



***eInclusion@EU***

Strengthening eInclusion & eAccessibility across Europe

IST-502553

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**Learning Examples:**

**Accessible Procurement Toolkits Denmark, Canada and USA:  
Description and synopsis**

**CANADA, DENMARK and USA**

## 1 Introduction

The eInclusion@EU project has identified learning examples for each of the topics in focus of the project work:

- Topic I: The eAccessibility component of eInclusion [For more information about this topic see <http://www.einclusion-eu.org/Document.asp?MenuID=126>].
- Topic II: eAccessibility and eInclusion in relation to work and employment [For more information about this topic see <http://www.einclusion-eu.org/Document.asp?MenuID=125>].
- Topic III: eAccessibility and eInclusion in relation to online services [For more information about this topic see <http://www.einclusion-eu.org/Document.asp?MenuID=124>].

In eInclusion@EU, a learning example is defined as successful practices which will often represent leading edge experience, though not necessarily the best, ideal or unproblematic. Learning examples are also those which can provide useful learning experiences for others, likely to stimulate creativity, ingenuity, self reflexivity and the transfer of good ideas. A learning example is thus defined in a qualitative sense, i.e. that the case is relevant to the eInclusion@EU project and:

- has fully or substantially achieved its own objectives
- has had a beneficial impact on its environment
- most importantly, provides relevant and useful learning points and lessons, which act as a reservoir of ideas, guides, checklists, etc., of good practice which others can use as input to their own learning and implementation processes.

Thus, a good learning example study is one which is 'good for learning', which means that it can include cases which made mistakes, and do not score high on conventional benchmarks, as long as the case has learnt useful lessons which are carefully described and presented so that others can learn from their experiences. Valuable learning also depends upon a clear understanding of the context and assumptions surrounding a particular case, as well as a clear description of what happened and the results obtained. All these should be standard items in any case study report.

Learning examples result from highly specific and unique conditions and contexts, which mean that there can be no one-to-one transferability to other circumstances. Examples mentioned in one country as good or innovative might not be mentioned in other countries, not only because they are not available but also because they are already established as a regular service. However, they represent an important learning potential if contextual considerations are borne in mind and they are used to create a dialogue between peers facing similar challenges and goals.

The selection of learning examples has covered each of the three topics mentioned above [for more information you can download the eInclusion@EU framework report (D1.1) at <http://www.einclusion-eu.org/SHOWUSERSQL.asp?SQLID=2,36,35,34,33,31,32,3,4&show=LIST&ShowEmpty=NO&MenuID=194>].

## 2 Structure of the learning examples

Each learning example is structured along four main parts:

- 1) eInclusion@EU Topic and Issue including short description of the topic: The first part of each learning example shortly describes the topic for which the learning example has been identified. Since each eInclusion@EU topic is divided into different issues, short descriptions of the issues are described as well. This enables the reader to better understand the overall context of the learning example.
- 2) The Case outline concentrates on a description of the background and context within the project or initiative has been conducted as well as its objectives and main aims. Furthermore, the case outline provides, where applicable, an overview on resources with regard to finance, people, skills, equipments and so on and an overview on concrete activities and actions undertaken within the framework of the learning example in order to achieve its objectives. In addition, results and impacts in the sense of what direct results did the case produce, related directly to the case objectives where relevant, further planned results and impacts. Unexpected results and impacts are described as well.
- 3) The “Learning Points” section presents the core of each example. Here, it is described what specific conclusions (for the learning example itself) and generic examples (potentially relevant for other cases) were learnt. In general, one can distinguish between thematic lessons, i.e. what can be learned from the whole project/initiative or parts in relation to its topics, and methodological/structural lessons, i.e. what can be learnt from the whole project/initiative or parts of it in relation to methods used or management issues.
- 4) The “Further information” provides interesting and important references and links, i.e. web-addresses, literature, relevant studies and reports and other related evidence.

### **3 Accessible Procurement Toolkits Denmark, Canada and USA: Description and synopsis**

#### **3.1 *eInclusion@EU Topic and Issue including short description of the topic***

Each of the Accessible Procurement Toolkits presented relates to eInclusion@EU Topic I: The eAccessibility component of eInclusion.

