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German-Spanish Success Stories – Doing Business Together

Spain and Germany
ICT Partner Countries 2010

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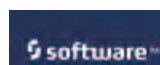
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Preface



Prof. Dr. Dr. h.c. mult.
August-Wilhelm Scheer,
President of BITKOM



Jesús Banegas,
President of AETIC

Germany and Spain look forward to an intensive and fruitful Partnership Year in 2010. German ICT companies are already working successfully in Spain, and Spanish companies in Germany. It is a pleasure to present in the following pages some examples of the exceptional level of co-operation between companies from our two countries. In addition, you will find helpful advice about the general business environment of both countries together with information on the chances and challenges which a German-Spanish collaboration can bring.

AETIC and BITKOM together will enliven the German-Spanish Partnership Year with a great many activities – not only at the CeBIT – to promote mutual understanding and to increase the existing co-operation between our countries. What is better for achieving this than meeting in person, numerous new contacts and intensive discussions?

Over 70 Spanish exhibitors at the CeBIT 2010 bear witness to the capability and variety of the Spanish ICT market. We wish all German and Spanish companies a successful CeBIT 2010 and a German-Spanish Partnership Year 2010 rich in new experiences. With it we want to lay the foundations for a large number of joint projects and activities in co-operation – extending far beyond the year 2010.



Foreword by Ulrich Dietz, GFT Technologies Chairman of the Executive Board



Ulrich Dietz,
GFT Technologies Chairman
of the Executive Board

German-Spanish success stories – the title of this brochure says it all. Working in partnership, both countries have demonstrated time and again how close collaboration leads to success, to the benefit of both parties. Joint projects certainly spell a variety of benefits for Spain and Germany – but they also bring benefits to the whole of Europe. So the task for the future will be to build on this success.

Especially in challenging economic times, international partnership between two strong countries is crucial. Germany and Spain would like to rise to the challenges, with strengthened resolve, and embark on new projects together. Together, both countries want to find answers to key questions facing both economies. German-Spanish partnership will bring the IT sector, user industries, politics and the economy in both countries closer together this year. Simultaneously, our partnership gives small and medium-sized providers a golden opportunity to forge international links.

Spain is an attractive economic region for hi-tech companies with a strong tradition as one of Germany's most important trading partners. The country's close links to South America and strong networks in the region allow Spain to act as a stepping stone to this up-and-coming continent. So it makes sense for Germany and Spain, two strong hi-tech economies, to exchange information and learn from one another. Working in unison, the goal must be to tackle the key issues of the future.

Each commanding different strengths, Germany and Spain complement each other ideally. And both countries are influential innovators. One of Spain's most impressive qualities is a flexible and creative approach to business – one of Germany's is an eye for precision and quality.

The cooperative approach adopted on past projects has already borne fruit. Constructive partnership was, and still is, founded on mutual cultural understanding. And I believe there is still plenty that can be done in this area.

As CEO of a German company with around 800 employees in Spain, I have witnessed firsthand how both countries complement one other time and again. As an international IT business, we reap the benefits of the skills and strengths of both countries.

This year's 'Partner country' initiative will add long-term impetus to the hi-tech sector in both countries, along with key related industries, in facing the challenges of the future.

From a European perspective, none of us can afford to squander the opportunities we are being given. So we must play more to our synergies. Combining German and Spanish strengths will be central to our ability to safeguard our global competitiveness. To innovate in the hi-tech industry requires intercultural understanding and new thinking. Here in Europe, we have already established a strong foundation in this area. Now, it is time to 'live' this maxim and continue to build on these foundations.

Germany Trade and Invest: ICT in Germany Drives European Innovation



GERMANY
TRADE & INVEST

The information and communication technologies (ICT) industry has continued to grow despite the economic downturn. The immense success of this industry in Germany cannot be overstated. In just a few years, ICT has become Germany's leading driver of innovation, responsible for over 80 percent of innovations across a number of key industries. Germany's automotive, medical technologies and logistics industries are just a few examples of segments that are thriving as a result of ICT innovation. Germany holds 19 percent of the European ICT market – second behind only the UK – and is the world's fifth largest market in this industry.

■ Cutting-Edge ICT

The German ICT industry posted over EUR 133 billion in revenue in 2008 and is boosting its future competitiveness even further with generous R&D spending. Innovative ICT companies registered over 1,800 patents in 2007, surpassed in number by only the USA and Japan. The importance of ICT for the German economy is further underscored by the industry's sheer size: there are over 800,000 employees in ICT and an additional 650,000 ICT specialists working in other economic sectors. Developments in ICT have spurred innovation across a wide range of industries, solidifying Germany's reputation as a high-tech business location.

■ Funding Innovation

Germany has recognized the need to invest in the future in order to drive economic growth. The strategic importance of this industry makes it a clear choice for solid R&D funding to further advance innovation. The German government's High-Tech Strategy supports the ICT industry directly with more than EUR 1.5 billion reserved for ICT R&D projects. At the same time, over EUR 12 billion is available in project grants and a further EUR 3 billion for

research funding in order to continue the long tradition of German innovation.

The 'ICT 2020 – Research for Innovations' program represents a comprehensive funding initiative financed by the Federal Ministry of Education and Research (BMBWF) and the Federal Ministry of Economics and Technology (BMWi). Its aim is to further consolidate and expand the country's position as an ICT leader. The program will make EUR 380 million per year available for research projects targeting ICT until 2011, including industries that depend on ICT as a key innovation driver (namely the automotive, medical devices, logistics and energy industries). The strategic focus of ICT 2020 covers a 10-year period that emphasizes an open, adaptive approach in order to support shifting industry developments. The overarching goal of the program is to translate R&D into economic success by facilitating links between new technologies and commercial channels. Since small and medium-sized enterprises (SMEs) play an important role in the delivery of specialized products for Germany's dynamic and competitive market, additional emphasis is placed on improving access to technological advancements for SMEs.

■ Spanish-German Cooperation

This year, Spain and Germany are fitting partner countries for the joint development of the ICT sector. The partner country program is especially promising in light of the ongoing importance of the two countries' trade partnership within the broader framework of the EU. There are over 1,000 Spanish companies with more than 48,500 employees active in Germany. And the number of Spanish investment projects grew by 21 percent in 2008. Especially interesting for Spanish companies is Germany's telecommunications segment. Telefónica O₂ Germany GmbH is the largest Spanish company in Germany in any sector, posting over EUR 3 billion in revenues in 2008 with over 4,000 employees in Germany. This is an indicator of the

opportunities available in Germany, as it represents the EU's largest telecommunication services market, which accounted for EUR 55.9 billion market volume in 2008 with an 18 percent EU market share. Mobile data and internet access services are among the fastest-growing sectors, with projected growth rates of more than eight percent for 2009.

Richard Offermann, Director of Service Industries at Germany Trade & Invest: "The ICT industry in Germany remains attractive to investors, especially in a challenging economic environment. As other industries suffer in the downturn, ICT continues to grow. The industry is a reliable motor of innovation, placing Germany at the forefront of cutting-edge technology. Spanish companies play a decisive role in Germany and we are always happy to welcome newcomers in this thriving industry."

investment project. Germany Trade & Invest's ICT industry experts offer these services free of charge to interested investors.

■ Future Outlook

The software and IT services market is expected to maintain its predominant share of the industry in Germany. There are currently over 65,000 companies active in this segment, which claims a 90 percent share of the entire industry. As FDI in Germany has grown extensively over the past five years, the Software and IT Services segment attracted the largest number of FDI projects. Germany's software market is Europe's leader with an estimated growth rate of five percent for 2009. The software market contributed nearly EUR 15 billion to Germany's ICT industry in 2008. Germany remains one of the largest exporters of software solutions products worldwide.

As the industry grows, German ICT must prove itself adaptable to new trends and challenges. Among these issues will doubtlessly be environmental/climate protection, online security, and the liberalization of media and telecommunication markets. However, the innovative capabilities of German ICT companies and governmental efforts such as 'ICT 2020' indicate that Germany is not only capable of maintaining its key position, but could soon emerge as a European and global leader.

