Protocol (EPP). EPP is used to process Domain registrations and Domain transfers between registries and registrars. This possibility is being used more and more, especially in the context of the new gTLDs. The effort required for registries to implement new gTLDs has increased and has led to new challenges. eco will accompany this process actively.

At the end of August, eco was able to announce that three member companies from the Domain sector had received a "Data Retention Waiver" from ICANN, which ensures the legal certainty for German registrars. Accreditation contracts which ICANN as a company enters into with registrars do not always comply in all points with the legal requirements of the country in which the registrar is based – for example, in the case of Blanket Data Retention, which is currently not permissible in Germany. For such cases, ICANN has introduced a procedure in which a legal opinion can be submitted that confirms the non-compliance of a certain stipulation with national law. On eco's initiative, three eco members were able to obtain an exclusion from the contractual requirement taking into account the full extent of German law.

The eco Names & Numbers Forum will continue in 2015 to inform members about new developments in the IANA Stewardship Transition and to represent the interests of its members in a range of committees.

Further information
**https://numbers.eco.de**

*Gerd Simon*
*Leader of Competence Group VoIP*

*Sebastian Abt*
*Leader of Competence Group Network Security*

## 4.2.7 Competence Group Networks

The Competence Group Networks focused in detail in 2014 on five different topics from the areas Infrastructure Security and VoIP.

The first topic was DDoS, which received an excellent response in the event on 12th June. The rapid increase in both the volume and frequency of attacks illustrates the game of cat-and-mouse played between attackers and defenders. In summary, both technical and organizational measures must be used today by every network operator to protect themselves.

On 1st July the experts from the area VoIP met in Cologne to discuss the current situation in the market for Internet telephony, and to take a look at future possibilities. Questions of number porting were of particular interest.

In conjunction with the Internet Security Days on 24th and 25th September, a further defensive measure for DDoS attacks was looked at in more detail – what is known as Blackholing. Rosella Mattioli, for the European Union Agency for Network and Information Security (ENISA), demonstrated that this is by no means purely a German problem, but rather that the attackers and attacks are found world-wide. John Kristoff (Team Cymru USA) and Thomas King (DE-CIX) presented two solutions for how network operators can react quickly to these attacks.

The year finished with an event in Frankfurt on the spoofing of IP addresses and BGP routing, and thus with the cornerstones of the Internet. Solutions and market barriers in the use of RPKI and BCP38 were discussed.

Further information
https://de-cix.eco.de

*Lucia Falkenberg*
*Leader of Competence Group New Work*

*Matthias Olten*
*Leader of Competence Group e-Recruiting*

## 4.2.8 Competence Group New Work

**Fresh air thanks to New Work – find future talents and keep them!**

Digitalization and the lack of specialist workers are creating challenges that require more than a simple "post and pray" attitude. For this reason, the Competence Group New Work/ e-Recruiting continues to deal with the most successful and promising recruiting models. But the question arises as to what employers can do to make themselves attractive for the best employees.

New Work stands for the start of a new work culture – for the eco Competence Group, New Work means even more varied HR topics, current trends and the chance to bring members from diverse companies and sectors into the discussion.

The Competence Group New Work began the year with a new format: The eco Theme Days "Working.Simply.Differently." formed the framework for a bright and diverse mix of everything that will contribute to our future working day. For three days the topics dealt with members of the legendary Generation Y, how to find them and get them to commit, and the techniques for enabling work without temporal or spatial borders.

The Working World 4.0 stands for a whole range of promising possibilities, for more freedom and more autonomous working practices, also outside of the traditional work times and spaces. But we will only be able to translate the possibilities of this new working culture into real chances for growth and economic success in a digitalized and global world if we actively start working on the design of the future working world today.

For this reason, the eco Competence Group New Work is looking forward to granting space to New Work in all its facets and recognizing its important role in the shaping of the Internet. The group is particularly looking forward to discussing new worlds of work and their framework conditions in political Berlin and the presentation of the first New Work award, which will honor the pioneers and shapers of New Work.

Further information
**https://e-recruiting.eco.de**

*Dr. Torsten Schwarz*
*Leader of Competence Group Online Marketing*

# 4.2.9 Competence Group Online Marketing

## Event overview

| Date | Venue | Title |
|---|---|---|
| 17.02. | Köln | KG-Meeting – Big Data im Marketing |
| 05.06. | Köln | eco Awards – Kategorie Online Marketing |
| 24.11. | Frankfurt | KG-Meeting – E-Mail-Marketing in Unternehmen |

The eco Competence Group Online Marketing welcomed the new year with the trend topic "Big Data in Marketing" on 17th February 2014. "Those who are quicker to recognize trends in demand and customer wishes have the advantage," explained the Competence Group Leader and Email Marketing expert, Dr. Torsten Schwarz, "because the increasing digitalization of the customer contact provides companies with vast quantities of information which is just waiting to be analyzed."

The presentation showed that new techniques for analyzing large amounts of data make it increasingly easy to extract information out of online purchases, website visits, surveys, responses to mailings, newsletters and information from the social web. "Particularly, interaction data from emails, websites and the social web are fertile sources of real-time information," said Schwarz. "And this is exactly the art of Big Data: To know in real-time which offer matches best to which customer at this very moment." Concrete projects were presented at the event, in which Big Data came into its own.

On the occasion of the Email-Expo on 13th and 14th May, eco surveyed around 100 Online Marketing experts. After all, the end of email has often been forecast. But the survey demonstrated that, despite social media, email will continue to be a central communication medium – especially in the business world.

Of course, the topic Mobile Marketing could not be ignored in 2014. During dmexco, the eco experts Dr. Bettina Horster and Dr. Torsten Schwarz pointed out that there is a great need to catch up throughout Germany – a quick poll carried out by eco on Online Marketing trends showed that only one third of digital company content is optimized for mobile, and Responsive Design is not yet used sufficiently.

In 2015, three meetings of the eco Competence Group Online Marketing are planned. In addition to this, Dr. Torsten Schwarz will give a presentation and a user workshop at the Certified Senders Alliance Summit.

Further information
https://online-marketing.eco.de

*Henning Lesch, Attorney at Law*
*Leader of Competence Group Law & Regulation*

*Matthias Horn*
*Solicitor Telecommunications Law*

*Folke Scheffel*
*Solicitor Internet and Media Law*

# 4.2.10 Competence Group Law and Regulations

The Competence Group Law and Regulations is the central discussion and information platform for eco member companies. This is where agreement on the content of the work is reached, positions are prepared, queries regarding legal and regulatory topics are answered and the general positioning of eco on the relevant Internet and network policy topics and issues is discussed. In this way, members have the opportunity to actively influence the legislative process at the state, federal and European level, and as such to participate in the shaping of legal policy.

In the eco Competence Group Law and Regulations, there were many points of contact in the political and regulatory areas in the reporting year. The meetings of the Competence Group were used to provide a perspective and an overview of current policy topics and legislative initiatives and to discuss these together with members.

The legislative endeavors for an increase in IT security was one of the central topics discussed in the group in 2014. With the publication of the draft bill for an IT Security Act, the German Federal Ministry for the Interior (BMI) put into concrete terms one intention stemming from the Digital Agenda. In one Competence Group meeting, Dr. Markus Dürig, Head of the BMI Unit responsible for the IT Security Act, explained the ministry's considerations, guidelines and timing.

Aside from this, the political deliberations for some kind of legal obligations for the regional routing of data traffic ("national routing" or "Schengen routing") was on the agenda. The technical, legal and economic aspects and implementability were clarified and discussed. Also controversial were the various perspectives on net neutrality and its regulatory treatment in Germany and Europe. Here, the current developments in the USA, such as the consultation undertaken by the Federal Communications Commission (FCC) and the anticipated initiatives, were taken into account. At the European level, the draft laws already in process and the intentions of the newly elected EU Commission were of great interest.

A further focus of one Competence Group meeting was the verdict from the European Court of Justice on the Data Retention Directive. After the court declared the Data Retention Directive invalid in the decision on 8th April 2014, the impact and consequences of the judgment at the national and European levels were analyzed and discussed. Here, one key question was whether there would be renewed initiatives at the European level for a Directive. Against this backdrop, the intention of the German Federal Government to reintroduce Blanket Data Retention was viewed particularly critically.

Further information
https://recht.eco.de

Foto: ©antispameurope

*Oliver Dehning*
*Leader of Competence Group Security*

# 4.2.11 Competence Group Security

After five years of successful leadership of the Competence Group Security by Dr. Kurt Brand, Managing Director of Pallas GmbH, a change was imminent in 2014. In the first Competence Group meeting of the year, on 19th February, the baton was symbolically handed over to Oliver Dehning, CEO of Hornet Security GmbH. For this meeting, the topic "Defense against Attacks on Websites" was in the focus, with AXA Insurance playing host, and Detective Inspector Werner Dohr, from the Cybercrime Competence Center of the Landeskriminalamt NRW, reporting on the new dimension of highly professional attacks.

The impact of the revelations by Edward Snowden was the topic of two further meetings for the Competence Group. On 2nd July, representatives from industry and politics met in Berlin to discuss openly how the German Internet industry should deal with this information, and found that there is no absolute protection against surveillance by the NSA and friends. But a wider use of encrypted communication can provide the authorities with considerable obstacles.

This challenge was also taken up in the Internet Security Days on 24th and 25th September in Bruehl, where the Competence Group organized an afternoon on the topic "My data is mine – A simple guide to encryption." This included not only the question of how classic email encryption can be made more user-friendly, but also the no-longer-quite-so-new topic of encryption in the Cloud. A highlight of the session was Ricke Kuipers, who reported on how he discovered the Heartbleed bug, which shook the Internet in spring 2014 and the aftershocks of which are still being felt today.

## eco Report "IT Security 2015"

At the end of the year, the eco Competence Group Security carried out the 6th annual survey of security expectations for the following year. The threat of cyber criminality and industrial espionage are continuing to rise, according to the report "IT Security 2015." Of the 280 specialists surveyed by eco, 44 percent assume that the threat situation for German companies will grow further. Corresponding to this, 59 percent of the security experts are expecting increasing or strongly increasing expenses for data protection and IT security. Oliver Dehning sees this rapid development as resulting from increased security awareness in German companies.

"German companies are particularly sought-after attack objects for cyber terrorists and industrial espionage," Oliver Dehning emphasized. "The Association of German Engineers (VDI) estimates the damages for German companies through industrial espionage alone to be 100 billion Euros a year." According to the Center for Strategic and International Studies (CSIS), no country suffers greater economic damage from cyber criminality – measured against their economic performance – than Germany. As a result, it is important to protect business-critical company data from access by third parties. In the eco Report "Data Protection" is therefore the most important security topic for 2015 – 88 percent of the experts agree. Second and third position are taken by "Encryption of Communication" such as email (81 percent) and the "Encryption of Data" in general (80 percent). At 78 percent, "Raising Awareness of Staff" is also of great importance. Finishing off the top six security topics for 2015 and "Malware in the Web" and "Mobile Device Security," each with 78 percent.

Further information
**https://sicherheit.eco.de**

*Detlev Artelt*

*Leader of Competence Group Unified Communications*

# 4.2.12 Competence Group Unified Communications

## Event overview

| Date | Venue | Title |
|---|---|---|
| 10.–12.02. | Köln | Thementage Einfach.Anders.Arbeiten. |
| 23.05. | online | Präsenzmanagement |
| 11.06. | Köln | Die besten 10 aus 200 |
| 04.–05.09. | Norderstedt | ecoTrialog #15 – WebRTC Kick-off |
| 22.10. | Köln | Die besten 10 aus 250 |
| 19.11. | Köln | eco Kongress – Einfach.Anders.Arbeiten. |
| 04.12. | Dresden | ecoTrialog #17 – Einfach.Anders.Arbeiten. |

## New event format and kick-off for the WebRTC Taskforce

The Competence Group Unified Communications can look back again in 2014 on a diverse range of new event formats, congress and event participation, and knowledge transfer through an online webinar.

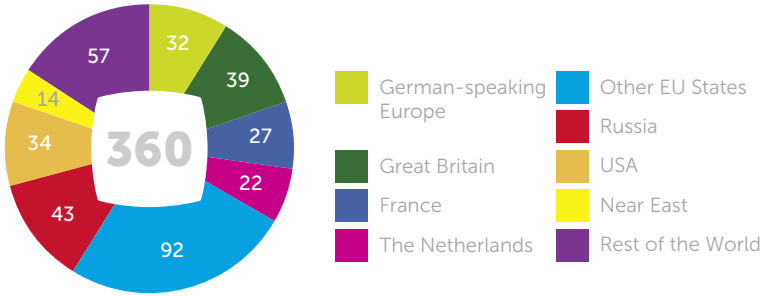
Under the slogan "Working.Simply.Differently.", the eco Theme Days took place in Cologne for the first time on 10th to 12th February. The three afternoons full of ideas on the workplace of the future developed into a fascinating integrated event concept, which enabled a vision of the future world of work. Together with the newly founded Competence Group New Work, the Competence Group Unified Communications Leader, Detlev Artelt, demonstrated how modern communication technology can effectively help us to manage our availability successfully – despite the abundance of information that influences us today.

How does the Internet change cooperation in companies, and what role do social networks and contact between staff members play in this? Detlev Artelt clarified these and other questions on 23rd May in a Google Hangout together with Gunnar Sohn, Editor in Chief of the online magazine ne-na.de, and Hannes Schleech, from the start-up support center in Ingolstadt.

Further information
https://unified-communications.eco.de

*Judith Ellis*
*International Member Services*

## Geografical Distribution of International Members 2014




# 4.3 eco International

The year 2014 was characterized by continual growth in the number of international members at eco: 56 percent of new members in 2014 were based outside of Germany. The geographical distribution of the – at the end of 2014 – 360 international members can be seen in the graph on the right.

### eco International Services

The first priority of eco International in 2014 was a strengthening of communication with members and other interested parties. The monthly eco International Newsletter informs its English-language audience about relevant topics in the form of news items, press releases and specialist articles. A wide range of eco studies, reports, white papers and position papers became available in English during the year, and are available for download on the eco International website. eco International has also been publishing English-language podcasts since the beginning of 2014, containing expert interviews and background information on Internet-related topics

eco International is planning to expand these communication services in 2015. A relaunch of the newsletter is planned for the second quarter of 2015. Here, a second newsletter will be developed which will provide international readers with dedicated information on the German Internet industry, and on relevant developments and policy issues at the national level. In addition to this, eco members, both German and international, will have the possibility of publishing their own English-language content – in the form of specialist articles – on the eco International website members' page, to be developed in 2015. In this way, eco members can position themselves via the eco International platform to reach a wider audience.

