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| ToR STF 675(Ref. Body TC HF) |
| Version: 4.1 |
| Author: Harri Puskar – Date: 2023-05-18 |
| Last updated by: ETSI Secretariat – Date: 2023-06-27 |
| page 1 of 15 |

Terms of Reference – Specialist Task Force Proposal

STF 675 (Ref. Body TC HF)

Accessibility of ETSI Deliverables and Improvement of the Development Process of Deliverables

Summary information

|  |  |  |
| --- | --- | --- |
| Approval status | Approved by TC HF (23-07-05) / endorsed by GA#81 | **YES** |
| Approved by Board decision number D-B144/1 | **YES** |
| Reference Body | Ref. Body TC HF |
| ETSI Funding | **Maximum budget : 194 000 EUR** |
| Minimum of 4 ETSI Members Support | **YES/NO** |
| Time scale | **From** | 2023-10-23 |
| **To** | 2025-03-31 |
| Work Items  | *N/A* |
| Board priority | [ETSI STF funding criteria](https://portal.etsi.org/STF/STFs/Funding/ETSIbudget.aspx)

|  |  |
| --- | --- |
| **Priority Criteria** | **X** |
| Maintenance of standards in mature domains |  |
| Innovation in mature domains |  |
| Emerging domains for ETSI |  |
| Horizontal activities (quality, security, etc.) |  |
| Societal good / environmental |  |
| Project approved by GA for Accessibility Strategy | X |

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Part I – STF Technical Proposal

# Rationale & Objectives

## Rationale

The ETSI Board and GA#80 have approved the ETSI Accessibility Policy proposed by TC HF. As part of the process of implementing the Accessibility Policy, TC HF develops four project proposals, which together will constitute the ETSI Accessibility Strategy:

1. Review the accessibility of ETSI infrastructure (buildings, facilities); Define baseline requirements and guidelines.
2. Making ETSI meetings accessible on demand, including online and hybrid meetings.
3. Make ETSI published deliverables fully accessible, including improvement of their development process.
4. Make IT processes and tools more accessible, possibly starting with an audit and recommendations for the future.

These four projects are part of the ETSI Usability Strategy which was endorsed at GA#81.

The work proposed in this document refers to the third project: Make ETSI published deliverables fully accessible, including improvement of their development process.

## Objectives of the work to be executed

Accessibility and usability of ETSI deliverables is less than optimum and removal of the existing usability and accessibility barriers is in the interest of the various stakeholders and would contribute to a wider usage of ETSI deliverables. In this context, it is important to understand that accessibility and usability problems related to the development and use of ETSI deliverables is likely to have a negative effect on the accessibility of these documents. Improving the accessibility of ETSI deliverables may, on the other hand, lead to documents which are less usable for readers/users without disabilities or lead to more cumbersome and document development processes. It is therefore important to assess and possibly improve the accessibility and usability of ETSI deliverables and of the development process for ETSI deliverables in one coherent process.

The objective of the project is to support the overall ETSI Accessibility Policy as discussed during the GA#80 and create explicit requirements for a workflow that produces accessible and user-friendly / usable ETSI deliverables for external stakeholders (such as developers of technical solutions, administrations and alike) and that is efficient and convenient for internal stakeholders (such as authors of ETSI deliverables, authors of 3GPP technical specifications, or EditHelp). In addition, viable technical solutions will be identified for those requirements, namely ones that satisfy both the authors and the users of ETSI deliverables.

## Previous funded activities in the same domain

There are no previously-funded activities in this domain.

## Market impact

ETSI deliverables that are published in an accessible and usable manner will have a greater potential for a wider uptake. Use of standards benefits both market players and societies at large. Standards provide the basis for safety and reliability to technology users – raising their confidence and hence fuelling sales and take-up of new technologies. Standards also provide an important support for government policies and legislations. Accessible and usable standards would make it easier both for regulators to implement policies to cater for user interests and ensure an even playing ground for market participants, as well as for businesses to develop successful strategies for their products and services.

