

“European accessibility requirements for public procurement of products and services in the ICT domain, Phase 1”

(EC Standardisation Mandate M 376 to CEN, CENELEC and ETSI)

ETSI STF333: Progress & status report and full technical Draft TR presentation

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STF 333 Leader

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Agenda

1. ETSI and TC Human Factors
2. The team
3. Our tasks, work and time plan
4. Coordination with stakeholders
5. Notes and issues
6. Detailed technical presentation

Questions welcome any time –please feel free to interrupt!

What is ETSI?

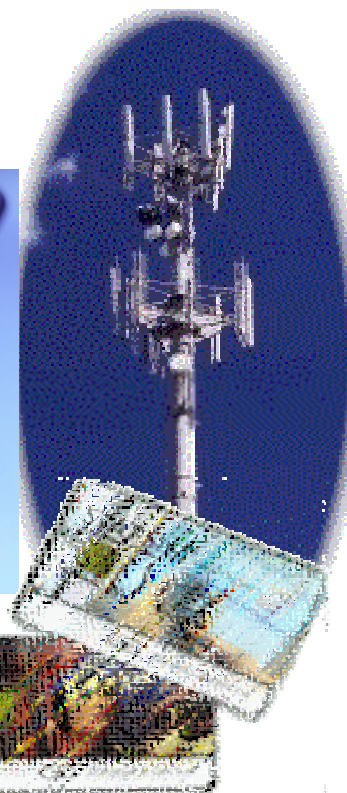
- **ETSI, the European Telecommunication Standards Institute**
- **A European standards organization, active in all ICT areas**
- **Independent, non-profit, created in 1988**
- **Officially recognized and co-funded by the EU & EFTA**
- **Setting globally-applicable standards for:**
 - **Telecommunications, in general**
 - **Radio communications, especially mobile**
 - **Broadcasting, and**
 - **Related topics**
- **Offering direct participation of all members**
- **More than 15,000 publications → all available for free!**



World Class Standards

ETSI

The home of the GSM™ standards...



... and ISDN, DECT, DAB, DVB ...



World Class Standards

ETSI
...and a founding Partner in



A GLOBAL INITIATIVE

It's a Standards World

International bodies



JTC1

Interregional Co-operation



- DECT Forum
- DVB Project Group
- EBU
- GSM Association
- IEEE
- IMTC
- IPv6 Forum
- TETRA Forum
- UMTS Forum
- & 50+ others

Europe



ETSI STF333 (M 37)

TSB/ DATSCG meeting

16, 2008



Global Standards Collaboration

Interregional collaboration on selected standardization subjects between

**isacc
cccnt**
(Canada)

TIA
(USA)

atis
(USA)



ARIB
(Japan)

TTC Telecommunication
Technology
Committee
(Japan)

TTA
(Korea)



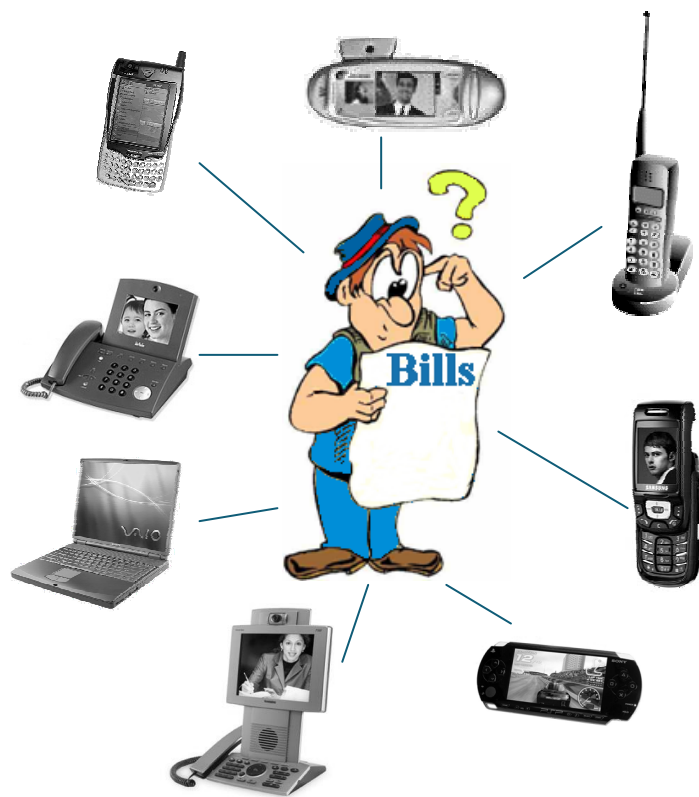
(International)