### Events

Partnerships with a range of event organizers led to discounted entry for our members to fairs and congresses in Germany and abroad. eco International plans to strengthen these partnerships and organize its own eco events at the international level in 2015. These should not only serve to involve international members more closely in eco activities, but also to intensify the interaction and networking possibilities between German and international members.

Further information
**https://international.eco.de**

*Dr. Sandra Schulz*
*Head of Policy and Law*

Foto: Deutscher Bundestag / Julia Nowak-Katz

# 5 Political Representation

The Policy and Law Department coordinates all of eco's association activities on legal and regulatory framework conditions for both national and international Internet and network policy.

Via the Capital Office in Berlin, eco represents the political interests of members and keeps them informed about legislative initiatives and current developments. The interests of companies flow directly into political debate through the development and agreement on industry positions on relevant topics, be that through events, discussions or political press and publicity.

## Legislative initiatives and focus topics

The political representation of interests through the regulatory work of the eco's Capital Office covers both national and international developments in Internet and network policy. In 2014, the USA was again busy with the topic of net neutrality, so that those world-wide developments played an ever more important role for the Berlin team.

## In Germany

From the perspective of the Internet industry in Germany, the political year 2014 was shaped largely by the post-election makeup of the Federal Government and its Digital Agenda, which was published this legislative term. eco responded with a corresponding position paper, and since then has taken stock on a six-monthly basis with a network policy barometer.

At the beginning of the year, the Central Committee Digital Agenda was officially established in Federal Parliament, which strengthened its advisory function on Internet and network policy throughout the year. The members of this committee, various ministries, and Members of Parliament and its factions who are interested in Internet and network policy issues were the focus of eco's political representation of interests.

In addition to this, there were numerous Internet and network policy initiatives and activities from the Federal Government in 2014 which were of importance to companies in the Internet industry, including:

- The introduction of a law to increase the security of information technology systems (IT Security Act) by the Federal Ministry for the Interior
- The planned (national) reintroduction of Blanket Data Retention, after the ECJ

declared the European Directive to be invalid on 8th April 2014

- The attempt by Parliament to simplify the liability for operators of public, localized wireless networks for Internet access
- The positioning of the Federal Government on Internet governance
- The discussion on Schengen routing
- The German negotiation position on net neutrality for the EU Regulation for the Digital Single Market

These and other topics, such as Ancillary Copyright for Publishers, the Film Funding Act and the Right to be Forgotten were followed closely by lobbyists from our department.

The Capital Office campaigned for the interests of the Internet industry with position papers, position statements and participation in hearings, events and discussions.

All details on the legal and regulatory work can be found in chapter 5.1.1.

## In Europe and the World

The political work in Brussels was heavily influenced by the European election in May 2014. In advance of the election, eco developed a position paper covering the most

important policy and regulatory fields of action for the Internet industry of the new Commission, and correspondingly analyzed the government program. Through the election of Günther Oetinger as Commissioner for the Digital Economy and Society, Brussels became more important for Germany.

In focus this year were the following topics:

- The negotiation regarding the EU General Data Protection Regulation, which should be concluded in 2015
- The modernization of copyright
- The directive concerning measures to ensure a high common level of network and information security across the Union
- The discussion about net neutrality

In the European representation of interests, eco was this year again in close contact with the European umbrella association EuroISPA. Further information about this can be found in chapter 5.1.3.

## eco Complaints Office and Youth Media Protection

In the reporting period, the German states started an initiative for the revision of the Youth Media Protection contract. eco took a position on this and is active in numerous national and international committees on this topic.

The topic "Content Takedown vs. Website Blocking" was constructively handled and was successfully supported, as in previous years, through the work of the Internet Complaints Office and the Federal Government's corresponding annual report, which is based on the figures from the Complaints Office and the Bundeskriminalamt.

Internationally and in Europe, the same issue is also of great importance. Thanks to the support of a range of players, the co-funding of a Europe-wide Safer Internet Center has been successful, and has been ensured for another 18 months past 2014.

Further information on the topic Youth Media Protection can be found in chapter 5.2.

*Henning Lesch, Attorney at Law*
*Leader of Competence Group Law & Regulation*

*Matthias Horn*
*Solicitor Telekommunications Law*

*Folke Scheffel*
*Solicitor Internet- and Media Law*

# 5.1 Legislative Processes and Focus Topics

## 5.1.1 Germany

### The German Federal Government's Digital Agenda

In August 2014, the Federal Government presented its Digital Agenda, which was previously announced in the Coalition Contract. With the Digital Agenda, the Federal Government shows it is taking into account the increasing importance of Internet and network policy in Germany, giving digitalization and the Internet a strategic value. Thus, for the very first time, there is now an overall framework bringing together the various strategies and approaches to Internet and network policy in the different departments. In response to the Digital Agenda, eco published a position paper, taking stands on a range of topics. With this, eco readdressed the association's fundamental positions. Projects like the IT Security Act, a clarification of Wi-Fi liability for operators and the Network Alliance Broadband Expansion are already undergoing implementation. The first draft bills can be expected in early 2015.

### Blanket Data Retention

One of the most controversial policy topics was the topic of the reintroduction of Blanket Data Retention. The term Blanket Data Retention refers to a legal obligation for telecommunication service providers to save the connection data of their users for a certain period of time without justification, so that law enforcement agencies can gain access to these in retrospect if necessary. Traffic data concerns the particulars of the communication, and not the content itself. In the Coalition Contract, the Federal Government agreed to the reintroduction of Blanket Data Retention. The resulting German regulation was deemed unconstitutional by the German Constitutional Court in 2010. The European Directive which formed the basis for this legislation was declared invalid by the European Court of Justice on 8th April 2014.

What remains unclear within the Federal Government after the ECJ verdict is whether a regulation for Blanket Data Retention is still legally possible. It is also not yet clear to what extent a regulation according to the stipulations of the court would make sense from a technical perspective. From the side of the representatives of the security authorities and the CDU/CSU faction, Blanket Data Retention is called for repeatedly as a necessary investigative tool. So far, Blanket Data Retention has been rejected by the SPD through the Federal Minister for Justice. Therefore, the topic is politically controversial.

At the European level, it is not foreseeable whether a new initiative for the Data Retention Directive will come following the ECJ verdict.

A preventative retention of connection data without prior suspicion of criminal activity is, in eco's eyes, neither in keeping with the times nor with the Constitution in this age of omnipresent electronic communication. The associated violation of citizens' and companies' fundamental rights and the accompanying loss of trust in the Internet is in no way proportionate to the alleged, but not proven, gain in effectiveness for law enforcement.

During the reporting period, eco organized a Policy Breakfast in which the technical and legal problems and the financial burden for the Internet industry of Blanket Data Retention were discussed. In a collective association document, eco – together with ANGA, BITKOM, BREKO and VATM – pointed out that a national legislative initiative was neither sensible nor appropriate. As a stronger debate on Blanket Data Retention is expected in 2015, eco will continue to address this topic intensively.

## Copyright

The EU Commission started a consultation on the topic of copyright back in 2013, and eco responded in February 2014. The consultation dealt with, among other things, cross-border use of digital content and the copyright and licensing problems which often occur in conjunction with this. This served, above all, as a clarification with regard to the extent of revision necessary for an adaptation of the European regulatory framework for copyright.

The new Commission, following the European parliamentary election, declared a reform of European copyright to be one of their priorities. The Commissioner for the Digital Economy and Society, Günther Oettinger, and Andrus Ansip, Vice President of the Commission and responsible for the Digital Single Market, will take the lead.

The European Parliament also announced at the end of 2014 its intention to present a report on the evaluation of the Copyright Directive, the so-called InfoSoc Directive 2001/29/EG. This would lay important initial foundations for a reform of the European legal framework for copyright. However, it is to be assumed that the legislative process will take some time, and that it will be put into concrete terms in 2015.

In the German Federal Parliament, a public specialist consultation took place with the Committee for the Digital Agenda in December 2014, with the objective of compiling the discussion points on an amendment to German copyright law. The invited experts were in agreement that copyright required amendment. However, there was disagreement on the questions of where and to what extent amendment was necessary. Given that this process is beginning elsewhere in Europe, Germany must quickly determine its general position, in order to represent the German position in the forthcoming debate. However, this determination will take some time.

## Ancillary Copyright for Publishers

The Ancillary Copyright for Publishers also continued to cause legal disputes and legal uncertainty in 2014. In summer, publishers presented their "Publisher Tariff", which demanded 6 percent of gross revenues that users of so-called "snippets" attain with relation to making excerpts of online content publicly accessible. As the large search engines did not want to fulfill this requirement, VG Media took action through the board of arbitration at the German Patent and Brand Office. An initial settlement proposal is expected in summer 2015. Some search engine providers reacted to the lawsuit with a list of the companies involved in VG Media. Others decided to no longer include snippets from the corresponding companies in their search results. The appeal against this list was rejected by the Cartel Office as unjustified.

In August, a further search engine provider decided to bring a case against Ancillary Copyright in the German Constitutional Court. A finding has not yet been reached.

In reaction to parliamentary questioning on Ancillary Copyright, the Federal Government referred to the agreement in the Coalition Contract to wait for initial experiences before beginning an evaluation. The controversy about the design of the law will, according to the Federal Government, be clarified by the responsible courts. At the end of the year, the opposition decided to introduce a bill into Parliament for the abolishment of Ancillary Copyright for Publishers. The leading committee for Law and Consumer protection then decided to conduct a public hearing on this topic. This was scheduled for the beginning of March 2015.

## Wi-Fi Liability "Störerhaftung"

The Federal Government communicated in the Coalition Contract, and emphasized in the Digital Agenda, its intention to exploit the potential of local wireless networks (Wi-Fi) as Internet access in public spaces. The Federal Government's objective is to improve the distribution and availability of mobile Internet using Wi-Fi. For this, the legal foundations for the use of open networks and for their providers still need to be laid. Legal security for Wi-Fi operators is, according to the Federal Government, urgently required. A clarification of the liability regime in the Telemedia Act is being considered, analogous to that for Internet access providers.

eco presented a position paper on this topic in May 2014. In addition, a Policy Breakfast was organized in November in which a background paper handling the question "Why do Wi-Fi providers need legal certainty?" was discussed. Along with this, eco presented a study on the spread and usability of Wi-Fi, Wi-Fi access points and public hotspots in Germany.

Foto: iStock

The proposed bill announced for 2014 by the Federal Ministry for Economic Affairs and Energy (BMWi) was delayed. The reasons for this are the remaining unanswered questions which need to be clarified through agreement in the ministry. It is assumed that the BMWi will present a proposal in early 2015.

## IT Security

There are initiatives for further legal regulation with regard to IT security at both the national and European level.

At the federal level, the Federal Ministry for the Interior presented a draft in 2013 for a law on increasing the security of Information Technology systems. However, the legislative process for the IT Security Act could not be completed before the election of the 18th German Federal Parliament. In the Coalition Contract, the Federal Government agreed on the establishment of an IT Security Act. In addition to this, the Federal Government retained a variety of inspection orders and mandates for action with relation to IT security.

On 17th December 2014, the Federal Government concluded an IT Security Act in Cabinet. The draft legislation contains requirements for IT security for the operators of critical infrastructure. These operators should comply with a minimum standard of IT security, and should report significant IT security incidents to the Federal Office for Information Security Technology (BSI). The BSI would then analyze the accumulating information and make this available to the operators of critical infrastructure.

Aside from critical infrastructure, the requirements for IT security for telecommunication and telemedia service providers also face increasing regulations. In addition to existing obligations, telemedia service providers are to be required, analogous to the Federal Data Protection Act, to guarantee IT security to the respective current state of technology. Telecommunication companies are also to be obligated to warn their customers if the connection of one of their customers has been misused for attacks. The legislative process for the IT Security Act is expected to be concluded in 2015.

At the European level, there is work being done on a directive containing comparable regulations. In 2013, the EU Commission presented a draft directive concerning measures to ensure a high common level of network and information security across the Union. The European legislative process can also only be concluded after the election of the new European Parliament.

At the beginning of the legislative period, eco presented a position paper detailing its stance on the Internet industry. The topic IT security and the associated legislative intentions were also focus topics for meetings of the eco Competence Group Law and Regulations. eco provided commentary on the planned regulations and participated in the subsequent association hearing in the Ministry for the Interior.

eco will continue to monitor the draft law through the parliamentary process.

## UP KRITIS

eco has been involved in UP KRITIS since 2010. UP KRITIS is handled by the Berlin Capital Office in order to ensure close agreement and interlocking with the Policy and Law Department. UP KRITIS is a public-private partnership between public and private commercial operators of critical infrastructure (KRITIS). Specialists, industry associations and the responsible authorities – in particular the Federal Office for Information Security, the Federal Network Agency and the Ministry for the Interior – are also represented in the cooperation. The work of UP KRITIS consists, on the one hand, of the operative and technical collaboration of all participants, and on the other, of the strategic and conceptual work of the committees established for this purpose.

In conjunction with UP KRITIS, the industry standards in the new IT Security Act should be jointly developed. eco will continue to be involved, in conjunction with the responsible industry working groups.

## 5.1.2 Europe and the World

### The European Election

The European Union's decisions influence the Internet industry and ICT companies to an ever greater extent. For this reason, on the occasion of the European Parliament elections in May 2014, eco published a position paper addressing the topics that would to play a large role at the European level during this legislative period.

The topics dealt with in the position paper included competition in digital markets, discussions at the European level on a legal codification of net neutrality, and the General Data Protection Directive. With the position paper, eco clarified the position on the controversial demands for a reintroduction of Blanket Data Retention and the continuing negotiations on the Network and Information Security Directive. In addition, further information was provided on the topics the digital single market and copyright. The new European Commission declared both of these topics to be among their priorities for this legislative period.

The position paper was presented to the parliamentarians and discussed with them in September 2014 in an eco event at the European Parliament. This forms a solid foundation for representing the interests of the Internet industry at the European level more strongly in future.

### General Data Protection Directive

The EU General Data Protection Directive has been the focus of discussions since 2012. With this directive, the still valid Data Protection Directive from the year 1995 is to be adapted and modernized.

The objective of the directive – creating a unified data protection law valid for all market participants in the European Union – is ambitious. The intention has enormously high economic relevance for all companies that process (personal) data. The social importance of the omnipresence of the processing of personal data cannot be overstated. As a result, the goal is politically controversial.