In this topical area the project focuses on eAccessibility issues emerging from the eEurope 2005 roadmap and from the inclusive electronic communication regulatory framework, in particular, as well as other relevant policy frameworks.. The workshops and data collection carried out under this topic have focused on the issues of:

- Addressing eAccessibility requirements in the public procurement of ICT
- digital rights management and copyright issues in relation to accessibility for those who are print disabled
- eAccessibility rights and redress - the possible role of an eAccessibility ombudsman
- Access to telecommunications and broadcast services for disabled and older people in light of the EU Universal Service Directive Case Outline

#### **3.2 *Public Procurement Toolkit Denmark***

##### **3.2.1 *Case Outline***

The Danish public procurement toolkit is a web-based application aiming to assist public procurers in successfully implementing e-accessibility requirements in their procurement processes or, more specifically, in their tenders and contracts. To reach this aim, the toolkit incorporates a number of e-accessibility standards/guidelines applying to different kinds of ICT components, namely hardware, software, and web-solutions. Among others these are the Section 508 of the US Rehabilitation Act, the "Guidelines for Procurement of Accessible Personal Computer Systems" as set out by the EU's ACCENT project, industry guidelines from IBM and Microsoft, the Web Content Accessibility Guidelines (WCAG) of the W3C, and the Danish Government Guidelines for Public Homepages (for a full list of the incorporated standards/guidelines cf. the resources list below). The toolkit covers the procurement of hardware, software, websites and web-based applications. It is available via a public website.

The toolkit was created by a Centre of Excellence based at the Danish National IT and Telecom Agency. The Agency is responsible for the development and implementation of initiatives within the framework of the governmental IT policy strategy. The Agency is formally a part of the Danish Ministry of Science, Technology and Innovation. The Centre of Excellence was created in May 2003 by the ministry. Its specific aim is to support the political goal of an inclusive and non-discriminative information society. The technical development of the toolkit was carried out by Adapt, a private company developing web solutions. The current version of the toolkit was first presented to the public on a conference in Copenhagen in September 2005.

Public procurement was seen as a central starting point in the endeavour to reach an inclusive information society for three reasons: 1) Public authorities represent a large player in the market for digital solutions with about 15% of the EU GNP and have accordingly a relatively high influence on this market. 2) Effective implementation of e-accessibility should start at an early stage of an IT project, i.e. with the invitation to tender at the beginning of the procurement process. 3) With the beginning of 2006 a structural reform will require many

Danish local authorities to procure new digital solutions. Despite the lack of a specific e-accessibility legislation in Denmark (that would force customers to heed e-accessibility issues when acquiring ICT components), these three framework conditions gave rise to the hope that public procurement in general and an appropriate toolkit in particular would be an effective instrument to get nearer to the goal of an inclusive information society.

The toolkit is designed to provide a list of specific e-accessibility requirements for a given hardware, software or web-solution to be procured. This list can then become part of a tender and contract. On the one hand this helps the tenderer to calculate his efforts, on the other hand it can be used by the client to a) compare the different tenders and b) review the performance of the contract afterwards. The requirements returned by the toolkit are not merely a copy of the underlying guidelines/standards (e.g. of the WCAG) but have been analysed and rewritten (by the Center of Excellence) into specifications directly applicable to the features of the solution to be procured. In addition, the toolkit also provides guidance on why the authorities have to provide accessible solutions and on the problems caused by inaccessible ones.

Technical requirements: The web interface of the toolkit was designed to conform to common accessibility standards.

When a public procurer plans the procurement of an ICT component with the aid of the toolkit, he has first to choose between three different types of solutions: hardware, software or web-solution (i.e. a website or a web-based application). Then he has to answer 5 – 10 questions to specify the required features of the solution, e.g. whether a computer to be bought shall be a desktop computer or a laptop. For every question the toolkit offers a help entry, describing the respective feature in more detail. According to the features selected the toolkit generates the list of requirements specific to the item to be procured. In a final step, the procurer has to select the overall level of e-accessibility the item must meet. There are three levels of e-accessibility, comparable to the WAI A, AA and AAA priorities of the WCAG. Priority 1 contains specifications that must be met to ensure a basic accessibility. Priority 2 contains specifications that should be met in order to allow easier access for a majority of impaired users. Priority 3 specifications may be met to further facilitate access. A long and a short version of the list of requirements is stored on the web server and can later be accessed via a fixed URL.

