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| Author: TC HF - EC/EFTA – Date:12 June 2018  |
| Last updated by: Youssouf Sakho – Date: 17 Sep 2018  |
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Terms of Reference - Specialist Task Force

STF CT (TC HF)

Smart cities and communities: standardisation to meet citizen and consumer requirements

Summary information

|  |  |
| --- | --- |
| Funding | **EC/EFTA. Specific agreement N°ETSI/2017-03.** Total budget 145 291,80 EUR* Manpower budget: 92 891,80 €
* Travel budget: 22 400,00€
* Subcontracting to external organisations (“Open Meeting”): 30 000€
 |
| Time scale | Start date: November 2018End date: October 2020 |
| Work Items  | DTR/HF-00162: SmartCities: Smart cities and communities standardization for citizens & consumers |

**Part I – Policy relevance and expected market impact**

# Policy relevance

This proposal provides support for the creation of a comprehensive overview of the standardization requirements of the citizen, in the context of being an inhabitant of, or visitor to, a smart city or community.

Since industrialisation, our world has been considerably weakened by unsustainable development and rampant over-consumption. Humanity faces several environmental sustainability challenges including, but not limited to, declining biodiversity, degraded land and soil, depleting natural resources, polluted air and water, and increasingly severe climate changes. Closely interlinked are issues of population increase and rural-to-urban migration, which is occurring at an extraordinary pace: since 2008, more than half of the global population has been and is living in cities.

Adapting to these challenges will require increased cooperation among local actors, along with comprehensive systems that can create and maintain synergies for sustainable urban societies in which people want to work, live and maximise their well-being. Cities can also be seen as one of the ‘driving forces’ in generating European economic and sustainable growth, given, for example, the opportunities provided by the green economy.

Cities are becoming more and more of a focal point for our economies and societies at large, particularly because of on-going urbanisation, and the trend towards increasingly knowledge-intensive economies as well as their growing share of resource consumption and emissions. To meet public policy objectives under these circumstances, cities need to change and develop, but in times of ever tighter budgets this change needs to be achieved in a smart way: our cities need to become 'smart/sustainable-cities/communities'.

It is important that initiatives strive towards a triple bottom line gain for Europe: a significant improvement of citizens' quality of life, an increased competitiveness of Europe's industry and innovative SMEs together with a strong contribution towards sustainability and the EU’s 20/20/20 energy and climate targets. This will be achieved through the wide-reaching roll out of integrated, scalable, sustainable smart city/community solutions – specifically in areas where energy production, distribution and use, mobility and transport, and information and communication technologies, are intimately linked.

Linking and upgrading infrastructures, technologies and services in key urban sectors (transport, buildings, energy, ICT) in a smart way will improve quality of life, competitiveness, and sustainability of our cities.

The smart community offers considerable opportunity not only for citizens to have an improved living environment in which they can benefit from effective services, but also for them to influence matters affecting their daily lives. At the same time, equal treatment for all citizens needs to be ensured, and account needs to be taken of "big data" risks to their personal information.

Against this background, citizens need:

* transparent information about the public and commercial services being provided in a smart/sustainable-city/community, what is their cost, what are their rights and the redress procedures when they go wrong, etc.;
* mechanisms to ensure their individual voice is heard;
* assurances that the security of their personal information is properly protected and that this data will not be misused for commercial purposes;
* support and education for those unable to take immediate and full advantage of smart community living;
* a physical environment that ensures accessibility for very young and older people and those with disabilities.

It is European public policy to encourage the development of smart cities. As well as smart cities being a component of the European Strategic Energy Initiative (SETIS), the European Commission has created a Smart Cities and Communities European Innovation Partnership (SCC-EIP). This group has established a Smart Cities Stakeholder Platform (with ESO participation) and a High Level Group advising the Commission. The High Level Group released in early 2014 a Strategic Implementation Plan (SIP) that describes a joint vision, a common target and proposals for implementation, which contain standardisation aspects. The SIP is available at <http://ec.europa.eu/eip/smartcities/files/sip_final_en.pdf>. The EIP has established a “Marketplace” as a platform for information exchange - see <https://eu-smartcities.eu/>.

The request to develop a technical report on smart citizen requirements was also included in the 2016 and 2017 ICT Standardisation Rolling Plans (<https://joinup.ec.europa.eu/collection/rolling-plan-ict-standardisation/smart-cities-technologies-and-services-smart-and-efficient-energy-use> ).

