

## Invitation to the workshop on

### Personalization and user profile standardization

**When:** 09:00 the 28th January (registration from 08:30) until 12:30 on 29th January 2009

**Where:** ETSI Headquarters, Sophia Antipolis, France, see  
<http://www.etsi.org/WebSite/AboutETSI/VisitingETSI/VisitingETSI.aspx>

**Who should attend:** manufacturers, service creators, service providers, operators, standards developers, organizations representing user groups, e.g. disability organizations

**Fee:** There is no fee for attending the workshop

**Please register online before the 20th January 2009 at:**  
<http://webapp.etsi.org/meetingcalendar/MeetingDetails.asp?mid=11990>

**You are welcome to fill in the questionnaire at (not mandatory):**  
[http://portal.etsi.org/stfs/STF\\_HomePages/STF342/QuestionnaireV1.doc](http://portal.etsi.org/stfs/STF_HomePages/STF342/QuestionnaireV1.doc)

### Who are we?

We are working in a project at the Technical Bodies Human Factors and eHealth, of the European Telecommunications Standards Institute (ETSI), with the goal of writing standards related to personalization and user profiles. This work is co-funded by EC/EFTA (European Commission/European Free Trade Association).

### Why do we organize this workshop?

ETSI has defined the concept and guidelines on personalization and user profile management, which was published in 2005. In January 2008, ETSI started new projects working on three deliverables about personalization:

- Architectural framework
- Standardized objects related to ICT services/devices
- Personalization of eHealth services

Our work on these draft deliverables has progressed and we invite you to discuss the interim results, to propose input to our work and to discuss what could be better.

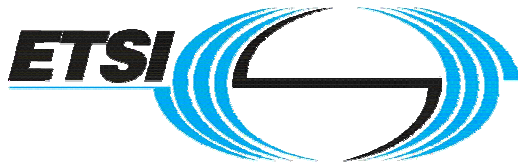
### Workshop focus

The workshop will focus on two major topics:

#### 1. Working with user profiles in the device and in the network

Some key issues are:

- Criteria for deciding where profile information is stored and where rules are run, taking into account factors such as efficiency of execution, privacy, security/hacking, network traffic, reliability, backup, etc.
- What does a profile agent in a device look like?
- Synchronization issues - what could go wrong – how important are these errors?
- Where is the current “situation” assessed?



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## 2. Information and preferences for personalization

Some key issues are:

- What preferences are common today, where/how are they set, do we wish to retain and build upon these or do something more radically different?
- How do we expect a service provider to use our preferences (e.g. directly, map to some other form, interpret and then map)?
- How would we expect device manufacturers to use our preferences (e.g. use them directly to capture the user's setting preferences, map them directly to a proprietary internal form, interpret them and then map)?
- To have preferences that relate to classes of service or classes of devices implies industry wide acceptance of a common formulation of those preferences (or each company developing their own mappings to their own preferred way of expressing preferences). How feasible is this: for service providers, for device manufacturers?

### Agenda items day one

The workshop will be in the ETSI main building, Iris Amphi theatre, unless otherwise stated

**Day one:** Wednesday 28th January 9:00-18:00 (agenda may be further amended)

#### • Introduction and overview

Françoise Petersen and Mike Pluke: *A summary of previous and ongoing ETSI work on personalization including architectural framework, preferences in general as well as for eHealth systems. Purpose of the workshop and selection of major topics for discussion at the workshop. Also, some key issues will be proposed for discussion at the workshop. The workshop participants are welcome to suggest further issues for discussion. (30 min)*

#### • Architectural Framework for personalization and user profile management – Part 1

Françoise Petersen and Mike Pluke: *The ongoing work on the Architectural Framework will be presented. The workshop participants are welcome to discuss the requirements and proposed solutions, and to suggest further input. (30 min)*

- Overview of concepts
- Scenarios illustrating key concepts

#### • Information sharing and privacy

Scott Cadzow: *As personalized services become more common, personal privacy issues will become an increasingly important factor in their acceptance. This presentation highlights some important requirements and discusses possible solutions. (30 min)*

#### Coffee break 10.50-11.10

#### • Architectural Framework for personalization and user profile management – Part 2

Tatiana Kovacikova and Giovanni Bartolomeo: *The ongoing work on the Architectural Framework will be presented. (50 min)*