## Consequences if not agreed

ETSI members and users of ETSI deliverables will continue to receive documents that are limited in their accessibility and usability, and that are difficult to process electronically. ETSI/3GPP authors/content creators with disabilities will continue to encounter accessibility barriers when working with/on ETSI deliverables. Finally, ETSI will continue to have credibility issues, asking for accessibility in its documents while delivering documents that are of limited accessibility.

# Relation with ETSI strategy and priorities

|  |  |
| --- | --- |
| **Priority Criteria** | **Rationale** |
| Maintenance of standards in mature domains |  |
| Innovation in mature domains |  |
| Emerging domains for ETSI | The ETSI Accessibility Policy (AP) (as endorsed by GA#80) is a new initiative by ETSI aiming at ensuring accessibility of ETSI facilities, activities, and documents. It is an ambitious and broad initiative. The proposed STF addresses one specific area – the accessibility of ETSI deliverables. |
| Horizontal activities (quality, security, etc.) |  |
| Societal good / environmental | ETSI’s mission is to provide platforms where interested parties come together and collaborate on the development and promotion of standards for Information and Communication Technology (ICT) systems and services, used globally for the benefit of all. To realise this mission and bring the value and benefit to the market players and societies, it is essential that ETSI standards, the deliverables, are accessible and usable. |

# ETSI Members Support

|  |  |  |
| --- | --- | --- |
| **#** | **ETSI Member** | **Supporting delegate** |
| 1 | Project endorsed by GA#81 |  |
| 2 | Amazon | Shadi Abou-Zahra |
| 3 | Apple  | James Craig |
| 4 | ETSI 3SI Advocate  | John Ketchell |
| 5 | Hillebrand GmbH  | Mike Pluke |
| 6 | CPTRA  | Harri Puskar |
| 7 | Volkswagen  | Matthias Schneider |

# Deliverables

## Base documents

|  |  |  |
| --- | --- | --- |
| **Document** | **Title** | **Status** |
| N/A |  |  |
|  |  |  |
|  |  |  |

## New deliverables

|  |  |  |  |
| --- | --- | --- | --- |
| **Deliv.** | **Work Item code****Standard number** | **Working title****Scope** | **Expected date for publication** |
| D1 |  | Report on implementable solutions to enhance the accessibility of ETSI deliverables, including results of pilot tests to show their adequacy and efficiency. | T0+18 |

# Maximum budget

## Task summary/Manpower Budget

|  |  |
| --- | --- |
| **Task short description** | Budget (EUR) |
| Task 0: Project Management | 21 000 |
| Task 1: Identifying and addressing the most crucial accessibility requirements of ETSI deliverables | 35 000 |
| Task 2: Authors/content creators’ requirements and the development process | 31 500 |
| Task 3: User-centred analysis of ETSI deliverables’ accessibility and usability | 38 500 |
| Task 4: Requirements for accessible and usable ETSI deliverables and solution proposal to address these requirements. | 35 000 |
| **TOTAL** | 161 000 |

Note: There are additional efforts required from EditHelp, in total estimated at 25 person-days.

## Travel budget

There will be a need for travel, estimated at 12,000 Euro.

## Other budget line

The need to involve technical experts for the verification of the proposed solutions (e.g. developers and UX designers) will be decided at the onset of the STF work (preliminary estimates are included in the task descriptions). The foreseen cost for external experts is estimated at 21 000 Euro (equivalent of 30 person-days)

Part II – Details on STF Technical Proposal

# Tasks, Technical Bodies and other stakeholders

## Organization of the work

It is proposed to conduct this work as part of an STF, in close cooperation with ETSI-internal and external experts (see 6.3).

