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**UNITED NATIONS ECONOMIC COMMISSION
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CONFERENCE OF EUROPEAN STATISTICIANS**

**EUROPEAN COMMISSION
STATISTICAL OFFICE OF THE EUROPEAN
UNION (EUROSTAT)**

**ORGANISATION FOR ECONOMIC COOPERATION
AND DEVELOPMENT (OECD)
STATISTICS DIRECTORATE**

Meeting on the Management of Statistical Information Systems (MSIS 2011)
(Luxemburg, May 2011)

Topic (iv): Software sharing and shared maintenance

Report on Activities and Results of the Sharing Advisory Board (SAB) and Proposed Programme of Work

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I. Introduction

1. This report looks back from April 2010 until May 2011 reports the activities and results of the Sharing Advisory Board. In the Annex our proposed program of work for the coming year is described.
2. This has been our second official year as a board. Our official status has undergone some changes. Some months ago the CES bureau decided that a new group was to be created to coordinate all other groups, [High-Level Group for Strategic Directions in Business Architecture in Statistics](#) (HLG-BAS). The CES Bureau further decided that the SAB should have a separate status from MSIS and no longer be an body residing under the MSIS steering committee but should reside under the HLG-BAS.
3. This does not mean however, that we now lose our association with the MSIS meeting. The MSIS is an important connection for the Sharing Advisory Board both as a resource for ideas and members, but also as a valuable discussion platform.
4. Membership of the SAB has been stable and devoted and we have a teleconference once a month. We are a global board, with members in very different time zones.
5. During the MSIS meeting in Daejeon, Republic of Korea, we held a brainstorm session to determine possible future work for the SAB. In section III you will find the account of the items that made it into our program of work and the items that didn't and why.

II. Program of Work 2010-2011

A. RECURRING TASKS

A1. Maintenance of the SAB wiki

6. There are basically two wiki's, the SAB part of the MSIS wiki and a private wiki that is used by members of the SAB as a work area. The MSIS Wiki has public read access and a user account allowing edit access is available on request for all attendees of the MSIS meeting. Requests for user accounts should be addressed to the UNECE secretariat (support.stat@unece.org).

A2. Production and distribution of the SAB newsletter

7. The two newsletters a year we are committed to have been published. The number of articles is slowly growing. Newsletter issue #4 (the current one) is the largest ever.

A3. Software inventory

8. The software inventory is complete and available in the wiki. There are several ways of finding the right information, by alphabet, by GSBPM phase and sub-process, and by using the search box. Maintenance is planned in the form of a mailing of all contact persons to audit their data.

A4. Coordination

9. Members of the SAB participated actively in following projects

(a) ESSnet CORA and CORE (ongoing)

10. Members of the SAB attended following meetings where the issue of software sharing was raised:

(a) Eurostat Workshop on Standardisation, October 2010

(b) Eurostat IT Directors Group, Luxembourg, October 2010

(c) European Data Documentation Initiative Conference, Utrecht, December 2010

(d) ESSnet on SDMX, Final Workshop, Lisbon, March 2011

(e) UNECE Work Session on Statistical Data Editing, Ljubljana, May 2011

(f) Various meetings of the HLG-BAS during 2010 and 2011

A3. Reporting

11. An annual report and programme of work for the next year is prepared for approval by the CES Bureau and the MSIS meeting

B. SPECIFIC TASKS FOR 2010/11

B1. Set rules for collaboration projects

12. B1(i): Create a proposal for funding of future SAB activities (administration, travel etc.). Funding for projects can come in the form of cash, resources or infrastructure from participating agencies. (Should) Status: Cancelled, to be re-examined later. At the moment while the HLG-BAS group is starting to exert its influence and it is better to arrange these kinds of things in agreement with the HLG-BAS.

13. B1(ii): Consider a default proposal for funding (small) collaboration projects to be agreed on by all statistical organizations taking part in MSIS. (Should)

Status: We are looking at the model the "Statistical Network" is following and there might be a broader application for it.

14. B1(iii): Enhance the possible forms of collaboration with templates and prefab agreements etc., and have them ratified by the MSIS countries. In this way creating an international collaboration will be easy to give form and easy to be approved in different countries if the "mother form" of the agreement has been approved already (Should)

Status: Done; a initial set of example documents or templates is available on the wiki.

B2. Collaboration

15. B2(i): Keep track of how successful the inventory of existing initiatives and collaborations is and upgrade the guidelines for collaboration models looking at those models that appear to be more successful from the inventory. (Must)

Status: UNECE is constantly monitoring with the use of the inventory using Google Analytics.