As said before there are in Denmark no legal obligations to procure accessible ICTs. The toolkit project therefore had to choose another implementation approach than e.g. the USA, where the requirements of Section 508 are a mandatory part of every ICT procurement and the “Buy Accessible Wizard” could be implemented more or less in a top-down way (cf. the learning case “Buy Accessible Wizard by the GSA, USA”). The Danish project had to rely mainly on measures of awareness raising and convincing and on the active cooperation of the relevant actors in the field of public procurement, like public authorities, industry and disability organisations. In order to achieve this, the toolkit development started with a hearing phase, involving representatives from these three groups including “The Danish Council of Organisations of Disabled People” and the “Legal Adviser to the Danish Government”. Thus, it was possible to learn the needs and demands of the target groups and integrate them into the development at an early stage. The decision for the factual usage of the toolkit lies with each institution, as well as the concrete implementation into the procurement process and the choice of the requirements to be applied.

The technical development of the toolkit cost approx. 17.000 €. Additionally, the Danish National IT and Telecom Agency has spent about 1.000 working hours for the development of the first version. These were used primarily for the content-side of development, i.e. collecting the applicable standards, conducting the hearing phase, writing the help-texts and the components of the list of requirements, running tests, etc.

As the toolkit is still a very young application, there exists as yet no much information on its actual use and the impact it has on the procurement processes in the different government agencies. In December 2005 and January 2006 the toolkit was used about 150 times,

according to server statistics. There are currently no plans for further developments of the toolkit.

### **3.2.2 Learning Points**

The Public Procurement Toolkit Denmark does not include a list of special products which achieve certain accessibility standards, but instead offers information on how a special hardware, software or web-solution should be designed in general to be accessible. Herewith the Toolkit gives consideration to the fast changing market, which launches new products, makes changes in product styles and technical configuration and phase out products in due course. According to the features selected by using the Toolkit it generates the list of requirements specific to the item to be procured, and gives therewith an universal, not becoming obsolete, information on how a hardware, software or web-solution should be designed to be accessible. With a very easy to handle questioner system the toolkit identifies the specific use of the required device. Thereby it is in all probability that the device really fulfils all required specifications.

Though Denmark has no legal obligation, no own/national standards or legislation (except website guidelines), the Centre of Excellence based at the Danish National IT and Telecom Agency, responsible for the development and implementation of initiatives within the framework of the governmental IT policy strategy, which has the aim to create an inclusive information society, thought the Toolkit would be an effective instrument do make progress in the field of accessibility in a little while. Because of this the Danish project had to rely mainly on measures of awareness raising and convincing and on the active cooperation of the relevant actors in the field of public procurement, like public authorities, industry and disability organisations. In order to achieve this the toolkit development started with a hearing phase, involving representatives from these three groups including "The Danish Council of Organisations of Disabled People" and the "Legal Adviser to the Danish Government". The Integration of stakeholders and representations of interest at an early stage is a good opportunity to implement the Toolkit instrument automatically, though a legal obligation is missing. This integration is not only very helpful for the development of a practicable solution, furthermore it increases the probability that the toolkit later on really is used by the people playing a decisive role in public procurement. This is a very intelligent and effective way to motivate for a use in practice.

The fact that Denmark reverts on existing standards, on the one hand ensures that the toolkit guarantees a higher international comparability and maybe gets attractive for a audience beyond the borders of Denmark, and on the other hand the toolkit benefits from the international made experiences in the field of standardisation.

With the use of such a public procurement toolkit Denmark promotes the development of an inclusive information society and an environment that meets "design for all" principles.

