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| ToR STF 652 (Ref. Body TC HF) |
| Version: 1.2 |
| Author: Martin Böcker – Date: 2022-07-28 |
| Last updated by: ETSI Secretariat – Date: 2022-09-23 |
| page 1 of 20 |

Terms of Reference –Specialist Task Force Proposal

STF 652 (Ref. Body TC HF)

**User Centered Terminology**

Summary information

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| Approval status | Approved by Ref. Body TC HF (doc ref: HF(22)000012) | | **YES** |
| Approved by Board#139 (6-8 September 2022) | | **YES** |
| Reference Body | Ref. Body TC HF | | |
| ETSI Funding | **Maximum budget : 89.520,00 €** **EUR** | | |
| Minimum of 4 ETSI Members Support | **YES** | | |
| Time scale | **From** | 2022-11-21 | |
| **To** | 2024-05-31 | |
| Work Items | REG/HF-00301563 (July 22, 2022) (doc ref.: HF(22)000011r3) | | |
| Board priority | [ETSI STF funding criteria](https://portal.etsi.org/STF/STFs/Funding/ETSIbudget.aspx)   |  |  | | --- | --- | | Priority Criteria | **X** | | Maintenance of standards in mature domains | X | | Innovation in mature domains |  | | Emerging domains for ETSI |  | | Horizontal activities (quality, security, etc.) | X | | Societal good / environmental | X | | | |

Part I – STF Technical Proposal

# Rationale & Objectives

## Policy Relevance

The first of the areas for action in COM(2010) 636 (the "European Disability Strategy 2010-2020") is accessibility which it defines as meaning that:

"people with disabilities have access, on an equal basis with others, to the physical environment, transportation, information and communications technologies and systems (ICT), and other facilities and services."

Effective access to ICT will depend on the user being able to understand all of the features (such as the controls and capabilities) of the products and services that are required to operate it. To discover and understand these features, a user must first identify and recognize them. The names of these features will be a primary means by which a user can recognize and understand them.

If product and service features are poorly named, or if a familiar feature is named differently to the way that a user has previously encountered that feature, the user is likely to fail to recognize and understand it. If users fail to recognize and understand it, they are unlikely to be able to use it effectively. Learning to use ICT will always require a user to identify and then memorize the names of the various product features. This will always be a significant task for all users, but for older users and users with learning or intellectual disabilities this initial memorization task will be more challenging than for other users.

Having terms that have clear and well understood meanings will aid this initial memorization task. However, if the terms for features are different from product to product, users will need to learn that multiple terms refer to the same underlying feature and will need to understand which name is used in which product (or in the worst case in different parts of the same product). This additional complexity will disproportionally disadvantage those older users and users with learning or intellectual disabilities who have impaired memory and comprehension abilities.

ETSI Guide EG 203 499 “Human Factors (HF); User-centred terminology for existing and upcoming ICT devices, services and applications”, created by ETSI STF 540 and published in August 2019, addresses the need for harmonised user-centred terminologies by providing selected terms in five languages (English, French, German, Italian, and Spanish) that are based on empirical analysis and that cover a range of device-related and service- and application-related terminologies. Version V2.1.1. of EG 202 499, published in July 2022, expanded the list of languages covered to 19 (adding those official EU and EFTA languages that are spoken by more than five Million native speakers, i.e. Bulgarian, Croatian, Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Portuguese, Romanian, Slovak, Spanish, and Swedish).

In its “ROLLING PLAN ON ICT STANDARDISATION 2020” the European Commission listed clause 3.1.10 “Accessibility of ICT” that the list of languages in EG 203 499 should be extended to cover all official EU/EF languages:

**Action 8:** SDOs to consider and propose a possible expansion of the vocabulary and language coverage of EG 203 499 (currently under production) to all official EU/EFTA languages (and possibly, the minority languages used in Europe). EG 203 499 will specify a basic, most frequently used set of user-centred and accessible ICT terminology for existing and upcoming devices, services and applications (currently covering only five languages: English, French, German, Italian and Spanish).

Similarly, the draft RP2023 “Accessibility of ICT products and services” states:

Standards could be evaluated to produce a guide to user-centred terminology for all potential users in several EU languages, focusing on the benefits for those with learning and cognitive disabilities. The preponderance of different names for the same ICT features and functions is confusing for all people, but this can be a significantly more important problem for older users or users with learning and cognitive disabilities. This has a negative impact on individual citizens and on the size of the ICT market. A guide would provide benefits for all potential users, particularly older users and users with learning and cognitive impairments who are currently partly excluded from benefiting from the use of modern ICT.

EG 203 499 contributes to the reduction of ICT terminology confusion benefitting all and helps removing a barrier to the effective usage of ICT for older users or users with learning and cognitive disabilities. While EG 203 499 is beneficial for all users, its effects are even more important for people with accessibility needs. The removal of this barrier is one step towards meeting the aims of the UN Convention of the Rights of Persons with Disabilities (UNCRPD) and of the European Accessibility Act (Directive (EU) 2019/882 of 17 April 2019) with regard to these groups of ICT users.