Following the European Parliament's demands for very strict regulations and its concrete proposal, agreement must now be reached in the European Council; in other words, between the governments of the member states. Disagreement exists in particular in the area of the application of the regulation and the way in which consistent application of the agreement by the national data protection authorities can be ensured.

The challenge here is to respond to current technology, modernizing data protection while adapting the conditions to an increasingly networked and digitalized world. A balance of interests between civil rights and commercial data processing needs to be created. A strong data protection law which is open to innovation can create a locational advantage for the entire European single market in the information age.

For this reason, eco calls for the legislative process for a General Data Protection Directive to be concluded as soon as possible.

### Digital Single Market and Net Neutrality

On 11th September 2013, the Commission presented a draft for a regulation laying down measures concerning the European single market for electronic communications and to achieve a Connected Continent. The proposed regulation is supposed to complement and modify the existing European legal framework for electronic communication. The Commission proposal forms part of the Digital Agenda for Europe and should enable the establishment of a digital single market for the European Union. Unified anti-discrimination obligations and unified methods for cost calculations to encourage competition and improve the investment environment for broadband expansion are some of the components of the proposal.

Above all, TC companies and providers of electronic communications would be affected

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expansion receive substantially less consideration. Overall, however, the Parliament advocates a comprehensive evaluation of the entire existing legal framework for electronic communication in order to adapt this to future challenges.

Klaus Landefeld, eco Director of Infrastructure and Networks, participated as a specialist in the public hearing of the committee for the Digital Agenda in the German Parliament on 2nd June 2014 on behalf of eco. Landefeld brought the perspective of Internet companies into the discussion.

Foto: iStock. ©yenwen

by the legal changes, as would their national regulatory authorities and European consumers and end-users – meaning commercial and private customers of TC companies, from the normal user through to application, content and service providers. The objective of the Commission is to create a unified single market for electronic communication.

On 3rd April 2014 the European Parliament concluded a revision with proposals for far-reaching amendments particularly with regard to net neutrality. The proposal from the European Parliament primarily emphasizes the characteristics of the Internet as a public good, and focuses on promoting that component. In contrast to the Commission proposal, the legitimate economic interests and needs of the companies operating and financing infrastructure and broadband

The German Government brought their position on net neutrality to the European Council in December 2014. In this way, the Federal Government committed to an open Internet, and intends to put their best effort into it, but does not wish to prohibit special services from the very outset. The member states must agree on a compromise in the coming year so that the legislative process can be brought forward.

In the USA, parallel regulations on net neutrality and on preserving the open Internet were also worked on. The American telecommunications supervision authority, the FCC, advised of their intention to present new regulations for broadband services in 2015.

eco advocates in the interest of net neutrality. The fundamental principles of openness, transparency and the a de-central structure of the Internet are, in eco's view, central foundations for future innovation and economic success. The guidelines for the Telecommunications Act must be designed to create investment security for companies while retaining market diversity. Particularly at the European level, the regulatory policy must ensure incentives for investment, fair competition and equal chances in the market.

## "Right to be Forgotten"

On 13th May 2014, the European Court of Justice (ECJ) made a judgment on the interpretation of the Data Protection Directive 95/46/EG, still valid 20 years after its inception. The verdict, which attracted world-wide attention, was described in the press as the creation of a "right to be forgotten," and was described as a victory for data protection over the large Internet corporations.

eco supports the legal certainty pertaining to the application of European data protection law established by the ECJ decision. Furthermore, this verdict clarifies that the European Data Protection Directive is applicable to all companies that are commercially active within the European single market. However, the ECJ decision also created new questions. The verdict strengthens the data protection of the individual, but may well have unforeseen consequences for the freedom of information and opinions in the Internet, something which is equally worthy of protection. The potential negative impact of the consequences of the judgment must, in eco's view, be taken into account, particularly in

conjunction with the legislative process for a European General Data Protection Directive. On this topic, eco organized a breakfast in the European Parliament in Brussels in November 2014. The issue will be further discussed intensively in the next eco MMR Congress in Berlin in 2015.

## TTIP

The Transatlantic Trade and Investment Partnership being pursued between the EU and the USA will potentially also affect the companies in the ICT and Internet industry. Strengthened regulations for the enforcement of intellectual property rights are not to be a component of the agreement, according to publications from the EU Commission. Which components should be contained in the final agreement remains unclear. Whether agreement on data streams and platform regulation can be achieved is under discussion. A conclusion of the negotiations is not expected before the end of 2015.

## Internet Governance

The topic of Internet governance, which above all deals with the questions of the future shape of Internet policy and the future technical and administrative regulation of the Internet, has become increasingly important both at the European and the international levels. eco has been advocating for years for a strengthening of the successful multi-stakeholder dialog in Internet governance and is convinced that this model represents the best alternative for the development of a sustainable Internet governance system with broad social acceptance. For eco, as the Association of the German Internet Industry, it is important to maintain the successful multi-stakeholder self-administration of the Internet, and to continue this. Politics and companies, along with all other stakeholders, should therefore become involved in the relevant committees in which the future design of the Internet and Internet policy is discussed.

## "Who owns the Internet?"

One of the central topics and the object of discussion in the area of Internet governance was the redesign of Internet administration. At the core of the debate and the disputes regarding Internet governance is the question of who should in future have responsibility for and who should carry out the supervisory function over the central resources for the operation of the world-wide Internet. The multi-stakeholder approach, in which different committees feel responsible for different areas of the Internet, has become established. With the increasing importance of the Internet, economic and state interests have grown and the question of "who owns the Internet" has become an increasing focus for governments.

In July 2014 the German Parliament Committee for the Digital Agenda also focused on the topic of Internet governance and undertook a public hearing on the subject. eco completed the written questionnaire from the committee in preparation for the public hearing. Prof. Michael Rotert participated in the public hearing as specialist on behalf of eco and brought the perspective of Internet companies into the discussion.

## EU Commission Communication

In February 2014, the European Commission published a communication (COM(2014) 72 final) on Internet policy and Internet governance. The communication laid a foundation for the common European position and objectives for Internet governance, for the world-wide negotiations such as the NETmundial Conference in São Paolo (April 2014) and the Internet Governance Forum (September 2014).

The recommendations published by the European Commission in the communication formed, as did the NETmundial Conference in Brazil a few months later, a good starting point for the discussions to take place during the year on the future design of Internet governance.

eco took advantage of the opportunity and took a position on the EU Commission communication, also bringing the fundamental principles to the table in the dialog and the discussion on the future design of Internet governance and providing initial stimulus for the discussion.

## Redesign of Internet Administration

How the reform of ICANN might look is a subject that has been discussed at the international level for a considerable amount of time. Until now, the US Government has played a leading role in Internet administration, with the Department of Commerce's supervision of ICANN's IANA functions. With the announcement by the USA of their intention to relinquish their supervisory function of the important Internet Assigned Numbers Authority (IANA), the question of the design and reorganization of IANA has become increasingly important.

Internet Assigned Numbers Authority

The IANA is responsible, among other things, for the allocation and coordination of central Internet resources such as numbers, names, IP addresses and the Domain system. The discussion on the future model for the reorganization and the supervision of IANA is therefore relevant for the companies in the Internet industry, as this can have an impact on the security, stability and robustness of the central Internet infrastructure. What the reorganization of ICANN should look like is so far unclear and is the object of international negotiations.

eco has participated actively in the discussion at the national, European and international levels and will continue to follow the process closely. The German Federal Government also intends to develop a position on the ICANN reform. Against this backdrop, the BMWi developed an preliminary position which will be agreed on and discussed with those involved in the continuing process.

On this topic, eco is in close discussion with the responsible body, the Federal Ministry for Economic Affairs and Energy, and will participate in the development of a joint position.

## EuroDIG

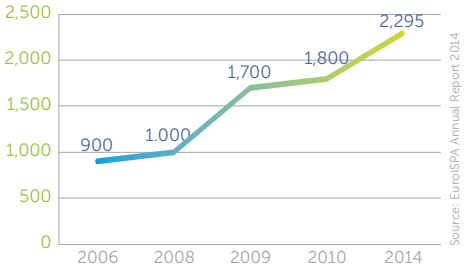
At the European level, the European Dialogue on Internet Governance (EuroDIG) has established itself as a platform for discussion. It is the most important event at the European level in which stakeholders from industry, government, academia and the civil society can exchange ideas on the future design of Internet governance.

On 12th and 13th June 2014, EuroDIG took place under the patronage of the Federal Ministry of the Economy in the Foreign Office in Berlin. eco played host in 2014. The event ran under the slogan of "Digital society at stake – Europe and the future of the Internet". The German Foreign Minister, Frank-Walter Steinmeier, opened EuroDIG and welcomed the more than 700 participants from 67 countries to the Foreign Office. Current developments and the forthcoming European Internet policy questions were discussed, as were Cloud computing, youth protection, net neutrality, data protection and copyright.

## IGF

The 9th international Internet Governance Forum (IGF) 2014 took place on from the 3rd to the 5th of September in Istanbul. Around 2,500 representatives of international governments, companies and non-government organizations, as well as participants from the civil society, discussed current Internet governance questions, such as Internet administration, net neutrality, security and data protection, surveillance and copyright in the digital age. The focus of the discussions at the international IGF, and of great importance for the participants, was also the reform process for the IANA Stewardship.

## Companies represented by EuroISPA 2006–2014




# 5.1.3 EuroISPA

### EuroISPA

The umbrella organization for European Internet service provider associations, EuroISPA, currently represents more than 2,300 ISPs and is thus the largest provider association in the world. Along with eleven national member associations from various EU member states, companies like Facebook, Google and Microsoft are involved in EuroISPA over the industry forum.

At the end of 2013, eco Director Oliver Süme was unanimously elected for three years as President of the association. This means 2014 was the first full reporting year under his leadership.

At the European level, the year 2014 was shaped largely by the parliamentary election and the appointment of the EU Commission last fall.

For the first time in the history of the EU, the realization of a digital single market was made one of the topic priorities of the new Commission. Through this, the needs of the European Internet industry have been established as a top political issue. The digital single market is to be implemented over the next few years by the Vice President of the Commission and Leader of the Digital Single Market Team, Andrus Ansip, and in particular the German Commissioner Günther Oettinger, who is responsible for the Digital Economy and Society. EuroISPA actively followed these developments and the associated reorganization of the Commission, and warned its members in good time about the new responsibilities in the Commission, the new contact people and the relevant new members in the European Parliament.

At the end of 2014, members were presented the draft strategy, "EuroISPA 2020," for the first time. The strategy gives high priority to the Commission's digital single market and takes into account the transformation toward a digital economy. Part of the strategy is a considerable strengthening of activities in political communication, which has already been developed in a four-month pilot project.

From a content perspective, 2014 was shaped again to a large extent by the topics which were in the focus of the political work in Brussels in 2013.

The General Data Protection Directive represented a key component of work, where in contrast in the previous year, the draft regulation on the "right to be forgotten" had taken center-stage. This latter topic achieved new importance in 2014 through the European Court of Justice verdict. The "One-Stop Shop," a principle of considerable importance to the European Internet industry through which as much clarity as possible should be brought into the responsibilities of the supervisory authorities for cross-border services, was a topic where EuroISPA was also especially active. EuroISPA took on the leadership role for this topic in the Coalition for Data Protection, which is made up of a range of European industry associations.

In addition to this, the NIS Directive was the object of further political consultation. At the end of 2014, the organization entered tri-partite negotiations between the Commission, the Parliament and the member states, looking in particular at the scope of application for companies in the Internet industry.

Alongside this, EuroISPA, among others, took part in the European Commission hearing on copyright and in the associated discussion. It also contributed positon papers to numerous discussions on the issue of the assertion of claims in the case of violations of Intellectual property rights.

The topic of creating a safer Internet and the financing of the associated projects through the Commission was one of the topics which played a particularly large role for the association at the European level.

The EuroISPA Annual Report 2014 is available on the association's website at: www.euroispa.org

*Alexandra Koch-Skiba, Attorney at Law*
*Head of eco Complaints Office*

eco COMPLAINTS OFFICE

# 5.2 eco Complaints Office and Youth Media Protection

The successful work of the eco Complaints Office in the fight against illegal online content is central to eco's work in the area of youth protection. eco is also involved, along with partners from politics and the industry, in a range of initiatives and alliances for combatting youth-endangering Internet content and supporting youth protection online. In addition to this, eco is involved in the consultations on the revision of the Youth Media Protection Treaty.

## eco Complaints Hotline for illegal Internet content

Internet users can report potentially illegal Internet content, in particular in the area of youth media protection, free of charge to the eco Complaints Hotline (http://www.internet-beschwerdestelle.de/en/), and thus contribute to the fight against such content at both the national and international levels.

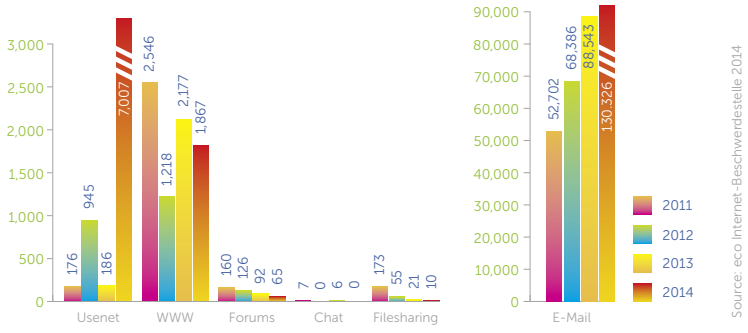
eco has operated the Complaints Hotline for the past 15 years. The hotline has been available via the web portal www.eco.de/services/internet-beschwerdestelle.html and operated together with the Voluntary Self-Monitoring of Multimedia Service Providers (FSM e. V.) since 2004. Reports submitted there are processed by eco and the FSM according to the respective responsibilities and rules of procedure. The portal also provides a great deal of information and advice on the topic of media competence.

Until the end of 2014, the eco Complaints Office was financially supported by the European Commission, with funding set aside for the Safer Internet Program, and since 2008 as part of the German Safer Internet Center. In the German Safer Internet Center, eco works together with FSM, jugendschutz.net, the "Nummer gegen Kummer" hotline and klicksafe.de. In August 2014, the partners applied for continued financial support from the European Commission for a further 18 months. After the end of the Safer Internet Program, the "Safer Internet Services" are eligible for funding through the Connecting Europe Facility.