Germany Trade & Invest, Germany's official foreign trade and investment promotion agency, readily assists companies seeking to enter the German ICT market. Germany Trade & Invest provides expert consulting services, assisting and advising potential investors through every step of the investment process – from preliminary market research to site selection and the final realization of an

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Invest in Spain:

Spain – Your partner in Europe



INVEST IN SPAIN

■ Why Spain

Spain is nowadays a competitive, modern, innovative and increasingly internationalized country. The agility and versatility of the Spanish market, together with the exceptional quality of life and creativity of its citizens and organisations, all serve to make Spain particularly attractive for investment. With over 46 million inhabitants and a per capita income of Euro24,020, Spain is currently the world's 9th largest economy (GDP for 2008: USD1,612bn) and the 6th largest recipient of Foreign Direct Investment worldwide (3rd in the EU). There are over 11,000 foreign-owned companies already established in the country, employing more than 1.3 million people (around 6.7% of the total workforce, up to 10% in some regions). New productive investments or Greenfield projects grew by 14.5% in 2008 in comparison with the previous year, biased towards value-added sectors like Information Technologies, Biotech and Renewable Energies. Spain is also the 8th largest investor in the world, and the 6th largest exporter and 7th largest importer of commercial services worldwide.

Its geostrategic location as an international business hub and its strong cultural and commercial affinities not only offer access to more than 1.3bn consumers in the EMEA region and Latin America, but also enable companies to draw on resources from these regions. EU membership means European business culture, regulations and data security policies, making business dialogue easier, and there is a strong culture of information security with companies having already implemented appropriate security controls. The legal structure is also mature, with appropriate recognition and enforcement of intellectual property, and cultural barriers are easy to overcome for companies from the rest of Europe.

■ Why ICT

Spain has a mature and healthy national ICT Industry, with high levels of industrial expertise. The Spanish ICT market is the fifth largest in Europe, with a market volume in 2008 over Euro102bn and an accumulated growth of 44.3% over the last 6 years (6.3% CAGR, well above the European average). This market is expected to continue being one of the fastest growing across Western Europe, despite the global economic downturn. The ICT sophistication of many industries such as financial services, energy, utilities and telecommunications, combined with the public sector's modernisation effort, has helped spur growth in this sector. For the past few years, central and local governments have been modernising their ICT applications and infrastructures, investing large amounts in technological education initiatives both for citizens and enterprises.

Spain offers attractive opportunities for companies within this sector through a powerful set of competitive differentiators that create a unique value proposition, well aligned with the needs of Western European companies and their selection criteria for locations. European firms rate Spain highly for the quality and skills of its ICT professionals, the size of its labour pool, the strength of its indigenous ICT industry and technology infrastructure, as well as its near-shore location and ability to scale through resources from other low-cost areas – qualities that Europe's principal destinations lack.

Leading ICT multinationals are already successfully located in Spain or have people working in the country in their account, taking advantage of Spain's benefits, no matter if we focus on Software or Hardware vendors, Service Providers, Telecom Equipment vendors or ICT Services and Consulting Companies. German companies like Siemens, SAP, Software AG, T-Systems or Medion can provide good examples of the possibilities the country offers.



Montjuïc Telecommunications Tower, Barcelona

■ Human resources

There are currently over 28,000 ICT companies already operating in Spain, mainly small- and medium-sized, employing over 415,000 highly qualified workers. Indirect employment generated by the sector rises to 1.5 million people, a 7.5% of the total workforce. Spain boasts one of the highest rates in Europe for senior professionals, largely due to a robust tertiary education system, and ranks fourth in Europe in terms of the number of people with a tertiary scientific/technical education – just behind France and the UK, despite their much larger populations. The ratio of Spain's scientific/technical workforce to its total population puts the country well ahead of Europe's main countries. There are 75 Universities scattered along the country, most of them offering IT or Telecommunication related studies, with currently over 345,000 students undertaking engineering and technical tertiary studies. The country has a young and highly qualified labor market, and has also experienced one of the highest growths in ICT seniors in the EU in recent years – so not only does it offer a huge base of experienced and skilled ICT professionals and consultants, but with its relatively young ICT workforce the country is also well prepared to tackle any future scarcity of senior skills. It also provides a wide range of management educational opportunities, being one of the international leaders in executive education,

with three international business schools consistently ranking among the best 20 in the world.

Multinational firms have been using these Spanish resources to support more complex ICT projects, rather than for simple low-cost staff augmentation, in search of solutions that provide them with a competitive advantage. Global systems integrators and pan-regional service firms continue to build centres of excellence throughout Spain to foster vertical experience, capture innovation and develop service excellence on behalf of their clients. Spain has only a handful of very large national firms, but each punches above its weight. Companies from the Spanish financial services, retail, telecommunications and utility sectors are world renowned for lean processes, innovation and technology excellence, and there is plenty of proof of successful IT service delivery from Spain – from substantial service specifications to technical requirements and vertical expertise.

■ Competitive Operating Costs

Providing skills maturity, vertical experience, geographical proximity and stability have a direct impact on costs, but salaries in Spain are among the lowest in Western Europe, with rates substantially below their equivalents in northern and central Europe. Controlled attrition and inflation

rates also make them sustainable and predictable in the future. These costs correlate to a high-level of service competence. Staff turnover is among the lowest among its European counterparts, obtaining one of the highest scores in employment retention and Business Process Outsourcing. Furthermore, companies already established in the country have the ability and experience of including and managing a combination of Spanish and Latin American resources, which further reduces cost and risk.

■ Modern Infrastructures and Innovation Networks

As an international business hub, the development of ultra modern transportation, energy and telecommunication infrastructures has been, and will continue to be, one of the priorities of Spain's economic policy. Its place as third most popular tourist destination in the world means Spain has very competitive transport prices, with 49 airports and 250 airlines offering international connections to all major cities. Spain is ranked third among the EU-15 countries by railway network length (second in high-speed) while its motorway network has tripled in length since 1982 and is now the second largest per capita in the EU.

In the last few years, technology parks have proliferated in the main industrial areas and near universities and research- and development centres, providing innovation, environmental and technology resources to the more than 3,800 companies already established in them. State of the art telecommunication infrastructures are now available all across the country, with both companies and citizens embracing the new digital paradigms. Spain ranks fourth in Europe in terms of number of internet users, with an accumulated growth in the number of broadband lines (fix and mobile) over 134 % since 2005. Mobile penetration rate is currently over 116 %, leading Europe in mobile broadband lines, both in absolute and relative terms.

■ Business Friendly working climate and quality of life

Spain offers a very attractive working climate for companies within this sector, coupled with an exceptional quality of life that helps attracting and retaining talent. Companies established in Spain can benefit from a wide range of aid instruments and incentives at a European,

national and regional level, including incentives for hiring and training workers, R&D&I activities, as well as financial and tax incentives to encourage innovation and technological improvement. As a matter of fact, Spain offers one of the most favourable fiscal incentives for R&D among OECD countries, both for large companies and SMEs. The National R&D and Technological Innovation Plan and the Ingenio 2010 Plan, through the Avanza2 Programme, assign important resources to the development and promotion of the Telecommunications and Information Society in the country, focusing both on industry, consumers and Government.

Although there is no one strategy for all, Spain offers all the ingredients to make an international move successful. Its thriving high-technology economy, world-class industry expertise, mature but growing market, large, well qualified ICT labour pool and competitive costs create an environment to drive innovation and provide value-added services. There are plenty of testimonials that reveal Spanish value, risk and cost alignment, but it still suffers from poor perception among its neighbouring countries. European companies looking for an attractive destination where to minimize investment risks, develop service excellence and obtain high profitability should consider Spain as a credible destination for some of their ICT activities and explore the benefits it can provide.

■ Invest in Spain

INVEST IN SPAIN is the leading Government organization that supports foreign companies seeking to set up or expand their business in Spain. The organization provides confidential consultation at no cost during all stages of the investment process.

To ensure the success of the business venture nationwide, it works in close partnership with Spain's regional development agencies and with the support network abroad of 97 Economic & Commercial Offices at Spanish Embassies worldwide.

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GFT Technologies AG



Germany and Spain form powerful alliance in IT outsourcing: bank's online-banking services fully overhauled by GFT Technologies in record time

Efficient teamwork between German, Spanish and Brazilian sites is part of everyday life at international IT service provider, GFT Technologies. Its flexible-working approach has proven particularly valuable in outsourcing projects, where deadlines are tight and highly specialised experts are required to solve complex challenges. Cost benefits resulting from the employment markets involved also play a role, though not always a decisive one. One of Europe's biggest banks recently enjoyed all three of these advantages; last year, in record time and with the greatest discipline in terms of costs, GFT fully overhauled the front-end of the online banking services for various private customer brands.