### **3.2.3 Further Information**

Danish Public Procurement Toolkit - <http://vkassen.oio.dk/guide/> (Web-interface of the toolkit (in Danish))

National IT and Telecom Agency at the Ministry of Science, Technology and Innovation - <http://www.tst.dk/mainpage.asp> (Responsible for the creation of the public procurement toolkit)

Adapt A/S - <http://www.adapt.dk/> (Technical development of the toolkit)

List of guidelines/standards incorporated into the toolkit, sorted by type of solution:

#### **Hardware**

- "Section 508 of the Rehabilitation Act of 1973, § 1194.26 Desktop and portable computers"

- "Section 508 of the Rehabilitation Act of 1973, § 1194.25 Self contained, closed products"
- "Guidelines for Procurement of Accessible Personal Computer Systems" EU-project ACCENT
- "Section 508 of the Rehabilitation Act of 1973, § 1194.25 Self contained, closed products"
- "Section 508 of the Rehabilitation Act of 1973, § 1194.26 Desktop and portable computers"
- "Guidelines for Procurement of Accessible Personal Computer Systems" EU-project ACCENT
- ITU-T's Recommendation E.161 (02/2001) "Arrangement of digits, letters and symbols on telephones and other devices that can be used for gaining access to a telephone network"

### **Software applications and operating systems**

- "Section 508 of the Rehabilitation Act of 1973, § 1194.21 Software Applications and Operating Systems"
- "Section 508 of the Rehabilitation Act of 1973, § 1194.22 Web-based intranet and internet information and applications"
- "IBM Software Accessibility Checklist v. 3.1"
- "Irish National Disability Authority IT Accessibility Guidelines v. 1.1, Application Software" "Guidelines for Keyboard User Interface Design" from Microsoft
- "Authoring Tool Accessibility Guidelines 1.0" from W3C/WAI"

### **Web based Internet information's and – applications**

- "Section 508 of the Rehabilitation Act of 1973, § 1194.22 Web-based intranet and internet information and applications"
- "Section 508 of the Rehabilitation Act of 1973, § 1194.21 Software Applications and Operating Systems"
- "Web Content Accessibility Guidelines 1.0" from W3C/WAI
- "The Danish Government's guideline for Public Homepages"
- "Accessibility Design Guidelines for the Web" from Microsoft
- "Creating Accessible PDF's with Special Consideration for Publication Release Notices"

## **3.3 Accessible Procurement Toolkit, Canada**

### **3.3.1 Case Outline**

The Accessible Procurement Toolkit is a Web-based application that delivers accessibility guidelines and standards to be applied in the procurement process of mainstream ICT products and services. The development of the Toolkit was part of the ADIOs (Assistive Devices Industry Office) work and has been launched in 2000.

By applying accessibility requirements and standards the toolkit will ensure that products meet "Universal Design" principles. Universal design, which is related to the concepts of "inclusive design" and "design for all," is an approach aiming at designing products, services and environments which are usable by as many people as possible regardless their age, functional or mental abilities or situation. It links directly to the political concept of an inclusive society.

The Canadian toolkit aims at helping public procurers in purchasing accessible goods and services by covering all relevant areas such as documentation, instructions and technical support, hardware, media and content, office furniture, software, telecommunication

products, training and web sites/ web applications. Another purpose of the toolkit is to demonstrate product designers and developers the range of accessibility standards that their products should meet in order to ensure that it can be used by disabled people. A commonly expressed concern often expressed is that on the one hand the reason for making such design decisions is unclear, and/or that the technical or functional standards are difficult to implement in actual product features. In order to address these concerns of product developers and designers the Accessible Procurement Toolkit brings together a series of design resources, demonstrations and mock-ups to illustrate aspects of accessible design of products and implementation of services.

The toolkit references a variety of standards, policies and best practices relevant in the area of anchoring accessibility aspects in public procurement processes. The primary aim of the toolkit is to familiarise public procurers with these standards, policies or best practices in order to ensure the acquisition of the most accessible goods or services possible. In the absence of national Canadian standards for accessibility related to many types of products, US Section 508 standards and other best practices have been included as references. According to Canadian guidelines, public procurers are not obliged by specific policy to adopt accessibility criteria when purchasing any electronic or information technology. Only websites must meet the requirements of the "Common Look and Feel" (CL&F) standards and have to be applied by persons developing or procuring the development of websites for the Government of Canada.