Communications Alliance

Next Generation Mobile Networks could deliver this:

Today



Tomorrow

ANY SERVICE – ANYWHERE



FREEDOM TO CHOOSE



ETSI

Please visit <http://www.ETSI.org>
or contact helpdesk@etsi.org

3GPP

Please visit <http://www.3GPP.org>
or contact 3GPPContact@etsi.org

TISPAN

Please visit <http://www.TISPAN.org>
or contact TISPANsupport@etsi.org

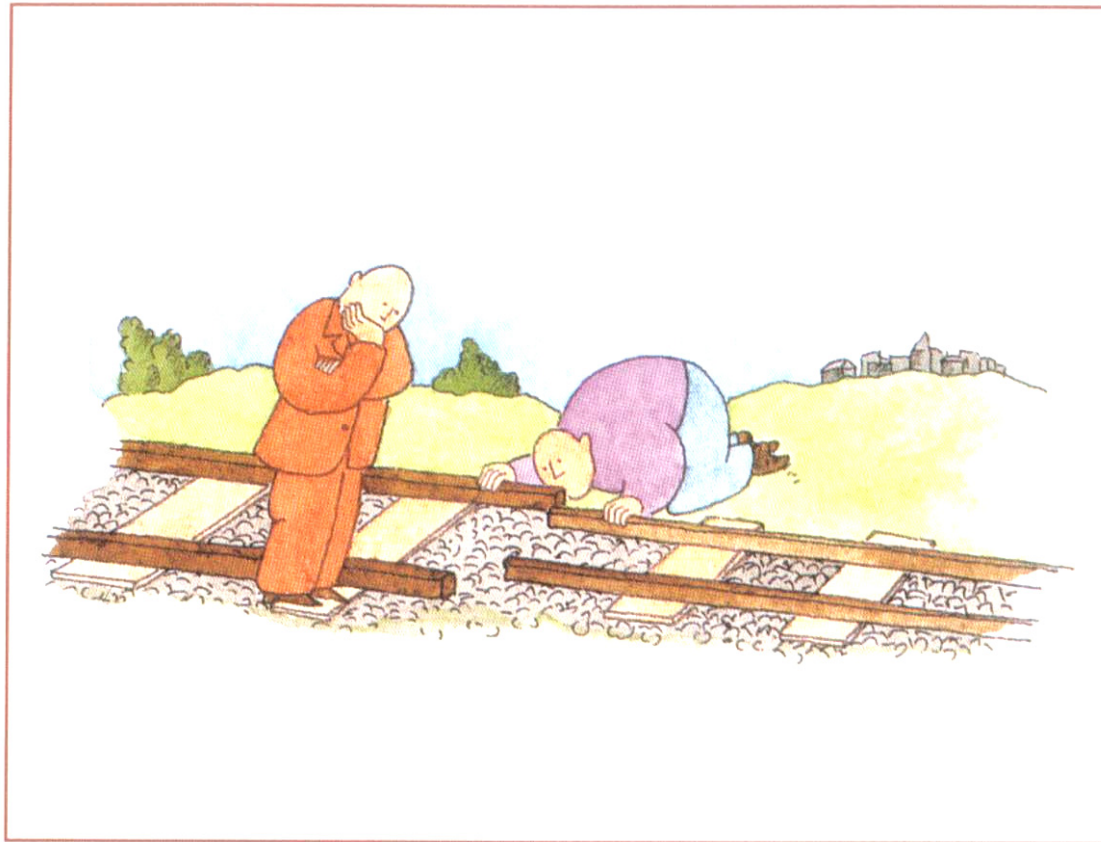
World Class Standards



We need standards to ensure:

- Compatibility of equipment and services from different suppliers
- Full interoperability
- Transfer of learning
- Accessibility to equipment and services
- Better safety and security
- Load sharing, cost saving, co-operation of competitors

Standards- starting with the user experience!