■ A strategic decision for a new IT architecture

The objective and prescribed time frame of the project were particularly ambitious: within 12 months, GFT was to develop and implement a completely new IT architecture for the online banking services of a German private customer brand. Within a further four months, the parent company's transaction platform was then to be migrated on to the new solution. There were a number of reasons for implementing a single multi-bank system. Firstly, the German private customer offshoot had recently been integrated into the banking group, following a takeover: by standardising the existing online banking systems, potential synergies could be leveraged. The strategic decision to implement a completely new IT architecture was thus considered. The existing system was reliable, stable and efficient, however, after over 10 years of operation, it was increasingly obvious that it had reached its limits and did not correspond to current standards. Elementary technology components had reached the end of their life cycle, with their manufacturers no longer offering upgrades or customer support. Ever fewer IT experts on the market were familiar with them, which led to higher maintenance costs and greater risks in terms of their reliable

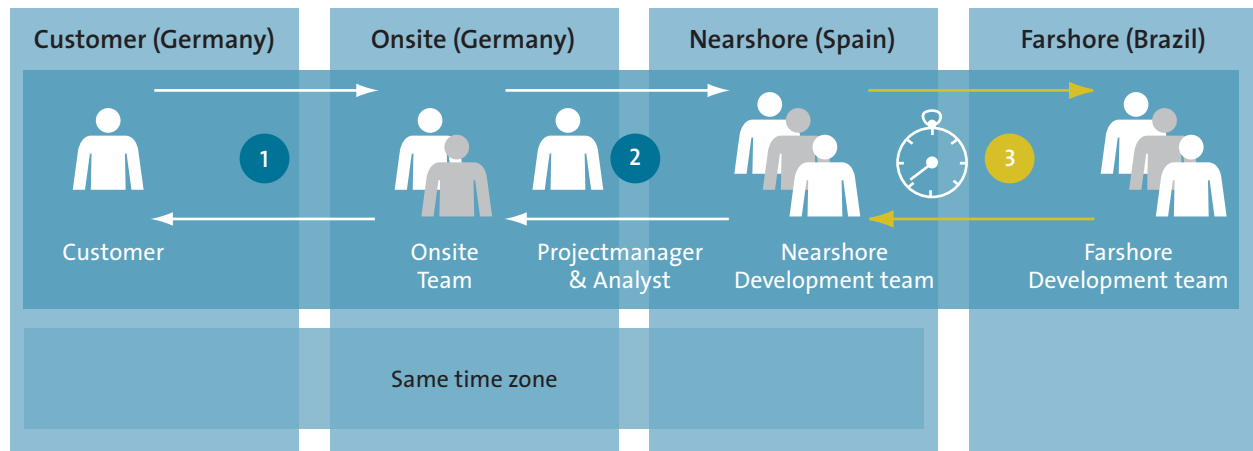
operation. For the same reasons, it was becoming ever more expensive and took increasingly longer to expand the system with new functionalities. At the same time, the running costs necessary to ensure the infrastructure remained operational were rising. This was because of the huge growth of online banking, with around 3.2 million of the client's 15 million customers currently using the online channel. The systems must cope with one million users daily, and around two billion transactions every year, with both statistics enjoying year-on-year double-digit growth. The new architecture would thus offer a long-term technical base for the future.

■ Proven, flexible technologies with high re-use potential

Two fundamental principles in the development and implementation of the time-critical project, were to ensure thinking was process-oriented, rather than application driven, and to avoid unnecessary risks. The online services of a bank must offer the highest standards in security, reliability and performance. As such, proven technologies that offer flexibility and the possibility of reuse are particularly popular, to reduce complexity and keep risk, maintenance and operating costs to a minimum. The assignment was to create a multi-bank and multi-channel front-end, based on an unified business logic and the same functionalities and interfaces. These can be employed on every channel and for every subsidiary or brand. Whether via online banking, mobile banking, call centres, self-service devices, stationary branches or back office – the interface for something like personal money transfers may differ slightly from channel to channel and between different brand profiles, though the functional base is identical. To minimize the dependence on suppliers, great value was placed on open standards. A modular, service-oriented architecture means new technology and functionalities can be added flexibly with minimum complications, and be integrated from one banking interface

GFT Global Delivery Model

Role distribution



Global delivery model applied for the project execution

into the other. The customer experience will continue to improve in future, as the bank reacts to technological trends and offers services such as mobile online banking via smart phones and Web 2.0 collaborative or interactive functions. Examples of this which have already been integrated include the mobile TAN service, which is an additional authentication system, and dynamic field forms, increasing user-friendliness.

■ GFT: an experienced partner in development and implementation

When selecting its development and implementation partner, the IT and industry experts at the bank were not prepared to leave anything to chance. As a strategic IT partner, GFT assisted the organisation at all times. One reason to select GFT as IT service provider was its proven project methodology. This allowed the client to further refine their requirements over the course of the project, without having to leave the given project scope. Quality, cost and time targets could also be achieved with these changes and extensions.

A major advantage was that the client and GFT had already had a close business relationship for many years. Among other things, the IT service provider, which has extensive experience in the financial sector, was responsible in the previous 13 years for developing and upgrading the transaction platform to be replaced. Since its founding more than 20 years ago, GFT has proven its comprehensive technological expertise through working with the

client, and convincingly demonstrated time and time again that it can reliably carry out major complex projects to the required time and budget restrictions.

■ Global delivery: up to 50 experts at six sites in three countries

A decisive factor in the company's success is the international set up of its outsourcing service. This ensures a highly efficient distribution of tasks between experts at different sites, which are selected according to client and project requirements. This was the key reason why the official launch of the new platform took place less than nine months after the initial quote. Over 100 people were involved on what was a huge project, including up to 50 specialists from GFT alone, who recorded over 60,000 working hours in less than a year. The teams were distributed over six sites in three countries. In Germany, an on-site project office was set up with the client in Frankfurt, ensuring decisions could be taken quickly and reactions were swift. Staff there combined all of the client's requests with hundreds of the new platform's requirements and functionalities. Spain also played a key role, as this is where the project management was based. All development and quality management activities were steered and co-ordinated in Barcelona and Madrid, with specialists in Barcelona, Valencia and Zaragoza carrying out the work. Additional support in development and testing was provided by the GFT site in Sorocaba, Brazil, with Spain acting as an intermediary.

While traditional outsourcing projects with near and offshore sites see cost benefits reduced by high communication and co-ordination costs, the GFT model delivers lower costs while guaranteeing the highest quality. This is due to an effective network of highly qualified specialists with expertise in the banking sector, with each boasting inter-cultural awareness and training. To ensure a consistent level of quality, each of GFT's sites follows CMMI (Capability Maturity Model Integration), an internationally recognised process for software and system development.



GFT in main development offices in Sant Cugat (Barcelona)

■ Additional business potential: transfer from a transaction to a sales platform

Through its work, GFT proved itself as a centre of excellence for the new IT architecture. The outsourcing service provider was able to fully develop and launch a new online banking portal, to an incredibly strict time frame and tight budget, as well as migrating a further bank to this new IT architecture. The client was extremely satisfied with the results, and since autumn 2009, the end customers of their banking businesses have enjoyed greater user friendliness and intuitiveness, and can carry out processes faster and easier with the greatest security. Furthermore, the transaction platform is set to be transformed into an integrated banking platform with a strong sales focus. In this way, the bank hopes to unlock additional business potential in the future from the 200 million customer contacts its online channel provides every year.

more than 180,000 freelance IT specialists, provides the basis of this service (Resourcing division).

With the software environment inboxx GFT offers a new generation of IT solutions, which enables the management of all archiving processes of a company via a central and infrastructure (Software division).

The company was founded in 1987 by Ulrich Dietz who is today CEO of the GFT Group. In 2008, the GFT Group generated a turnover of around Euro 242 m (preliminary). Currently, the company employs around 1,100 employees in seven countries. GFT shares are listed on the Frankfurt Stock Exchange (Prime Standard: WKN 580 060, GEX).

■ About GFT

The GFT Group, based in Germany, is an international service provider for innovative IT solutions and services. 20 years of experience makes the company a reliable strategic IT partner. With its three business divisions GFT supports its clients in making their business processes more efficient and more profitable, as well as helping to sustainably improve their competitiveness. GFT is one of the leading international IT service providers for the financial services sector. The company (Services division) combines profound expertise in technology with comprehensive knowledge of the industry in order to develop, implement and maintain customised IT solutions, GFT recruits and supplies IT freelancers for companies across all industries and also takes care of the entire management of their IT service providers. A pool of experts, of

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INDRA – Innovation applied



Indra is one of the major Information Technology multinationals in Europe and Latin America. It employs more than 29,000 professionals and operates in more than 100 countries. It is the Europe IT services company with the highest R&D spending relative to sales. Indra's offer addresses both the public and the private sectors in their multiple activities: defence and security sector, telecommunication and media companies, energy and utility companies, public administrations, healthcare, transport and traffic companies, industry and trade companies, as well as financial entities and insurance companies.