The Toolkit was developed by the Assistive Devices Industry Office (ADIO). ADIO itself was launched in the late 90ies to provide a window into the Federal Government for the Assistive Technology (AT) and Rehabilitation Engineering Research Sectors. In 1997, a meeting of Canadian assistive device developers, manufacturers and vendors was held. At this event, participants generally agreed that since the field of assistive devices is one that has grown in importance for the Canadian economy over the last decade and since much more can be done in this area, it was necessary that industry players should have its own distinctive voice. Six months after this meeting the ADIO was launched. There were compelling reasons to establish ADIA, not at least an official request by the Canadian Deputy Minister of Industry to the Industry Minister's Advisory Committee on Assistive Devices calling for a need of an association which allows the Government a single point of contact with this growing industry sector. Although many of the Association's potential members belonged to other, more general trade or manufacturing associations, a separate voice was needed to represent industry organisations. This is in particular important since the assistive technology market is a very fragmented one and consisting of small enterprises, working in isolation from one another, often perceiving themselves as "lone voices in the wilderness". These enterprises needed a way to establish and maintain contact with one another. This is a role that can be well played by an industry association like ADIO. The development of the Accessible Procurement Toolkit was part of the ADIO's work and is also an outcome and continuation of the above mentioned developments and reasons.

As already stated above, Canada does not have a specific federal legislation regulating accessible procurement. Discrimination on grounds of disability is prohibited both by the Canadian Charter of Rights and Freedoms (Available at: <http://laws.justice.gc.ca/en/charter/index.html>) and by the Human Rights Act 1985 (Available at: <http://lois.justice.gc.ca/en/H-6/243963.html>). Ontario has however, a more specific legislation on accessible procurement. Article 5 of the Ontarians with Disabilities Act 2001 (Available at: [http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/01o32\\_e.htm](http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/01o32_e.htm)) states: "In deciding to purchase goods or services through the procurement process for the use of itself, its employees or the public, the Government of Ontario shall have regard to the accessibility for persons with disabilities to the goods or services." The requirement to 'have regard to' accessibility is significantly weaker than the United States requirement for accessible procurement. However, in general, the attention given to accessibility in Canada is high. This is also reflected in the national legislation and the development of the Accessible Procurement Toolkit which does fit in the overall atmosphere related to accessibility.

When a public procurer is planning to purchase or procure an electronic or information technology or any other service for an organization, he is not expected to know whether any of the employees of the organization have disabilities that would prevent them from using any of the items to be purchased. He knows that all technology and services purchased by the organization must either be directly accessible to people with disabilities, or must be capable of being made accessible through the use of some assistive technology.

Two things are important for him to know:

- What requirements have to be added to a contracting document (e.g. a Request for Proposal) to ensure that the purchases will be maximally accessible?
- What questions need to be asked of a vendor or manufacturer to ensure the mainstream products you are buying - through competitive bid or off the shelf - will be useable by employees with disabilities?

The Procurement Toolkit is designed to help the public procurer in answering these questions. The toolkit does not list or recommend specific products, but instead aims at providing enough detail to be of use in a requirement document or purchasing decision. The Toolkit website presents therefore a list of mainstream products and service. If an item in the list is linked the procurer can select it and thus opens a page that lists more specific sub-categories related to that item. If an item is not linked it usually means that a further breakdown would require listing individual brand or model names. In addition to this every item in the list has a definition link that provides a short description of the item. The definition page often includes information about the barriers the item may have for persons with different disabilities. When an item is specific enough to warrant the assignment of accessibility criteria the requirements link will appear beside the definition link. The information given here can be added to a contracting document to ensure that product or service meets or exceeds accessibility standards.

The toolkit can be used by:

- purchasing managers to inform public procurers of their product requirements,
- public procurers to add accessibility clauses to purchasing documents,
- manufacturers to see what standards might apply to their products for planning and development purposes,
- vendors to compare the compliance level of their products to government or national standards.

The toolkit web site is receiving 650 hits per day; it has been used in five major procurements and worked well for these; it has also been used in two smaller procurements.