The eEurope and i2010 Initiatives

- Launched by the European Commission in 2000: “*eEurope 2002 – An Information Society For All*”
- Intended to accelerate positive change in the EU
- Aims to:
 - secure equal access to digital systems and services for all citizens
 - promote computer literacy and
 - create a partnership environment based on trust and enterprise
- Ultimate objective: bring everyone in Europe on-line
- Building on this success, in June 2002 the initiative was extended into *eEurope Action Plan 2005*
- *i2010* was launched in 2005, complemented in 2007



ETSI TC HF (Technical Committee Human Factors)

- Responsible for human factors issues in all areas of telecommunications
- Responsibility to ensure ETSI takes account of the needs of all users
- Produces standards, guidelines and reports that set the criteria necessary to ensure the widest possible accessibility of converging I&C technologies

- Chairman: Stephen Furner (BT, UK)
- Vice Chairmen: Bruno von Niman (ITS, Sweden)
Lutz Groh (Siemens, Germany)

Some recent ETSI HF Deliverables (1/2)

- Requirements for assistive technology devices in ICT
- Generic spoken command vocabulary for ICT devices & services (5/28 languages)
- Guidelines on the multimodality of icons, symbols and pictograms
- Guidelines for ICT products and services: Design for All
- Access to ICT by children; Issues and guidelines
- Alphanumeric characters: sorting orders and assignment to the 12-key telephone keypad (official European and minority and other languages)
- Human Factors of work in call centers
- Multimodal interaction, communication and navigation
- Maximizing the usability of UCI based systems

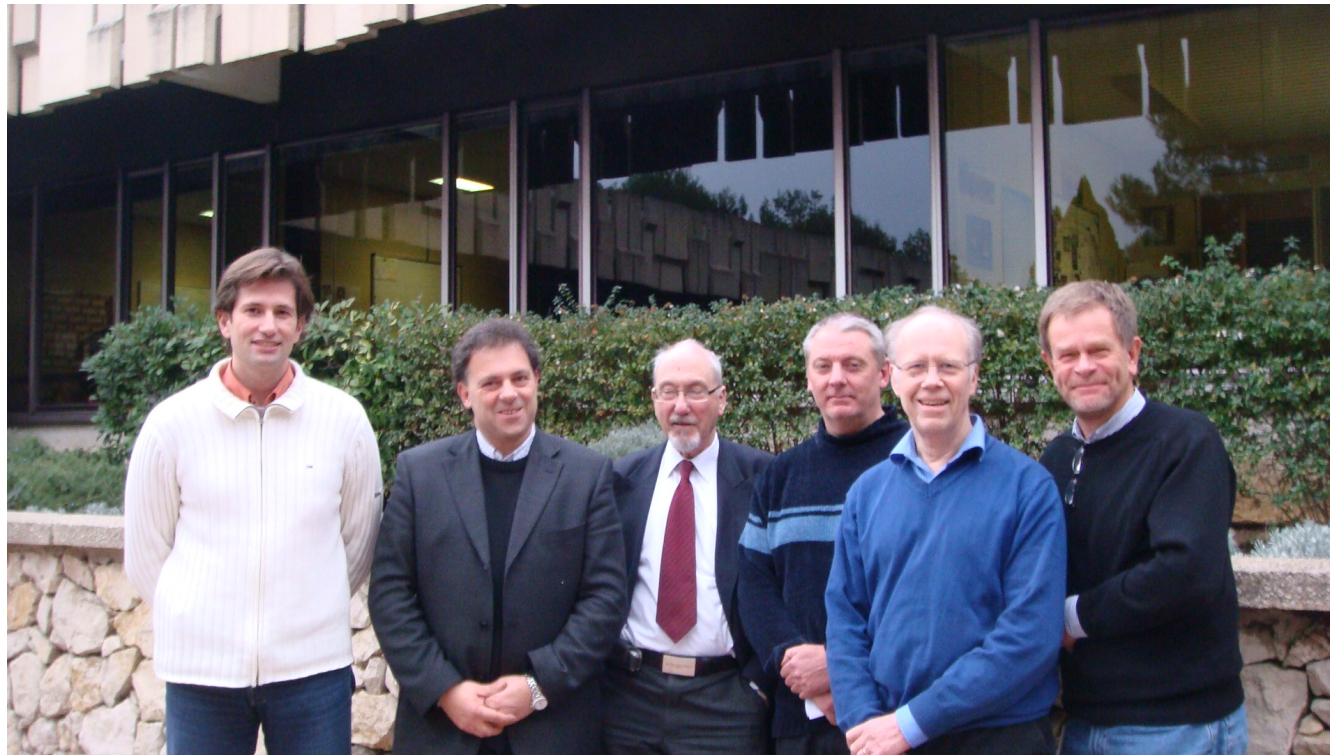
Some recent ETSI HF Deliverables (2/2)