Innovation is the foundation of Indra's business, the core of our responsibility as a company, and the differentiation factor for our offer of solutions and services. Our



Control tower, Munich

engagement with innovation has led us to invest more than 500 million Euros over the last three years. Indra's innovation is focused on value creation for our customers. Our aim is to identify and develop business solutions that go beyond pure technological proposals.

Germany stands as a reference of high-level technological excellence and development in many areas. For this reason, entering this market became an important challenge for Indra. Our presence in Germany goes back to 1995, when we were selected to develop the modernization in air traffic control centres for DFS, the organization responsible for German air traffic management. Indra developed the flight plan management system that is currently in operation in all approach and en-route control centres of DFS at Frankfurt (1999), Dusseldorf (2002), Munich (2005), and Bremen (2007).

The relationship between DFS and Indra has been a fruitful one for both parties over the years. In 1999, the initial program, named P1, served as the starting point of the VAFORIT (Very Advanced Flight Plan Processing Operational Requirements Implementation) project. Recently, Indra has been awarded a new cutting-edge ATM (Air Traffic Management) system to face the foreseen congestion in the German upper airspace, which is planned to be implemented in the Karlsruhe control centre by the end of 2010. This system optimizes and simplifies tasks for air traffic controllers, and increases security with advanced support functionalities through a very advanced HMI. This is considered the largest advance in the last few years towards the Single European Sky, and complies with all requirements established by Eurocontrol during the eFDP (European Flight Data Processing) project.

The recent Indra's purchase of the German company AC-B, a critical supplier of DFS specialized in aeronautical communications networks, in order to improve our offer and our service capacity, is a sample of Indra's strategic interest in growing in Germany.

Thanks to this cooperation with leading organization as AENA and DFS, Indra's leadership in air traffic management has been strengthened globally, with more than 1,000 Indra-technology managed facilities in 80 countries. Working with these organizations has allowed us to play an active role in the iTEC-based development, which will be one of the most important contributions to the SESAR project, which is promoted by the European Commission and Eurocontrol, whose objective is to homogenize air traffic management in Europe by 2020 in order to face the increasing air traffic and higher security and efficiency demands.



Buena cabina

Indra's involvement in Germany extends to other fields. Indra participates in one of the most important projects for European Defence: the development and manufacturing of the Eurofighter EFA (European Fighter Aircraft). Indra is the second avionics supplier for EFA GmbH, which supplies 180 aircrafts to Germany. It is worth mentioning that, in the Eurofighter project framework, Indra manages the ESS (Eurofighter Simulation Systems) consortium, with its headquarters based in Munich, and created for the manufacturing and maintenance of its ASTA flight simulators together with companies in Germany, Italy and the United Kingdom. This consortium provides simulators for the Air Forces in all four countries that participate in this program, as well as for other countries, such as Austria, which have purchased this aircraft.

In the simulation field, where Indra is a leading global player, Indra has provided an EC-135 helicopter simulator to Eurocopter Germany. This simulator is installed in the Eurocopter Training Centre at Donauwörth, and it's mainly addressed to train civil pilots. This simulator was certified in April 2009, according to JAR European Regulations,

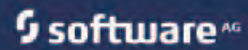
as a FTD Level 3 with movement system (Flight Training Device) with the German civil aviation authorities (LBA). Indra is currently working on an extension of the original contract to incorporate certain enhancements and to achieve the FFS Level B (Full Flight Simulator) certificate. In the Information Technology field, there are further examples of Indra's cooperation with German companies, such as our relationship with ThyssenKrupp Elevators, the elevation division of ThyssenKrupp AG group (escalators, elevators, fingers, etc). Indra has recently intensified and strengthened its relationship with the objective of becoming ThyssenKrupp Elevator SEAME's preferred technological partner, which is the geographical organization that includes South European, African and Middle Eastern countries within this segment. Indra believes this relationship to be strategic due to the importance of the projects themselves and due to the opportunity to work with ThyssenKrupp in other challenges beyond the current geographical area and in other segments.

Let us conclude, by mentioning that the successful results of our work for DFS allowed us to have the opportunity to collaborate with other relevant clients in Germany. We continue to increase our presence in this country based on our business model founded in innovation, dynamic response to the needs of demanding customers, and the talent and drive of our professionals.

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Software AG – Customer Reference Story: CASBEGA



Castellana de Bebidas Gaseosas S.A. (Casbega) is a Spanish company which was established in 1952 as a Coca-Cola distributor. Its activities today are primarily the production, marketing and distribution of beverages registered under the The Coca-Cola Company trademark. The company currently produces some 700 million liters, or 100 million cases, of carbonated and non-carbonated soft drinks, juice, and mineral water per year. Casbega accounts for 23 percent of the total volume of Coca-Cola in Spain. It has 15 regional offices, including an industrial complex in Fuenlabrada (Madrid). Casbega's staff is comprised of 900 employees.

■ The Challenge

- Optimize and accelerate interoperability between the central Accounting department and branch offices.
- Minimize the excessive flow of documents between branch offices and departments.
- Convert the inadequate role of e-mail to drive workflow and manage files.
- Examine the company's processes, starting with Accounting, with a view to optimizing them.
- Speed up the invoice administration process and cut associated costs.

■ The Solution

Casbega identified the need to implement a business process management solution, to introduce best practices in its departments, to automate and optimize the execution of certain tasks as well as to monitor processes. The company therefore decided to take its SOA (service-oriented architecture) strategy to the next level. It had begun in 2006 with the integration of a business process management (BPM) tool. The new solution would enable the company to improve its communication infrastructure at a lower cost than with a traditional rip-and-replace

approach. Furthermore, the solution offered significantly greater potential for process automation and optimization. Software AG's webMethods BPMS Quick Start Edition 7.1 was the chosen solution.

■ Why Software AG's webMethods BPM Suite?

Casbega opted for Software AG's webMethods BPMS Quick Start Edition 7.1 because it offered functionality based on models, rules, meta data and composition as well as a solid architecture. In addition, it enabled integration with the company's existing IT infrastructure, specifically, with SAP systems. The solution would provide global control and the ability to effectively track processes.

In addition, webMethods BPM Suite offers the following features:

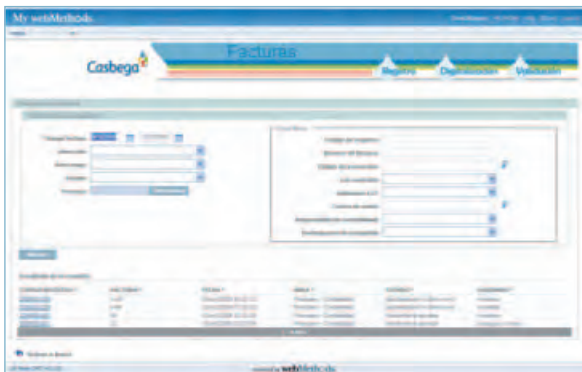
- A comprehensive platform for integrated processes which responds to the requirements of all stakeholders involved in a process and to any type of process (document-centric, system-centric or human-centric).
- Business analysts and IT can collaborate on designing, testing, deploying and monitoring processes based on a single process model throughout the entire process lifecycle.
- Simulation feature allows calculation of process performance and optimization of resource requirements under real-world conditions, prior to deployment.
- Monitoring and analysis of process model functionality in real time.
- Task analysis indicates to what extent human resources are contributing to the effectiveness of a process. This information helps define priorities in assigning tasks.
- Automation of human work flow via user-friendly task routers.

■ Tackling the project

The goal of BPM solutions is to increase the efficiency of an organization's internal processes, thereby optimizing the relationship between internal and external tasks. To achieve this, an organization must structure its activities based on processes. Only then can they be automated and made more efficient. In this way, a company can adapt quickly to market fluctuations which, in turn, increases competitiveness, a vital element in today's business climate.



Homepage Invoice Management application



Search Invoices Page and results list

Casbega chose to begin reorganizing and optimizing its Accounting processes. As in any other BPM project, this meant having to modify the structures and roles in this department as well as those in the IT department. Because BPM is a process of change that extends beyond technology, in addition to IT, Casbega's management also played a part in the leadership of the project. In collaboration with Software AG, tEnEntia, a partner company experienced in this type of project, was also relied upon for project development and implementation. The opinions

of process "workers" and "owners" were also considered in defining and implementing the solution. In other words, those who conduct the processes as well as those who make that possible were included in the project. BPM enables process owners and workers to implement change. It is therefore necessary to provide them with support in the form of policies, rewards and recognition.