A CEN-CENELEC Technical Report was originally proposed, but CEN and CENELEC lack a suitable technical structure; on the other hand, ETSI TC HF can carry out this activity.

An ETSI Technical Report is therefore needed to clarify whether further standardisation is needed on citizen issues related to smart cities (e.g. on what, where, when, etc.), and to take full account of other standards activities under way. The TR would also support recommendations that are being made at policy levels. For example, the SCC-EIP recommends to fully respect consumer privacy (EIP SCC operational implementation plan, page 6) in support of the strategic smart city goals. Also, the Commission and SETIS consider it essential for innovation to build trust, concerning energy data security and privacy.

# Rationale

Standardization in this domain is still in its infancy. Indeed, the requirement for dedicated standards for smart cities as such is somewhat limited, existing work so far is confined to standards activity within ISO (Technical Committee 268 “Sustainable Development in Communities”) in terms of support for elements of management systems, common terminologies, common indicators, etc. There are different activities in a number of SSOs (ISO, IEC, ITU-T, ISO-IEC/JTC1) seeking to provide strategic overviews of standardisation activities and requirements in smart cities, but these are for the most part high level.

At the European level, the CEN-CENELEC-ETSI Smart and Sustainable Cities Co-ordination Group (SSCC-CG) originally proposed the development of a Technical Report on citizen-related issues, later taken up in the ICT Rolling Action Plan. The SSCC-CG has been seeking to enhance overall understanding of smart city issues, and to try to engage the EIP on standardisation matters, but it is not a group designed to provide formal standards deliverables. The SSCC-CG has now been converted to a longer-term CEN-CENELEC-ETSI Sector Forum, but equally this is not a a group producing standardisation deliverables.

On the other hand, the concept of integrating community infrastructures, technologies and services in a smart way embraces very many different standardisation activities, indeed from many different standards organisations. Not only are these activities fragmented, but very few have been initiated with the citizen perspective in mind; they are generally driven by industrial requirements in terms of technologies or service provision.

No overview is currently available, and the proposed Technical Report will go a long way towards redressing the balance by making a dedicated assessment of the needs of citizens in the relevant development areas and related standardisation requirements.

# Objective

The objective of the proposed activity is to prepare and develop an ETSI Technical Report identifying the requirements for citizen-related standardisation in the area of smart-city development, with the contents set out below.

The activity will be carried out in ETSI TC Human Factors (TC HF) and a work item has been adopted, DTR/HF-00162 (which has ETSI TR 103 455 as the intended final result) with the title “Smart cities and communities standardization for citizens and consumers”. The work will reflect the convergence between AIOTI and Smart Cities initiatives.

The proposed Technical Report will assess the different citizen-related issues that smart city-related standardization in the ICT domain needs to address. For each of these issues, the report will:

* provide a short statement of the subject area;
* make a short statement of the key citizen concerns (for example accessibility or privacy) related to the subject;
* list relevant current standards and ongoing relevant standards activities,
* assess whether it appears the activities are in practice taking reasonable account of the smart city/community dimension from the perspective of citizen welfare, and if not, what might be needed to rectify the position;
* identify any further general legal and ethical issues that require attention outside the standardisation domain, or other issues not covered.

The Report will provide a brief introduction outlining how it has been drafted, i.e. what the topics included are, and how each issue is treated (suggest the same basic pattern of sub-headings for each topic as far as appropriate). These sub-headings should cover the five bullets listed above in the scope, emphasising what is the suggested good/best practice.

The core sections of the report should assess the following specific issues:

## Citizens’ general needs

Smart cities should have citizen welfare at their core. The needs of the citizens should therefore be properly considered in every standardization activity relevant to smart cities.

After a general introduction to reflect this principle, this section will cover certain “horizontal” matters that affect citizens' lives, and which need to be taken due account of in standardization relevant to smart cities, including:

* citizen involvement/empowerment, complaint and redress procedures;
* physical security;
* cyber-security;
* exchange and handling of citizen data, data protection, digital privacy;
* accessibility, both physical and electronic.

The section will include the availability of new types of public and civic data services, provided through internet and smart phone applications, and the need for the provision of general data sets from multiple data sources, for citizens to access and analyse to help citizens identify new services or improvements to current services.

Mention will be made of developing “sharing economy” issues, since, for example, as these become more widespread, local authorities may in future be providing services to citizens in the new ways.