- Guidelines for generic UI elements of mobile terminals and services (GSM/GPRS and now 3G/UMTS)
- Telecare in and outside of intelligent homes
- Telecare User Experience design guidelines
- User addressing and profile management
- Guidelines for the design and use of ICT by children
- Total communication (Duplex universal speech and text communication)
- Enabling and improving the use of mobile e-Services
- User education and Setup procedures
- Multicultural aspects of ICT
- EC Mandate M 376 (Accessibility requirements for public procurement)
- User profile management standardization
- ...more work under development...

AVAILABLE FREE OF CHARGE AT WWW.ETSI.ORG

ETSI STF 333

Nikos Floratos, Bruno von Niman (STF Leader), Walter Mellors, Sean Hayes, Gunnar Hellström, Richard Hodgkinson



ETSI STF333 (M 376) @ 19th ICTSB/ DATSCG meeting (Brussels, April 16, 2008)

“European accessibility requirements for public procurement of products and services in the ICT domain, Phase 1” (EC Standardisation Mandate M/376 to CEN, CENELEC and ETSI)

- Open, collaborative, liaison-dense process
- Welcome requirements, input and comments through true, all-accessible communication means supported:
 - http://portal.etsi.org/stfs/STF_HomePages/STF333/STF333.asp
 - Links to http://www.e-isotis.org/demo/ETSI_website/STF333.html
 - WAI AA(A) compliant
- All-inclusive communications
 - Email: Bruno.vonNiman@etsi.org
 - Voice calls: +46 733 66 12 82
 - Text calls (v.21): +46 8 556 002 05
 - Total conversation (SIP only; speech, text and sign language supported): info@sip.omnitor.se

Deliverable (1/2)

An ETSI Technical Report (developed during September 2007 – May/September 2008) that will provide:

1. Inventory of ICT products and services (grouped in technical areas) that are usually bought by public procurers
 - which will cover at least the ICT products addressed in Section 508 and Canadian toolkit.
 - Other ICT products may be added, if identified as bought by public administrations.
 - a forward-looking approach will be taken.
2. List of existing functional accessibility requirements in Member States and internationally
 - for those ICT products and services within each technical area, particularly those currently in use in public procurement
 - the requirements will cover the concepts of "Design for All" and "Assistive Technology".
3. In each technical area, gaps are identified where no accessibility requirements exist
 - suggestions will be provided for developing missing or additional requirements.

Deliverable (2/2)

4. List of existing national, European and international standards and technical specifications (in the sense of Directive 98/34) will be identified which might comply with those requirements.
 - An assessment will be made on whether the above mentioned requirements can be used as either technical specifications or as criteria for awarding public contracts (in the sense of the Public Procurement Directives).