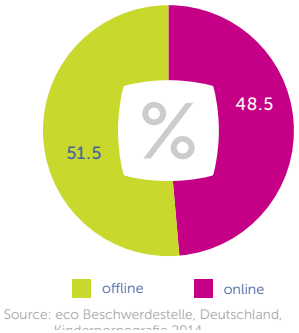
## 2014 Statistics

The eco Complaints Hotline team, consisting exclusively of lawyers, received around 40 percent more complaints in 2014 than in the previous year, and dealt with a total of 139,275 objects of complaint. Complaints about emails made up by far the greatest proportion, with 130,326 reports. This was followed by complaints about Usenet contributions (7,007) and websites (1,867). Leaving out the complaints submitted about spam, 87 percent of the examined objects (8,472) contained images of child or youth pornography, or grooming for child and youth

## Complaints Submitted 2011–2014

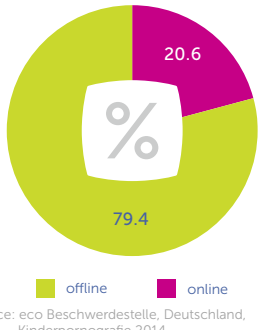



## Success Rate after 2 Days



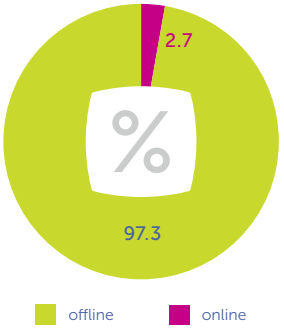

Source: eco Beschwerdestelle, Deutschland,

## Success Rate after 4 Days




Source: eco Beschwerdestelle, Deutschland,

## Success Rate after 1 Week




pornography. This represents an increase of seven percent in comparison to the previous year. In contrast, complaints relating to freely accessible adult pornography, incitement of the masses and propaganda in violation of the Constitution, as well as developmentally damaging content, reduced slightly, and made up 7.6 percent of the reports received.

With regard to justified complaints, the disproportionately high percentage of emails with illegal content, for example, pornography or developmentally damaging content, is striking. If pure spam is removed from the calculation, around ten percent of the justified complaints referred to emails with illegal content.

Take-down times for child pornographic content on the World Wide Web varied little from the previous year. Child pornography was no longer accessible worldwide within, on average, 5.32 days from the time of the report being received by the eco Complaints Hotline. For content hosted in Germany it was 2.94 days, including weekends and public holidays.

The complaints, depending on the type of offence and its country of origin, were forwarded to the relevant law enforcement agency, the content provider, the hosting provider and/or the relevant member of the INHOPE network.

As was also demonstrated in the German Federal Government report for the year 2013 on the deletion of telemedia content with child pornographic content, the principle of "Notice and Takedown" works successfully.

## INHOPE

eco is a founding member of INHOPE, the international umbrella organization for Internet complaints hotlines (www.inhope.org). The organization celebrated its 15th birthday in 2014. INHOPE has coordinated a network of Internet hotlines since 1999, and was financially supported by the European Commission until the end of 2014 as part of the Safer Internet program. Worldwide, INHOPE is the leading organization for the international exchange of user complaints in order to combat illegal content in its country of origin with the help of law enforcement agencies. Currently, INHOPE is comprised of (including three hotlines established with the support of the INHOPE foundation) 51 complaints hotlines in 45 countries. In 2014, New Zealand and Sweden swelled the ranks of member hotlines.

In 2014, eco also advocated in committees for the targeted expansion of the network and for the funding of the worldwide and effective Notice and Takedown of images of child abuse. Along with this, eco was active in the development of best practices with regard to the processing of reports of images of the sexual abuse of minors in P2P networks and in the pilot project "IC-CAM", the further development of the INHOPE database, initiated by INHOPE.

*Sidonie Krug*
*PR Specialist Policy and Law*

*Christin Wagner*
*PR Assistant Policy and Law*

# 5.3 Political Communication

## Reorganization of Political PR

Successful political representation of interests and exertion of influence is the result of the strategic interplay of two levels of action: On the one hand, there is classic lobbying, which ensures direct contact to the Federal Government, the ministries and the legislator. On the other hand, there is political Public Relations, which transports the central messages of the association to the public through the media and multiplicators, and thus initiates and shapes debates regarding current political issues.

Parallel to the increased importance of Internet and network policy for politics in general, and the expansion of the eco Capital Office in 2013, eco strengthened and reorganized the political PR team in Berlin during 2014. With the expanded team, all political press and publicity work can again be taken care of in-house.

## More service for Members

Along with the improvement in external communication, the strengthening of internal communication about political topics is an important objective for the eco Capital Office. An initial activity in this direction is the new newsletter "Politik und Recht," which has been informing eco members exclusively about current developments in Internet and network policy topics at the national and international level since the beginning of 2014. The newsletter is issued every week of the German Federal Parliamentary Session, and portions of this newsletter are translated into English and published via the International Posts on the Policy and Law blog site (**https://politik-recht.eco.de/international**). Along with an overview of current legislative process, members receive information on eco positions, reports from events, and announcements about eco Capital Office events.

# 6. Professional Services

## 6.1 Certified Senders Alliance

The Certified Senders Alliance (CSA) was formed back in 2003 jointly with the German Dialogmarketing Association (DDV). As a certifier of mass mailers, the CSA sets quality standards for commercial mailing. Email service providers and companies that send emails with their own IP addresses can be certified. Applicants must fulfill high quality standards to be included. At the same time, they need to undergo continuous monitoring. After successful certification, senders have the opportunity to use the CSA seal of certification, and to send their emails with the CSA Whitelist.

At the time of reporting, the CSA was able to report strong growth in comparison to the previous year, with a total of 100 participants and 21,738 IP addresses. This growth was accompanied by constant revision of the admission requirements and investment in the monitoring of the Whitelist in order to ensure the high quality standards. The new revision carried out in June 2014 in accordance with the bi-annual cycle. The associated tightening of admission requirements brought important changes, such as DKIM, the X-CSA-Complaints-Header and the tightening of the rules for publication and exceptions. The CSA Complaints Office was required for the first time to temporarily exclude two senders from the list as a result of them exceeding the number of allowable reprimands.

In 2014, the CSA organized the inaugural CSA Summit, which took place in Cologne and was attended by customers and partners. The feedback from the around 100 participants was very positive. The redesign of the corporate identity and the new logo was presented at the CSA Summit 2014, as was the relaunch of the website. The new customer portal, in which customers can manage their IP addresses and contacts while taking advantage of other CSA services, was also introduced.

As a further service in the last financial year, the Sender Reputation Index (SRI) was launched, which offers a unique rating for the seriousness and legality of email marketers. CSA senders can expand existing reputation ratings for customers, in order to prevent possible damage to their own reputation.

*Ivo Ivanov*
*Head of Professional Services, Director CSA*

*Rosa Hafezi*
*Legal Consulting and Certification*

*Alexandra Koch-Skiba*
*Head of Complaints Office CSA*

CSA Certified Senders Alliance

*Alexander Zeh*
*Engineering Manager CSA*

*Julia Janßen-Holldiek*
*Manager Business Development & ISP Relations*

*Maike Marx*
*Marketing Assistant & Business Development*

In 2014, intensive discussions were undertaken with international ISPs, with a focus on Russia. Among other things, the CSA presented themselves at a high-status event in Moscow with many representatives of Russian dialog marketing. We look back on a very intensive and successful year which laid the foundations for the continued services of the CSA for the quality of direct email marketing.

*Thorsten Kraft*
*Senior Technical Project Manager*
*Anti-Botnet Advisory Center*
*Advanced Cyber Defence Centre*

# 6.2 Cyber Security Services

## 6.2.1 Anti-Botnet Advisory Center

Again in 2014, botnets represented one of the greatest threats in the area of cyber crime. Despite several successful operations on the part of international law enforcement agencies, millions of computers are still infected with malware. In addition, 2014 played witness to an increase in smartphones and tablets infected with malware. All of these devices are, generally without the knowledge of the owner, part of a botnet, and regularly send spam emails. Many are also involved in DDoS attacks on websites and webservers, also without the owner's awareness. Some of these devices even host phishing or malware sites.

In the year 2014, the various services of the German Anti-Botnet Advisory Center were called upon more than two million times. The EU Cleaner provided at https://botfrei.de/en detected infections in the computers of almost 40 percent of users. Both of these figures illustrate a growth over the previous year. The innovative encryption Trojan, in particular, posed a great danger for Internet users.

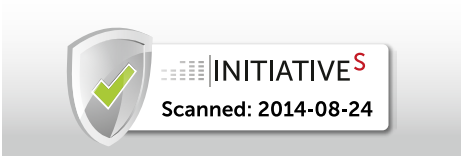
The Anti-Botnet Advisory Center is no longer an established presence exclusively in the German-speaking regions. An increase in visitor numbers from abroad to the English-language services of the center could also be observed in 2014.

Thanks to the support of the connected ISPs, banks and numerous press reports, botfrei.de serves as the best resource for a large number of Internet users, as well as small and medium-sized companies, in the case of a botnet infection. The services and support include, along with the telephone and email support, a lively and comprehensive forum made up of volunteers, where affected users can find professional help. In addition to this, the free tools for the detection and removal of malware continue to enjoy great popularity.

The Anti-Botnet Advisory Center is also a leading partner in the European anti-botnet project, the Advanced Cyber Defence Centre (ACDC), and serves as an orientation for project partners on how to establish and operate a national Anti-Botnet Support Center. In close cooperation with the specialists from the eco Association, national Anti-Botnet Support Centers began operation in 2014 in Belgium, Croatia, Italy, France, Portugal and Romania.

Further information:
www.botfrei.de/en
www.botfree.eu

*Markus Schaffrin*
*Head of Member Services*
*Project Manager Initiative-S*



## 6.2.2 Initiative-S

### Initial Situation

A modern web presence is an important flagship for every business. However, without the necessary protection and regular checking, company websites can become a gateway for malware and other attacks. According to the Internet Security Threat Report by Symantec, 50 percent of such attacks target the websites of small and medium enterprises. Here, the attackers take advantage of the fact that small companies in particular tend to neglect their web presence. Certainly, at the outset the website will be programmed to be appealing, but regular monitoring of the website for vulnerabilities and the closing of these does not, as a rule, occur. Often, small companies do not have their own IT specialists, and have little understanding of the security issues.

### Objectives achieved

By 31st December 2014, over 30,000 domains were registered in the system. On average, three infected websites are found daily. In total, the number of infected websites found since the beginning of the project is 503, and all infections could be successfully removed. Analyses demonstrated that 20 percent of the infections occurred via compromised FTP accounts, and 80 percent via outdated PHP versions on the websites.

A large proportion of new registrations to Initiative-S came via partners (54 percent) or via the security seal embedded in other websites (31 percent). The web seal contains, along with reference to Initiative-S, the date of the last scan, and will only appear if the website is free of malware. This seal has three primary tasks. First, its appearance on websites should lead to other companies registering for Initiative-S through viral marketing. Second, it should create trust for the website visitor. Third, the seal makes it clear to the website operator when the website was last scanned by Initiative-S and whether the website is free of manipulation. The main objective of the project was to support small and medium-sized enterprises in Internet security, and to sensitize them long-term to the issues. This has clearly been achieved in previous months.

### Outlook

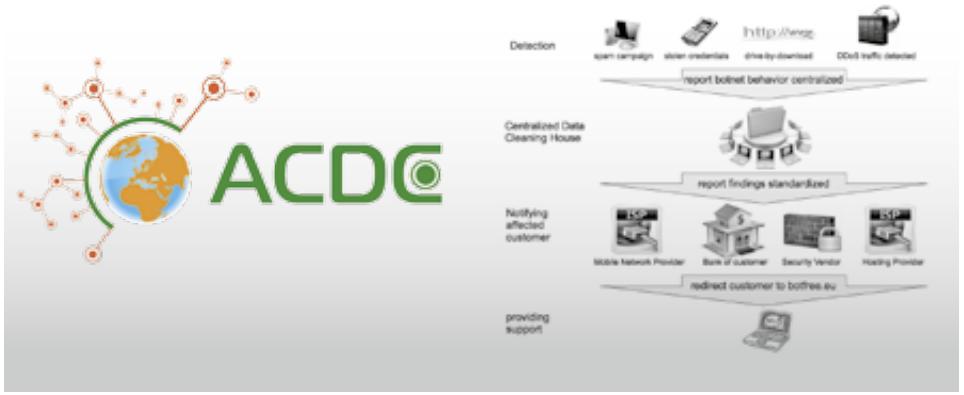
As envisioned in the previous year, cooperation with partners continued with the objective of marketing the website check. Our partner, Greenmark IT, delivered domains into the system on a daily basis and was responsible for half of all new registrations. Despite this, only seven percent of the partner's customers made use of the free website check.

Further cooperation exists with TULOCK. Companies can scan their websites for malware and vulnerabilities in the networks, web applications and SSL certificates using the TULOCK product Certificus WebCheck. This can function as a supplement to the Initiative-S website check. Discussions were held with a view to continuing the cooperation.

Finally, eco plans to continue the free website check after the end of financial support in a new phase from 1st January 2015. Cross-financing through other projects or the transformation into a commercial service are possibilities for funding this service in the long term.

Further information:
www.initiative-s/en

*Peter Meyer*
*Project Manager ACDC*




## 6.2.3 Advanced Cyber Defence Centre

### Fighting botnets without borders

The Advanced Cyber Defence Center (ACDC) is a European pilot project with the objective of developing and actively implementing a cross-border concept against the spread of botnets and malware. In a consortium of 27 further partners from 14 European states, eco carries the responsibility as project coordinator. The project began in February 2013 and will run until July 2015.

Together with renowned partners from the areas of public administration, the Internet industry, operators of critical infrastructure, the financial sector, research and educational institutions, anti-virus vendors, CERTs and law enforcement agencies, a central database with open interfaces was created in 2014. This database enables all partners to share information, for example on malware or phishing, and to analyze this using their own tools.

The project is administered over a community portal, first presented at the Internet Security Days 2014 on 24th and 25th September. The ACDC community is not just open for members of the consortium, but for all interested companies, research institutions and authorities. All that is required is registration in the community portal.

Along with the cross-sector and cross-border exchange of data and knowledge, another important supporting pillar of the project is security, protection and prevention. For this, a further eight national Anti-Botnet Support Centers were established in 2014, which modeled themselves on the long-standing eco service www.botfrei.de/en. These national support centers help affected end-customers and small and medium-sized companies in the case of a malware infection. For this, free tools for cleaning and active support are offered.

