

ISSS/WS/eCAT/02/003Rev

WS/eCAT: “Multilingual Catalogue strategies for eCommerce and eBusiness”

Terms of reference for the WS/eCAT Project Team

1. Scope

The Workshop main objective is to prepare a draft document to be endorsed by the Workshop and to become a CEN Workshop Agreement (CWA) containing:

- a) information on and analysis of the state-of-the-art situation concerning the application of e-catalogues (identifying the existing problems and coming up with recommendations for a systematic approach to overcoming these problems) in order to give a comprehensive picture of what happens in e-cataloguing globally, taking into account a representative selection of institutions/organisations involved in the field, with a focus on the European situation.
- b) concepts and plans for:
 - the formulation of requirements for a meta-model framework (in order to ensure interoperability even of heterogeneous and otherwise incompatible systems)
 - the investigation of existing and required kinds of meta-data registries
 - the identification of existing and further needed guidelines, standards, methodologies etc., which should be integrated or to which interfaces need to be established
 - the preparation of e-learning material and training opportunities for SMEs and consultants
 - the launch of a pan-European promotion and dissemination campaign
 - the support of standardisation/harmonisation efforts in this connection in order to facilitate the preparation and application of multilingual e-catalogues

2. Background

Multilingualism in the Union is often seen as an obstacle for the European economy in terms of competition and the opening up of new markets, but it also has political dimensions relating to consumer protection, freedom to move, etc. However, new economies have emerged in the wake of trying to overcome the language barriers, such as the language industries (incl. activities and the language technologies for making language resources and terminologies available at a large scale), where Europe has a leading edge thanks to the R&D programmes of the EU Commission.

It has been recognised that products and services must be sold in the language of the target market. There are strong indications that e-commerce and e-business can only function well, if the virtual marketplaces and all their major elements (such as product classification schemes, user interfaces, product catalogues etc.) are multilingual from the outset. This, however, would create insurmountable financial barriers for SMEs, if they cannot benefit from synergies through a systematic approach to multilingual data, the methods for their management and the respective tools, as well as the integration of these data, methods and tools into the company's whole ICT environment.

The Management Group (MoU/MG) of the Memorandum of Understanding of the ITU, UN/ECE, ISO and IEC (joined by several other organisations for the sake of coordinating all standardisation and harmonisation efforts with respect to e-commerce and e-business) is convinced that e-commerce/e-business can only perform satisfactorily if it is multilingual and properly harmonised. That is the reason why the International Information Centre for Terminology (Infoterm), taking care of the Secretariat of ISO/TC 37 "Terminology and other language resources", has been invited to join the MoU/MG. ISO/TC 37 has recently decided on a NWI (New Working Item) "Basic principles for multilingual product classification schemes for electronic commerce".

The real challenge after establishing interoperable international multilingual product classification schemes for e-commerce will be multilingual e-catalogues (fully integrated in terms of process

chains into the whole information/knowledge management and data processing environment of enterprises). E-catalogues must be compatible or – what is more important – Interoperable with engineering systems (such as CAD/CAM, FIM, etc.) as well as with business software (such as ERP, etc.) and all kinds of information/knowledge management systems (incl. the language technology software supporting them).

3. Deliverable(s)

Three deliverables (D) are identified as follows:

- i) **Deliverable 1: Study (draft CWA):** “Investigation and analysis of e-catalogues for e-business: state-of-the-art concerning the application of e-catalogues for e-business and recommendations for future developments”
- ii) **Deliverable 2 (Annex to D1): Report** “Plans and concepts for a standardisation strategy”
- iii) **Deliverable 3 (Annex to D1): Report** “Plans and concepts for pan-European implementation¹”

Deliverable 1 with annexes D2 and D3 will be submitted as draft to the Workshop for approval as CWA (CEN Workshop Agreement).

i) Deliverable 1: Study (draft CWA)

Work Item 1 (W 1): “Investigation and analysis of e-catalogues for e-business: state-of-the-art concerning the application of e-catalogues for e-business and recommendations for future developments”

Timescale: Months 1-12

Resource requirement: 5 Experts (1 expert per task), 140 p/d

Deliverable 1 will contain the results of the following 5 Tasks (W 1.1 – W 1.5) of Working Item 1:

- W 1.1 “Survey on existing e-catalogues in e-business – schemes, systems/tools, way of application” (Months 1-2; 45p/d)

Focus will be put on existing e-catalogues, methodologies, e-catalogue software, use/application in virtual marketplaces, use in/integration into enterprise content management. The following topics will be addressed (the list is not exhaustive –other topics can be identified during the lifetime of the Workshop):