The harmonised terminology of ICT user experience device and service features across device manufacturers and service providers published in EG 203 499 reduces the need for each individual player to invest costs for defining terms, ensures a consistent terminology within each company while at the same time increasing interoperability (of particular importance for service providers whose customers use several different devices).

It supports COM(2010) 245 "A Digital Agenda for Europe", section 2.2. "Interoperability and standards" states that:

"We need effective interoperability between IT products and services to build a truly digital society."

Whereas this Communication talks exclusively about interoperation between technical systems, the ability of a person to effectively communicate with a range of different products and services is equally important and can only be achieved if people recognize and understand the terminology that describes the functionality of those products and services. Greater use of a standardized set of user terms among diverse products and services is one way to achieve this human-centred interoperability.

In section 2.2.2 "Promoting better use of standards", COM(2010) 245 talks of "selecting standards which can be implemented by all interested suppliers, allowing for more competition and reduced risk of lock-in" in the context of publicly procured ICT. If all suppliers adhered to a common set of terms for core functionality, lock-in due to user familiarity with proprietary terms for these functions would be eliminated or reduced.

In 2.6.1, "Digital literacy and skills", COM(2010) 245 states that:

"It is essential to educate European citizens to use ICT and digital media."

If all ICT and digital media use different terms for the same functions, the task of providing general digital literacy and skills will be greatly hampered as the knowledge and skills that were taught based on one terminology set used by a certain range of ICT could not be directly applied to the use of ICT systems that utilise different terminology to describe the same functionality.

What is needed now and what is the aim of the proposed action is the extension of languages covered in EG 203 499 in include the remaining official languages of the EU / EFTA (i.e., those not covered by the most recent revision of EG 203 499).

## Rationale

Work that included the topic of user-centred terminology was started by ETSI TC Human Factors in 2002 and EG 202 132 (“Guidelines for generic user interface elements for mobile terminals and services”), that recorded the terminology terms in English, was published in 2004. Work item DEG/HF-00138 was created in order to produce an ETSI Guide that extends the terminology work that was initiated in EG 202 132 to:

* bring the set of functions up to date with new features/services including mobile and web-based applications, as well the setting-up of and access to the Internet;
* extend the terminologies to include tables in more languages (English, French, German, Italian and Spanish were covered in the first version of the document and 14 more languages were added in the 2022 revision);
* initiate the work within the framework of an STF with close co-operation with industry and other key players.

These tasks identified in the work item were those that were addressed in EG 203 499.

The subject of the proposed action is the extension of that EG to add the remaining official EU / EFTA languages (and possibly other important European languages).

## Objectives of the work to be executed

Terminology deals with terms and their use (a term is a name for an object). In most cases, the terms used for everyday objects have developed over the centuries and are taught to children as some of the words that make up their mother tongue. Problems arise when new objects (e.g., new ICT services or device functionalities) are given names that are not self-explanatory or immediately understood. The situation gets worse when different manufacturers or service providers use different terms for identical functionalities. This hampers the detection and uptake of those features and functionalities and hinders an easy migration of users between terminals and services of different providers.

ETSI STF 540 developed EG 203 499 with the aim of formulating a set of language-specific terminologies for the basic ICT features commonly used across a range of ICT and to publish the recommended terminologies in the form of an ETSI Guide (EG). An ETSI Guide was preferred to a Standard due to the need to gain acceptance after experience with its application. Wide acceptance by relevant stakeholders may lead to a later transition into an ETSI Standard.

14 more languages (Bulgarian, Croatian, Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Portuguese, Romanian, Slovak, Spanish, and Swedish) were added to EG 203 499 in 2022 through the work conducted by ETSI STF 604.

Simple dictionary-based translation of the terms used for ICT functions from one language to another will not produce optimum results and will, in some cases, lead to the use of terms that are confusing or ridiculous (the user instructions of some products produced in East Asia are a legendary example of how such dictionary translations can produce incomprehensible and sometimes comical results).

The proposed action would be carried out with the aim of continuing the work of STF 540 and STF 604, extending the terminologies in EG 203 499 to cover the official remaining EU / EFTA languages.

The way of working of a future STF would include:

1. To identify and interact with localised domain experts, briefing them on the methodology used for the development of EG 203 499 and providing any assistance needed during the development of terminologies in their respective languages.
2. To organise stakeholder meetings to ensure the support of relevant players such as device manufacturers, application providers, and users with disabilities.

The results of the proposed action will extend the available terminologies to the remaining official EU / EFTA languages (Estonian, Icelandic, Irish, Latvian, Lithuanian, and Maltese - Raeto Romance to be confirmed) and possibly other important European languages (e.g. Turkish as spoken in EU country Cyprus).

As well as the linguistic support provided by the language-specific domain-experts, the STF will be further supported by means of a “Reference Group” (an approach that has proved useful in previous standardization actions including industry and others such as representatives of organisations for people with cognitive impairments using contacts available from the activity of STF 488 and STF 540). Within this reference group, there should be at least one representative for each language covered.

The intention of the proposed action is to converge on a set of terms that are commonly supported in a wide range of ICT contexts and systems. In doing this, the number of cases will be minimized in which suppliers or operators will need to change their current terminology.