Further information:
**www.acdc-project.eu**
**www.botfree.eu**

*Arnold Nipper*
*CTO/COO, DE-CIX*

*Andreas Sturm*
*Head of Business Development, DE-CIX*

*Frank P. Orlowski*
*Chief Marketing Officer, DE-CIX*

# 6.3 DE-CIX Management GmbH

Growth in customers and ports continued in 2014. More than 100 new customers connected to DE-CIX Frankfurt in 2014. With this, they connected to DE-CIX's Apollon platform, the most powerful interconnection platform in the world for the exchange of data traffic in the Internet.

The installation and commissioning of the DE-CIX Apollon platform in 2013 laid the foundation for the considerable growth of DE-CIX in Germany in 2014. At the same time, the international locations could also be expanded. DE-CIX is an integral component of the global Internet infrastructure and connects international content networks, carriers and ISPs in – by now – five locations: Frankfurt, Munich, Hamburg, Dubai and New York. The Internet exchanges DE-CIX Frankfurt, DE-CIX Hamburg and DE-CIX Munich are operated by DE-CIX Management GmbH. 2014 was another successful business year. The customer base rose by eleven percent, while the total capacity of all connected ports in Frankfurt reached the mark of 10 Tbit for the first time. During the year, this rose to 13.4 Tbit. The increase in new customers and the growth in capacity of the existing customers also ensured an increase in data traffic, following 2013's trends. At peak times, the traffic values rose to more than 3.5 Tbit per second.

Data traffic is growing worldwide, and DE-CIX is keeping pace both in Germany as well as at the international level. The subsidiary DE-CIX International AG is responsible for the business outside of Germany.

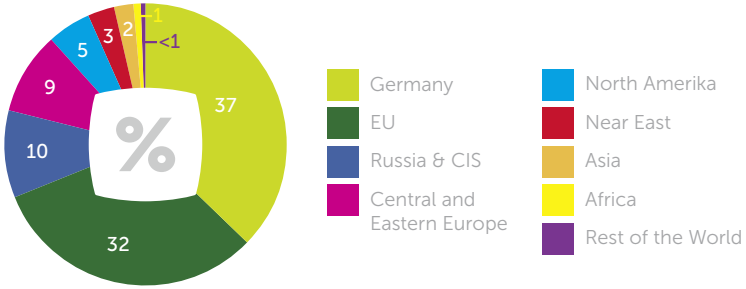
The Internet exchange UAE-IX in Dubai, United Arab Emirates, founded in 2012, makes it possible for ISPs from the GCC states to reduce their latency times for local data exchange by up to 80 percent and lower their costs by up to 70 percent. It is the first neutral and independent Internet exchange in the Near East and is operated with the know-how and the support of DE-CIX Management GmbH.

At the end of 2014, more than 25 customers were connected and peak traffic reached nearly 25 Gbit per second, a 100 percent increase over the previous year.

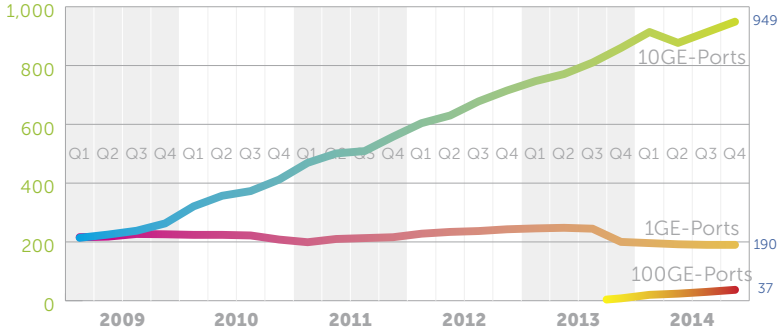
Like the other Internet exchanges operated by DE-CIX, DE-CIX New York is a neutral platform for cost-neutral exchange of data traffic known as public peering. Public peering has long been neglected by the US American networks, but it is gaining in importance. In comparison to private peering the connection of a mere two networks with one another the public variation requires considerably less administration, particularly when more customers connect. The first traffic flowed over DE-CIX New York in 2014. During the year, 50 customers connected to it and peak traffic reached almost 20 Gbit per second. Thus, the new Internet exchange is growing exponentially. DE-CIX New York is distributed over a variety of data centers in the New York/New Jersey region, and is accessible via over 100 access points. DE-CIX New York is operated by DE-CIX North America Inc., a subsidiary of DE-CIX International AG.

DE-CIX
Frankfurt · Hamburg · München · New York · Dubai

## Customers per Region 2014




## Development of Ports in Use 2009–2014




For its establishment and expansion of the two locations in Dubai and New York, DE-CIX was nominated for the renowned Capacity Awards in 2014, and won the prize for the Best North-American Project, as well as receiving the Jury Prize for the Metro Connect Awards.

In addition to the establishment and operation of Internet exchanges, DE-CIX offers consulting services when companies need advice on the establishment of their own exchanges. In 2014, the new Internet exchange Angonix in Angola was established with the help of DE-CIX.

DE-CIX also supports companies in establishing peering and gaining the best-possible benefit from this. Every year DE-CIX organizes and supports many events for the national and international peering community, such as the Global Peering Forum and the European Peering Forum.

Internationally, DE-CIX met the industry at more than 50 events, including a range of Capacity events like Capacity Europe, Capacity Middle East, and Capacity Russia, the ITW in Chicago and RIPE, NANOG, ENOG and MENOG events. A high point in 2014 was the annual DE-CIX Customer Summit, which – in keeping with the process of internationalization – took place with parallel conferences in Frankfurt and New York.

In addition to the large events organized by DE-CIX, smaller events also took place, like the DE-CIX Christmas Dinner in Moscow, which the most important representatives of the Internet and peering community in Russia and the CIS attended. DE-CIX also extended invitations to Peering Roundtables in Hamburg and Munich, and peering workshops and the Christmas Party in the DE-CIX MeetingCenter in Frankfurt. The DE-CIX MeetingCenter is available free-of-charge for DE-CIX customers and eco members once per quarter, and is used for a range of industry meetings and events.

DE-CIX made use of 2014 to grow in Germany, at the same time driving forward the process of internationalization. The outstanding reputation which DE-CIX enjoys in the industry is also of benefit for the international locations and is the basis for the growth anticipated in the coming years.

### DE-CIX success story

With DE-CIX Frankfurt, eco has been providing the German Internet industry with the world's largest Internet exchange point since 1995, over which more than 600 Internet Service Providers (ISPs) from more than 60 countries exchange a large proportion of their traffic.

The rapid development of the global Internet infrastructure has led to an increased demand for DE-CIX's know-how and comprehensive experience for the establishment and operation of exchange points in many countries around the world. DE-CIX International AG was founded two years ago with the objective of exporting the public peering model and coordinating the associated activities.

### DE-CIX underway internationally

The speed and the extent to which the German model has been adopted internationally in the last 18 months has both surprised and pleased

us. This growth allowed the company to open an office in one of the most important digital hotspots in the world, New York, as early as 2013. In the future DE-CIX North America will expand the Internet exchange, eventually making it one of the top five Internet exchanges in the world.

The interconnection platform UAE-IX in Dubai was one of the very first of DE-CIX's international projects, and forms an important bridge to the entire Arabian world. Data traffic in the region has more than doubled, and it continues to grow at high speed. In keeping with the motto "keep local content local," DE-CIX has been successful in both countries in achieving the right "mix" of regional content and access providers for successful collaboration and future expansion.

A further foundation stone in the international development was achieved by DE-CIX International through a comprehensive consultation project on the African continent – strategically an extraordinarily important region, with the highest growth rates for data traffic and Internet use in the world. Since 2013, DE-CIX International has also been providing consulting expertise to Angola Cables, a consortium of all important access, data center and under-sea cable providers in West Africa. The project includes evaluating the status quo and developing proposals for better framework conditions for interconnection in Angola and in the entire region. The long-term objective is the development of a high-performance ecosystem, which should have a decisive impact on the establishment of large interconnection platforms throughout Africa, and eventually the expansion of intercontinental connections with Europe and South America. In future, a central exchange point will be created in West Africa, which can take on a portion of the traffic which has previously primarily been routed through the USA. Against the backdrop of the surveillance scandal in the U.S. and continuing discussions on data protection, this exchange point can represent a politically and economically attractive peering alternative in these countries.

DE-CIX International is currently evaluating the potential of further locations for Internet exchange points in Europe and other parts of the world.

## Certified and honored

DE-CIX International is particularly proud of the recently issued OIX Certification through the Open IX Board, which documents the high quality and performance of the physical infrastructure and also the actual access services of DE-CIX in North America.

*Andreas Weiss*
*Director EuroCloud Deutschland_eco e. V.*

*Peter Koller*
*Project Leader EuroCloud*

# 6.4 EuroCloud Deutschland_eco e.V.

## EuroCloud: A vision celebrates its fifth birthday

"Europe needs an address for Cloud Computing" – with this vision toward providing solutions to cloud computing, EuroCloud Deutschland_eco e. V. was founded on 19th December 2009. The association was officially christened at a kick-off event on 2nd February 2010. More than 100 representatives of the Cloud Computing industry came to the headquarters of eco – Association of the German Internet Industry on 2nd February 2010 to participate in the kick-off event for EuroCloud Deutschland_eco e.V., and to start work. At this time, "Services from the Cloud" were not at all well known here, and for these ambassadors it was clear that a lot of work lay ahead of them.

As one of twelve national European societies, EuroCloud Deutschland began its work as the representative of the still young Cloud sector. In the meantime, the association can count 125 member companies in its German arm, and 22 nations are represented throughout Europe. EuroCloud can already look back on a successful history.

## Legal guidelines and seal of quality

To help the sector achieve success, along with marketing the advantages of the offers, it was above all necessary to create trust. As a result, the group focused initially on two objectives: Questions of data protection needed to be clarified, and Cloud Computing needed a secure legal basis. The Competence Group Law developed guidelines, which were published as a free download under the title "Cloud Computing – German Law, Data Protection and Compliance," in German and in English. Within the first three months, the study had been downloaded more than 1,500 times. At the national German IT Summit in 2012, the paper "Legal Requirements for Cloud Computing – Secure Cloud Services," was published (in German only), in which the association also participated.

In order to document technical security and reliability, the second objective was to develop a seal of quality. Here again, a separate Competence Group was involved. At the CeBIT in Hannover in 2011, the certification "EuroCloud Star Audit," was first presented publicly with the first certified services from Pironet NDH and Optivo. The initially national certification was then broadened and passed over to EuroCloud Europe for international implementation. For the German market, a DIN specification was created for the management of Cloud solutions in SMEs, which was published in September 2014.

## Active at the European level

The work began in parallel in the European association. As a result of the first pan-European Member Congress, the "16-Point Action Plan for Cloud Computing in Europe" was published. The objectives of this plan went beyond raising awareness for Cloud services

and successful applications in practice, but also cooperation with other industries and government authorities, in order to build trust in services from the Cloud.

The efforts would soon pay off. Two years later, EuroCloud took part in EU initiatives for the creation of standards (ETSI), quality (certification) and legally secure contracts with respect to data protection. In 2013, there followed the active support of the EU Commission working group (EU Cloud Select Industry Group), through which the focus was on the topics of certification, SLAs and a Data Protection Code of Conduct. EuroCloud Deutschland_eco e.V. was also actively involved in the EU-funded project "Clouding SMEs" for the application of Cloud Computing to small and medium-sized businesses.

## Publicity work for the Cloud

In parallel, the association worked on publicizing the subject of Cloud Computing. By the end of 2010, the first EuroCloud Roadshow had already started, and the first EuroCloud Deutschland Conference (ECDC) and German EuroCloud User Congress had occurred. At the Viennese Congress, the first edition of the book, "Der Weg in die Cloud," was presented by the industry specialists. The advisory guide bundled for the first time all necessary information, scenarios for Cloud implementation in the company, and information on technical and legal aspects for Germany, Austria and Switzerland.

The breaking of the NSA scandal meant a setback for the Cloud Computing industry, as well as for the entire Internet industry. An intensive debate and clarification of the associated issues on the use of Cloud services helped to rebuild trust. This was confirmed by the German Census Bureau, which announced last year that around twelve percent of German companies use Cloud services.

## Cloud Computing becoming a matter of course

And what does the future of Cloud Computing hold? Cloud Computing is developing more and more into a standard IT service, without which trend topics like Big Data and M2M would not even be possible. As a result, the slogan for the EuroCloud Deutschland Conference in 2014 was "Cloud Business in Dialog."

The German Mittelstand is also increasingly recognizing the advantages of IT services in the Cloud, but compared to other European companies still remains one to two years behind in this development. It is time to make up the lost ground. The provision of cost analyses, case studies, checklists and advice will be a major task for EuroCloud.

In the future, public Cloud offers will become more common. Most so-called private Clouds are expected to disappear from the statistics, as they are often not actually Cloud structures, but rather self-operated virtualized systems.

The biggest challenge is now at the feet of the software vendors, who need to provide adequate Cloud-model alternatives for their classic licensed software. Here, the balancing act is to offer a highly professional service from the very beginning, and to provide this with relatively manageable costs. This also

requires realistic financial planning and in most cases financing over several years, as it will take two to three years before the service will pay off for the customer.

So there is an exciting time ahead of us and we are certain that by 2020, Cloud Computing will be as normal as the Internet is today.

## Competence Groups

The Competence Group Seal of Quality and Certification develops inspection requirements and checklists for trusted Cloud services. The EuroCloud Star Audit, the first Cloud-specific certification system, was implemented back in 2011.

The Competence Group Cloud Acceptance analyzes acceptance factors for the use of Cloud services in comparison to other complex processes and systems. The group produces studies and guidelines, in order to provide information and to support the development of Cloud services. They cooperate closely with the Aschaffenburg University of Applied Sciences for work on the topics. The Competence Group published the new edition of the successful "Study on Acceptance of Cloud Computing" in 2014.

The Competence Group Law and Compliance works, among other things, on recommendations for legal assessment and checklists for data-protection-compliant use of Cloud services. For the development of practical processes, they work together with the authorities and with data protection agents.

The Competence Group Cloud Project Marketing primarily develops guidelines on how Cloud projects should be set up according to Leading Practices, so that the affected IT staff and future users can be informed and involved in the best possible way.