## Citizens and their local authorities

This section will cover the standards aspects of citizens' day-to-day interfaces with their local authorities. This will need to include issues related to their residence (residence registration, local taxation, communications from and to the local authority), and also citizens' requirements in connection with community-based initiatives, especially how these link to local authorities. It will seek to explore ways in which eGovernment standards-related initiatives can take account of citizen needs as fully as possible.

## Citizens and their local services

Depending on the context in individual countries, these services may in practice be public-sector, or provided by the private sector under contract, or purely private. But the essential requirements of citizens being served are going to be the same. In the case of private sector-provided services, of course the “citizens'” interests and those of consumers will overlap.

This section will cover, albeit at reasonably high-level, the standards aspects of citizens' day-to-day interfaces with local service providers, including:

* mobility and transport;
* education and child-care services;
* recreational services;
* healthcare services;
* sanitation;
* utilities;
* emergency services.

For each of these interfaces, the report will seek to examine the extent to which existing standards work takes due account of the citizens’ concerns, and, if there are shortcomings, propose ways in which the standardisation activity can overcome these.

## Citizen indicators

This section will cover the issue of citizen indicators. It will cross-refer to the EIP Action Cluster proposal for a citizen-focused standardization toolkit, based on a methodology that uses indicators and metrics as means to assess performance in meeting citizens’ needs, for example Eurocities' “CityKeys” activities, currently being specified in an ETSI ATTM project, and similar.

## Recommendations to standardisation

This section will contain general and specific recommendations to the ESOs and to other standardization organizations. It may be, for example, that the development of the TR exposes gaps in current standardisation activities, or issues relating to published standards, that merit further attention by the committees concerned.

## Other relevant issues

Finally, the TR will note any relevant aspects not related to standardization, and which entity ought to address those aspects.

# Market impact

The present proposal will have a wide impact, by providing an invaluable single overview of citizen requirements related to smart and sustainable cities and communities. There is a wide range of potential beneficiaries, whether these be in cities - whose understanding of standards and of standardisation processes is at present inevitably generally very limited - or industry, which will find it beneficial to be given a clear understanding of these issues.

The Report will also prove invaluable in terms of improving the understanding of standards practitioners. Consumer (or indeed “end-user”) representatives are seldom able to be present in standards committees, given the industrial background of these committees. Technical practitioners need a much-improved understanding of the needs of citizens, to avoid solutions that at worst simply ignore those needs, and at best may not be user-friendly solutions.

Furthermore, “horizontal” issues such as data protection and privacy, security or accessibility tend to be standardised (if at all) in dedicated expert groups. Standards committees dealing with specific applications are frequently unaware of the detailed activities of such dedicated groups; worse still, where they are given a specific requirement to address aspects of these “horizontal” issues, they may not be willing to wait for an overall solution but will seek to develop their own approach. This enhances fragmentation and potentially conflicting approaches.

The proposed Report will provide a focal point for the wider understanding of these requirements. A successful publication will also have some potential spin-off in other domains, for example, extending the report to cover citizen requirements in other domains such as the Internet of Things to support the ongoing standardisation convergence in IoT for Smart Cities & Communities (IoT4SCC). Especially the EU IoT Large Scale Pilots and their open calls piloting should be useful for emerging standardisation and its validation in this domain. IoT and SCC are brought together in particular by “SynchroniCity: Delivering an IoT enabled Digital Single Market for Europe and beyond”.

If the proposed work is not carried out, then the current fragmented understanding of citizen issues in the smart city context will continue. The synergies being sought from an integrated approach to smart and sustainable city and community standards issues would be considerably reduced by the continuation of a silo-based approach from the individual standardisation committees involved with specific applications.

**Part II – Execution of the work**

# Working method / approach

## Specialist Task Force (STF)

This action to develop an ETSI TR will be performed by an ETSI Specialist Task Force (STF) reporting to and monitored by ETSI TC Human Factors (TC HF). TC HF has a long experience of managing this type of activity, given that the overall activities it covers are by definition of importance for societal stakeholders, including consumers and those with accessibility requirements.

In particular, the STF will enable the necessary research and consultation to be carried out to the fullest extent possible. The overall reach of the matters relating to smart cities is broad, and the issues affect potentially a very wide range of stakeholders, whether these are in the standard setting domain or are potential standards users with needs to address.