- e-catalogues in e-commerce, e-procurement and future m-commerce
- B2B & B2C
- application in major virtual market places
- by industry branches/trade areas
- transaction volumes
- languages used
- integration into intra-company content management
- transnational use, cooperation between companies and industrial groups
- compatibility (concordance) of e-catalogue schemes (from point of view of data and data structures) between each other
- application of localisation methods and localisation support systems
- compatibility (interoperability) of e-catalogue systems among each other
- existing standards (and other unification/harmonisation efforts)
- types and quality of services in support of e-catalogue development, maintenance and implementation
- quality management and certification schemes
- open source software use vs. commercial software use
- comparison EU – USA
- quantitative figures and qualitative analysis

¹ EU+ EFTA+CEECs countries.

- development forecast 2003 – 2005 and 2003 – 2010

- W 1.2 “Survey on existing major institutions/organisations supporting e-catalogue development in e-business and state-of-the-art in pertinent research” (Months 1-2; 15p/d)

Focus will be put on public, semi-public and non-governmental institutions/organisations engaged in e-catalogue research, development, system development, consultancy services and other kinds of services; companies offering e-catalogue systems and services; inter-company and inter-branch cooperation operating at national/European/international level.

- W 1.3 “Analysis of existing e-catalogues” (Months 2-5; 35p/d)

Focus will be put on methodologies applied and their diffusion, degree of re-use within company, degree of interoperability between virtual market places,

- methodologies applied (metadata, data structure, proprietary systems, data modelling, etc.)
- range of application of methods
- application of standards (and other unification/harmonisation guidelines)
- multilingual aspects and potential to localise
- application of content management
- user-friendliness of updating and change management
- relation to ontologies and terminology
- identification of problems with respect to quality, multilinguality, re-use and interoperability, pan-European use, etc.
- analysis of usability aspects
- identification of deficits with respect to pan-European use
- suggestion for solution to existing (and foreseen future) problems

- W 1.4 “Analysis of the relation between (as well as application of) existing product classification schemes/product identification schemes and e-catalogues” (Months 2-5; 15p/d)

Focus on: major product classification and product identification schemes and their relation to e-catalogues in virtual market places as well as in intra-company use, duly taking into account pan-European requirements

- multilingual aspects of existing product classification/identification schemes
- international character and authoritative nature
- speed of updating and change management
- diffusion of support software
- upward and downward compatibility of versions
- application in e-catalogues and ontologies
- relation to terminology and ontologies
- identification of problems
- suggestion for solution to existing (and foreseen future) problems

- W 1.5 “Formulation of problems and recommendations for a systematic approach to implement highly interoperable e-catalogues at SME level” (Months 5-10; 30p/d)

Focus will be put on identification of major problem areas and individual problems falling under these problem areas, formulation of recommendations with respect to a European strategy to make SMEs fit for e-business and future m-commerce

- re-usability of e-catalogue data
- interoperability of data structures and systems/tools
- multilingual aspects and localisation methods/tools
- awareness creation aspects and promotion aspects
- coordination needs
- pan-European requirements

ii) Deliverable 2: Report (Annex to D1)

Work Item 2 (W2): “Plans and concepts for a standardisation strategy”
Timescale: Months 6-12

Resource requirement: 1 Expert, 25 p/d

To draw plans and concepts for

- formulation of requirements for a meta-model framework in order to ensure interoperability even of heterogeneous and otherwise incompatible systems;
- investigation of existing and required meta-data registries;
- identification of existing and further needed guidelines, standards, methodologies etc., which should be integrated or to which interfaces need to be established.

iii) Deliverable 3: Report (Annex to D1)

Work Item 3 (W3): "Plans and concepts for pan-European implementation"

Timescale: Months 3-12

Resource requirements: 1 Expert, 15 p/d

To draw plans and concepts for

- preparation of e-learning material and training opportunities for SMEs and consultants;
- launch of a pan-European promotion and dissemination campaign;
- support of standardisation/harmonisation efforts in this connection in order to facilitate the preparation and application of multilingual e-catalogues.