The Competence Group Open Cloud is targeted at all who operate a Cloud with open products, or who want to help third parties in this area. Both technical and practical experience is exchanged. The objective of the Competence Group is, among other things, to develop practical guidelines for SMEs to enable them to create a simple introduction to open-source products and to support them in the choice of products.

## EuroCloud Projects

EuroCloud is involved in a range of funded projects at both the national and international levels:

## Clouding SMEs

Clouding SMEs is a joint initiative of SME associations, and SME and Cloud computing experts that act as catalysts to support the successful implementation of Cloud computing for European SMEs. The project follows a comprehensive approach to Cloud computing for SMEs. It deals with both the supply side (innovative ICT-SME with Cloud know-how) and the demand side (use of Cloud by SMEs).

## Cloud Catalyst

The project Cloud Catalyst supports the European Cloud ecosystem in the development and implementation of innovative services. Through this, the competitiveness of the EU industry should be strengthened and the business possibilities better exploited.

## NGCert

The objective of the project Next Generation Certification (NGCert) is to develop fundamental processes for a dynamic certification, which should ensure that all quality and security requirements of the certificate are being met at all times. The continual proof of compliance to the certification criteria is thus also given in the case of the implementation of new technical features and by security updates.

Further information:
www.eurocloud.de

*Christiane Skiba*

*Head of Marketing & Event Management*

# 7. Event Highlights 2014

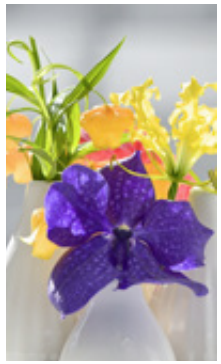
## 7.1 eco Gala: The best of everything

It is the social climax for the German Internet industry: Close to 400 guests visited the eco Gala on 5th June in KölnSKY. Added to this, more than 600 viewers followed the eco Internet Awards ceremony live online. After a reception with drinks and finger food, eco Chairman Prof. Michael Rotert and eco CEO Harald A. Summa welcomed the guests. From here, the MC Ralph Günther took over for the thrilling presentation of a total of ten eco Internet Awards.

Following the ceremony, the party went up to the 28th floor, high over the roofs of Cologne, where guests could partake in a gala buffet from Hyatt Catering. The open-air panorama level, on the 29th floor, offered an impressive view over the cathedral city. A chill-out area, a cocktail bar and live music ensured a successful evening, and the party continued into the early hours of the morning.

## Categories and companies which were honored with the eco Internet Award:

| | |
|---|---|
| Carrier/ISP | **Interoute Germany GmbH**<br>with „One Bridge" |
| Domains & DNS | **regiodot GmbH & Co. KG**<br>with their domain conzept .ruhr |
| E-Commerce | **Payleven Holding GmbH**<br>with their mobile EC and creditcard reader „Payleven" |
| Entertainment | **1. FC Köln GmbH & Co. KGaA**<br>with „FC-Connect" |
| Housing/Hosting/ Datacenter | **Claranet GmbH**<br>with „Disaster Recovery as a Service" |
| Mobile | **Yapital Financial AG**<br>with their pay-app „Yapital" |
| M2M | **doubleSlash Net-Business GmbH**<br>with their „Telematik Service Plattform" |
| Online-/E-Mail-Marketing | **optivo GmbH**<br>with „optivo broadmail" |
| Sicherheit | **Ageto Service GmbH**<br>with „AGETO-eID-Client" |
| Internet Start-up Award | **FastBill GmbH**<br>with their accountingsoftware FastBill |
| *Awarded by the federal state of Northrhine-Westfalia for digital industry* | **svh24**<br>with „made in NRW" |



# 7.2 Internet Security Days 2014: Looking today at the security of tomorrow

At the Internet Security Days (ISD), held for the fourth time in 2014, experts from around the world came together on 24th to 25th September to inform themselves about current solutions and future trends and to share their knowledge. Organized by eco, the two-day event took place in the amusement park Phantasialand in Bruehl, near Cologne. With more than 650 visitors from 25 countries, 30 exhibitors, and media and marketing partners, the event was a great success again in 2014.

Alongside the specialist trade fair, the event offered a wide variety of presentations and fascinating discussions on diverse aspects of IT security. International security experts offered insight into the current state of technology and introduced diverse solutions for combatting cyber crime and for securing modern applications.

The participants were in agreement that an enormous new area of activity has been opened up for unauthorized access and criminal action through the Internet of Things. Dr. Bettina Horster, eco Director of Mobile, therefore advocates that "Security aspects must play a leading role in the development of M2M products and services. The industry is called upon to plan in effective security and encryption solutions from the very beginning."

Encryption itself was also a major topic. For a long time eco has been recommending the broad implementation of encrypted communication. "IT companies are urged to make encryption as simple as possible for users, through intuitive and user-friendly products," says Oliver Dehning, Leader of the Competence Group Security.

Further information:
**https://isd.eco.de/en**

## 7.3 eco Congress: Meeting the future

On 19th November 2014, visionaries and experts from the Internet industry met for the eco Congress in the RheinEnergieSTADION in Cologne. The visitors enjoyed entertaining keynotes, high-class tracks and interesting discussions on future-oriented topics like enterprise mobility, physicalization versus virtualization in data centers, Smart Home, and the new Top-Level Domains. Keynotes included "Star Trek: Facts & Fiction", by Prof. Dr. Metin Tolan (TU Dortmund), Crowdsourcing, by Raúl Krauthausen, activist for wheelchair accessibility and winner of the German Citizen Prize 2010, and "Gummi bears and beer", by renowned patent attorney Rolf Claessen. A tour of the stadium and a Cologne buffet with one or two cold ones encouraged relaxed networking, and many participants left at the end of the day with the words "see you again next year!"

Further information:
www.eco-kongress.de

# 7.4 EuroCloud Deutschland Conference

## Cloud Business in Dialog

The focuses for the EuroCloud Deutschland Conference on 14th May were the development of the Cloud services business, and activities for the opening of new markets. 100 participants attended and participated in the most important industry meeting for the Cloud computing industry. The festive Gala on the previous evening provided the stage for the presentation of the coveted EuroCloud Deutschland Awards. Topics covered during the event included security, with a presentation by Dimitra Livery from the European Union Agency for Network and Information Security (ENISA), Cloud acceptance, Cloud business models, data protection, and Cloud risk management.

*Thomas Müller*

*Head of Corporate Communications*

# 8. Corporate Communications

## Media interest in Internet industry topics growing

After a successful reorganization of Corporate Communications in 2013, the step-by-step implementation of the mid-term communication strategy began in 2014.

The association established itself again, particularly in the specialist media, as an oft-quoted source, and found itself appearing in articles, specialist contributions and interviews with association representatives. In addition to this, the political publicity work undertaken by an internal team ensured appearances in a range of leading national media (see Chapter 9.2) and cemented the association's position as a sought-after contact-point for the press on all topics related to the Internet industry.

The planning and coordination of the PR activities for the Expert and Competence Groups was again managed by the PR agency euromarcom, which worked together with the Head of Corporate Communications to identify and communicate the subject matter. This included the creation of reports from which figures and material could be generated for journalists.

Alongside the successful placement of the topics of the eco Expert and Competence Groups and their leaders, the "eco Trend Report 2020" was a valuable asset for the proliferation of corporate communications. Around 100 experts were surveyed on their assessment of the up-coming trends in the Internet industry. The resulting press releases were taken up by specialist media, leading national German media, and also by regional newspapers.

## Interest in the Internet industry growing – a chance for eco and its members

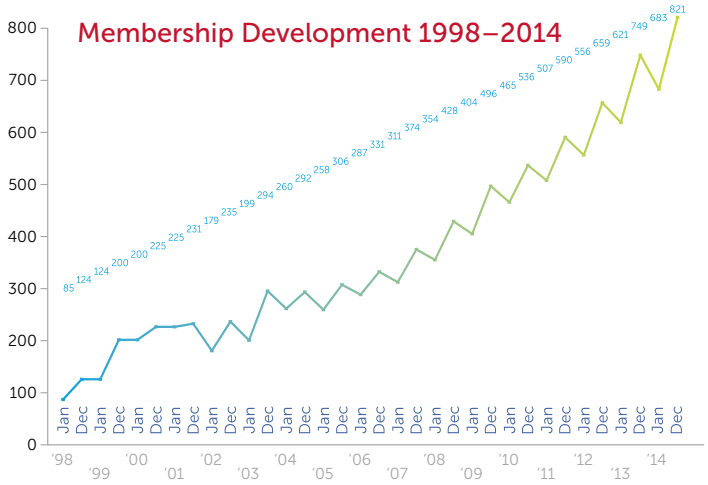
Interest in economic topics continues to grow unabated, and media interest – from traditional print media through to bloggers – in IT and Internet topics is growing tremendously, in parallel with the increasing relevance of the Internet industry to the economy.

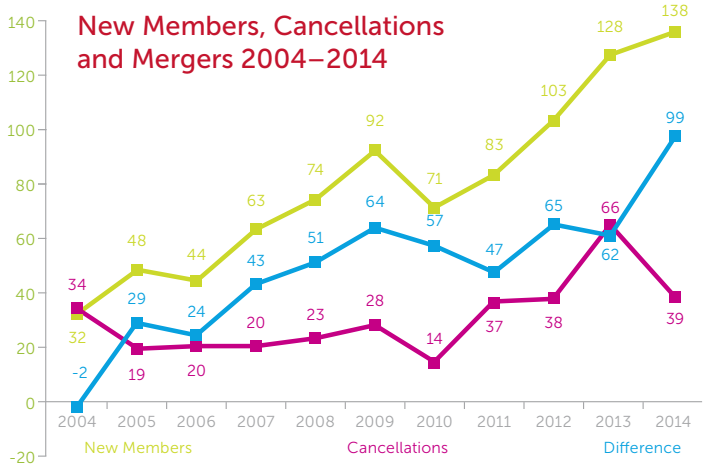
There has never been a greater chance for the media penetration of the topics of Internet companies than there is today – and the trend is continuing. eco also wants to support member companies more strongly in the area of corporate communication, as communication management plays a decisive role in economic success. For this reason, the decision was taken in 2014 to establish the Competence Group Corporate Communications. The objective of the group is the professionalization of PR and better media penetration through advice and training. This will start at the beginning of 2015.

eco warmly welcomes member companies from the Internet industry, universities, PR experts, and all those interested in the topic corporate communications to participate, collaborate, and network in the Competence Group Corporate Communications

# 9. Statistics

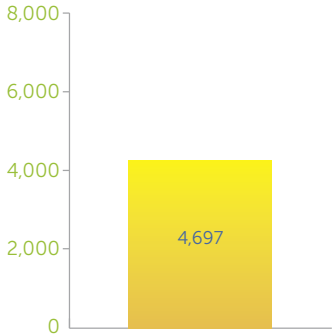
## 9.1 eco Members



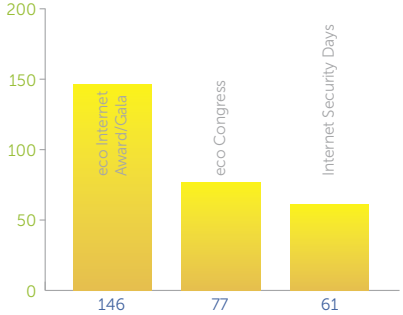




## 9.2 Press

## Press Mentions (Online[1]) eco Total 2014




## Press Mentions (Online[1]) eco Events 2014




[1] incl. PR- and Press Portals

## Press Mentions (Online[1]) eco Topics 2014

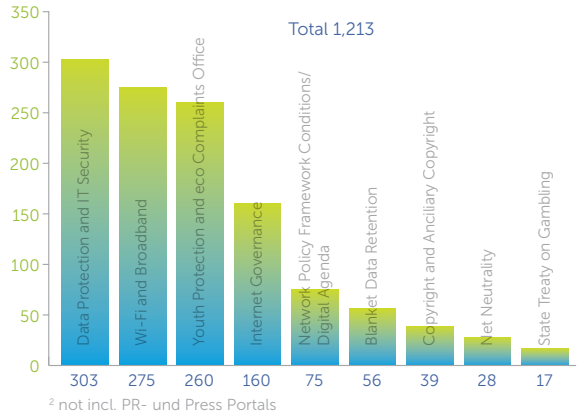
| | |
|---|---|
| Email | 1,350 |
| Data Protection and IT Security | 922 |
| Mobile | 850 |
| Datacenter | 721 |
| Games | 450 |
| e-Commerce | 412 |
| Machine-to-Machine/M2M/Smart Home | 408 |
| Certified Senders Alliance (CSA) | 337 |
| DE-CIX | 331 |
| Content | 248 |
| Big Data | 225 |
| Digital Agenda | 203 |
| Initiative-S | 170 |
| Cloud Computing | 151 |
| eco Internet Awards/eco Gala | 146 |
| Datacenter Star Audit (DCSA) | 140 |
| Blanket Data Retention | 124 |
| 30 Years of Email | 121 |
| Internet Complaints Office | 113 |
| Botfrei.de | 107 |
| WLAN | 91 |
| Net Neutrality | 85 |
| VoIP/Voice over IP | 80 |
| eco Kongress | 77 |
| Internet Governance | 68 |
| Internet Security Days (ISD) | 61 |
| e-Recruiting | 58 |
| Online Marketing | 54 |
| Youth Protection | 48 |
| EuroCloud | 47 |
| Copyright | 40 |
| Unified Communications | 23 |
| Broadband | 18 |
| Anciliary Copyright | 9 |
| Domain Sector/New Top Level Domains (TLD) | 7 |
| Advanced Cyber Defence Centre (ACDC) | 4 |
| Anti Botnet Advisory Center | 1 |
| Total | 4,697 |

[1] incl. PR- and Press Portals

## Press Publications (Print) eco Topics 2014

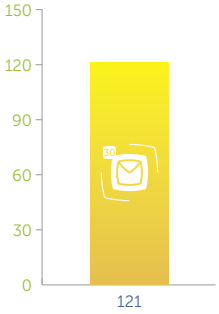
| | |
|---|---|
| DE-CIX | 488 |
| IT Security | 261 |
| Data Protection | 170 |
| Cloud Computing | 141 |
| Email | 135 |
| Datacenter | 84 |
| Youth Protection | 79 |
| eco Complaints Office | 78 |
| Internet Governance | 64 |
| Wi-Fi | 56 |
| Botfrei.de | 52 |
| Broadband | 51 |
| Streaming Media | 46 |
| M2M | 42 |
| Domain Sector | 41 |
| QR-Codes | 41 |
| Copyright | 30 |
| e-Commerce | 20 |
| Netw. Policy Framework Conditions/Digital Agenda | 16 |
| Other | 13 |
| eco Internet Award/Gala | 12 |
| Search Engine Optimization | 11 |
| Start-ups | 10 |
| Net Neutrality | 7 |
| Blanket Data Retention | 7 |
| Internet Security Days (ISD) | 6 |
| New Work | 6 |
| eco Congress | 4 |
| Games | 4 |
| Cologne Internet Week | 4 |
| Online Marketing | 3 |
| Mobile | 2 |
| Big Data | 1 |
| Infrastructure | 1 |
| Anciliary Copyright | 1 |
| Total | 1,987 |

