As one panellist remarked in the *CTO roundtable for growth*, a focus on sustainability translates into a move away from "always on" to "always available" technology. At the same time, the ICT sector must look at both infrastructure and users of infrastructure as the driver of savings.

The green agenda may also impact accepted notions of market structure. For example, in the *Adapting to Circumstances* session, much was made of the role played by multiple technologies providing solutions in mobile broadband in developing markets, for example. In developed markets, infrastructure competition between cable and DSL has been historically prized by regulators eager to see choice increase and prices come down for end users. Yet, competitive intensity and economic slowdown have prompted moves to share mobile networks in many European markets in recent quarters. In this light, the drive towards sustainability adds a strong new voice to those arguing against the duplication of sector resources.