On formation, the STF will prepare its detailed work plan, to cover the entire period of the activity, for approval by TC HF. Initial activities will comprise the creation of the content for a dedicated website, to be hosted by ETSI, with links to smart city resources, including in particular to the European Innovation Partnership on Smart Cities & Communities (EIP-SCC), the Open & Agile Smart Cities (OASC), and the EU Urban Agenda Digital Transition Partnership. The website will be launched with a broad promotion exercise.

The STF will actively consult ETSI Technical Committees and ISGs/Workshops and other standardisation groups in CEN and CENELEC that are concerned about smart city issues and related technological areas with a possible impact on smart cities developments. Within ETSI, there needs to be at minimum involvement of the User Group, TC Smart M2M (including the IoT aspects) and possibly the M2M Partnership, with the ETSI ATTM work on Sustainable Digital Multiservice for Cities, the ISG CIM on Context Information Management, and the ISG CDP on City Digital Profile. Within CEN and CENELEC, although there is no committee wholly or even mainly involved with these issues, several different TCs responded to an SSCC-CG questionnaire that they had at least some specific interests in smart city issues, sometimes on topics where consumer inputs would be desirable, and these committees will all be consulted. There is also a recently-formed CEN Workshop on “Good Practices for Smart City Solutions” with which the STF will coordinate.

The STF will also seek the active involvement of the cities themselves, including through their own networks, for example EUROCITIES and global Open & Agile Smart Cities, in the preparation of the report. One particular challenge to the adoption of standards in relation to smart cities is the generally low level of understanding and hence participation by cities and other local communities in standards processes - this may be seen as an obstacle also to the proper reflection of citizen requirements in the standards themselves, which in turn may become too driven by technological issues.

Whilst the TR itself will be important to promote the benefits of standards, the prior involvement of cities and communities will be sought in particular through the stakeholder communities in cities, through the EIP and other European-level smart city-related initiatives in which they are participating, as well as, if possible, through the wider contacts of these initiatives, as well as open comment invitations on the internet. This outreach will itself help considerably to improve understanding and awareness of the benefits of standardisation within this stakeholder community.

Each of these consultations will include questionnaires, to be designed by the STF, concerning the requirements of citizens. For the TCs and other interested groups within the three ESOs, the exercise will also endeavour to establish the extent of awareness of the issues explored, for other stakeholders to validate and enhance the propositions set out in section 3 above.

The STF will hold up to two web-based workshops, one to present the questionnaires and, if necessary, a second one dedicated to obtaining initial feedback on the overall issues.

Using the questionnaire results, the STF will prepare a first draft of the Report for endorsement by TC HF and subsequent discussion in the face-to-face workshop mentioned in the following section, and submit the draft to public comment. Finally, it will prepare resolution of comments for consideration by TC HF and others involved.

## Other types of activity than STFs

The STF will establish a broadly-constituted Steering Group, acting on a voluntary basis, open to all interested parties (including ETSI members), to interface with the STF and external stakeholders and to carry out the overall day-to-day management of the activity, including overall performance as specified in the following section of this proposal. The Steering Group will be established with the support of ETSI TC HF, but of necessity will need to have wider participation. ETSI TC HF will endorse the Terms of Reference and will provide the Chair of the Steering Group. The STF Leader will act as Steering Group Secretary. The Steering Group will be closed on completion of the proposed TR.

The participation of the Steering Group will be established by ETSI HF, in close consultation with the CEN-CENELEC-ETSI Smart Cities and Communities Sector Forum (SSCC-SF) - the successor to the former Smart Cities and Communities Co-ordination Group. The Steering Group will meet as far as possible on a virtual basis, although one or more physical meetings may be required.

Moreover, since standards issues related to smart cities and communities are of interest to all three ESOs, the preparation of the TR needs to be done in close collaboration with CEN and CENELEC. This will be achieved through extensive interchange with the SSCC-SF. The Steering Group will consult this at each stage in the project. In addition, all three international standardisation bodies have activities related to smart cities and communities, - ISO (TC268), IEC (including a World Smart City Forum), ISO-IEC JTC1 and ITU-T (SG20 and its FG DPM): the Reference Group will establish contact with these through telephone, e-mail and face-to-face meetings as appropriate, including through the SSCC-SF, where these activities are represented. The Steering Group will also consult the European Commission's Multi-Stakeholder Platform on ICT standardisation at appropriate points, and this will permit contact with those ICT standards consortia active in the MSP and with an interest in the smart cities subject-matter.