4. Timescale of eCAT Workshop and related Project Team

eCAT Workshop timescale

Work Item (W); Deliverable (D); Milestone (M)

		2002-12 / 2003-12													
		Month 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	
W	Task	02-12	03-01	03-02	03-03	03-04	03-05	03-06	03-07	03-08	03-09	03-10	03-11	03-12	
W1	W 1.1				M2★										
	W 1.2				★										
	W 1.3														
	W 1.4	★													
	W 1.5													D1	
W2	W 2.1													D2	
	W 2.2									★					
	W 2.3														
W3	W 3.1													D3	
	W 3.2														
	W 3.3													★	

W1 (Analysis)

W2 (Plans for Standardization)

W3 (Plans for Implementation)

D1 (Study)

D2 (Report)

D3 (Report)

M2 (Plenary Meeting)

M3 (Plenary Meeting)

M4 (Conference on WS Results & Final Plenary Meeting)

Timescale for WS/eCAT Project Team

Date	Action	Who
29 November	Approval BP and TORs for Project Team Appointment Selection Panel	Workshop
6 December	Launch call for nominations for PT	Secretariat
31 December	Closing date for application for PT	Candidate experts
10 January	Short list of selected candidates	Selection panel
17 January	Approval experts	Workshop
Mid March	Draft survey (W1.1&W1.2)	PT
28 March	1 st plenary meeting	Secretariat
End May	Draft analysis (W1.3&W1.4)	PT
July 2003	First Draft D3	PT
Sept 2003	First Draft D2 and Final D3	PT
Sept 2003	2 nd plenary meeting	Secretariat
Oct 2003	Draft W1.5	PT
Oct/Nov 2003	First draft CWA (including D2 and D3)	PT
Nov 2003	First round for comments	Workshop
End Nov 2003	Final draft CWA (including D2 and D3)	PT
Mid Dec 2003	Final plenary and conference	Secretariat

CEN/ISSS WS/eCAT will act as the reference authority, providing the voluntary means for monitoring, peer review and public consultation, and formal approval of the final document for publication as a CWA. CEN/ISSS will administer the contractual arrangements.

5. Resource requirements

The project will be carried out by a Project Team of experts, which shall submit their outputs to WS/eCAT for review and approval.

A Project Team of **7 experts** will be appointed for a total of 195 man/days² for a period of maximum one year (January - December 2003). One expert should act as the Project Team coordinator and call for experts will ask which applicants are willing to undertake this task.

² A total of 180 m/d will be assigned. 15 m/d will be kept as reserve.

6. Experts – criteria for eligibility and working conditions

6.1 Skills

Deep knowledge of classification and cataloguing techniques.
Broad knowledge of existing and ongoing standardization and research projects in the field of electronic catalogues, in Europe and internationally.
Very good knowledge of the English language.

6.2 Availability

Experts shall guarantee electronic availability during the contract period and physically participate at certain meetings as indicated below.

6.3 Financial conditions

The rate for experts will be 650 Euros/man day. This is an “all-inclusive” rate that covers any travel and lodging costs that would be incurred in the context of the project.

The contracts will be between each expert and CEN and will follow standard CEN rules.

Funding for the WS/eCAT Project Team was approved by the European Commission under the eEurope initiative.

6.4 Other

Both individuals acting in their own right and on behalf of their employing companies may apply. However, contractual arrangements will only be possible with registered companies.

6.5 Organization of the Project Team

The Project Team will be appointed electronically by the Workshop after the eCAT Workshop kick-off meeting, which will be held on 29 November in Brussels (foreseen date of start of duties: Mid January 2003).

In accordance with the CEN rules, the appointment will be made on the basis of prior nominations by a Selection Panel, which comprises the Workshop Chair, the CEN/ISSS Secretariat and one Workshop representative.

The Project Team shall work mainly electronically; a representative of the Project Team shall attend the Workshop Plenary meetings. Additional meetings may be agreed among the experts and the Workshop Chair.

CEN rules on the functioning of the Project Team shall be respected (see Annex 1).

Annex:

- N1: Rules for the establishment and functioning of a Project Team in the CEN/ISSS Workshops

Annex 1

Rules for the establishment and functioning of a Project Team in the CEN/ISSS Workshops

1 The concept of a Project Team (PT)

Project Teams are a light working structure, bringing together for a specified period of time a limited number of technical experts to complete specified tasks.

2 Types of work assigned to a PT

A Project Team may be created for each of the following purposes:

- to prepare a draft programme of work on behalf of a Workshop or Workshop Project, developing standardization/specification requirements;
- to provide support to a Workshop or Workshop Project on (a) specific and delimited task(s);
- to carry out a study or investigation and to produce a Report with recommendations to the Workshop or Workshop Project;
- to prepare the first drafts of CWAs for Workshop consideration and approval;
- to carry out editing of documents;
- to investigate and implement under the direction of the Workshop or Workshop Project prototype and pilot implementations of standards/specifications;
- to prepare and carry out specific implementations under the direction of the Workshop or Workshop Project (for example through the creation of a Web site, or a register of objects or codes, where CEN/ISSS is required to provide a service to the standardization community).

3 Proposal for a PT

Proposals to establish Project Teams may be made by an existing or proposed Workshop, or Workshop Project, or by registered Workshop participants. The proposal submitted shall include the proposed Terms of Reference of the PT, including Technical Proposals where available, and the expected deliverables with corresponding target dates, as well as the required resources.