■ The main steps

In a BPM project it is necessary to first define process characteristics according to possible selection criteria. Casbega identified two criteria: firstly, processes which affect current spending, with the goal of minimizing and optimizing these expenditures; secondly, processes which affect current income, with the goal of maximizing and optimizing income. Following the initial evaluation, the company chose its process for Administration of Invoices from Service Providers, which can be described as follows:

- Every year Casbega's Accounting department processes 40,000 invoices from other departments and regional offices.
- The invoice approval process varies depending on the office and department.
- Invoices advance to different levels of approval enabling delegation of tasks and automatically generated reminders to the responsible employees at each level.
- All employees who process invoices maintain a photo copy of each invoice as a record.
- The process is integrated with an accounting system controlled by SAP technology.

■ Results

Since the implementation of Software AG's webMethods BPMS Quick Start Edition 7.1 in June 2008, Casbega has reaped the following benefits with respect to administration of invoices from service providers:

- 20% less time is spent on the invoice process.
- 10% reduction in costs associated with internal administration of invoices.
- Standardized approval rights.
- Digitized invoices and their transmission can be viewed at any time online.
- Feedback from users is very positive.

- Less “paper pushing” between regional offices and departments.
- Decrease in telephone calls between the Accounting department and other departments.
- Optimized cash flow.

■ Next steps

Because webMethods BPM Suite is based on SOA, it enables modifications and future-oriented growth in a simple manner and according to business needs. With that in mind, Casbega is planning to continue its activities in the BPM arena with various initiatives within the organization:

- Process for investment in assets.
- Entry and management of customers.
- Administration of applications for vending machines.

■ Customer testimony

“With the implementation of this BPM solution our goal is to find out exactly what is taking place in our company. In other words, we want to learn about the processes, initially in the Finance department, to then be able to optimize them as quickly as possible. With SOA we will be able to make modifications and expand into the future in a simpler way and according to our business needs. We estimate that, with respect to invoice administration, for example, we will speed up the process by 20% and cut costs by 10%,” commented Javier Goyeneche, Systems Director at Casbega.

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SOFTPRO: Taking Signatures Seriously – make signature biometrics meet digital signatures



The Spanish Savings Banks Organization – Confederación Española de Cajas de Ahorros(CECA) – partners with the German specialist for electronic signatures SOFTPRO for their project “Firma Digitalizada” (“Digitized Signature”).

Santiago Uriel Arias, Technology Vicesecretary (CIO) of CECA’s Commission of Organization, Automation and Services (COAS): “We have learned that CECA and SOFTPRO share the same values of being dedicated to innovation, sustainability and long-term partnerships. We appreciate SOFTPRO’s commitment to deliver excellent quality. It is exactly the kind of dedicated partner we need.”



Signing on SOFTPROs SignPad at Caja Avila, Spain

■ The Challenge: Documents requiring a Signature

Spanish Savings Banks have been increasing the automation level in branches for many years, but there are documents that cannot be eliminated: Those which need to be signed by clients. These documents must be stored, moved, manually reviewed and kept during the complete life of the legal period (from six years to some decades).

The main objective of the project is to get rid of the paper in Savings Banks branches, eliminating physical documents which are still produced for the sole purpose of capturing handwritten signatures. The aim is to work end-to-end with electronic documents. Employees in Spanish Savings Banks should be unburdened from paper handling and gain time to focus on excellence in customer service.

Thus it is necessary to capture the handwritten signature in a trustworthy manner and embed it into the document workflow in a reliable way to achieve proof of non-repudiation.

■ Paradigm Shift: Embedding handwritten signatures in digital processes instead of replacing them

Spain is known to spearhead several IT-initiatives such as the roll-out of electronic ID-cards, similar to the new ID card planned for roll-out in Germany in November 2010. “Firma Digitalizada” proves that for several applications the best choice for signing electronically is to embed the handwritten signature in digital workflows rather than replacing it with other means. Although a lot of Spanish citizens already possess a “DNI electrónico” (electronic ID-card) they do prefer to sign with the handwritten signature. As digital signatures based on certificates on smart-cards are still struggling for acceptance the Spanish Savings banks decided to seek a trustworthy solution to digitize the handwritten signature throughout the writing process, store this information together with the electronic document and secure its authenticity and integrity. They intended to make signature biometrics meet digital signatures.

■ Inspiration from German Experience

When investigating for potential solutions CECA detected that a huge initiative for a similar approach was under way in German Savings Banks, supported by their German supplier SOFTPRO. The initiative “Elektronische Unterschrift” (Electronic Signature) is part of the project “Model P” for cost-cutting in the workflow of German Savings Banks.



Signing on softpros signpad at Berliner Sparkasse

Santiago Uriel Arias, Technology Vicesecretary (CIO) of CECA's Commission of Organization, Automation and Services (COAS): “We are happy to benefit from our best practice information exchange with already existing customers of our German partner SOFTPRO like the German Savings Banks Association. We took a lot of inspiration from our talks with the processing centre Finanz Informatik and her customer Berliner Sparkasse which has rolled out very successfully a corresponding system with the similar hardware for signature capturing we are using in 2008.”

■ Award-Winning Solution receiving worldwide attention

- In October 2009 the German IT security association TeleTrust has awarded its prestigious innovation award for applied electronic signatures to CECA for “Firma Digitalizada”. With this award, the jury honored the idea of combining the benefits of biometric signatures and cryptographic techniques in one application. The award reflects the increasing importance of electronic

signatures based on handwritten signatures and their integration in the digital workflow.

- The monthly magazine spin-off of the US daily finance newspaper “American Banker” – “Bank Technology News” (btn) listed CECA as one of the “Top 10 Companies and Technologies of 2009”.
- When this report was edited “Firma Digitalizada” was also shortlisted for the 2010 awards of the UK-based Finance-IT magazine “Financial Sector Technology” for “Best Use of IT in Retail Banking (International)” and “Security/Anti-fraud Strategy of the Year”.

■ The Track Record so far

CECA is about to achieve its goal of setting the de-facto the standard for E-Signing throughout Spain in financial and other sectors. Clients will feel comfortable having the same signature process regardless if they go to their bank or to a shop next door.

The savings bank of Avila pioneered “Firma Digitalizada”. As of February 2010 the solution is fully deployed in 14 of the 45 Savings Banks. In 2010 another 11 Savings Banks will deploy the solution. In 2010 more than 70 Spanish Banks (besides Savings Banks also Cooperative Banks and Retail Banks) will implement the solution. More than ten Thousands of SOFTPRO's SignPad eSignio tablets have already been rolled out. Since the start of the project more than 17 Millions of electronic documents were signed digitally. At the end of 2010 the number of signed documents is expected to exceed the 100 Million documents mark.

The project already attracted a lot of attention outside the financial industry. Contract management is a topic in a lot of industries. Some examples where “Firma Digitalizada” is under investigation these days too: Telecommunication Providers, retailers, companies for temporary employment and the public administration sector including tax authorities, to mention a few.

■ Significant Cost Reductions

The Spanish Confederation of Savings Banks estimates that introducing electronic signing for banking transactions in their branches saves its 45 members of up to 26 Million Euros every year. These savings are calculated



SignPad of Wacom and Softpro Signature Capturing with SignDoc

based on paper savings alone. Additional savings are expected as paper forms disappear in internal workflow reducing the efforts for printing, storing, preparing, signing, routing, shipping, scanning, indexing and physical archiving.

■ The Components of the Solution

Prior to CECA's "Firma Digitalizada" there were no packaged solutions providing such capabilities in the European market. Today CECA offers a solution highly customized to the financial sector and its transactions and contracts – running as a "black box" in the user terminal, where a signature pad is attached with capabilities to scan biometric signatures or to read the client's smartcard. CECA has integrated SOFTPRO's SignPad eSignio and the Software Development Kit SignWare into its document workflow solution.

The solution has been packaged and is not only sold in the Savings Banks Association, but to other Spanish & International Financial institutions and outside the financial sector (telecom, retailers, public administration ...).

- Today signatures of customers and employees of Spanish Savings banks are digitized using the SignPad eSignio immediately throughout the writing process. The SignPad captures signals of time, location and pressure and an individual signature profile is created.

Hence a signed document includes more than what meets the eye in the first stage. Besides the signature image, it also contains biometric characteristics captured throughout the signing process.

- Software components cater for the authenticity and integrity of the electronic documents. The captured data are linked with the signed document content. Based on the individual biometric signing characteristics an "electronic signature" is created. Modifications of documents after the signing ceremony are recorded and the documents' integrity is protected.

■ Creating an optimized Workflow Through Process Transformation

- New contract opening automation, since original signatures can be checked automatically against the clients' signatures.
- Joint signatures can be applied in different time & location on the same digital document without moving papers.
- Agent mobility enhanced, since no printers are needed.
- No errors resulting from the content transfer from paper files to electronic files
- On-Line signature verification (not only visual checking, but automatic biometric validation).
- Enhanced security for better quality of reference signatures allowing automatic signature verification in paper based payment processing (check processing)

■ Making the Auditing Department happy

Audit processes extremely simplified since signature review can be done with a simple query against all database contracts. Automatic archiving in a centralized digital custody allows instant recovery of original documents (not a scanned copy). Ex-ante compliance checks can be executed at the click of a button: Who (required number of signatures) signed transactions, contracts, agreements, etc. what where (track of the signature location) and when (time stamp control).