Consultation with consumer representative bodies is also essential, and the Steering Group will ensure regular consultation with the membership of ANEC, with ISO/COPOLCO, and with other relevant organisations such as the European Disability Forum. EUROCITIES will also be consulted, as this forum is seeking to address relationships between cities and their citizens. AIOTI will be brought into the picture also.

In consultation with the Steering Group, the STF will organise, together with the ETSI Secretariat, an open meeting to be held in Sophia Antipolis or Brussels to consider the structure and content of a draft TR and obtain stakeholder feedback and comments, to be incorporated in the final draft for the formal approval process. The stakeholders that have contributed to the initial requirements-setting process will be invited, together with representatives of the European Commission, EFTA, the ESOs and international standards bodies.

The Steering Group will endorse the changes to the report proposed by the STF following the open meeting and on-line public comments, and subsequently to be approved by TC HF under the usual ETSI procedures.

## Expertise required, (qualification required, mix of skills)

The STF will be composed of up to four experts, with one appointed as STF leader. One (the same individual or a different one depending on selected aptitudes and experience) will act as Editor of the Report, and will be therefore expected to be experienced in drafting consensus reports in concise and correct English, and amending them to take account of stakeholder comments.

Overall, the STF members recruited will need to have: a good general understanding of smart cities and communities. They should together possess:

* considerable knowledge and understanding of consumer issues in the standardisation environment, including the tensions between these requirements and the objectives of technical stakeholders, and of the overall standardisation landscape;
* a knowledge of the smart city advantages for community management in the interests of citizens in specific areas, for example:
	+ governance, empowerment and engagement;
	+ education and capacity-building;
	+ health and care in the community;
	+ culture and community identity;
	+ living together, independence and mutuality;
	+ smart community infrastructures.
	+ capability to translate these issues into clear concise text.

It would be advantageous for the team to have an understanding of the problems posed for citizens in terms of data security, data protection and privacy, and accessibility issues.

## Previous work

Standardisation in the domain of smart cities and communities is in effect a new discipline. There exist, or are under development, very few dedicated standards in this domain – these relate mainly to terminology or city management matters. On the other hand, the standards essential to the smart city and community come from multiple domains; these standards are seldom developed with the interests of the city in mind but are driven by technological and/or commercial requirements. The rapid development of Internet of Things standardisation will also impact smart cities, and citizen concerns are particularly critical in that context. Consequentially, the basic objective of the report is to improve awareness of citizen-specific issues, to encourage future standardisation to take them into proper account.

Whilst no current “smart citizen” standards activities in this domain are known, all three ESOs have activities that are potentially strongly relevant to the “smart citizen”, for example matters such as data protection and privacy. AIOTI is also seeking to reference citizen requirements in the IoT context, and increasingly aspects of that will be of relevance to the smart city and its residents.

Overall the work proposed appears to be ground-breaking by relating the specific citizen requirements to such ongoing activities. As noted above, the action proposal is included within the Commission’s Rolling Action Plan on ICT Standardisation.

# Performance indicators

Management of the overall performance, measured in relation to specific KPIs, will be a standing item on the agenda of meetings of ETSI TC HF. Both ETSI TC HF and the Reference Group will specifically monitor the performance of the STF and suggest improvements, also in relation to any comments expressed by the Commission and EFTA on the interim report to be delivered at milestone 10 (see below). In the event of targets risking not to be met, it will propose remedial actions to the STF, to ETSI TC HF, or other involved parties.

The following KPIs are proposed:

Concerning effectiveness and efficiency –

* Deliverable achieved on time and in accordance with project work plan and milestones;
* Stakeholder satisfaction survey carried out at the open meeting and subsequently electronically, registering a positive outcome

Concerning stakeholder engagement and dissemination of results –

* at least a dozen participants in the Steering Group;
* 50 entities (organisations, associations, companies, individuals etc.) registered on project website;
* Feedback obtained from 10 standards Technical Committees (or other consensus groups) within the ESOs;
* Contact with at least five other SDOs to ascertain their interest and possible involvement;
* Contact with at least ten cities or local communities, to ascertain their interest and possible involvement;
* 30 participants in the open meeting that will serve to consider the draft Technical Report;
* Comments on the draft Technical Report at public comment stage from at least 20 separate entities.