## Tasks for which the STF support is necessary

* Examination of existing criteria for document accessibility and deliverables to test them on
* Involving internal and external stakeholders
* User tests and examination of the results thereof, accessibility tests etc.
* Composing requirements and a strategy for implementation
* Coordination of implementation of the requirements and the strategy

## Other interested ETSI Technical Bodies

* ETSI Secretariat
* Edithelp
* ETSI Project team on new working methods

## Other stakeholders

* Accessibility evaluators
* Users with disabilities.
* Representatives of implementers (for example, public sector bodies that enforce EN 301 549).
* Authors of ETSI deliverables.
* 3GPP Project team on new working methods
* Document editors responsible for the accessibility of standardization documents of other SDOs (ITU, CEN/Cenelec, IEC, IETF, etc.)
* External developers and UX designers

Part III: Execution of Work

# Work plan, time scale and resources

## Task description

|  |  |
| --- | --- |
| **Task 0** | **Project Management (T0 – T18)** |
| **Objectives** | The goal of Project Management is to ensure that the objectives of the project, are achieved within the foreseen time and budget.  |
| **Input** | * STF work plan
 |
| **Output** | * Selection of STF experts
* Invitation of relevant stakeholders to participate in a Reference Group
* Detailed project planning and coordination of the work among the STF experts, and with other relevant workgroups to be identified
* Periodic reports to ETSI TC HF
 |
| **Interactions** | * STF
* Dialogue with EditHelp:
	+ Assistance in selection of test document candidates
	+ Discussion of the accessibility evaluation of the results and what impact are they likely to have on the EditHelp services
* Dialogue with the ETSI authors
	+ Discussion with and communication of results to authors of ETSI deliverables of the accessibility evaluation results.
	+ Decision body (TC HF)
	+ Approval of the outputs
 |
| **Resources required** | Manpower:* STF 30 days
 |

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| --- | --- |
| **Task 1** | **Identifying and addressing the most crucial accessibility requirements of ETSI deliverables (T1 – T7)** |
| **Objectives** | Develop a short-term solution that works for around 95% of typical ETSI deliverables. The aim of this task is to examine the current templates in order to identify embedded accessibility barriers and produce versions that remove those barriers, if possible. The task will not lead to changes that would impact the way ETSI authors work today but would possibly influence the subsequent EditHelp workflow. This task will provide an immediate, short-term solution for easy-to-fix accessibility problems related to current ETSI deliverables. |
| **Input** | * Existing criteria from WCAG, ISO and EN 301 549 are reviewed and the ones that apply to typical ETSI deliverables/3GPP documents are selected. EN 301 549 Chapter 10 offers a comprehensive set of accessibility requirements for documents. It is mandatory for public sector bodies of EU member states, and it is going to be mandatory for some portion of private businesses. Hence, it seems reasonable to take this set as the basis for accessibility evaluations of the ETSI templates.
* Selection of three typical ETSI deliverables, including one originating from the 3GPP, that are representative with respect to technical documents’ content such as tables, graphics, mathematical formulas, languages, other media, to be used as test cases to examine their accessibility against the accessibility requirements.
 |
| **Output** | * A set of accessibility requirements for ETSI deliverables (including 3 GPP documents), to be tested with the selected existing deliverables.
* Report outlining test results – accessibility flaws in the tested ETSI deliverables, and the ways to remove the barriers.
* Modified ETSI deliverable templates with the identified barriers removed.
* Additional outputs:
	+ Accessibility evaluations and analyses carried out in this task will provide additionally a further quality control for the document accessibility criteria included in the EN - confirming their correctness and/or identifying the need for modifications in Chapter 10 of the EN. The Output is a short-term solution for raising the accessibility of currently emerging ETSI documents (“low-hanging fruits”).
 |
| **Interactions** | * STF
* Dialogue with the 3GPP authors/3GPP Project team on new working method
	+ Assistance in the selection of a test document candidate
* Dialogue with the EditHelp
	+ Assistance in the selection of test document candidates
* Dialogue with the ETSI authors
	+ Discussion of the accessibility evaluation results and what impact are they likely to have on the work of ETSI authors
* Dialogue with the ETSI Project team on new working methods
	+ Discussion of the accessibility evaluation results and what impact they are likely to have on the ETSI working methods
* Decision body (TC HF)
	+ Approval of the outputs
 |
| **Resources required** | Manpower:* STF 50 days
* EditHelp 10 days
* External developers and UX designers 10 days
 |