 5. A proposal will be made for a standardization work programme for the development of requirements and award criteria
 - that still do not exist or that are not yet standardized or where the existing requirements are not considered adequate or suitable as either technical specification or award criteria.
 - The work program will provide an indication of the types of standardization deliverables best suited to carry out the work described in phase II of the Mandate, other than for II.1 where an EN is required.
- **Tasks are not discrete but continuous**
 - **Development in close collaboration with the CEN PT**
 - **Cross-approval of deliverables by all three ESOs**

Time plan of work

- **September 2007:** Start of work, progress reporting to ETSI TC HF
- **October 2007:** Coordination with CEN and ICTSB/DATSCG
- **November 2007:** 1st Public draft
- **February 2008:** Progress reporting to ETSI TC HF and 2nd Public draft
- **March 2008:** Interim Progress Report to EC/EFTA and 3rd Public draft
- **May 2008:** 4th Public (Workshop) draft
- **June 2008:** Open Workshop; progress reporting to ETSI TC HF
- **Sept/Oct 2008:** Progress reporting to ETSI TC HF; submission of the Final Draft TR for approval (end of development work phase)

Formal reporting and closure contractual deadlines:

- **February 2009** Final report to ETSI TC HF and publication of the ETSI Technical Report by the ESOs, following joint agreement
- **March 2009** Final Report to the European Commission and EFTA and closure of the project

M 376 Phase II work will follow.

Public draft release plan

Preliminary public draft release dates	Commenting deadlines	Status and notes
November 20, 2007	January 10, 2008	First public draft
February 12, 2008	March 4, 2008	Second public draft
March 17, 2008 (this version)	April 16, 2008	Third public draft
May 19, 2008	August 11, 2008 (before, during and after the June 3-4, 2008 Open Meeting in Brussels)	Pre-final (Open Workshop) draft; Last public comment opportunity
September 22, 2008	Following ETSI process	Final draft for ETSI and CEN WG/185 approval
<p>NOTE: The above dates are preliminary and subject to change at any time, as required by the progress of the work. An additional (post- Open Workshop) draft version may be announced later.</p>		

Note: This is a draft document that will be updated, replaced or made obsolete by future versions at any time. It is inappropriate to cite this document as other than “work in progress”.

Coordination and reporting activities

- Home page published on 24th September, kept updated
- 1st progress report to ETSI TC HF, 26th September 2007
- Liaisons initiated during October 2007, intensified in February
- 1st CEN PT coordination/ planning meeting, 1st October 2007
- 1st CEN/BT/WG185 coordinatin, 2nd October 2007
- 1st Steering Group meeting, 23 November 2007
- 2nd progress report to ETSI TC HF, 3 December 2007
- 2nd CEN BT/WG185 and DATSCG coordination, 16-17 January 2008
- 2nd progress report to TC HF, 6th February, 2008
- 2nd Steering Group meeting, March 11, 2008
- Human Factors in Telecommunications presentation, March 18 2008
- 3rd CEN BT/WG185 coordination, April 15, 2008
- 2nd DATSCG coordination/presentation, April 16, 2008
- G3 dissemination, April 21 2008
- Activities on the national and international level
 - ISO/IEC JTC1-SWG-A, journals and magazines, ISO/IEC TC 159/SC 4/WG 3, ICCHP 2008
- CEN PT coordination: electronic working and face-to-face meetings

Promotion & Reporting

□ UK ISTC “Communicator” & “Ability” journals

56 International standards

Accessible ICT documentation for Europe?

Richard Hodgkinson reports on new developments for European ICT

Regular readers of this my reports on the US G ('Section 508') require accessibility of Informa Communication Techno documentation (Autum software documentatio (Summer 2007). While th are not mandatory for th of ICT products sold in situation is beginning t

An estimated 90 milli the European Union (or population) are elderly form of disability. With healthcare we are living number of elderly peop Across Europe, public p has long been recognis means of improving the ICT products (hardware

EU acts on inclusive IT

The power of public procurement could lead to accessible ICT for all

By Richard Hodgkinson

Across Europe it has been calculated that 20% of the working age population have a degree of disability that may require accessibility facilities to ensure that they can work effectively with information and communications technology (ICT).

There are also children with similar disabilities and older people for whom the availability of accessible ICT is necessary



require the European standards bodies to develop the additional standards, guidelines and tools identified in phase one to support the introduction of public procurement requirements for accessible ICT products and services throughout the European Union.