The ideal situation would be for all key ICT market players to agree a common set of ICT functions and to also agree that they are prepared to endorse and then use the terms identified in the proposed action. Given the market dominance of the major software platform providers, they may not be willing to change all of the terms that they currently use in order to conform to the proposed ETSI Guide (EG). To maximize the impact of the proposed action the aim will be to work towards a hierarchy of actions related to the terminology used by ICT suppliers. In order of preference, the desired outcomes are that the supplier will either:

* change all of the terminology used across their entire portfolio to align with the terminology in the EG;
* change most of the terminology used across their entire portfolio to align with the terminology in the EG but persist with using alternative terms to describe some functions for which a standard term exists within the EG (e.g. because the supplier believes that their user-base would be confused by a change in the terms used to describe important and commonly used functions);
* to agree to change some terms used in their product portfolio and identify how the other functions map to the functions used in the EG. Although this would result in the use of terms that differ from those identified in the EG, it would allow operators that offer these devices to their customers to produce user documentation that can clarify the meaning of the functions to its users, potentially identifying the two alternative descriptions for the same function.

Supplier feedback on EG 203 499 is encouraging and promises a positive uptake of terminologies in additional European languages once they are covered by a further release of that ETSI Guide

## Previous funded activities in the same domain

TC HF received funding under a EU action grant for the development of EG 203 499 v2.1.1 in 2021 and 2022. Overall budget for this activity was 136,200 Euro.

## Market impact

When earlier work in the area of terminology was commenced, the ICT marketplace, and the telecommunications market in particular, was very different to what it is today. At that time the market was dominated by a small number of major handset manufacturers, each with their own proprietary user interfaces. Mobile operators offered handsets from these manufacturers and the experience that they provided to their customers was significantly impacted by the terminology used within the handset and its accompanying user documentation.

The current marketplace has now changed so that mobile operators offer products from a much larger range of device manufacturers. However, the core functionality of these various devices is determined by the capabilities of the underlying software platforms and there are now a very small number of dominant platform providers.

Many widely used ICT applications relied upon by end-users, are developed by developers working within a wide range of large and small software development companies. The availability of a set of multi-language terminologies for the basic commonly used ICT features is a highly valuable resource for these application developers to help them make their applications more usable and more readily accepted by users familiar with the common terms. In particular, manufacturers and service providers save resources otherwise to be invested in (a) selecting terms and implement them in prototypes, (b) usability testing and, depending on the results, re-designing the interface based on different terms, (c) updating user guides and other reference materials issued to end users, ensuring a consistent terminology, and (d) providing a clearer and easy-to-understand marketing message. In addition, they reduce the risk of market failure of products that don’t meet user acceptance due to misunderstandings from the user side.

The multiple language terminologies also enable them to more easily offer their applications in a range of different languages as many of the terms that they need to use will already be provided for them. The ready availability of these terms in a range of languages will significantly reduce the time and costs incurred in localizing their applications to those languages.

Those organizations that supply ICT to users (whether they be commercial mobile service operators or companies supplying devices to their users) wish to have the freedom to offer a wide range of applications and devices to their users and to allow those users to easily operate these applications devices without having to learn a set of unfamiliar terms to describe functions that they were previously able to use.

This action will make it very much easier for organizations that provide ICT to users who don’t speak the major EU / EFTA languages to acquire that ICT from a range of suppliers without risking users becoming confused because of the diversity of terminology used on products from different suppliers.

This action would also allow organizations that offer ICT from multiple suppliers to offer user documentation that requires the minimum of adaptation to take account of the subset of functions that do not conform to the terminology specified by the EG. This should significantly reduce costs where an organization wishes to support a diverse range of ICT from multiple suppliers.

In addition, harmonised terms will support existing and emerging eServices for older and/or disabled users and citizens in a variety of languages. This will help service providers to enhance e-Inclusion by increasing the range of people who are able to effectively utilise solutions by understanding and recognising the meaning of offered features and services and developing realistic expectations about the outcome of the use of those features.

## Consequences if not agreed

Completing the EG with all official European languages would make it possible to (i) make the EG to an EN which would become important for the European Accessibilty Act. The European Commission has made this clear in the ICT RP 2023. It is, however, clear that the Commission will not fund this finalization of the EG 203 499.

Without the proposed STF the results of the earlier STF(s) will remain relevant but cannot be used as a EAA-related standard.