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| **Task 2** | **Authors/content creators’ requirements and the development process****(T4 – T10)** |
| **Objectives** | Develop a good understanding of the ETSI deliverables’ authors/content creators’ requirements with respect to the accessibility and usability of the deliverables, and with respect to the tools and processes deployed. Conduct a series of in-depth interviews/workshop sessions with ETSI/3GPP authors/content creators to identify the specific needs. Collection of information about solutions employed by other SDOs to make standards documents accessible |
| **Input** | * Results of Task 1, including identified accessibility barriers likely to arise in ETSI deliverables.
* Catalogue of ETSI deliverable templates/types
* Current ETSI/3GPP deliverable production process and the tools deployed
 |
| **Output** | * Report on the needs and requirements of ETSI authors/content creators with respect to the accessibility of ETSI deliverables, the process of their production and the tools deployed.
* Report of in-depth information exchange with responsible members of other SDOs as listed in 6.4
 |
| **Interactions** | The task will require a close dialogue between STF experts and the representatives of ETSI/3GPP authors/content creators, as well as ETSI EditHelp. * Dialogue with the ETSI authors
	+ Discussion of the accessibility evaluation results and what impact they are likely to have on the work of ETSI authors and the deliverables’ production and publication processes.
* Dialogue with the 3GPP authors/3GPP Project team on new working methods
	+ Discussion of the accessibility evaluation results and what impact are they likely to have on the work of 3GPP authors and the deliverables’ production and publication processes.
* Dialogue with the ETSI Project team on new working methods
	+ Discussion of the accessibility evaluation results and what impact they are likely to have on the ETSI working methods.
* In-depth information exchange with (among others) ITU, CEN, Cenelec, IEC, IEEE on working methods leading to more accessible standardization methods.
 |
| **Resources required** | Manpower:* STF 45 days
* EditHelp 5 days
* Developers and UX designers 5 days
 |

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| **Task 3** | **User-centred analysis of ETSI deliverables accessibility and usability****(T7 – T14)** |
| **Objectives** | Conduct extensive user tests and interviews to understand the needs of the various user target groups of ETSI deliverables. Developed understanding of the accessibility and usability needs of the target groups will form the basis for the formulation of a comprehensive set of requirements to ensure high accessibility and usability of ETSI deliverables. |
| **Input** | * Results of Task 1 and Task 2, including identified accessibility barriers and the key requirements to ensure accessibility of typical ETSI deliverables.
* Catalogue of ETSI deliverable templates/types
 |
| **Output** | * Report on the results from user-centred activities (user tests, interviews, workshops, etc.) identifying user needs and requirements regarding accessibility and usability of ETSI deliverables, and the analyses of the best ways to eliminate the barriers.
 |
| **Interactions** | The task will require a close dialogue between STF experts and the representatives of the identified user target groups. * User Groups
	+ Representatives of users with impairments (visual, auditory, mobile).
* EditHelp
	+ Continuous dialogue between STF and EditHelp to ensure an appropriate information flow and feedback.
* ETSI/3GPP authors/content creators/3GPP Project team on new working methods
	+ Continuous dialogue between STF and the ETSI deliverables’ authors to ensure an appropriate information flow and feedback.
* The ETSI Project team on new working methods
	+ Discussion of the accessibility evaluation results and what impact they are likely to have on the ETSI working methods.
* Decision body (TC HF)
	+ Approval of the outputs.
 |
| **Resources required** | Manpower:* STF 55 days
* EditHelp 05 days
 |