The requirements of MiFID and AML regulations and the like are met thanks to these improved audit processes. There is no longer a need to rely on confidence on tellers/agents as signatures can be automatically checked prior to formalizing contracts or executing transactions with the method of pre-embedded automatic signature verification.

■ Creating a “Green Workflow”

Last, but not least electronic signing is a very vital asset in CECA’s overall Corporate Social Responsibility strategy: CECA and the environment benefit from a significant reduction in paper usage and have created a truly “green workflow”. Less paper means less pollution, saving trees, and water waste reduction.

■ Additional information

SOFTPRO provides a detailed report about “Firma Digitalizada” on its website.
<http://www.softpro.de/ceca>

■ About CECA

The Spanish Confederation of Savings Banks is the National Association of 45 Spanish savings banks. All of them are involved in the project. These savings banks have 25.000 branches in the Spanish territory and process more than one Billion transactions/contracts per year.

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■ About SOFTPRO

The SOFTPRO Group is the worldwide leading vendor of systems for capture and verification of handwritten signatures. The company is based in Boeblingen, Germany with local subsidiaries in North America (Bear, Delaware), the United Kingdom (London), and Asia-Pacific (Singapore). The group currently employs an international staff of over 60 people, enabling more than 200 companies worldwide to streamline their document and transaction workflows.

With its “eSign Workflow” product line, SOFTPRO provides solutions for securing the authenticity and integrity of documents within electronic processes, such as those required for legal contracts. For this purpose, a unique signature technology is used to extract and evaluate both the static and dynamic (biometric) characteristics of handwritten signatures. SOFTPRO’s “Fraud Prevention Solutions” portfolio provides a holistic approach to detecting and preventing fraud in paper-based processes (such as payment transactions), as well as increasing operational efficiency using signature management and verification solutions.

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Telefónica – can do



Telefónica O₂ Germany is a leading telecommunication provider in Germany – and a success story of Spanish-German cooperation

Germany is one of the most attractive markets in Europe – including the telecommunications market. Still, the long dominance of a former state-owned company, a saturated mobile market and low revenues per user make it a difficult market. One way or another, Telefónica intended to be represented by a strong local branch. In 2006, the Spanish company acquired O₂, the subsidiary of British Telecom, in all European markets and accordingly, O₂ Germany. Today, Telefónica O₂ Germany is regarded as the innovation leader among German telecom providers and is set to challenge the market with fresh ideas and superior services.

With almost 260 million customers, Telefónica is the world's third-largest telecommunications company by market capitalisation. The integrated communications services offered by the former Spanish state-owned group generated almost 58 billion Euros in 2008. Thanks to a strong position in South and Central America and the company's involvement in China, Telefónica is well set for further growth in the future. The Spanish company took the first steps in Germany in 2003. Telefónica Deutschland GmbH was established by the merger of mediaWays and Highway One and has been one of the leading internet backbone network operators in Germany from the outset. End customers, however, did not get in touch with Telefónica in Germany as the German subsidiary was only selling connections to internet service providers and carriers. 1&1 or Alice have used the network for years.

The focus on end customers has advanced with the acquisition of O₂. The smallest German mobile telecom provider has opened up new business opportunities based on the affiliation to Telefónica. Since 2006, O₂ has offered DSL connections for the home and steadily gained customers. Consequently, the mobile telecom provider O₂ has turned into an integrated telecommunications provider. This is also reflected in the corporate name. Since 2008, the company has operated under the name of Telefónica O₂ Germany. In 2009, Telefónica Deutschland GmbH and



Headquarter of Telefónica O₂ Germany in Munich

the DSL-wholesale business, which had been a separate company until then, was incorporated and has been a strong business unit of Telefónica O₂ Germany.

The parent company proved that they are serious about their commitment in the German market. In 2007, they announced strong investments aimed to expand the fixed and mobile network in Germany over the next couple of years. O₂ customers have seen the positive results of these investments. After the company had invested almost 3 billion Euros in the network expansion, the mobile network now covers almost one hundred percent of the population today and is in regards of data- and voice-quality state of the art. Since the beginning of this

Company building with O₂ shop

year, O₂ does no longer require roaming through the T-Mobile and has a completely independent network. Furthermore, the Telefónica O₂ Germany network was evaluated by independent tests as equivalent and, in some cases, even superior to the networks of the major competitors.

In Germany, the market for the mobile internet is currently evolving very fast. The mobile data network of O₂ reaches about 99 percent of the population. More than 65 percent of the population already have access to the mobile broadband technology HSDPA/HSUPA for fast upload and download. In other regions, it is complemented by the data accelerator EDGE in the traditional GSM network. In November 2009, the mobile data turbo HSPA+ with speeds of up to 28 MBit/s went live in some parts of Munich. Further expansion of the mobile broadband is scheduled to take place.

The state-of-the-art network is the basis for continuing the success story of Telefónica's commitment in Germany. After Rene Schuster assumed the position as new CEO of Telefónica O₂ Germany in 2009, the company speed up the pace of growth, introduced smart new products and significantly improved customer satisfaction. The result: In 2009, Telefónica O₂ Germany was the fastest growing telecommunication company adding more new customers than all other competitors. The courage to embrace

new concepts like the radical new tariff concept O₂ o has paid off.

"O₂ o has set new standards in mobile communications and we are strongly focusing our marketing efforts on this tariff", says Lutz Schüler who assumed responsibility for the market launch at that time as Managing Director Marketing & Sales of Telefónica O₂ Germany. O₂ o offers flexibility, transparency and security. Customers do not need to make any monthly obligations. For O₂ o requires no minimum contract term, monthly basic fee or minimum revenue. The tariff is easy to understand: every call minute and every text message is 15 Cents to all German fixed and mobile networks. Unique to the market is the O₂ cost airbag. It stops costs for national calls and text messages at 60 Euros a month. Afterwards, customers talk and send text messages without limits and benefit from the advantages of an all-network flat rate. O₂ thus offers a new type of protection against high invoices. O₂ o is available both as a post-paid and pre-paid version.

The challenger strategy is backed by a consistent hardware portfolio. As mobile internet is becoming increasingly important, O₂ positioned itself as the "home of the smart phone" ad offers the best choice of devices for mobile surfing. In addition, the purchase of mobile phones is no longer linked to mobile phone contracts. People wanting to buy one of the phones can buy them independently with "O₂ My Handy" with monthly,

interest-free payments for 12 to 24 month – they do not have to conclude a mobile contract. The current flagship product is Palm Pre. By introducing this highly attractive smartphone, the former pioneer for PDAs has returned to the big stage after many years. The mobile phone connects mobile applications in an intuitive and multitasking environment. Consumers and business customers are able to link their data usefully and efficiently. The success has demonstrated that the concept comes off well. Never before has O₂ offered a mobile phone which sold as well as the Palm Pre.

In many areas, the German subsidiary of Telefónica strongly benefits from the parent company in Spain. Telefónica's powerful Research & Development division is developing new services, technologies and deployment scenarios for integrated communications which are used in Germany as well. O₂ is testing the Near Field Communication technology in initial pilot projects; the technology enables, for example, the contact-free and paperless purchase of train tickets.

Telefónica O₂ Germany offers business customers enormous added value thanks to Telefónica. The new business customer group which was established in 2009, offers the whole range of telecommunication products and services to all kinds of businesses – from for small to medium-sized and multinational companies. It is a second key pillar in addition to the consumer business of O₂. With the new organisation, O₂ is able to further accelerate its strategy of integrated telecommunications. This approach is supported by the integration of the mobile and fixed networks. Another advantage for multinational customers is Telefónica's international exposure. International services for multinational companies are offered by Telefónica in the form of "Telefónica Multinational Solutions". Under one roof, customers are provided convergent and global communications solutions for the fixed and mobile network as well as data transmission and IT. By concentrating all communications services, tremendous potentials for cost reductions are opening up. The logistics company Deutsche Post DHL, for example, expects to benefit from savings of 150 million Euros in Europe based on the cooperation with Telefónica.