# Work plan, milestones and deliverables

## Deliverables

A two-year project duration is envisaged, to prepare an ETSI Technical Report entitled (working title) “Smart cities and communities standardization for citizens and consumers”, and with the scope to carry out an assessment of the different citizen/consumer needs that smart city standardization in the ICT domain has to address (accessibility, usability, personalisation, interoperability, personal data protection, etc.).

| Deliverable ID | Type | Title and Contents | Observations |
| --- | --- | --- | --- |
| DTR/HF-00162 | TR | **Title:** SmartCities: Smart cities and communities standardization for citizens & consumers **Content:** DTR/HF-00162 has ETSI TR 103 455 as the intended final result) with the title “*Smart cities and communities standardization for citizens and consumers”.* The work will reflect the convergence between AIOTI and Smart Cities initiatives. |  |

## Reports to be submitted to the EC/EFTA:

An interim activity report will be submitted to EC/EFTA 15 months after the start of the action, to cover all the actions leading up to and including the first draft of the proposed report as submitted to public comment.

A final report will be submitted after 24 months, to cover the subsequent actions, including the report of the open meeting and the comments made and their resolution, and a copy of the adopted and published ETSI TR.

## Summary of main activities and milestones

The following table sets out schematically the tasks to be performed over the contract period and the major milestones in the project:

**Table 1 - Calendar for tasks and milestones**

|  |  |
| --- | --- |
|  | **Month** |
| **Task** | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 1. Recruitment of experts |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2. Creation and adoption of detailed work programme |  |  | MSA |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3.Creation of dedicated WG to support the activity |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4.Drafting and launch of project website |  |  |  | MSB |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 5.Consultation of ESO TCs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 6.Consultation of cities, EU projects etc. |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 7. Involvement of other SDOs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8. Web-based Workshops |  |  |  |  |  |  |  | MSC |  |  | MSD |  |  |  |  |  |  |  |  |  |  |  |
| 9. First draft report |  |  |  |  |  |  |  |  |  |  |  |  | MSE |  |  |  |  |  |  |  |  |  |
| 10. Interim report to EU/EFTA |  |  |  |  |  |  |  |  |  |  |  |  |  | MSF |  |  |  |  |  |  |  |  |
| 11. Public comment phase |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 12. Open meeting |  |  |  |  |  |  |  |  |  |  |  |  |  |  | MSG |  |  |  |  |  |  |  |
| 13. Resolution of comments, preparation of final draft for approval |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 14. Final Report to Commission/EFTA |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | MSH |

Following are the main activities the STF will undertake:

Task 1 – expert recruitment and set-up of the Specialist Task Force (to be performed by ETSI TC HF and the ETSI Administration).

Task 2 - detailed organisation of the activity including drafting and adoption of the work plan (months 3 and 4)

Task 3 - preparation and launch of the dedicated project website and subsequent maintenance (months 3 and 4, then throughout project)

Task 4 - consultation of TCs, and other technical activities, EIP and MSP and other stakeholders (months 6-21)

Task 5 - preparation of material for and handling of first web meeting (months 6-9)

Task 6 - preparation of material for and handling of second web meeting (months 9-12)

Task 7 - preparation of first draft of the Technical Report and inclusion of ETSI HF comments for opening for public comment (months 10-14)

Task 8- preparation of draft interim report to EC and EFTA on the action (months 14 and 15)

Task 9 - preparation and handling of open meeting to discuss draft report; preparation and execution of first stakeholder satisfaction survey (months 14-16)

Task 10 - preparation of proposals for the resolution of public comments and organisation of the resolution meeting (months 18-20)

Task 11 - preparation of final draft Technical Report, and its finalisation for publication following ETSI HF approval (months 19-21)

Task 12 – preparation and execution of final stakeholder satisfaction survey (months 20-22)

Task 13 - preparation of draft final report to EU and EFTA on the action (months 22-23)

Task 14 - overall project management, Steering group, and presentations to relevant interested entities (all through)