A number of international and European accessibility standards already exist and some will be published this year,

news feature

Promotion and reporting

- **Presentation at the 21st Human Factors in Telecommunication 2008, in March 2008 In Kuala Lumpur, Malaysia**



- **Introduction to G3 ICT at ITU-T in Geneva, Switzerland, on April 21, 2008**
- **Report to ISO/IEC JTC 1 SWG-A, Tokyo, Japan, June 2008**
- **Paper accepted for ICCHP Conference, Linz, Austria, July 2008**



Public drafts

- ETSI DTR 102 612 version 10, 20, 30 (and 40 planned)
- **Allowing for a long-enough commenting time**
 - average of 34 days until now;
 - 46 days by the end of the project
 - 84 days for the Open Meeting draft (considering 60 days)
- **Announced to 190 stakeholders directly**
- **Reached 700+ stakeholders through email lists**
- **296 procurement experts approached**
 - contacted for a second time for content validation purposes
- **Full logs available**
- **57 logged comments received until this morning...**
 - ...and counting
 - **Summary published on homepage, with team resolutions**
 - Updated following the release of the *next* draft

Notes

- **Going public early and being fully transparent**
 - **Not necessarily and always optimal**
 - **Considerable document volume and level of details**
- **End user segmentation**
 - **business- consumer- corporate, children?**
- **Forward-looking, broad ICT perspectives**
 - **What will be procured tomorrow?**
 - **Global harmonization? Update frequency?**
- **"Lifecycle" approach (e.g. pre-use and replacement)**
 - **Necessary to optimize accessibility**
- **Lack of common procurement processes and tools**
 - **To make it efficient**
- **Global liaisons and cross-referencing**

A bus ticket in Stockholm (April 2008)



Considerations

- **What's a gap?**
 - **Different gaps**
 - **National standards (e.g. ANSI?)**
- **Access to standards: 166 standards identified (and counting)**
 - **142 international; copyright?**
 - **42 ETSI**
 - **Cost of buying, understanding, deploying**
 - **Updated versions?**
 - **Global agreements may be required for Phase II**
 - **EU licensing?**
- **Input to TEITAC/US Access Board**
 - **Possible as a Minority Report? To the US Access Board?**
 - **Some areas: eServices, multicultural (e.g. language-related) aspects, children, disability displays, tactile markers, external alerting, captioning/subtitles, terminology**

ISO/TC 159

- **ISO/TC 159 – Ergonomics has agreed on a new, broader, definition for accessibility:**

“accessibility – extent to which products, systems, services, environments or facilities can be used by people from a population with the widest range of capabilities to achieve specified goals in a specified context of use”

Technical presentation and review of the ETSI HF STF 333 Deliverable:

**DTR 102 612: “Human Factors (HF); European
accessibility requirements for public procurement
of products and services in the ICT domain
(European Commission Mandate M 376, Phase 1)”**

4 - Approach, methodology and contexts of use

- **Studies of various approaches to organize the required information**
 - Listing products identified by the CPV code, associating requirements with them
 - User centred approach –user requirements for each product feature (similar to the approach of EG 202 116)
 - User requirements identified in clause 5
 - CPV codes in clause 7 and Annex B
- **User abilities and impairments**
 - Physiological
 - Psychological
- **Contexts of use and user roles**
 - Professional, consumer, other (e.g. secondary/carer)
 - Forward-looking,service-centric, usage lifecycle-oriented approach

5 – User requirements and ICT

- **Not feasible to list requirements by products**
- **Decided to follow US Section 508 precedent and categorise by user requirements:**
 - Originally used TEITAC words (for the US Access Board)
 - Readily available...would support global harmonisation
 - No copyright problems
- **New 5.1 using listing of ISO/IEC JTC 1 Special Working Group on Accessibility (SWG-A):**
 - ISO/IEC PDTR 29138 – Accessibility Considerations for People with Disabilities – Part 1: User Needs Summary
 - Identifies requirements not in TEITAC
 - Recent approval for STF 333 to re-use text

5.2 – General technical requirements

- **Maps technical requirements to existing standards:**
 - Relevant standards sourced from:
 - **ETSI SR 001 996: 2007 - An annotated bibliography of documents dealing with Human Factors and disability.**
 - **ISO/IEC PDTR 29138-2 – Accessibility Considerations for people with Disabilities – Part 2: Standards Inventory.**
 - **Tiresias web site - List of accessibility standards in development**
 - **International Telecommunication Union – Telecommunications**
 - **TEITAC**
 - Both published and developing standards reviewed.
 - Adding requirements missing from US work.
- **Comments:**
 - Few exact matches, many partial matches.
 - Work is ongoing...