But, the growth story of Telefónica in Germany is far from being completed. Just now, the EU Commission approved the acquisition of HanseNet by Telefónica. The closing of the transaction was expected in the first quarter 2010. The fourth-largest German provider for DSL connections,

operating under the brand name Alice, contributes 2.3 million customers to the Spanish family. "Telefónica O₂ Germany is the most rapidly growing telecommunications provider in the German market. Together with HanseNet we can further accelerate our growth", Rene Schuster, the CEO of Telefónica O₂ Germany, is convinced. The success story of Telefónica in Germany continues.

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Fraunhofer IOSB – Germany



ORCHESTRA – An Open Service-Oriented Architecture for Environmental Risk Management

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■ Type of Project

R&D (Basic or applied R&D)

Start: 2004

Duration (month): 42

Category of contract value: < 50 Mio Euro

■ Major results and achievements of the project

The ORCHESTRA project (<http://www.eu-orchestra.org>) specified an open service-oriented architecture for environmental risk management applications based upon international standards of the Open Geospatial Consortium (OGC). The architecture was systematically derived from requirements of environmental and civil

security authorities. It is technology- and policy-neutral, is applicable to all types of disaster risks (natural and man-made) and designed for cross-border situations. Successful ORCHESTRA implementations were carried out for forest fire and flash flood risk assessment in Catalonia (Spain), for the assessment of natural disasters such as landslides on road networks in the French-Italian border, for risks caused by heavy ship traffic in the German Bight, and to assist European experts evaluate forest fire and flood risks in the Member States of the European Union. The ORCHESTRA architecture reached “best-practices” status at the OGC which means that OGC recognizes and supports the good use of its standards with the final goal of enabling interoperability.

■ Economic results

The ORCHESTRA results have been applied to numerous follow-on projects of the 6th and 7th European research programmes. Its open and flexible approach enables its extension towards the inclusion of environmental sensor networks (project SANY) and customisation to further applications domains. An non-exhaustive list comprises Tsunami early warning systems (project DEWS), biodiversity (project LifeWatch) and civil security (German project SoKNOS). Their total research budget volume is estimated up to 50 M Euro.

Atos Origin has launched a specific business programme based on ORCHESTRA results after the completion of the R&D project, with 3 currently on-going projects in Spain, and an estimated volume of 20 M Euro over 5 years. The programme is likely to be globally extended to other companies in the group.

ORCHESTRA strengthens Fraunhofer IOSB’s position as leading institute for applied research in the field of innovative ICT solutions for environmental and security applications. The research cooperation has been continued and intensified in a further European research project called EO2HEAVEN investigating the complex relationships

between environmental factors, population exposure and health impacts.

■ Challenges, barriers or problems in cooperation

The main challenge for the design of the ORCHESTRA architecture was to bridge the language gap between the thematic experts of the environmental risk domain and the IT experts in an ever changing technological environment. This challenge was mastered by a close cooperation between Atos Origin as the project manager and Fraunhofer IOSB who led the edition of the ORCHESTRA architecture specification in a joint activity with the other consortium members. From an institutional and managerial point of view, the main challenges were the coordination of various relevant stakeholders in different fields, and the organization of 4 geographically distributed pilots.

■ Proposals for improving the framework for Spanish-German cooperation

After successful collaborations at EU level, there are barriers to continue the cooperation in a bilateral manner. The German-Spanish exploitation of European research project innovations could be strengthened by supporting bi-national research programmes with the clear objective to turn mature research results into competitive products on the IT market.

■ Comments

The ORCHESTRA project has been co-financed by the European Commission, DG Information Society & Media, Unit H4 “ICT for Sustainable Growth”, within the 6th Framework Programme for Research and Technological Development.

The ORCHESTRA consortium consisted of 14 organisations from 7 European countries. See <http://www.eu-orchestra.org/contact.shtml> for details about the ORCHESTRA consortium.

Note: Due to a merger with another research institute, Fraunhofer IITB was renamed to Fraunhofer IOSB by 1.1.2010.

Giesecke & Devrient Group – Spain



Secure authentication for eGovernment services in Basque Region

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■ Type of Project

Implementation of a medium or large-scale ICT system at end-user facilities (design-build-up; including consulting; delivery of components, system integration, implementation)

Start: 2002
Category of contract value: < 10 Mio Euro

■ Major results and achievements of the project

Implementation of secure authentication and digital signature functionality at Basque Public Service agencies. Issuance of ID cards with PKI functionality for all Basque public servants and Basque citizens to access

eGovernment services in a secure way. GyD is providing the cards with the secure authentication software Safesign. It offers data encryption, secure logon and digital signature functionality. This citizen card is at the same time the health ID card within the Basque Health care system. It includes several applications, e.g. e-prescription.

■ Economic results

The Basque country is the most advanced autonomous region in Spain regarding eGovernment services. Apart from establishing many webbased services to its citizens Izenpe, as the public Certification Agency of the Basque country, advanced in a pioneering way to digitize public administration in itself increasing transparency and efficiency of government agencies and its services. Shorter waiting lists, better accessibility (24/7/365) and less paper consumption are some of the remarkable achievements through this project.

■ Challenges, barriers or problems in cooperation

In the beginning of the project, training and consulting services were necessary to develop such a new and complex project for the first time. Even the legal conditions were not completely established yet, when the project started. But since the creation of the digital signature law by the Spanish Government, all the eGovernment services could go ahead.

■ Proposals for improving the framework for Spanish-German cooperation

The cooperation was very good during the whole project. The Spanish subsidiary of G&D operates as the perfect link between Izenpe and Giesecke & Devrient.

Intershare S.L. – Spain



A Spanish website goes German – Softonic.de

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Partner / Customer / End-User

Softonic International S.L.
www.softonic.de

Contact person

Alexander Schwarz
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alexander.schwarz@softonic.com

■ Type of Project

Website internationalization

Start: 2004
Duration (month): 60
Category of contract value: > 10 Mio Euro

■ Major results and achievements of the project

Launch of the German version of softonic.com which lead to further internationalization of the company up until now. The project is not finished yet and in January 2010 Softonic counts 8 languages online, the German version being the 3rd strongest in terms of traffic with over 46 mio page views and 11 mio visits per month in December

2009 (IVW data). Softonic.com is now the No. 1 European and Latin American software download site and number 2 worldwide.

■ Economic results

In Germany, softonic.de made it to leading software download site offering its users independant software reviews, videos, tipps & tutorials, etc. The project was the first step to becoming an internationally known company and only the German part had a turnover of 3mio Euro in 2009. Amongst the overall 170 employees of Softonic, six native German content editors are writing for softonic.de from Softonic's headquarters in Barcelona. The IT, admin and business team are shared with other versions of softonic.

■ Challenges, barriers or problems in cooperation

Finding native German software experts in Spain, The platform was not made for being launched in other languages than Spanish – had to be adjusted first, To get a .de-domain it was necessary to have an admin in Germany, Cultural differences like compliance with timings (solved now).

■ Proposals for improving the framework for Spanish-German cooperation

Inter-regional events, Job portals for natives in a foreign city, Training in cultural differences and how to overcome them, Prepare your product to be launched in different languages, even if an internationalization is not planned originally.

LANCOM Systems GmbH

– Germany



WLAN Internet access for hotel guests of Spanish luxury hotel chain “Sallés Hotels”

Company Details

LANCOM Systems GmbH
www.lancom.de / www.lancom.eu

Employees: 120

Contact person

Pamela Krosta-Hartl
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Partner / Customer / End-User

INFORMATICA I GESTIO 89 S.L. / SALLÉS HOTELS SPAIN
<http://igestio89.com/>

Contact person

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■ Type of Project

- Implementation of a medium or large-scale ICT system at end-user facilities (design-build-up; including consulting; delivery of components, system integration, implementation)
- Delivery of hardware to realise the above mentioned project through a Spanish distributor / reseller

Start: 2007

Duration (month): 8

Category of contract value: < 50.000 Euro

■ Major results and achievements of the project

- Excellent guest service by providing full Wireless LAN coverage in all hotels (4 & 5 stars)
- Easy login & Internet usage for guests from Europe and Asia using different client systems (2.4 / 5 GHz clients)
- Reduction of communications costs & improvement of staff availability by implementing Voice-over-WLAN on the basis of the same network

In the hotels of the Sallés Hotels group, one single multi-service Wireless LAN serves various internal & external needs; the different services and data streams are securely separated by means of network virtualization. The implementation was achieved in record time.

■ Economic results

This lighthouse project in one of Spain's prestigious hotel chains has established German networking specialist LANCOM as a serious vendor of high-end Wireless LAN & hotspot solutions for the Spanish hospitality industry.

■ Challenges, barriers or problems in cooperation

Extensive initial pilot and testing in a highly competitive market.