# Relation with ETSI strategy and priorities

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| **Priority Criteria** | **Rationale** |
| Maintenance of standards in mature domains | X |
| Innovation in mature domains |  |
| Emerging domains for ETSI |  |
| Horizontal activities (quality, security, etc.) | X |
| Societal good / environmental | X |

# ETSI Members Support

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| **#** | **ETSI Member** | **Supporting delegate** |
| 1 | BMWK | Martin Böcker |
| 2 | Volkswagen | Matthias Schneider |
| 3 | Commledge | Emmanuel Darmois |
| 4 | Hillebrand CE | Mike Pluke |

# Deliverables

## Base documents

|  |  |  |
| --- | --- | --- |
| **Document** | **Title** | **Status** |
| ETSI EG 203 499 | User-centred terminology for existing and upcoming ICT devices, services and applications | Version 2.1.1 |

## New deliverables

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| --- | --- | --- | --- |
| **Deliv.** | **Work Item code**  **Standard number** | **Working title**  **Scope** | **Expected date for publication** |
| D1 | REG/HF-00301563  ETSI EG 203 499 | User-centred terminology for existing and upcoming ICT devices, services and applications, | T0 + 18  (31-03-2024) |

# Maximum budget

## Task summary/Manpower Budget

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| --- | --- |
| **Task short description** | Budget (EUR) |
|
| STF management | 5.940 |
| Develop STF Methodology | 5.280 |
| ETSI Guide Development | 23.100 |
| Consultation and Dissemination | 7.920 |
| STF Validation | 2.640 |
| STF Conclusions | 2.640 |
| **TOTAL** | **47.520** |

## Travel budget

Travel will be required for:

* Meetings with TC HF: travels to ETSI premises
* Meetings for initiating work with languages experts: 7 European travels
* Workshop and conference for Dissemination: 3 European travels

It may be possible to replace a very limited number of these travels by online meetings.

Overall estimate is max **14.000 Euro**

## Other budget line

For potentially most of the languages third party contractors will have to be recruited to perform the work for Task 3. For that purpose, a subcontracting budget is foreseen. This is based on the assumption that the project will need subcontracting of local language experts for 7 languages, with an average of 4.000 Euro/language. The tasks to be performed based under this budget include potential translation activities where desktop research does not lead to the expected results.

Estimated cost of this sub contracting **28.000 Euro**

Part II – Details on STF Technical Proposal

# Tasks, Technical Bodies and other stakeholders

## Organization of the work

* 1. **Specialist Task Force (STF)**

ETSI will perform this work with the support of an ETSI STF, reporting the milestones to the ETSI Human Factors Technical Committee (TC HF), according to the planned TC HF meeting agenda (to be planned in more detail) and additional dates agreed by the HF chairman. TC HF will take an active role in steering and contributing to this work.

The technical content will be developed through consultation with stakeholders, workshops, and desk-based research.

In the context of this proposal relevant stakeholders to be consulted are:

* Equipment manufacturers and service providers. They are expected to implement the resulting terminologies in their products and services (see section 7 for further details).
* A selection of companies that have in the past been successfully involved in HF STF work, as well as the current market leaders. Those include Samsung, T-Mobile, Vodafone, Telenor, Apple, Google and others (directly, or through a subsidiary such as, for example, Motorola Mobility to Google).
* Organisations representing consumers (ANEC), disabled and/or elderly users (EAO, EDF).
* Public authorities, industry organizations.
* Additionally, the STF will also invite players that haven’t been involved so far in HF STF work and that address the markets covered by the selected languages.

In particular, the STF will:

* co-ordinate all activities of the STF team, the co-operation partners and the stakeholders to ensure the creation of high-quality terminologies that are accepted and taken up by the various commercial stakeholders;
* co-ordinate work sessions with the members of TC HF in order to present (interim) results and to collect and accommodate their input;
* identify academic and/or commercial co-operation partners who cover the target languages to be covered (to be identified, see Task 2);
* create the revised EG with recommended terms in languages covered and recommendations on terminology management for user education;
* conduct workshops (virtual or face to face) and other dissemination activities with relevant stakeholders to seek guidance and input and ensure the uptake of the recommended terms (see task 3 in section 7 of this proposal).
  1. **Other interested actors**

Co-ordination with various stakeholders, including user representatives as well as standards organizations (ISO/IEC CEN/Cenelec, ITU) and possibly other international projects will be necessary to achieve the best outcome of this work.

Stakeholders will be encouraged to provide comments on the EG, either as members of a “Reference Group”, at meetings and events or by e-mails. The Reference Group is a selected number of company representatives and other identified stakeholders with know how in the area of user interface design and localization. Their input and advice need to be complemented by the input from other stakeholders (user group representatives, etc.). The Reference Group will be set up in the initial phases of the project for a first consulting activity prior to Milestone A in the work plan below.

Drafts of the EG will be made publicly available at the STF portal page at several stages throughout its development when agreed by TC HF.

* 1. **Expertise required (qualification, mix of skills, etc.)**

The STF work will be performed by 2 experts with the mix of competences required to achieve the proposed action. They will become members of the STF team. One of the experts will be appointed as the STF Leader and will be responsible inter alia for the consolidation of the documentation, coordination of the STF activities and the provision of the required progress reports to TC HF and of the Progress and Final Reports to TC HF and ETSI.

A call for experts will be published. Applicants must provide the following mix of expertise:

* For the STF leadership, a proven record of standards project delivery, strong knowledge of project management, report writing, consensus building, presentation skills,
* Human Factors experience in working with intelligent communications networks, ICT user interfaces, accessibility of fixed-network and mobile communication;
* Specific expertise in the area of user experience design, technologies and innovations;
* Specific expertise in the area of current and forthcoming ICT technologies and eServices;
* Specific expertise in the area of Design for All (requirements of elderly and/or disabled people and technical solutions for addressing those);
* Specific expertise in linguistic and/or foreign-languages skills and experience;
* Experience of working in the international environment.