## Press Publications (Print and Online[2]) Policy and Law 2014




[2] not incl. PR- und Press Portals

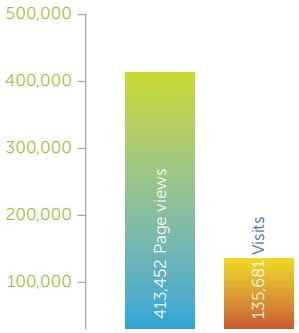
## Press Publications (Print and Online[1]) 30 Years of E-Mail



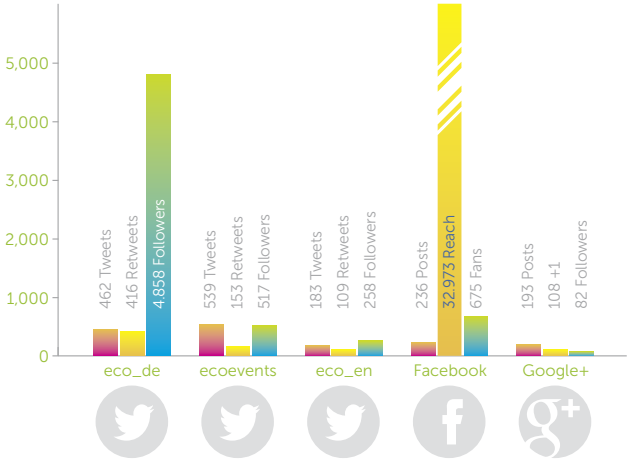

[1] incl. PR- and Press Portals

# 9.3 eco Websites

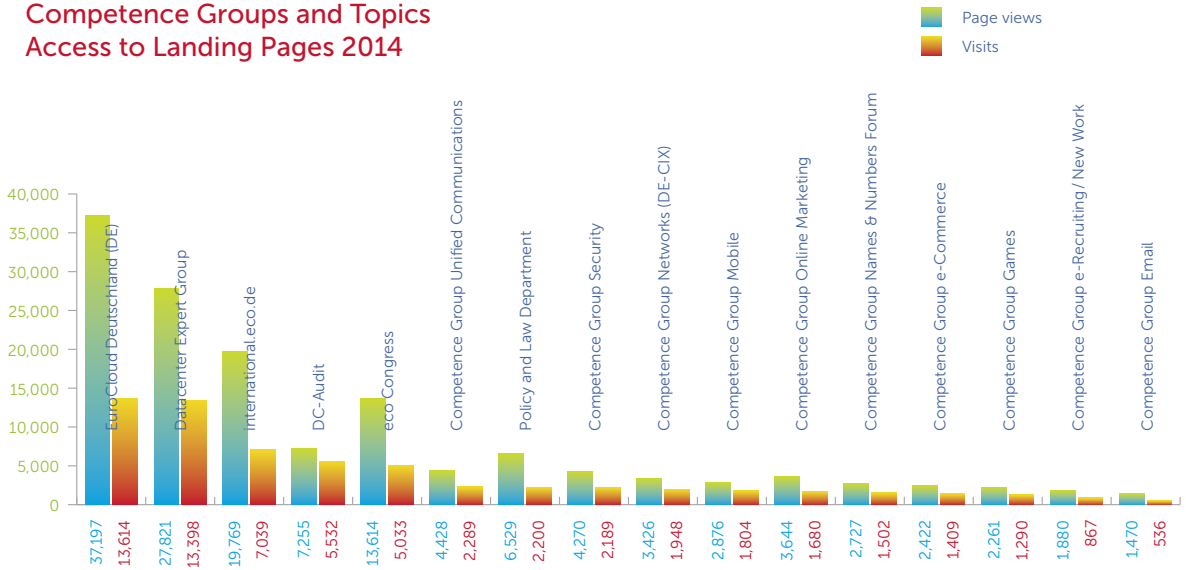
## Access to www.eco.de 2014




## eco in social Media 2014

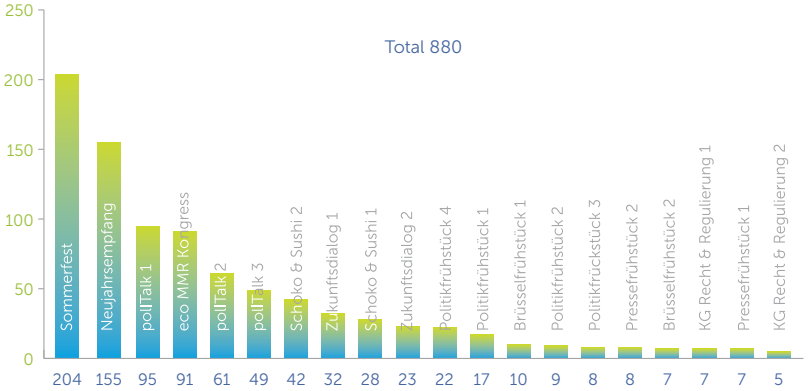



## Competence Groups and Topics Access to Landing Pages 2014

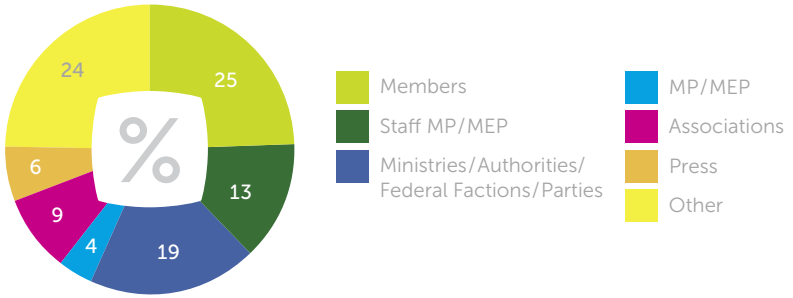


# 9.4 Events

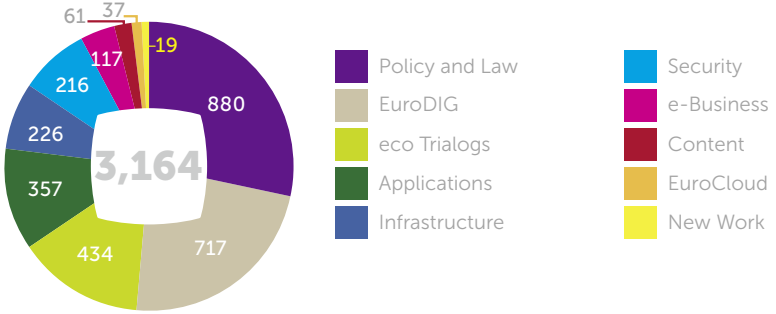
## Participants and Events Policy and Law 2014




## Participants at Policy and Law Events According to Function




## Participants at eco Events per Topic



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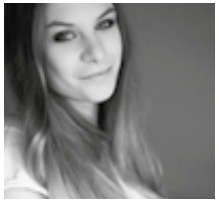

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CMC Networks , Port St. Luis, MUS; conova communications GmbH, Salzburg, AUT; ConSol* GmbH, München; Consultix GmbH, Bremen; ContactLab S.r.l., Milano, ITA; Continum AG, Freiburg; CoolSolution UG, Köln; CORE Association d/b/a CORE Internet Council of Registrars , Geneva, CHE; Core-Backbone GmbH, Nürnberg; COSMONOVA LLC, Kiev, UKR; Cross Tel Ltd., Moscow, RUS; CSB-System AG, Geilenkirchen; cyberways Informationsdienste GmbH, Augsburg; Cybits AG, Mainz-Kastel; CYREN GmbH, Berlin; cyscon GmbH, Düsseldorf; CYTA, Nicosia, CYP **[D]** DAILYMOTION S.A., Paris, FRA; Daisy Communications Ltd. 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KG, Bad Homburg; DMI GmbH & Co. KG, Münster; DNS:NET Internet Service GmbH, Berlin; dnsXperts UG, Bornheim, Rheinland;

Docler Holding S.à r.l., Luxembourg, LUX; DOKOM Gesellschaft für Telekommunikation mbH , Dortmund; domainfactory GmbH, Ismaning; Domainvermarkter Ltd. & Co. KG, Wuppertal; Donuts Inc., Bellevue, USA; dotBERLIN GmbH & Co. KG, Berlin; dotHIV gemeinnütziger e.V., Berlin; DOTRO Telecom, Bucharest, ROU; dotSaarland e. V. c/o Steuer- und Wirtschaftsberatung Ulrich Kiefer und Gerhard Jochum, St. Ingbert; Dr. Andreas Leupold LL.M. 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KG, Düsseldorf; Epsilon Telecommunications Ltd., London, GBR; equada GmbH, Alzenau, i.UFr.; Equinix (Germany) GmbH, Frankfurt am Main; Ernst & Young GmbH Wirtschaftsprüfungsgesellschaft, Kassel; Ertl & Groß OG, Stainz, AUT; ESET Deutschland GmbH, Jena; e-shelter facility services GmbH, Frankfurt am Main; e-Spirit AG, Dortmund; Etisalat Emirates Telecommunications Corporation , Zabeel, Dubai, ARE; euNetworks Services GmbH, Frankfurt am Main; EURid VZW, Diegem, BEL; European Data Hub, Luxembourg, LUX; Eurotel Ltd., Kiev, UKR; Eurotranstelecom VTEL , Kiev, UKR; EUROWEB ROMANIA S.A., Bucharest, ROU; e-via S.p.A. 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KG , Leonberg; Interxion Deutschland GmbH, Frankfurt am Main; Inxmail GmbH, Freiburg; IP Telecom Bulgaria Ltd., Burgas, BGR; IP Transit, Inc., Fort Lauderdale, USA; IPA Institut für Personalentwicklung und Arbeitsorganisation , Köln; IPERCAST Network, Boulogne-Billancourt, FRA; IPHH Internet Port Hamburg GmbH, Hamburg; iPlace Internet & Network Services GmbH, Rankweil, AUT; IP-Max S.A., Genève, CHE; IQ Networks, Sulaimaniya, IRQ; ISP Service eG, Stuttgart; ISPpro Internet KG, Hermsdorf; ITD Network AD, Plovdiv, BGR; ith Kommunikationstechnik GmbH, Plattling; iWelt AG, Eibelstadt; IX Reach Ltd., High Wycombe, GBR **[J]** JasTel Network Co., Ltd., Pakkret, THA; Jobware Online-Service GmbH, Paderborn; Johannes Gutenberg-Universität Mainz/ZDV, Mainz; Joint-Stock Company "COMCOR" Otdel Mezhoperatorskogo Vzaimodeistvia , Moscow; JUCONOMY Rechtsanwälte, Düsseldorf **[K]** Kabel BW GmbH, Heidelberg; Kabel Deutschland