16. During the year from 1 May 2010 to 30 April 2011 there were over 6,700 hits on the inventory pages on the MSIS wiki from over 70 countries. The five software tools that received the most hits were: Tau-Argus, Mu-Argus, Canceis, Demetra+ and Banff. The most consulted GSBPM sub-processes were 7.2 (Produce Dissemination Products), 2.2 (Design Variable Descriptions), and 5.7 (Calculate Aggregates).

17. B2(ii): Seek input from MSIS 2010 meeting about possible follow up on the current ESSnet CORA which is producing a first start for a common reference architecture linked to the GSBPM. (Must)

Status: Done, see CORA website <http://cora.forge.osor.eu/> where you can find all deliverables. In the meantime the follow up ESSnet CORE has been started.

18. B2(iii): Create a mapping of existing initiatives and existing solutions and concepts onto a single framework (Must)

Status: In progress; a first version of the mapping is present on the wiki.

19. B2(iv): Contact ESSnet on SDMX about possible cooperation (Must)

Status: Done, we have agreement in principle that any tools developed by the first or second ESSnets on SDMX will be included in the software inventory

20. B2(v): Create facilities for users to post information about software tools, including questions, experiences and case studies. Create links to existing shared software user groups, and pages for sharing feedback and problems. (Must)

Status: Basic facilities are in place via the MSIS wiki, but further refinement and additional functionality could be added

C. ACTIVITIES CONTINUED FROM 2009/10

These are activities started in 2009/10, which will require further work in 2010/11.

C1. Set up administration of the SAB

21. C1(i): Define the subjects that the SAB will be the responsible administrative body for, in line with the Terms of Reference.

Status: Done

22. C1(ii): Define a workflow for decision making; how are proposals made by the SAB to be executed. This is closely related to the mandate. (Should)

Status: Postponed to be agreed with the HLG group

C2. Collaboration

23. C2(i): Work in collaboration with the ESSnet to develop information on licencing and judicial issues related to sharing of software in and outside EU. (Must)

Status: Done See ESSnet CORA WP4

http://cora.forge.osor.eu/WP4_Design_of_the_Organizational_Architecture.htm

24. C2(ii): Work in collaboration with the European Union funded "ESSnet" project on a common reference architecture to produce documentation about prerequisites for sharing of software on a technical level. **(Must)**

Status: First set of wiki pages created. To be enhanced in the future

25. C2(iii): Research possible cooperation models for software development, identify those that are successful, and develop guidelines for this type of collaboration. **(Must)**

Status: Done

26. C2(iv): Research possible governance and management models for the outputs from collaborative development projects, identify those that are successful, and develop guidelines for future projects. **(Should)**

Status: Merged with C2(iii)

C3. Outreach

27. C3 (i): Expand the inventory of existing initiatives and collaborations (including persons to contact) and open this for maintenance and inputs from national and international statistical organizations. **(Must)**

Status: Done - the inventory has been launched

III. Brainstorm results of the MSIS Daejeon meeting

28. During the Daejeon meeting a productive brainstorm session delivered a healthy number of ideas. The majority of the ideas were usable. Below these ideas are discussed. Following contributions have been adopted and found their way into our program of work: The indicator between [] is the item number of the program of work 2011-12.

- Consider language needs in application design [B1(i)]
--status: started, 30% done
- Expanding GSBPM with GSBIM [B2(i)]
--status: started in Statistical Network and CORE, see
www1.unece.org/stat/platform/display/metis/Generic+Statistical+Information+Model+%28GSIM%29
- Case studies of sharing linked to the software inventory [B3(ii)]
--status: not started
- Establish what is needed to make software sharable [B1(iii)]
-- status: started
- Create documentation / tutorials as well as code requirement [B2(ii)]
-- status: not started
- Sharing feedback from those who use software [C2(v)]
-- status: started
- Share specifications [B2(ii)]
-- status: not started
- Right granularity in components
-- is an architecture thing and will be handled within the architecture initiatives
- Documentation about expertise - who to ask
-- status: - lets try to set up some kind of Yellow Pages [B2(iii)]

29. The entries below are not yet applicable or feasible but deserve follow up:

- Sharing problems and how to avoid them
-- Difficult to operationalize; we seek suggestions from MSIS here.