Co-ordination and co-operation will be done with all interested stakeholders. A Reference Group of stakeholders will be established for more intensive feedback and co-operation. Those stakeholders will include device manufacturers, service providers, application developers, and accessibility experts, which will be the voice for organizations representing consumers (e.g. ANEC) and the communities of users with accessibility requirements (e.g. EDF). STF communications and promotion to these stakeholders will be done by different means such as:

* Presentations to various groups and stakeholders: at least two F2F or remote presentations, and more as triggered as contacts are established.
* Provision of information on the STF Web page to stakeholders about STF activities, and the availability of the most current draft for comments: STF Web page created three months after STF established, one update of the contents at least once a month during the runtime of the STF.
* E-mails to the group of stakeholders, often before and after stakeholder events: at least one mail per month with status information;
* At least one workshop (in the form of a continuous dialogue and/or a virtual or face to face meeting) with the Reference Group and other stakeholders.

**As required by any specific agreement, the STF will provide information in relation to the above that will act as performance indicators against this activity in the following cases**

## Tasks for which the STF support is necessary

The STF is necessary for all tasks described below in section 7. TC HF does not have the size and support from ETSI members to do this work without STF funding Moreover, there are no experts in the target languages within TC HF.

## Other interested ETSI Technical Bodies

N/A. The results of the work will be interesting to all ETSI members providing devices or services to the public.

## Other stakeholders

Interested stakeholders include device manufacturers, service providers, application developers, and accessibility experts, which will be the voice for organizations representing consumers (e.g. ANEC) and the communities of users with accessibility requirements (e.g. EDF)

Part III: Execution of Work

# Work plan, time scale and resources

## Task description

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| **Task0** | **STF Management** |
| **Objectives** | Provide appropriate development of the work in term of quality and timely delivery to ETSI TC HF |
| **Input** | ETSI secretariat for STF management, TC HF to review and approve the technical work, relations with other organizations inside / outside of ETSI, as described in section 6. |
| **Output** | Project Management,  Progress Reports (Milestone A/B/C) to TC HF  •Final Report (Milestone D) to TC HF |
| **Interactions** | As described in clause 6 of this STF proposal. |
| **Resources required** | 5 940 Euro |

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| **Task 1** | **STF Methodology** |
| **Objectives** | The methodology used in STF 614 will no longer work for the new target languages, as for these languages no user guides are available for the translation task. The STF therefore has to find and agree on an alternative methodology to collect the contents of the language tables. |
| **Input** | Draft versions of EG 203 499 v3.1.1, list of interested stakeholders |
| **Output** | Clear description of the methodology to be shared with external experts. |
| **Interactions** | The translation of ICT terms into the selected target languages will be based on the list of terms already developed in EG 203 499. There will be no need for the identification of additional terms.  The task will finalise the selection of the languages addressed by the STF (at least 6, possibly 7). These languages will be different from the 19 languages analysed in EG 203 499 V2.1.1. It will not be possible to rely on existing documentation (e.g., Manufacturers do not currently support the newly analysed languages so that User Guides are not available) and a new methodology will have to be defined and agreed upon.  The provision of the terminology in the target languages (i.e., the localisation) is a task that goes beyond mere translation. The task includes the analysis of the terms used by the main industry players, and the selection of the recommended terms based on the use by those industry players and based on the suitability of the terms to represent the concepts in question. In many cases (as was learned in the previous work on the first release of the EG) new terms are recommended that are better suited for comprehension by users with a wide range of cognitive capabilities than the ones currently employed.  The localisation activities will be performed by local experts. If possible, local university departments will be selected to support/perform the translation and validation process. Alternatively, localization experts may be identified or even be allocated by or with the help of NSOs. If that effort is unsuccessful, alternative local language experts have to be selected and contracted to perform this task  For each language, local language experts which can support the translation process have to be identified, selected and trained.  The tasks which must be performed by the STF team are   * Explanation and “teaching” of the methodology to the involved local experts / teams * Selection of tools/devices/apps used for the desktop analysis work of the local experts. |
| **Resources required** | 5.280 Euro |

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| **Task 2** | **ETSI Guide Development** |
| **Objectives** | **Develop version 3.1.1 of the ETSI Guide** |
| **Input** | EG version 2.1.1 |
| **Output** | An initial draft of the ETSI EG will be developed collecting the initial list of terms in all selected languages. This draft will be the basis for the validation workshops of Task 4. This draft will contain draft terms in the languages covered. The deliverables will be reviewed and approved by ETSI TC HF.  The tasks which must be performed by the STF team are   * Supervision and validation of the local expert work and results * Analysis and validation of the final delivery, i.e., the result table (jointly with the local teams) |
| **Interactions** | Approval of various draft versions by TC HF |
| **Resources required** | 23.100 Euro |