### **3.3.2 Learning Points**

The Accessible Procurement Toolkit wants to establish understanding and knowledge about the special needs of people with different restrictions and/or disabilities. When using the Toolkit a public procurer does not get a list of special products, but a hold of guidance to what factors attention should be paid to, when reaching a decision about a procurement. With descriptive examples, often illustrated, the user of the Toolkit is gets a more precise and descriptive picture on what is important for the accessible design of products and services. The Toolkit does not give simple determinate solutions; it stimulates a learning process to get increase awareness and consideration of Accessibility standards in the public procurement area. The relatively simple structure, with the integrated Definition-/ Requirements- and Prerequisites- links, allows getting an overview on Accessibility in public procurement relatively simple and fast. In addition to this, the web surface is designed clear and appealing; this motivates to browse trough the web page, and thereby the user gains knowledge automatically.

What also can be learned from this case is that the development and launch of a Procurement Toolkit does not obligatory need a legislative basis (as for example in the USA) forcing public procurers to implement such a toolkit. The fact that the field of assistive devices is one that has grown in importance to the Canadian economy over the last decade and that the related industry now has its own distinctive voice, via the ADIO facilitated the creation of a Toolkit that promotes general standards in procurement.

It can also be stated, that the establishment of an organisation like the ADIO – the Assistive Devices Industry Office facilitates the connections between this industry area and policy stakeholders and also leads to a better coordination, information and experience exchange within between different industry players.

### **3.3.3 Further Information**

The Accessible Procurement Toolkit - <http://www.apt.gc.ca/> (Online Access to the Accessible Procurement Toolkit itself)

Responsible Contact Persons mentioned on the website:

Mary Frances Laughton or Deb Finn  
Assistive Devices Industry Office  
Industry Canada  
P.O. Box 11490 Station H  
Ottawa, Ontario  
K2H 8S2  
Phone: 613-990-4316 or 613-990-4297  
Fax: 613-998-5923  
TTY: 613-998-3288  
E-mail: [adio@crc.ca](mailto:adio@crc.ca)

Online Access to the Responsible Institution - Assistive Devices Industry Office:  
<http://www.at-links.gc.ca/as/as001e.asp>

## **3.4 Buy Accessible Wizard by the GSA – US General Services Administration, USA**

### **3.4.1 Case Outline**

The Buy Accessible Wizard is a web-based application assisting public procurers in the procurement of ICT products and services meeting the requirements of Section 508 of the US Rehabilitation Act. The wizard is a tool for use by US federal government agencies and is available either via a website (which is also open to the general public) or as an install version for the agencies' own servers.

The Wizard is provided by the GSA – US General Service Administration, which is a governmental agency providing services to governmental institutions in the fields of procurement, supplies, telecommunication, facility management, etc. The Wizard was developed by Altarum, a non-profit research institution and the ATI Advanced Technology Institute.

The background for the development and implementation is provided by the above-mentioned Section 508 that was amended to the US Rehabilitation act in 1998. Section 508 regulates the accessibility and usability of ICTs (called EIT – electronic and information technology – in the US) procured by US federal government agencies for use either by their own employees or by members of the general public. It applies to the procurement of the ICTs itself but also to their maintenance, development and use. For government agencies it is mandatory to fulfil the Section 508 requirements in all ICT procurements with only a few

exceptions, namely if the ICTs are used in national security systems, are used strictly in the "back office" (e.g. for maintenance only), are obtained by a contractor incidental to the contract, or if the procurement would impose an "undue burden" on the procuring agency. The term "undue burden" is further defined as a "significant difficulty or expense" with a reference to the related scientific discussion and existing case law (cf. Section 508 Acquisition FAQ, Section G).

Although only a small document by itself, both implications and concrete technical implementation of the Section 508 requirements demand a serious effort on the part of the procuring agency. The "Section 508 Standards" paper, containing a concretion of the general requirements (definitions of important keywords like "assistive technology" or "information technology" as well as descriptions of technical standards and requirements for products and services) comprises 7 pages and is accompanied by a 150 page commentary (Quick Reference Guide to Section 508 Resource Documents). The Wizard aims to assist public procurers in getting to grips with this complex regulation in an easy-to-use and fast manner.