- Share plans / strategies
 - The “Key Indicators” template can be seen as a first step in this direction (<http://www1.unece.org/stat/platform/display/msis/Key+Indicators>). More discussion is needed on how to do this effectively
- Shared buying
 - we are asking MSIS opinion, we are somewhat sceptical but would be happy to facilitate.
- Information about software / evaluations
 - yes, possibly as information broker as to who has information (contact address). We do not want to be involved as a party because as a board we need to retain our impartiality.
- Share experience in dealing with commercial vendors
 - no, but we might act as information broker as to who has information (contact addresses)

ANNEX I – Program of Work 2011-2012

A. RECURRING TASKS

A1. Maintenance of the SAB wiki and website

1. The SAB wiki (private), and the SAB section of the MSIS wiki (public) are the primary means of communication. It is particularly important to keep the public pages up to date to reflect the activities of the SAB and to give the proper impression that the SAB is an active body. Members of the SAB should be constantly reviewing these wikis so that they retain their value to the official statistics community.

A2. Production and distribution of the newsletter

2. The SAB produces a twice-yearly newsletter, so there is ongoing activity in order to get it published. This includes writing and commissioning short articles or other texts or some research.

A3. Software inventory

3. Although the inventory should be kept up to date by contributing organizations, some periodic maintenance is needed, such as checking for dead links and checking that entries are still being used etc. The SAB also monitors the success of the inventory, and updates the guidelines for collaboration models as necessary, to reflect the activities in the inventory.

A4. Coordination

4. The SAB should be actively represented in initiatives and events of other organizations concerning statistical software sharing, statistical business architectures and other topics related to the work of the SAB, to ensure the coordination of international work in this area.

A5. Reporting

5. An annual report and programme of work should be prepared for presentation to the MSIS meeting and approval by the HLG-BAS.

B. SPECIFIC TASKS FOR 2011/12

New activities in response to demands from the official statistics community, or activities that were proposed in earlier years but were not carried out.

B1. Develop standards and guidelines

6. B1(i): Develop and publish guidelines for developing software with multi-lingual support (**Must**)

7. B1(ii): Prepare a study on communication methods and tools for effective multi-national collaboration activities (**Must**)

8. B1(iii): Prepare a study on prerequisites on sharing of software(**Must**)

B2. Sharing information

9. B2(i): Add a wiki page with information on the current state of developments on a Generic Statistical Information Model (GSIM) including who is doing what (**Must**)

10. B2(ii): Add a facility to share information on requirements, specifications, software evaluations and other documentation (**Must**)

11. B2(iii): Create a set of wiki pages to act as a directory with specialists on different subjects in the member organisations.

B3. Communication and outreach

12. B3(i): Develop a communication strategy to increase awareness of SAB outputs, and make them more accessible (success can be measured by increased hits to the wiki) **(Must)**
13. B3(ii): Add possibility for case studies to individual software descriptions in the Software Inventory pages

C. ACTIVITIES CONTINUED FROM PREVIOUS WORK PROGRAMMES

These are activities have already started, and will require further work in 2011/12.

C1. Set up administration of the SAB

14. C1(i): Define a workflow for decision making; how are proposals made by the SAB to be executed. This is closely related to the mandate. (Should)
Status: Postponed to be agreed with the HLG group

C2. Collaboration

15. C2(i): Work in collaboration with the European Union funded "ESSnet" project on a common reference architecture to produce documentation about prerequisites for sharing of software on a technical level. **(Must)**
16. C2(ii): Research possible cooperation models for software development, and governance / management models for the outputs from collaborative development projects. Identify those that are successful, and develop guidelines for this type of collaboration. **(Must)**
17. C2(iii): Keep track of how successful the inventory of existing initiatives and collaborations is and upgrade the guidelines for collaboration models looking at those models that appear to be more successful from the inventory. **(Must)**
18. C2(iv): Create a mapping of existing initiatives and existing solutions and concepts onto a single framework **(Must)**
19. C2(v): Create facilities for users to post information about software tools, including questions, experiences and case studies. Create links to existing shared software user groups, and pages for sharing feedback and problems. **(Must)**

C3. Provide infrastructure for collaboration projects

20. C3(i): Consider a default proposal for funding (small) collaboration projects to be agreed on by all statistical organizations taking part in MSIS. (Should)
21. C3(ii): Enhance the possible forms of collaboration with templates and prefab agreements etc. and have them ratified by the MSIS countries. In this way creating an international collaboration will be easy to give form and easy to be approved in different countries if the "mother form" of the agreement has been approved already (Should)