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| **Task 4** | **Requirements for accessible and usable ETSI deliverables and solution proposal to address these requirements. (T13 – T18)** |
| **Objectives** | The aim of this task is to arrive at a comprehensive set of requirements to ensure accessible and usable ETSI deliverables. The set of requirements would cover the needs of all user target groups identified in the Task 3 as well as the needs of the internal stakeholders (such as ETSI/3GPP authors, EditHelp and alike). This will provide crucial input for the formulation of long-term requirements and solutions. |
| **Input** | * The results of Tasks 1-3.
 |
| **Output** | * Set of the requirements for fully accessible and highly usable ETSI deliverables, including recommendations on the needed modifications of the ETSI publication processes and specifications of most suitable tools for publication.
 |
| **Interactions** | * STF
	+ Examination of the output of the Tasks 1-3 and drafting the requirements.
* External developers and UX designers
	+ External developers and UX designers are helping STF with the examination to find viable requirements.
* EditHelp
	+ Assistance of the STF.
* ETSI/3GPP authors/content creators and ETSI and 3GPP Project teams on new working methods
	+ Continuous dialogue between STF and the ETSI deliverables’ authors to ensure an appropriate information flow and feedback.
* Decision body (TC HF)
	+ Approval of the outputs.
 |
| **Resources required** | Manpower:* STF 40 days
* EditHelp 05 days
* External developers and UX designers 15 days
 |

## Milestones

The following milestones only cover the work conducted in team 3, milestones beyond are general milestones of implementation of the Accessibility Strategy.

**Milestone A**

|  |  |  |
| --- | --- | --- |
| **Milestone** | Description | Cut-Off Date |
| **A** | Task 1:Examination of a sample of templates used for typical ETSI deliverables to identify embedded accessibility barriers and to produce versions that remove those barriers, if possible.  | T7 |
| Reference Body Deliverable | Stable Draft approved by TC HF |
| ETSI Deliverable | Final Report approved by TC HF |

**Milestone B**

|  |  |  |
| --- | --- | --- |
| **Milestone** | Description | Cut-Off Date |
| **B** | Task 2:User-centred analyses to identify the needs of the ETSI deliverables authors/content creators of ETSI deliverables: conduction of user tests, interviews and workshops.Report of information exchange with other SDOs  | T10 |
| Reference Body Deliverable | Stable Draft approved by TC HF |
| ETSI Deliverable | Final Report approved by TC HF |

**Milestone C**

|  |  |  |
| --- | --- | --- |
| **Milestone** | Description | Cut-Off Date |
| **C** | Task 3: User-centred analyses to verify the needs of the various user target groups of ETSI deliverables: conduction of user tests, interviews and workshops. | T14 |
| Reference Body Deliverable | Stable Draft approved by TC HF |
| ETSI Deliverable | Final Report approved by TC HF |

**Milestone D**

|  |  |  |
| --- | --- | --- |
| **Milestone** | Description | Cut-Off Date |
| **D** | Task 4: Definition of a comprehensive set of requirements for production of accessible and usable ETSI deliverables. | T18 |
| Reference Body Deliverable | Stable Draft approved by TC HF |
| ETSI Deliverable | Final Report approved by TC HF |

**Milestone E**

|  |  |  |
| --- | --- | --- |
| **Milestone** | Description | Cut-Off Date |
| **E** | Task 0: End of project, results reported to TC HF and GA | T18 |
| Reference Body Deliverable | Final report approved by TC HF |
| ETSI Deliverable | Final Report approved by TC HF |