6 – US Section 508 and Canadian toolkit

- **“International co-operation”:**
 - “...assess all relevant existing activities, including those in other regions (e.g. the US Section 508 system) ...”
- **Clause 6 records situation in the Americas:**
 - Current Section 508 and “508 Refresh”
 - The roles of the Access Board, General Services Administration (GSA) and Information Technology Industry Council (ITI)
 - VPATs (Voluntary Product Accessibility Template™)
 - TEITAC (Telecommunications, Electronic and Information Technology Advisory Committee)
 - The Canadian Accessible Product Toolkit (APT)

7 – ICT products and services bought by public procurers

- **Clause 7 deals with legislation and gives an inventory of purchased products:**
 - European legislation
 - Common Procurement Vocabulary (CPV) and codes
- **For each country lists:**
 - Procurement legislation
 - Products and services procured

7 – ICT products and services bought by public procurers

- **Sources of information:**
 - Initial email requests to 270+ contacts in European public procurement network.
 - Contacts requested to verify information in 2nd draft.
 - National government web sites.
 - “Measuring Progress of eAccessibility in Europe” Report (2007-10).
- **Results:**
 - Low response rate (record of responses maintained).
 - Some counties very responsive/no responses from others.
 - Inconsistent levels of information.

8 – Existing functional accessibility requirements for public ICT procurement

- **Clause 8 deals with Functional accessibility requirements**
- **Will provide International, European and National examples**
- **Lists National requirements:**
 - Reporting variable:
 - **Mostly Web accessibility**
 - **Some Telecommunications requirements**
 - **Some Hardware and Software requirements**
 - **One or two procurement support/toolkits**
- **Sources of information (similar to clause 7):**
 - **European public procurement network**
 - **National government web sites**
 - **MeAC Report**

9 – Gaps in accessibility requirements

- **“Task 6: identify gaps”**
 - “In each technical area gaps will be identified where no accessibility requirements exist and recommendations provided for developing missing or additional requirements.”
- **Status:**
 - Ongoing work – results derived from:
 - **Clause 5 – User requirements, and**
 - **Clause 8 – Existing functional accessibility requirements**
 - **Clause 10 – Relevant European and International Standards**

10 – Relevant European and International standards

- **“Task 7 – List compliant specifications”**
 - “Prepare a list of existing national, European and international standards and technical specifications (in the sense of Directive 98/34) which could comply with those requirements.
- **Definitions:**
 - A national standard is "a standard adopted by a national standardisation body and made available to the public".
 - Similar definitions for European and International standards
 - A technical specification is "a specification contained in a document which lays down the characteristics required of a product such as levels of quality, performance, safety or dimensions etc. etc---, "

Annexes

- **Annex A:**
 - Records current US Section 508 requirements:
 - **May be removed before publication**
 - These are given for reference

- **Annex B:**
 - Gives inventory of relevant CPV codes:
 - **Also gives number of contracts awarded**

Work to be done

- **Mostly summaries and conclusions**
- **Clause 7 - Still searching for products procured:**
 - Many different purchasing arrangements (Central/delegated)
 - Many different policies towards support
 - Inconsistent recording (from details to CPV codes)
- **Clause 8 - Summary and conclusions needed:**
 - Many different policies and levels of support identified
- **Clause 9 – To be completed:**
 - Gaps to be recorded
- **Clause 10 - Summary and conclusions needed:**
 - Few National standards identified
- **Clause 11 - Summary and conclusions needed:**
 - Can listing of many standards be solution?
 - Is a “One Stop Shop” possible?



World Class Standards

THANK YOU!

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