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| **Task 3** | **Consultation and Dissemination** |
| **Objectives** | Presentation of the results of the translation activities to ICT companies, regulators, and other stakeholders in the countries in which the new languages are used. For this, relevant stakeholders need to be identified and informed about the project, its schedule, and the expected results. These stakeholders will the also be invited to participate in the validation workshops organized in the course of Task 4 below.  To ensure the uptake of the terminologies developed during the course of this work the following activities are planned:   * Presentations to identified manufacturers of ICT devices and service providers to raise awareness and lobby for implementation activities through these companies. * Presentation at relevant workshops and conferences to discuss and improve the solutions developed. |
| **Input** | Various drafts of EG version 3.1.1 and list of interested stakeholders |
| **Output** | New versions of the EG draft with comments taken into account |
| **Interactions** | Various drafts to be approved by TC HF |
| **Resources required** | 7.920 Euro |

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| **Task 4** | **ETSI Guide Validation** |
| **Objectives** | One consultation and consensus workshop per target language with stakeholders will be held with the main purpose of receiving comments about the list of terms developed for the target languages. These workshops may be held as online meetings.  The deliverable will be updated according to the input from the workshops. The final draft deliverable will be submitted to TC HF for approval. Updates resulting from any comments received in this approval process will be made before sending the draft to the ETSI Secretariat for publication. The STF will also prepare the Final Report to EC/EFTA. The published ETSI deliverable will be provided together with the Final Report and the necessary elements such as performance indicators and information about resources spent and costs. |
| **Input** | Existing draft of the EGIdentify the base documents/information/decisions that are required to perform the task and, if these are not yet available, at which point in time they are needed and who is responsible to provide. |
| **Output** | Next revision of the draft EG |
| **Interactions** | See above (Objectives) |
| **Resources required** | 2640 Euro |

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| **Task 5** | **STF Conclusions** |
| **Objectives** | The STF will prepare the Final Report for approval by TC HF. All the issues related to the publication of the Deliverable EG 203 499 will be addressed This includes the handling of the (complex) document by editHelp and the publication of the languages tables on the ETSI Forge. |
| **Input** | Final draft EG version 3.1.1 and voting result |
| **Output** | Published EG and updated Forge tables |
| **Interactions** | With Edit Help only, report to be sent to HF and approved |
| **Resources required** | 2640 Euro |

## Milestones

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| **Milestone** | **Description** | **Cut-Off Date** |
| **A** | Initial draft approved | T0 +6  **(2023-06-15)** |
| *Reference Body Deliverable* | Initial draft of DEG/HF-203 499 (v3.1.1) available for TC HF approval. |
| *ETSI Deliverable* | Progress Report #1 to TC HF approved |

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| **Milestone** | **Description** | **Cut-Off Date** |
| **B** | Interim Report approved | T0  +10  **(2023-09-30**) |
| *Reference Body Deliverable* | Interim draft available |
| *ETSI Deliverable* | Progress Report#2 approved by TC HF |

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| --- | --- | --- |
| **Milestone** | **Description** | **Cut-Off Date** |
| **C** | EG ready for member voting | T0 + 14  **(2024-01-31)** |
| Reference Body Deliverable | Final draft of DEG/HF-203 499 to be approved by TC HF and submitted to ETSI member vote |
| ETSI Deliverable | Progress Report#3 approved by TC HF |

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Description** | **Cut-Off Date** |
| **D** | EG published, STF closed | T0 +18  **(2024-05-31)** |
| *Reference Body Deliverable* | Publication of DEG/HF-203 499 |
| *ETSI Deliverable* | Final report approved by TC HF |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Code** | **Task / Milestone** | Target Date | | Estimated Cost (EUR) |
| From | To |
|  | Start of work |  |  |  |
| T0 | STF management | T0 | T0 + 18 | 5940 |
| T1 | STF Methodology | T0 +3 | T0 + 6 | 5280 |
| Milestone A | Initial draft of DEG/HF-203 499 (v3.1.1) available for TC HF approval.  Progress Report#1 approved by TC HF | T0+6 |  |  |
| T2 | ETSI Guide Development | T0 + 4 | T0 + 12 | 23100 |
| T3 | Consultation and Dissemination | T0 + 4 | T0 + 18 | 7920 |
| Milestone B | Interim draft available for TC HF  Progress Report#2 approved by TC HF | T0+10 |  |  |
| T4 | ETSI Guide Validation | T0 + 11 | T0 + 15 | 2640 |
| Milestone  *C* | Final draft of DEG/HF-203 499 to be approved by TC HF and submitted to ETSI member vote  Progress Report#3 approved by TC HF  EG ready for member voting | T0 + 14 |  |  |
| T5 | STF Conclusion | T0 + 16 | T0 + 18 | 2640 |
| Milestone D | EG published,  Final report approved by TC HF  STF closed | T0 + 18 |  |  |
|  | | | | **47520** |

Note: T0 is the effective starting date of the STF work!