On the technical side, the Wizard is build to use open-source software all of which is available on the internet free of charge. The Wizard itself is a JAVA application (requiring the JDK – Java Development Environment), running on an Apache Tomcat Server and using a MySQL database. Other ODBC-compatible databases like Oracle can also be used. The user interface of the Wizard is accessible according to Section 508 standards. Both online use and installation on other servers is free of charge for all US federal government agencies. The install version is available upon request from GSA. A security assessment has been performed classifying the Wizard as a so-called "low risk, low impact application" posing no unacceptable risk to agency operations, agency assets, or individuals. There is no information available regarding the costs of development and initial implementation of the Wizard.

When a public procurer plans to procure ICTs he/she is guided by the Wizard through a process of gathering data on the product or service to be bought and of receiving information about their Section 508 compliancy requirements. The first step is to select whether the item to be procured is a product or a service. This is followed by a range of questions specifying the item (specification of product/service, planned range of costs, item includes documentation, etc.). The procurer is then provided with a list of actual products/services stemming from a market research database. This list can serve as a starting-point for a vendor search. Finally, a summary report is created listing all Section 508 requirements relevant for the procurement along with detailed information on each requirement. This report can either be stored locally or on the server and can also be printed. Thus, the summary report not only helps the procurer to draw up a compliant invitation for tender but also serves as a documentation of how the Section 508 requirements were addressed in the specific process.

According to sources in the GSA itself, the initial uptake of Wizard use was very good and users reported noticeable positive effects regarding the effectiveness of their procurement processes as well as an increasing success in adequately meeting all applicable requirements of Section 508 for a given product. The Wizard was also selected as a "Best-of-the-Best Example" by the Best Practices Committee of the CIOC – Chief Information Officers Council of the US government in November 2005. The council was set up as an interagency forum for US government CIOs and is aiming to improve practices in design, use and performance of US federal government agency information resources. Although empirical evidence for this success is missing one can assume that the evaluations from the US governmental agencies are near the mark. This not only because meeting Section 508 requirements is mandatory for nearly all public ICT procurement processes and compliance research therefore is a must, but also because of the high complexity of the regulation which is considerably reduced by the interactive Wizard.

### **3.4.2 Learning Points**

Possible lessons to be learned from this example must be seen in the light of the framework conditions of the original case. Here, three things can be pointed out: 1. The regulations under Section 508 of the Rehabilitation Act are, as pointed out above, extensive. Although this is not done explicitly by the agencies responsible for the Wizard, one can say that the simplification provided by the Wizard was both sensible and important to assist the implementation of Section 508. 2. The application of Section 508 is mandatory for nearly all public ICT procurement processes. Therefore, all tenders and contracts must be checked for their Section 508 compliancy which cannot be done without the use of the extensive commentary resources, made readily available via the Buy Accessible Wizard. 3. Section 508 applies to public ICT procurement in federal agencies of the US government and was implemented in a top-down manner through the hierarchies of the US federal administration.

What learning points can be drawn from these three framework conditions? First, the (apparent) success of the Buy Accessible Wizard seems to stem to a considerable degree both from a mandatory, complex underlying regulation structure that needed to be facilitated on the one hand and from an authoritarian top-down implementation on the other. Second, based on the authority of the US federal government, a full geographic coverage of the whole United States could be reached in one go (more or less). However, nothing is said about the procurement of accessible ICTs on state-level, which is not covered by Section 508.

Accordingly, the Buy Accessible Wizard can provide learning points for similar schemes if, for instance, the use of an IT-application (a wizard or toolkit) really facilitates processes that would otherwise eat up more resources (e.g. for training procurement experts, doing research prior to an invitation for tender, etc.). It is also important that a suitable way is found to motivate procurement practitioners to use the application (where motivation does not necessarily mean a top-down implementation but also awareness raising, convincing, incentives, etc.). Third, the area to be covered (a country or region, an administration branch) should have a minimum of common characteristics that form the basis for the implementation (e.g. a common procurement law, one government or several governments cooperating closely).