#### • Information and preferences proposed in the draft ETSI Standard (ES) – Part 1

Erik Zetterström, Antonella Frisiello: *The structure of the ongoing work on the ES will be presented. Some principles will be highlighted and interesting issues will be studied in detail. The workshop participants are welcome to discuss the current draft, and to provide suggestions on further preferences that should be included. (30 min)*

#### Lunch 12.30-13.40

#### • Information and preferences proposed in the draft ETSI Standard (ES) – Part 2

Erik Zetterström, Antonella Frisiello: *The structure of the ongoing work on the ES will be presented. Some principles will be highlighted and interesting issues will be studied in detail. The workshop participants are welcome to discuss the current draft, and to provide suggestions on further preferences that should be included. (30 min)*



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- **Magnet Beyond and WWRF work on personalization**

Henning Olesen: *The talk will give an overview of the work on user profiles and profile management carried out in MAGNET Beyond. The conceptual structure of the user profile is presented, with emphasis on specific issues related to Personal Networks (PNs). Profile management in PNs and PN federations as well as interfaces to ongoing activities regarding subscriber data management and identity management are discussed. Results are also presented from a whitepaper on "User profiles, personalization and privacy", which is currently being prepared in a joint effort between Working Groups 1, 2 and 7 of Wireless World Research Forum (WWRF). (40 min)*

- **IST-SMS project Simple Mobile Services (SMS)**

- **Introduction**

Giovanni Bartolomeo: *SMS is a community of users based on innovative tools enabling a new class of services, addressing the specific needs of mobile users. SMS services are mostly built on the user-friendly concept of Mobile Electronic Memos (MEMs), electronic notes used to share/exchange information related to people, locations, activities. (5 min)*

- **Interface and interaction design of mobile SMS client applications**

Gregor Broll: *This presentation will give an overview of the development of guidelines for the interface and interaction design of mobile SMS client applications. In order to ensure the usability of their different features, this process includes scenario analyses, the definition of functional requirements, low-fidelity prototyping as well as their evaluation. (20 min)*

- **Secure and privacy respecting user data management based on Smart Card Web Server technology**

Carsten Rust (SAGEM-ORGA): *Presentation of an architecture for Simple Mobile Services integrating the SIM as an enabler for SP&T; Smart Card Web Server and Servlet Architecture. Also providing an overview of SIM-based services (e.g. Identity Management, Secure and portable user data management, Signatures) (25 min)*

#### Coffee break 15.40-16.00

- **Discussions of selected topics** (60 min)  
(Iris 2/3 and Iris 4 meeting rooms)
- **Identification of any potential contributions from meeting participants**  
Françoise Petersen (20 min)
- **Summary of the results achieved day one**  
Françoise Petersen (20 min)

#### Demo session 17.40

(Iris 2/3 meeting rooms)

- **Demo of IST-SMS project Simple Mobile Services**

Giovanni Bartolomeo: *This demo will present the SMS web community, the SMS client software for mobile phones and several different features related to the creation, management and sharing of MEMs*

- **Higgins demo**

Markus Sabadello (*more on this item day 2*)

### Agenda items day two

**Day two:** Thursday 29th January 9:00-12:30

- **Identity management – Higgins**

Markus Sabadello: *The Identity framework being developed at the Eclipse Foundation will be described. (20 min)*

- **The Universal Remote Console framework**

Gottfried Zimmermann: *The Universal Remote Console (URC) framework has been published recently as ISO/IEC 24752:2008. With its "pluggable user interface" approach, the URC technology supports personalization. The URC technology and user profile management are a perfect fit for personalized and adaptive user interfaces. (30 min)*



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- **Feel@Home**

Rémi Bars: *Feel@Home aims at the mass market adoption of Digital Home advanced audiovisual networked services enabled by a breakthrough in the "Extended Home" concept. To validate the new concept and demonstrate its benefits, Feel@Home will develop an open architecture and the required hardware and software components, and integrate and test the resulting system in several interconnected demonstration sites located in different European countries. Feel@Home will ensure the management of the digital content, the automatic Home Area Network management and the handling of multi-user service offerings. Moreover it will provide a new interaction paradigm enabling seamless, personalised and context-aware service delivery, to various types of user devices and to any user location, at home or elsewhere. (30 min)*