## Task summary

|  |  |  |  |
| --- | --- | --- | --- |
| Code | Task / Milestone  | Target Date | Estimated Cost (EUR) |
| From | To |
|  | Start of work |  |  |  |
| T0 | Project Management | T0 | T18 | 21 000 Euro |
| T1 | Identifying and addressing the most crucial accessibility issues of ETSI deliverables | T1 | T7 | 35 000 Euro |
| Milestone A | Final Report “Examination of a sample of templates” | T7 |  |  |
| T2 | Authors/content creators’ requirements and the development process, info exchange with other SDOs | T4 | T10 | 31 500 Euro |
| Milestone B | Final Report “User-centred analyses” and of information exchange with other SDOs” | T10 |  |  |
| T3 | Definition the requirements for accessible and usable ETSI deliverables | T7 | T14 | 38 500 Euro |
| Milestone C | Final Report on “Definition of a comprehensive set of requirements for production of accessible and usable ETSI deliverables” | T14 |  |  |
| T4 | Developing specifications for the solution that ensures accessible and usable ETSI deliverables | T13 | T18 | 35 000 Euro |
| MilestoneD | Final Report on “Definition of a comprehensive set of requirements for production of accessible and usable ETSI deliverables.” | T18 |  |  |
| Milestone E | Deliverables published, STF closed | T18 |  |  |
|  | **161 000 Euro** |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Task/ Mil.** | **S** | **O** | **N** | **D** |  | **J** | **F** | **M** | **A** | **M** | **J** | **J** | **A** | **S** | **O** | **N** | **D** |  | **J** | **F** | **M** | **A** | **M** | **J** | **J** | **A** |
| T1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MA |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MB |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MC |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T4 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MD |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ME |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

# Expertise required

## Team structure

(Up to) 4 participants to ensure the following mix of competences:

|  |  |
| --- | --- |
| **Priority** | **Qualifications and competences** |
| High | Experience of project management |
| High | Strong knowledge of ETSI workflow and deliverables |
| High | Specific expertise in the area of accessibility requirements and techniques for meeting them |
| High | Specific expertise in the area of user-centred design and user-driven development |
| High | Specific expertise in the area of document production and publication of digital documents |

Part IV: STF performance evaluation criteria

# Performance Indicators

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| --- |
| **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 testbeds, organization of workshops, events) |  |
| Steering Group meetings (number of meetings / participants / duration) | x |
| Number of delegates directly involved in the review of the deliverables |  |
| Contributions/comments received from the Reference Body | 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) | x |
| Contributions to other Reference Bodies |  |
| Presentations in workshops, conferences, stakeholder meetings | x |
|  |  |
| **Liaison with other stakeholders** |
| Stakeholder participation in the project (category, business area) | x |
| Cooperation with other standardization bodies |  |
| 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 | 2023-05-21 | Harri Puskar, Martin Böcker, Agata Sawicka |  | With edits by Matthias Schneider |
| 2.0 | 2023-05-31 | Matthias Schneider | Sent to Board#143 |  |
| 3.0 | 2023-06-27 | Matthias Schneider, Harri Puskar, Martin Böcker, Agata Sawicka | Ready for TC HF RC and to be sent to Board | Revision addressing Board#143 comments |
| 4.0 | 2023-06-27 | ETSI Secretariat | Approved | Board decision number D-B144/1 |
| 4.1 | 2023-08-31 | ETSI Secretariat | Final | Update before CL publication |

Annex I Response to the Request for Proposals
CfE – STF 675 (REFERENCE BODY TC HF)
Deadline: 29 September 2023

**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 675 creation? | oIndicate 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 | Project Management | 21000 | . | . |
| 01 | Identifying and addressing the most crucial accessibility issues of ETSI deliverables | 35000 | . | . |
| 02 | Authors/content creators’ requirements and the development process, info exchange with other SDOs | 31500 | . | . |
| 03 | Definition the requirements for accessible and usable ETSI deliverables | 38500 | . | . |
| 04 | Developing specifications for the solution that ensures accessible and usable ETSI deliverables | 35000 | . | . |
| **TOAL** | **161000** |  |  |

**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 675 (REFERENCE BODY TC HF)
Deadline: 29 September 2023

**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>