Vertrieb und Service GmbH , Unterföhring; Kaia Global Networks Ltd., High Wycombe, GBR; Kakao Corp., Seongnam-shi Gyeonggi-do, KOR; Kalaydo GmbH & Co. KG, Köln; KAMP Netzwerkdienste GmbH, Oberhausen; Kantonsschule Zug - Informatik, Zug, CHE; Kapsch CarrierCom AG, Vienna, AUT; Kazakhtelecom JSC, Almaty, KAZ; Kentix GmbH, Idar-Oberstein; KEVAG Telekom GmbH, Koblenz; Keycom PLC, Stafford, GBR; Key-Systems GmbH, St. Ingbert; keyweb AG, Erfurt; KGT new media, Berlin; KielNET GmbH, Kiel; King & Wood Mallesons SJ Berwin, Frankfurt am Main; Kingston Technology GmbH, München; KIU - Kölner Internet Union e.V., Köln; Knipp Medien und Kommunikation GmbH, Dortmund; Komro GmbH, Rosenheim; Konica Minolta Business Solutions Europe GmbH, Langenhagen; KPMG AG, Düsseldorf; KPN EuroRings B.V., Frankfurt am Main; KT Corporation, Gyeonggi-do, KOR; Ktv Istar Ltd., Silistra, BGR; KVANT-TELECOM CJSC, Voronezh, RUS **[L]** LANTA Ltd., Tambov, RUS; Larsen Data ApS, København, DNK; Lasotel, Villeurbanne, FRA; Lattelecom SIA, Riga, LVA; LeaseWeb Network B.V., Amsterdam, NLD; LEMARIT GmbH Business Domain Management , Harrislee; Lepida SpA, Bologna, IT; Level 3 Communications, L.L.C., London, GBR; Liazo SARL, Paris, FRA; Liberty Global Operations BV, Schiphol Rijk, NLD; Lidero Network AB, Enköping, SWE; Limelight Networks Inc., Tempe, USA; Link11 GmbH, Frankfurt am Main; LinkedIn Ireland Ltd., Dublin, IRL; Linx Telecommunications BV, Amsterdam, NLD; LLC DataCenter M100, Moscow, RUS; LLC Equant, Moscow, RUS; LogoSoft d.o.o., Sarajevo, BIH; LTT Inc., Parma, ITA; Luxembourg Online SA, Luxwmbourg, LUX; LUXNETWORK S.A., Dudelange, LUX; LWLcom GmbH, Bremen **[M]** M+W Germany GmbH, Stuttgart; M247 Ltd., Manchester, GBR; Magna International (Germany) GmbH, Sailauf; Manx Telecom Ltd., British Isles, GBR; maxspot GmbH, Königs Wusterhausen; McCrazy GmbH, Bad Sachsa; MCS Computer Systeme GmbH, Hamburg; MDlink online service center GmbH, Magdeburg; Meanie, Voorburg, NLD; MEDIA BROADCAST GmbH, Köln; Media Exchange GmbH, Unterföhring; Media Network Services AS, Oslo, NOR; mediaBEAM GmbH, Ahaus; Megaspace Internet Services GmbH, Landau; Messe Frankfurt Exhibition GmbH, Frankfurt am Main; Metroset, Nizhnevartovsk, RUS; Microsoft Deutschland GmbH, Unterschleißheim; Minds + Machines GmbH, München; Mittwald CM Service GmbH & Co. KG, Espelkamp; MIVITEC GmbH, Sinzing; MK Netzdienste GmbH & Co. KG, Minden; M-net Telekommunikations GmbH, Nürnberg; mobile.international GmbH, Europarc - Dreilinden; MOLDTELECOM S.A., Chisinau, MDA; Moselle développement, Metz, FRA; mr.net services GmbH & Co. KG, Flensburg; MRV Communications GmbH, Darmstadt; MSK-IX JSC, Moscow, RUS; MTX Services s.a r.l. Linkey , Bettembourg, LUX; Multimedia Polska S.A, Warsaw, POL; Multiplay (UK) Ltd., Southampton, GBR; MVM NET Ltd., Budapest, HUN; MYGATE Management GmbH, Zürich, CHE; myLoc managed IT AG, Düsseldorf; Myra Security GmbH, München; mywire Datentechnik GmbH, Mannheim **[N]** n@work Internet Informationssysteme GmbH, Hamburg; Naitways, Paris, FRA; National Cable Networks OJSC, Moscow, RUS; Nauka-Svyaz Ltd., Moscow, RUS; Naukowa I Akademicka Siec Komputerowa jbr , Warszawa, POL; Naver Business Platform, Seongnam-si, Gyeonggi-do, KOR; Neo Telecoms SAS, Paris, FRA; NERIM, Paris, FRA; net.DE AG, Hannover; NET1 Ltd., Sofia, BGR; NetAachen GmbH, Aachen; NetAssist LLC, Kiev, UKR; NetByNet Holding LLC, Moscow, RUS; NetCologne GmbH, Köln; netcup GmbH, Karlsruhe; NetDescribe GmbH, Oberhaching; Neterra Ltd., Sofia, BGR; NETHINKS GmbH, Fulda; NetIX Communications, Sofia, BGR; NetNames GmbH, München; NETORN LLC, Moscow, RUS; netplace Telematic GmbH, München; NETPLANET GmbH, Wien, AUT; Netrino UK Ltd. , Creslow, GBR; Netrouting, Spijkenisse, NLD; netsign networks GmbH, Berlin; Netskope UK Ltd., London, GBR; NetUSE AG, Kiel; networker NRW e.V., Essen; Neue Medien Münnich GmbH, Friedersdorf; Neuronnexion, Amiens, FRA; Nexinto GmbH, Hamburg; nexiu GmbH, Wehrheim; next layer Telekommunikations-dienstleistung und Beratungs GmbH , Wien, AUT; nexum AG, Köln; NFOrce Entertainment B.V., Roosendaal, NLD; Nianet a/s, Glostrup, DNK; nic.at GmbH, Salzburg, AUT; Nionex GmbH, Gütersloh; nIPper consulting, Sandhausen; nLayer Communications Inc., Chicago, Illinois, USA; NMMN New Media Markets & Networks IT-Services GmbH , Hamburg; noris network AG, Nürnberg; Notstromtechnik-Clasen GmbH, Ahrensburg; Novadex GmbH, Bietigheim-Bissingen; NOVATEL EOOD, Sofia, BGR; NTCOM LLC, Moscow, RUS; NTT Europe Ltd. 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KG , Fürth; OEV Online Dienste GmbH, Düsseldorf; OJSC MegaFon, Moscow, RUS; OMCnet Internet Service GmbH, Quickborn; One.com, København, DNK; OnLive, Mountain View, USA; OnPage.org GmbH, München; OODRIVE Germany GmbH, München; OOO "TK Telecom", Samara, RUS; OOO Media, Moskau, RUS; Ooredoo Qtel aka Qatar Telecom , Doha, QAT; Open Peering B.V., The Hague, NLD; Open Text Software GmbH, Grasbrunn; OpenCarrier e.G., Düsseldorf; OpenDNS, San Francisco, , USA; Oppenhoff & Partner, Köln; Opteamax GmbH, Rheinbreitbach; Optimate-Server, Heusenstamm; optivo GmbH, Berlin; OSN Online Service Nürnberg GmbH, Nürnberg; OTEGlobe S.A., Maroussi-Athens, GRC; OVH SAS, Roubaix, FRA; OXSEED Logistics GmbH, Bielefeld **[P]** Pacnet Global Headquarter Singapore , Singapore, SGP; Pactas GmbH, Frankfurt am Main; Pallas GmbH, Brühl; Panduit EEIG, Frankfurt am Main; PartnerGate GmbH, München; Patentanwälte Freischem, Köln; PAV Germany GmbH Panda Security , Duisburg; PCCW Global Ltd., Quarry Bay, HKG; PE Yuri Stanislavovich Demenin, Kiev, UKR; Peer 1 Hosting, Vancouver, CAN; Peering GmbH, Berlin; Perf-IT B.V., Sliedrecht, NLD; Performance Media 360 Grad - Gesellschaft für online Direktmarketing mbH, München; Perspektiva Ltd., St. Petersburg, RUS; Pfalzkom, Gesellschaft für Telekommunikation mbH , Ludwigshafen; Phibee Telecom SARL, La Grand Croix, FRA; PIRONET NDH Datacenter AG & Co. KG , Köln; Plus.line AG, Frankfurt am Main; PlusServer AG, Hürth; PlusServer Deutschland GmbH, Hürth; Polkomtel Sp. z o.o., Warszawa, POL; PORTLANE AB, Hägersten, SWE; portrix Systems GmbH, Hamburg; Post Group Post Luxembourg , Luxembourg, LUX; Premiere Conferencing Ireland Ltd., Clonakilty, Co. Cork, IRL; Previder BV, BE Hengelo, NLD; Prime Telecom S.r.l., Bucharest, ROU; PrimeTel PLC, Limassol, CYP; PRIOR1 GmbH, Sankt Augustin; Probe Networks, Saarlouis; ProCom-Bestmann Vertrieb + Service von Headsetlösungen u. Bürocommunication e.K., Naumburg; Proleagion GmbH, Wiesbaden; proRZ Rechenzentrumsbau GmbH, Wallmenroth; PSW GROUP GmbH & Co. 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M.; Trend Micro Deutschland GmbH, Hallbergmoos; TripartZ BV / Atrato IP, Schiphol-Rijk, NLD; Trusted Network GmbH, Unterschleißheim; T-Systems Multimedia Solutions GmbH, Dresden; TUI InfoTec GmbH, Hannover; Tulock GmbH, Saarbrücken; Türk Telekom International HU Kft., Budaörs, HUN; Turk Telekomünikasyon A.S., Ankara, TUR; TÜV Rheinland Cert GmbH, Köln; TV1 GmbH, Unterföhring; TVP Operations Company t/a TV PLUS, Melbourne, AUS; Twitch Interactive, Inc., San Francisco, USA; TYPO3 Association, Baar, CHE **[U]** UAB Bité Lietuva, Vilnius, LTU; Ucom LLC, Yerevan, ARM; Unicast Invest LLC, Kiev, UKR; Unify GmbH & Co. KG, München; Union Betriebs-GmbH, Rheinbach; United Gameserver GmbH, Coburg; united-domains AG, Starnberg; Unitymedia NRW GmbH, Köln; Universal Card Technologies JSC Prime-line JSC , Moscow, RUS; Universität zu Köln Seminar für Medien- und Technologiemanagement , Köln; UPC Polska Sp. z o.o., Warszawa, POL; Ustream Inc., San Francisco, USA; uvensys GmbH, Butzbach **[V]** VASCO Data Security International GmbH, Glattbrugg, CHE; Vectra S.A., Gdynia, POL; velia.net Internetdienste GmbH, Hanau; vente-privee.com, La Plaine Saint Denis, FRA; VeriSign Netherlands B.V., Rotterdam, NLD; Verizon Deutschland GmbH, Dortmund; Verlag für die deutsche Wirtschaft AG, Bonn; Versatel Deutschland GmbH, Düsseldorf; Virgin Media (Telewest Broadband), Hook, Hampshire, GBR; Virgin Media Ltd., London, GBR; VirtuaOperator Sp. z.o.o., Wyszkow, POL; VIVAI Software AG, Dortmund; VKontakte Ltd., Saint-Petersburg, RUS; VL-telecom Ltd., Vlasikha, RUS; Vodafone GmbH, Düsseldorf; Voxility S.r.l., Bucuresti, ROU; VSE NET GmbH, Saarbrücken; VTL Telecom GmbH c/o Viatel Limited, Dublin 15, IRL **[W]** Wagner Group GmbH, Langenhagen; WATCHEVER GROUP SA, Levallois-Perret, FRA; Wavenet Ltd., Solihull, GBR; Webdiscount GmbH & Co. KG, Münster; Websense Deutschland GmbH, Unterföhring; WEISS Doppelbodensysteme GmbH, Schwäbisch Gmünd - Lindach; Well-comm Ltd, Lytkarino, RUS; Whitelabel, Landgraaf, NLD; WideVOIP / Chmurtz SARL, Strasbourg, FRA; Wifiweb s.r.l., Altavilla vincentina, ITA; WIK Consult GmbH, Bad Honnef; Wikia Inc. (Fastly) , St. Petersburg, USA; WILDE BEUGER SOLMECKE Rechtsanwälte, Köln; wilhelm.tel GmbH, Norderstedt; Wind Telecomunicazioni S.p.A., Rome, ITA; WiTCOM Wiesbadener Informations- und Telekommunikations GmbH , Wiesbaden; W-IX Ltd., Moscow, RUS; WV Fiber Inc., Nashville, USA **[X]** Xantaro Deutschland GmbH, Hamburg; Xenna Services GmbH, Frankfurt am Main; XING Events GmbH, München; XO International Inc., Herndon, USA; XQueue GmbH, Offenbach **[Y]** Yahoo! Europe Ltd., London,GBR; Yandex Europe B.V., Shiphol,NLD; YOUNECT GmbH, Berlin **[Z]** Zain Group Head Office, Safat-Kuwait,KWT; Zajil International Telecom Company KSCC, Kuwait City,KWT; Zayo Group UK Ltd., London,GBR; Zen Systems ApS, Kobenhavn,DNK; Zimory GmbH, Berlin; Zylon Internet Services, Groningen,NLD

as of December 2014

# 12. eco Association and Holdings

eco – Association of the German Internet Industry e. V. was founded in Bonn in 1995 as eco – Electronic Commerce Forum e. V. From the very beginning, the association included taxable and non-taxable business areas, and was expanded in 2003 to cover asset management. This was necessary due to the spinning off of the working group DE-CIX to become an independent limited liability company (GmbH), and the simultaneous spinoff of individual services into eco Service GmbH. Both companies were established as wholly owned subsidiaries of the eco Association.

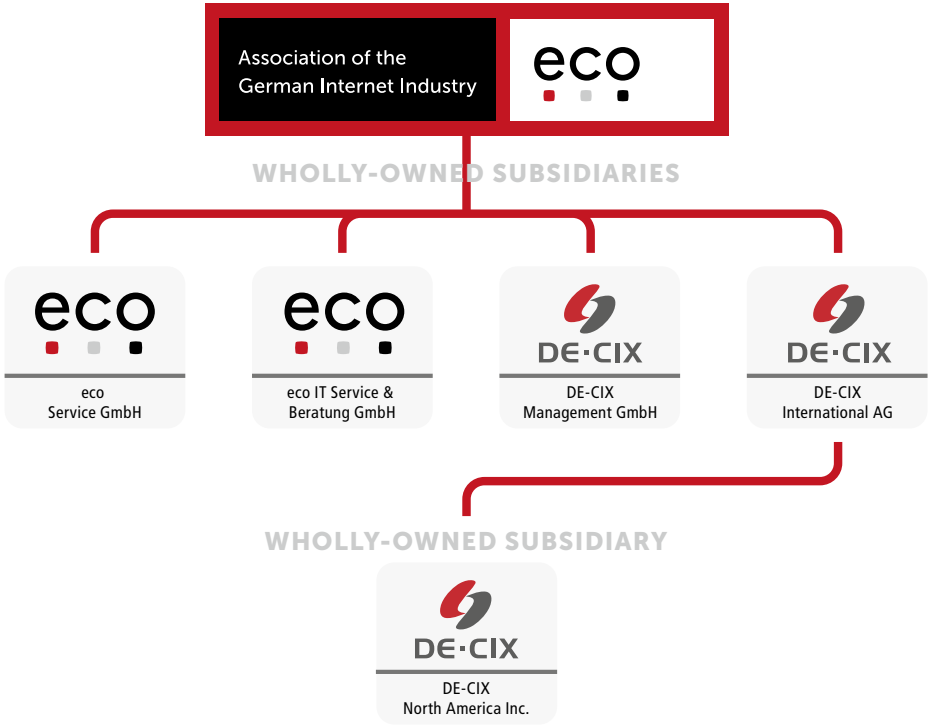
In 2005, a further company, eco IT Service & Beratung GmbH, was founded as a wholly owned subsidiary. This is to be understood as an internal service provider.

The internationalization of the DE-CIX activities, decided upon in 2010, was highlighted in 2013 by the establishment of DE-CIX International AG. At this time, the business purposes of the company were re-formulated. DE-CIX Management GmbH has the task of delivering peering and interconnection services within Germany, whereas DE-CIX International AG is responsible for service provision abroad.

All companies have their headquarters in Cologne, and there are also branch offices in Berlin (eco) and Frankfurt.

In order to open up the American market, DE-CIX North America Inc. was also founded in 2013, in Atlanta, as a wholly-owned subsidiary of DE-CIX International AG.

DE-CIX currently operates exchange points in Frankfurt, Hamburg and Berlin, as well as in New York and Dubai. Further exchange points are in the process of being established or are in the planning phase.




| eco – Association of the German Internet Industry | eco Service GmbH | DE-CIX International AG | DE-CIX North America Inc. |
|---|---|---|---|
| | eco IT Service & Beratung GmbH | | |
| | DE-CIX Management GmbH | | |
| CEO | CEO | Customer Advisory Board | Board of Directors |
| Harald A. Summa | Harald A. Summa | Felix Höger (Chair) | Harald A. Summa |
| Board of Directors | | Klaus Landefeld | Ivo Ivanov |
| Prof. Michael Rotert | | Rudolf van Megen | |
| Oliver J. Süme | | Board of Directors | |
| Klaus Landefeld | | Harald A. Summa | |
| Thomas von Bülow | | Ivo Ivanov | |
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ANNUAL REPORT 2014

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Association of the German Internet Industry

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