PREMO Group – Spain

3D LF Antennas for passive entry systems – passive go systems



Company Details

PREMO

www.grupopremo.com

Employees: +300

Contact person

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Jorge.Hermoso@grupopremo.com

Partner / Customer / End-User

Marquardt GmbH

www.Marquardt.de

Contact person

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■ Type of Project

- R&D (Basic or applied R&D)
- Development (Software Product Development, Custom Software Development, Hardware Product Development, Systems Development)

Start: 2004

Duration: until 2020

Category of contract value: < 50 Mio Euro

■ Major results and achievements of the project

PREMO has developed a 3D antenna for the wake up function in a PKE automotive systems which is the best in market as well as our customer system

■ Economic results

Actual market share is around 50 %

Actual turnover 2KK Euro

■ Challenges, barriers or problems in cooperation

Challenges came from the difficulty on the design to get in different automotive platform like Daimler, Audi and Chrysler

■ Proposals for improving the framework for Spanish-German cooperation

- to get an office in Germany for PREMO Group
- local supports for its customers

Secuware S.L. – Spain



Secuware Central European Subsidiary

Company Details

Secuware S.L.
www.secuware.com

Employees: 20

Contact person

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Partner / Customer / End-User

Secuware Deutschland GmbH
www.secuware.de

Contact person

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■ Type of Project

Establishment of an affiliate/ subsidiary/ representative office in the partner country

Start: 2008

Category of contract value: < 1 Mio Euro

■ Major results and achievements of the project

Founding a German subsidiary and setting up a team of sales and technically highly educated employees. The German subsidiary team had to ramp up fast with the international sales in technical progress in order to become a full member of the Secuware offices. Within 3

month the GmbH was founded in Germany, the staff was hired and trained and the channel acquisition could start.

■ Economic results

Secuware has now gained a bigger market share in Central Europe and could win three major distribution companies with their partner channel. In addition to that, Secuware grow from the German spoken area DACH to UK and to Eastern Europe and had a major success in selling and implementing the Secuware solutions in a larger scale customer environment. Secuware Germany grew after one year into a profitable software company.

■ Challenges, barriers or problems in cooperation

To acquire an understanding and insight in the state of the use of encryption software market segment in DACH with its different types of user maturity, different technology and service vendors and diverse training and academic institutions.

■ Proposals for improving the framework for Spanish-German cooperation

Navigating Secuware's future in partnerships is a basic prerequisite for the big European Software players. Secuware maintain close and successful partnerships with a number of Spanish partners. Forward-looking recommendations for Spanish-German cooperation translate into the need for interaction between experts, exemplarily to enable and enhance the preparation and establishment of competitive security consortia for projects within an EU framework.

Unabhängiges Landeszentrum für Datenschutz ULD – Germany



European Privacy Seal – EuroPriSe

Company Details

Unabhängiges Landeszentrum für Datenschutz ULD – Germany

www.european-privacy-seal.eu;
www.datenschutzzentrum.de

Employees: 43

Contact person

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europrise@datenschutzzentrum.de

Partner / Customer / End-User

Agencia de Protección de Datos de la Comunidad de Madrid
<http://www.apdcm.es/>

Contact person

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Agencia de Protección de Datos de la Comunidad de Madrid

■ Type of Project

eTEN

eTEN is a European Community programme providing funds to help make e-services available throughout the European Union. EuroPriSe was funded in the priority-area of trust and security to help to increase people's confidence in making use of Information Society technologies.

Start: 2007

Duration (month): 21

Category of contract value: < 10 Mio Euro

■ Major results and achievements of the project

The project deployed a European Privacy Seal – EuroPriSe – for IT products and IT-based services certifying compliance with the demanding European data protection and privacy regulations (www.european-privacy-seal.eu). It set up a certification scheme including a criteria catalogue translating the legal requirements into practical questions, an evaluation manual and a commentary providing information on the interpretation and use of the European requirements as well as a training scheme for expert evaluators. Thus EuroPriSe provides guidance in data protection and privacy to companies and users throughout Europe. The certification is based on an evaluation conducted by independent experts validated subsequently by an impartial certification body. On behalf of the manufacturer or vendor the independent experts evaluate the IT product or IT-based service against the EuroPriSe- Criteria in terms of legal and technical compliance and produce a highly sophisticated confidential report. An impartial certification body validates the reports and ensures compliance with the demanding criteria valid throughout Europe. More than 80 experts (33 German, 28 Spanish) have passed the training successfully and are now offering EuroPriSe evaluations to manufacturers and vendors of IT products and IT-based services. Including four Spanish and four German companies, 13 companies have already completed the procedure successfully and more are under way. EuroPriSe matured into a permanent service offered by ULD.

■ Economic results

Data protection compliance is a growing worldwide market. The European regulations on data protection and privacy set an unprecedented standard. During its 21 months market validation and initial deployment phase EuroPriSe has reached out as far as North and South America for

both, experts and certification projects. In terms of trust, quality and assurance EuroPriSe – provided by trusted non-commercial and impartial third parties – is translating European Data Protection into business standards.

■ Challenges, barriers or problems in cooperation

The big challenge of the project was to test whether a successful German scheme could be implemented at the European level. All the work done during the process, including the appointment of experts and the pilot trials, showed the system could perfectly work at EU level and that there were great expectations for a rigorous and serious pan European privacy seal. The results also showed the seal could contribute to a further European harmonisation of different national implementations of the Data Protection Directive and even to serve as a basis for national extensions dealing with specific sector rules.

■ Proposals for improving the framework for Spanish-German cooperation

Spanish-German cooperation has worked all along the project and still works very well so there is little room for enhancements in this area.

■ Comments

EuroPriSe is a successful story that will greatly contribute to foster trust among citizens and consumers on a respectful processing of their personal data by products and services delivered through ICT channels. It provides a visible mark of excellence and offers a predictable environment for the processing of personal data by controllers satisfying the demands for a “regulated self-regulation” voluntary way of showing organisations’ commitment with privacy. Further partners to the project consortium: TÜVIT (Germany), Commission Nationale de l’Informatique et de Libertés (CNIL, France), Institute of Technology Assessment of the Austrian Academy of Science (Austria), Ernst & Young AB (Sweden) London Metropolitan University (UK), Borking Consultancy (The Netherlands), and VaF (Slovakia).

User Interface Design GmbH

– Germany



Company Details

User Interface Design GmbH
www.uid.com

Employees: 65

Contact person

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Partner / Customer / End-User

dnx group
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Contact person

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■ Type of Project

Establishment of partner network for product sales and services/ maintenance

Start: 2006

Duration (month): 42

Category of contract value: < 500.000 Euro

■ Major results and achievements of the project

UID and dnx work together on designing innovative interactive products. The cooperation between UID and dnx is part of a worldwide cooperation, the International Usability Partners (IUP). The IUP are an established network of independent usability companies who have

joined up to provide user experience services worldwide, from North America to the Far East. Each partner is an expert in global user experience design, specialised in the cultural and linguistic characteristics of their home country. Major results and achievements of the network across all projects are:

- Quick, efficient and reasonably-priced project management worldwide
- Consistent methodologies to compare markets
- A proven, consistently high quality
- International experience and established collaboration

■ Economic results

Our clients need to know how to design their products in a way that meets the needs of each target population. They need to know if and how they must adapt their products to different countries or cultures. Culture, language, work flows, environment etc. affect how people use interactive products. A design solution that is successful in Germany does not necessarily work for users in Spain. UID and dnx conduct user research to understand and compare the needs and expectations of users in Germany and Spain. Based on these research findings we can design products that will be successful in both markets. We call this the User Centred Design process. Including both German and Spanish users in the design process reduces many risks for our clients and ultimately leads to business success. The ongoing partnership between UID and dnx facilitates a smooth, most efficient and highly cost effective collaboration for the benefit of our clients. For us, in our own respective business environments, the partnership helps tremendously to generate business, to collaborate efficiently and to produce best-of-class results for our clients.

■ Challenges, barriers or problems in cooperation

Establishing and maintaining a successful cooperation like the IUP requires considerable effort and commitment from all parties involved. We meet regularly in person and on the phone to discuss and improve the collaboration itself. We have organized an employee exchange program so that we can get to know and learn from each other. We carry out non-profit research studies to continuously improve our collaboration. We have developed an efficient management structure for the network and use and maintain collaborative business tools.

The Federal Association for Information Technology, Telecommunications and New Media (BITKOM) represents more than 1,300 companies. Its 950 direct members generate a sales volume of 135 billion euros annually and employ 700,000 people. They include providers of software, IT and telecommunication services, manufacturers of hardware and consumer electronics as well as digital media businesses. BITKOM is working, in particular, to improve the regulatory framework in Germany, for modernization of the education system and for an economic policy which encourages innovation.



Federal Association for Information Technology,
Telecommunications and New Media

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