**Table 2: Proposed allocation of resources per Tasks**

The following table details the proposed allocation of resources per task:

| **Activity No.** | **Title** | **Description** | **Est. effort** | **Remarks** |
| --- | --- | --- | --- | --- |
| 1 | Expert recruitment and organisational set-up | Expert selection snd organisational set-up | 0 | To be covered by ETSI TC HF and ETSI Administration |
| 2 | Project organisation | First team meeting, drafting and agreement of work plan, creation of proposals for Steering group, etc. | 20 | Work Plan and Ref Group for TC approval. Travel required. |
| 3 | Website | Preparation and launch of site, ongoing maintenance throughout project lifespan | 10 |  |
| 4 | Consultation | Outreach approaches to TCs, EIP, MSP, other stakeholders; dialogue as appropriate; recording/reporting of results | 30 | Fundamental to project, needs to be worked on throughout. Some travel required. |
| 5 | First web meeting  | Drafting material, organisation of meeting, recording/reporting results | 5 |  |
| 6 | Second web meeting | Drafting material, organisation of meeting, recording/reporting results | 5 |  |
| 7 | First draft of the Technical Report  | Drafting material, consulting ETSI HF and incorporating their comments  | 35 |  |
| 8 | Interim report on the action | Drafting report for EC/EFTA on the action so far | 3 |  |
| 9 | Open meeting to discuss draft Technical Report | Organisation of meeting, recording results, preparing, executing and recording initial stakeholder satisfaction survey | 20 | In collaboration with relevant ESO Secretariat. Travel required. |
| 10 | Public comment process | Preparation of proposals for the resolution of public comments and organisation of the resolution meeting | 5 |  |
| 11 | Preparation of final draft Technical Report | Following resolution meeting, and includes editing final version for publication following ETSI HF approval | 10 |  |
| 12 | Final stakeholder satisfaction survey | Preparing and executing survey, recording results | 4 |  |
| 13 | Final report on the action  | Drafting final report for EC/EFTA | 3 |  |
| 14 | Project management and promotion | Includes also presenting the project to relevant general meetings and organisation of the Steering Group | 30 | Runs throughout the project. Travel required. |

**Part III: Financial part**

# Financial provisions in the EC/EFTA contract

## Total action costs

180 units are envisaged to be necessary to carry out the proposed activities, totalling **145.291,80 €** (lump sum plus 30 000 € sub-contracting cost).

Note: The ETSI unit cost is 640,51€ – 180 units x 640,51 = **115 291,80 €**

* Manpower budget: 92 891,80 €
* Travel budget: 22 400,00€
* Subcontracting to external organisations (“Open Meeting”): 30 000€

## Direct (eligible) costs

N/A

## Travelling costs

STF travel will be needed to attend meetings of the SSCC-SF, MSP, EIP, plus in addition to other events, conferences etc., where promotion of the activity and/or securing of feedback is desirable. In addition, as well as probably three STF physical meetings in Sophia there will be a need for some attendance at ETSI TC HF meetings.

**Possible list of travels**

| **Name** | **Date** | **Place** | **# Meetings** | **# Participants** | **Estimated budget** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
| Project Open Meeting | Dec-2019 | Brussels or Sophia | 1 | 4 | 3 200,00€  |  |
| Meetings of CEN-CENELEC-ETSI SSCC-SF and new TC |  | Brussels or sometimes elsewhere | 4 | 1 | 3 200,00€ |  |
| Meetings of ETSI HF |  | Sophia or elsewhere alternate | 4 | 1 | 3 200,00€ |  |
| Meetings of MSP |  | Brussels | 2 | 1 | 1 600,00€ |  |
| Meetings of AIOTI |  | Anywhere | 2 | 1 | 1 600,00€ | GA or IoT week or other |
| Meetings of EIP-SCC |  | Anywhere | 2 | 1 | 1 600,00€ | GA or User Cluster |
| ISO/IEC/ITU |  | Geneva? | 1 | 1 | 800,00€ | Could paricipate in one body if no combined opportunity |
| ICT 2019 |  | Anywhere | 1 | 1 | 800,00€ | Or 2019 event |
| OASC summer 2019 |  | Aarhus | 1 | 1 | 800,00€ |  |
| ETSI TC Meetings, other conferences |  | Anywhere | 7 | 1 | 5 600,00€ | One M2M, another... |
| **Total covered** |  | **25** |  | **22 400,00€** |  |

## Equipment necessary to implement the action

N/A

## Cost of consumables and supplies necessary to implement the action

N/A

## Other costs and services necessary to implement the action

N/A

## Subcontracting to external organisations

Assuming the proposed Open Meeting is held in Brussels, a sub-contracting budget of 30 000 € is required for hire of premises should these not be available free of charge.