The originators shall also indicate the priority accorded to the request, due justification why a Project Team approach has to be used and the corresponding funding.

Proposals shall be approved by (where appropriate) the Workshop Project participants, and by the Workshop Plenary.

4 Terms of Reference of a PT

The proposal for a PT shall provide the necessary information to enable a good understanding of the expected task(s) and the corresponding outcome.

Proposals must at least contain the following sections :

- 1) Title of the Project Team to be established
- 2) Subject and Scope
- 3) Justification of a PT
- 4) Reference authority (Workshop in charge of the follow-up of action)
- 5) General context/Background/Environment
- 6) Work plan, including duration and target dates
- 7) Manpower (in man-days or man-months)
- 8) Characteristics of the expertise required and criteria for selection of candidates
- 9) Expected deliverable(s).

If relevant, and according to the type of work assignment, the Terms of Reference should also provide information about reference specifications and documents, and connected working bodies.

A Workshop Plenary may decide to open calls for Technical Proposals to its members, if there is a need to establish the detailed workplan for the Project; such calls, to be made by the Workshop Secretariat and posted on the CEN/ISSS Web Pages, may be concurrent with the call for the Project Team's establishment. Technical Proposals may be made by companies or individuals. Selection of Technical Proposals shall be made by a Selection

Panel as specified in section 5, and the selection approved by the Workshop Plenary. Approved Technical Proposals shall be included in the Project Team's Terms of Reference.

5 Approval and establishment of a PT

Calls for applications to become members of a PT shall be made by the Workshop Secretariat, and notified to the CEN Member bodies and to registered Workshop participants, with a minimum time limit of one month. Applications to become members of a Project Team shall be made only by individuals. Where a Project Team requires only an editing task, it may comprise only one individual.

A Selection Panel established by the Workshop shall make the selection of the best-qualified candidates for Project Team membership according to the criteria laid down in the call for candidates. The membership of the Panel shall include, the Chairman (and Vice-Chair if so decided by the Workshop) and Secretary of the Workshop (if they are not themselves candidates), the Project Manager of any relevant Workshop Project (if he/she is not a candidate) and a representative of the CEN Secretary-General.

One or more specialists who have a good knowledge of the subject concerned and its industrial and standardization environment may assist the Selection Panel. These specialists shall not be candidates for the PT or involved with the submission of competitive Technical Proposals.

The Selection Panel shall ensure the composition of the Project Team is balanced, having regard to the required expertise in the subject matter and the different interest groups present in the Workshop.

The Selection Panel shall inform the Workshop of the composition of the Project Team. Workshop participants with specific objections to the inclusion of one or more of the selected individuals shall notify the Chairman (and Vice-Chair if so decided by the Workshop) of the Selection Panel, with their grounds for objection. The Selection Panel shall consider any objections and notify the Workshop Plenary of the outcome of their consideration.

Contracts will only be signed with companies, in principle not with individuals. These companies bear total legal liability for the expert(s) from their companies and for the good execution of the work contracted.

One signatory of the contract shall be the Secretary-General, or the responsible person of the CEN member holding the Workshop Secretariat, the other signatory shall be the relevant management level of the organisation providing the expert.

Workshop Chairmen (and Vice-Chair if so decided by the Workshop) and Project Managers who become experts in a PT shall not chair those parts of the meeting discussing the PT's progress and deliverables. Workshop Secretariat officials who become experts in a PT shall resign from their duties until the PT completes its tasks.

6 Management of a PT

Supervision of the PT work lies within the responsibility of the CEN Secretary General, delegated to the Secretariat of the Workshop, which shall be responsible for the administrative procedure and payment of the PT experts.

The Workshop Plenary shall be responsible for monitoring the PT, and for the technical approval of its results. PTs not preparing a formal document for approval, but which have been responsible for other tasks, shall prepare a report on their activities for the Workshop's acceptance. The PT shall in any case be disbanded when its tasks are completed.

After consulting the CEN Secretary-General, CEN/ISSS or the CEN member holding a Workshop Secretariat may terminate a contract if there is evidence that a PT expert is not fulfilling his/her contractual requirements or his/her performance is deficient. In general, any problems arising should be resolved with the organization providing the expert before a contract is cancelled.

7 Rules for financing of a Project Team

The Project Team members shall produce an invoice for each payment to be made by the CEN/CS. The CEN/CS commits itself to make the payments as rapidly as possible. However it can only make the payments after it has received the payment from the sponsoring body (e.g. CEC, EFTA Secretariat, private interest groups, etc.).