## Task summary

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **Month** | | | | | | | | | | | | | | | | | |
| **Tasks** | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| T0 | STF Management |  |  |  |  |  |  |  |  |  | MIL  B |  |  |  |  |  |  |  | MIL D |
| T1 | STF Methodology |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T2 | ETSI Guide Development |  |  |  |  |  | MIL A |  |  |  |  |  |  |  |  |  |  |  |  |
| T3 | Consultation and Dissemination |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T4 | ETSI Guide Validation |  |  |  |  |  |  |  |  |  |  |  |  |  | MIL  C |  |  |  |  |
| T5 | STF Conclusion |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | MIL D |

# Expertise required

## Team structure

Up to 2 participants to ensure the following mix of competences:

|  |  |
| --- | --- |
| **Priority** | **Qualifications and competences** |
| High | For the STF leadership, a proven record of standards project delivery, strong knowledge of project management, report writing, consensus building, presentation skills, |
| High | Human Factors experience in working with intelligent communications networks, ICT user interfaces, accessibility of fixed-network and mobile communication |
| High | Specific expertise in the area of user experience design, technologies and innovations; |
| High | Specific expertise in the area of current and forthcoming ICT technologies and eServices; |
| High | Specific expertise in the area of Design for All (requirements of elderly and/or disabled people and technical solutions for addressing those); |
| High | Specific expertise in linguistic and/or foreign-languages skills and experience; |
| High | Experience of working in the international environment. |

Part IV: STF performance evaluation criteria

# Performance Indicators

|  |  |
| --- | --- |
| **Select relevant Performance indicators applicable for these ToR (X)** | |
| **Contribution from ETSI Members to STF work** | |
| Direct financial contribution (co-funding) |  |
| Support to the STF work (e.g., provision of test–beds, organization of workshops, events) | X |
| Steering Group meetings (number of meetings / participants / duration) | X (2 5 1) |
| Number of delegates directly involved in the review of the deliverables | 5 |
| Contributions/comments received from the reference Reference Bodies | X |
| Contributions/comments received from other Reference Bodies |  |
|  |  |
| **Contribution from the STF to ETSI work** | |
| Contributions to Reference Body meetings (number of documents / meetings / participants) | 3 / 4 / 1 |
| Contributions to other Reference Bodies |  |
| Presentations in workshops, conferences, stakeholder meetings | 3 |
|  |  |
| **Liaison with other stakeholders** | |
| Stakeholder participation in the project (category, business area) | See above |
| Cooperation with other standardization bodies | NSOs |
| Potential interest of new members to join ETSI |  |
| Liaison to identify requirements and raise awareness on ETSI deliverables |  |
| Comments received on drafts (e.g. on WEB site, mailing lists, etc.) | X |
|  |  |
| **Quality of deliverables** | |
| Approval of deliverables according to schedule | X |
| Respect of time scale, with reference to start/end dates in the approved ToR | X |
| Comments from Quality review by Reference Body | X |
| Comments from Quality review by ETSI Secretariat | X |
|  |  |

Time recording

For reporting purposes, the STF experts shall fill in the time sheet provided by ETSI with the days spent for the performance of the services

During the activity, the STF Leader shall collect the relevant information, as necessary to measure the performance indicators. The result will be presented in the Final Report.

# Document history

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Date** | **Author** | **Status** | **Comments** |
| 1.0 | 2022-08-01 | Matthias Schneider | In RC at TC HF |  |
| 1.1 | 2022-08-05 | ETSI Secretariat | Final Draft | Updates before Board#139 submission |
| 1.2 | 2022-09-23 | ETSI Secretariat | Final | Updates before CL publication |

Annex I Response to the Request for Proposals  
CfE – STF 652 (REFERENCE BODY TC HF) Deadline: 25/10/2022

**If you are an ETSI Member \***

**ETSI membership status (Indicate your status):**

 Full

 Associate

 Observer

**If you are not an ETSI Member \***

Please indicate:

**Full name of the ETSI member supporting the application (list of ETSI members on etsi.org):**

-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Official contact name of the ETSI member supporting the application:**

-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Note: A formal confirmation of the support from the Official contact is required (e.g. by e-mail sent to STFLINK@etsi.org) and an “ETSI Member Support Letter” will be required if you are selected.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Contractor information \*** | | | | |
|  | | | | |
| **Contractor name \*:**  *Indicate the Company/Organization Name* | |  | | |
|  | | | | |
| **Contact person for the technical aspects** | | **Contact person for Decision on ETSI financial offer to this project (if any)** | | |
| Title |  | Title |  | |
| First name |  | First name |  | |
| Last name |  | Last name |  | |
| Role |  | Role |  | |
| e-mail |  | e-mail |  | |
| Phone |  | Phone |  | |
|  | | | | |
|  | | **Yes** | | **No** |
| Do you or any employee of your Company/Organization hold an elected or appointed position in the Reference Body requesting the STF 652 creation? | | o  Indicate in which position:  ----------------------------------- | | o |
| **If you are self-employed candidate:**  Do you currently have other contracts in progress with ETSI? | | o | | o |

All fields marked with an asterix (\*) are mandatory

**1.1 Introduction**

A short presentation of the technical structure responsible for this activity, e.g.:

* Business area, number of employees, link to WEB site,
* Department(s)/team(s)/experts in charge of the technical activities related to this Project,
* Reference to products/services of your Company/Organization or supporting Member to which the standards developed by this Project will apply,
* Motivation for your Company/Organization or supporting Member to participate in this Project.