- **A framework for aggregating, semanticizing and sharing user profiles**

Ajay Madhok: *This presentation describes a novel framework for builds on the OMA + 3GPP standards (XDMS and XCAP) and leverages Digital Identity and Semantic Technologies to make available a User's Temporal Context. (20 min)*

- a. *Acquiring + Aggregating user profile and relationships data across applications / trust domains using Semantic Adapters,*
- b. *Semanticizing the profile and relationships by marking up people, places and things in a Unified namespace*
- c. *Sharing the Unified Profile (and Relationships) Data with Control, on a per relationship, per context basis*

- **Discussions on the topics chosen at the workshop**

(Iris 2/3 and Iris 5 meeting rooms)

**Coffee break 10.40-11.00**

- **Further discussions on the topics selected at the workshop review of the draft deliverables (60 min)**

(Iris 2/3 and Iris 5 meeting rooms)

- **Summary of results achieved at the two day workshop**

Françoise Petersen (30 min)

## Background

As ICT usage becomes an integral part of many people's lives, users expect to be able to personalize a product or service to meet their individual needs and will no longer accept "one size fits all" products and services. Personalization can range from simple cosmetic factors such as custom ring-tones to the complex tailoring of all of the user's interlinked communications products and services to produce a communication environment that truly meets the user's needs. Behind every instance of personalization is a "user profile" that stores details of the user, their preferences and other information that can be used to deliver to the user an experience that is tailored to their individual requirements.

The published ETSI Guide, EG 202 325 on "User Profile Management" addresses all of the above issues and provides guidance to assist ICT product and service designers to make it easy for users to manage their user profiles. EG 202 325 also addresses the increasingly important issue of how users can be provided with an integrated approach to their profiles. Ideally this approach can ensure that when user information or a generic preference is supplied, this only needs to be done once and all products and services will then be aware of this data. For such a desirable outcome to be achieved, it will be necessary for all products and services to be designed to be consistent with a common set of guidelines.

The following two ETSI deliverables will be produced by STF342:

- **Deliverable on standardized objects**  
The deliverable will be an ETSI Standard (ES) on standardized objects related to personalization and user profile management and a rule definition language for defining automatic activation of profiles. This deliverable will describe objects related to a range of services and devices with the goal to suit all users' needs including disabled, young and elderly people. The intended readers of this deliverable are service developers and device manufacturers who wish to develop services and devices that can be personalized by their customers.
- **Architectural framework**  
The architecture needed to support the personalization and profile management concept will be defined in an ETSI Technical Specification (TS). The intended readers of this deliverable are profile providers, telecom companies and device manufacturers who will implement and provide the underlying infrastructure and architecture of network and devices necessary to achieve the user profile management concept described in EG 202 325 "Human Factors (HF); User Profile Management".

The following ETSI deliverable will be produced by STF352:

- **Standardized objects related to personalization within the eHealth domain**  
The deliverable will be an ETSI Standard (ES) on standardized objects (including settings, values and operations) related to personalization within the eHealth domain.

## More Info

More info on personalization in general can be found at:

[http://portal.etsi.org/stfs/STF\\_HomePages/STF342/STF342.asp](http://portal.etsi.org/stfs/STF_HomePages/STF342/STF342.asp)

and personalization within the eHealth domain can be found at:

[http://portal.etsi.org/stfs/STF\\_HomePages/STF352/STF352.asp](http://portal.etsi.org/stfs/STF_HomePages/STF352/STF352.asp)

You are welcome to contact Françoise Petersen, Specialist Task Force Leader STF 342 and STF352 on Email: [Francoise.Petersen@apica.com](mailto:Francoise.Petersen@apica.com)

## About ETSI

The European Telecommunications Standards Institute (ETSI) is an independent, non-profit organization, whose mission is to produce telecommunications standards for today and for the future.

Based in Sophia-Antipolis in the south of France, ETSI unites about 700 members from 60 countries, and brings together manufacturers, network operators and service providers, administrations, research bodies and users - providing a forum in which all key players can contribute. On the web: <http://www.etsi.org>