**1.2 Proposed approach**

**Proposed contribution to tasks & related cost**

Identify the tasks to which your Company/Organization is proposing to contribute by filling-in the table below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tasks\_No** | **Tasks\_Description** | **Max\_Budget\_Allocated\_in\_Euro** | **Amount\_in\_Euro\_(mandatory)** | **%\_of\_whole\_Task\_(mandatory)** |
| 00 | STF management | 5940 | . | . |
| 01 | STF Methodology | 5280 | . | . |
| 02 | ETSI Guide Development | 23100 | . | . |
| 03 | Consultation and Dissemination | 7920 | . | . |
| 04 | ETSI Guide Validation | 2640 | . | . |
| 05 | STF Conclusion | 2640 | . | . |

**Amount in Euro (mandatory)**: Indicate the price offered for your contribution to the task(s)

**% of whole task (mandatory)**: Indicate to which percentage of the execution of the whole task your offer corresponds

Provide a description of the proposed approach, competences, reference to related activities:

* Explain which part of the task is corresponding to the requested percentage that your Company/Organization will handle,
* Explain the scope that your Company/Organization will cover,
* Explain your approach to the management of the quality and,
* Explain your approach to the management of the risks and their mitigation,
* Describe and justify the proposed costs to achieve this project objectives.

Annex II Terms and Conditions  
CfE – STF 652 (REFERENCE BODY TC HF) Deadline: 25/10/2022

**2.1 Submission of Proposals**

All proposals in response to this CfE shall be submitted before the deadline indicated in thisCollective Letter, using exclusively the WEB application on the ETSI Portal at the following address: <https://portal.etsi.org/cfe>.

Proposals shall be composed of Curriculum Vitae of the proposed service providers’ personnel and the Annex I of this CfE duly filled-out.

Proposals that will be partial or incomplete at the deadline will not be accepted.

The Terms and Conditions in this Annex will apply.

**2.2 Modification and Withdrawal of Proposals**

Applicants may, without prejudice to themselves, modify or withdraw their proposal by written request, provided that the request is received by ETSI prior to the due date and time, at the address to which their proposal was submitted. The applicant may submit a new proposal provided that such new proposal is received prior to the deadline for responding which is specified in this Collective Letter.

**2.3 Assessment of Proposals**

The ETSI Director-General, in consultation with the Reference Body Chairman, is responsible for the selection of the service providers that will be contracted to perform this Project work. The ETSI Director-General and the Reference Body Chairman may be assisted by a Selection Panel to assess the applications received and make the final decision.

As per article 1.10.4 of the ETSI Directives, the Director-General may discard proposals that could be identified as creating potential conflict of interest.

The ETSI Secretariat will only communicate to the applicants the result of the selection (accepted or not accepted). Should applicants need more information on the rationale for the selection, they must address a formal request to the ETSI Director-General.

The following evaluation criteria will be applied to all proposals, in order of priority:

* Evidence that the applicant has the necessary structure and expertise to ensure delivery
* Reference to current or previous activities in the specific technical domain of this project
* Critical review of the most efficient way to achieve the objectives in this Project ToR
* Effective proposed approach/methodology for the execution of the tasks
* Implementation schedule
* Clear pricing policy

Compliance with the first two (2) criteria is mandatory.

Proposals that are not considered compliant with these criteria will be discarded.

Priority will be given to technical quality of the proposals. Pricing considerations will be taken into account to ensure that the best value for money is achieved. Compatibility with the maximum budget allocated to this Project will be verified before placing a Service Contract.

Following the assessment process, ETSI reserves the right to grant contracts to other than the cheapest proposals, to accept or reject any offer completely or in part, or to reject all proposals, without providing the reasons. If no offer is accepted, ETSI may decide to abandon the work or proceed in any other manner ETSI may select.

**2.4 IPR and confidentiality Agreements**

The information provided in this CfE, as well as the fact that the applicant has received the CfE, is considered confidential and protected under copyright laws. The applicant may not discuss, share, or use the information in this CfE for any purpose other than the response to this CfE.

ETSI will not disclose the content of any proposals to other applicants or any other party, with the exception of the persons involved in the assessment process described in §2.3 above.

However, ETSI reserves the right to make use of the information provided in this proposal to improve this project definition for the purpose of this CfE or any other manner in which ETSI may decide to proceed to select the service providers.

If successful, the applicant will be required to sign a Service Contract, which includes IPR and Confidentiality clauses aligned with the relevant policies in the ETSI Directives.

**2.5 Preparation cost**

ETSI will not be responsible for any costs or expenses that the applicant may incur in preparing and/or submitting the proposal.

**2.6 Service Contract**

A Service Contract will be proposed to the applicants that will be selected to perform the work.

Details on the Terms and Conditions of this contract can be found on the ETSI Portal, at the following address: <https://portal.etsi.org/STF/STFs/Contracts.aspx>