If those conditions are (more or less) met, the Buy Accessible Wizard shows a number of concrete characteristics that can be further considered as learning points in their own right. First among these is the easy to use and accessible (according to Section 508) user interface, which guides a procurer through the whole process and provides helpful hints, background information and a glossary on every step. Second is the use of open-source software which not only helps to reduce costs connected to commercial licences but also ensures to a large extent the platform-independency of the application. Third, the security assessment is an important step not only to reduce the risk for the institutions using the application but also to heighten acceptance and trust among users and IT personnel to use the application. The security of both transmission and storage of the data entered into the application must be guaranteed to ensure a fair and confidential procurement process. Fourth, the database of applicable products and services can be considered very helpful when it comes to finding a starting point for a vendor search in a complex field like e.g. that of software or hardware producers. However, mechanisms must be installed to ensure that such a database does not systematically exclude certain companies or whole branches. It can therefore be assumed, that the effort for the initial market research and the continuous updating of the database will be rather high.

### **3.4.3 Further Information**

The Buy Accessible Wizard – <http://app.buyaccessible.gov/baw/> (Online access to the Wizard itself)

Buy Accessible Wizard Support Site – <http://buyaccessible.aticorp.org/index.html> (Website providing various support material (like presentations) and a FAQ section)

US General Services Administration - <http://www.gsa.gov/> (Provider of the Wizard)

Section 508 - <http://www.section508.gov/> (Section 508 information website provided by GSA. Contains the Section 508 text proper, the Section 508 standards and the commentary (quick reference guide), also many additional information material)

Section 508 Acquisition FAQ -

<http://www.section508.gov/index.cfm?FuseAction=Content&ID=75>

CIOC Best Practice Committee - <http://www.cioc.gov/index.cfm?function=bpstatement>

Selected the Wizard as a “Best-of-the-Best Example” in November 2005 (also cf. here: [http://www.fedtechmagazine.com/article.asp?item\\_id=151](http://www.fedtechmagazine.com/article.asp?item_id=151))

Altarum - <http://www.altarum.org/default.htm> and ATI - <http://www.aticorp.org/index.htm> (Developers of the Wizard)

GSA newsletter: Section 508’s “Buy Accessible Wizard” - [http://www.gsa.gov/gsa/cm\\_attachments/GSA\\_DOCUMENT/falldition\\_news13oct\\_R2-oH1-w\\_0Z5RDZ-i34K-pR.htm#articleG](http://www.gsa.gov/gsa/cm_attachments/GSA_DOCUMENT/falldition_news13oct_R2-oH1-w_0Z5RDZ-i34K-pR.htm#articleG) (Newsletter article announcing the release of the Wizard and giving some user feedback)

### 3.5 Synopsis

To give a quick overview on the three above mentioned learning examples the following table demonstrates the basic “Toolkit facts” and summarizes similarities and differences.

	<b>Denmark</b> <b>“Public Procurement Toolkit”</b>	<b>Canada</b> <b>“Accessible Procurement Toolkit”</b>	<b>USA</b> <b>“Buy Accessible Wizard”</b>
<b>Products concerned</b>	hardware, software, websites and web-based applications	documentation, instructions and technical support, hardware, media and content, office furniture, software, telecommunication products, training and web sites / web applications	ICT products and services
<b>Applied eAccessibility standards/ guidelines</b>	Section 508 of the US Rehabilitation Act, the “Guidelines for Procurement of Accessible Personal Computer Systems” as set out by the EU’s ACCENT project, industry guidelines from IBM and Microsoft, the Web Content Accessibility Guidelines (WCAG) of the W3C, and the Danish Government Guidelines for Public Homepages	US Section 508 standards, other best practices, requirements of the “Common Look and Feel” (CL&F) standards	Section 508 of the US Rehabilitation Act
<b>Starting background</b>	First presented to the public in September 2005 Driven by the aim of fulfilling the governmental IT policy strategy Mainly “bottom-up” implementation	Launched in 2000 Driven by a growing market and missing structure/voice of the “accessibility” market segment Mainly “bottom-up” implementation	Available since October 2004 Driven by legislation “Top-down” implementation
<b>Responsible Institution</b>	Centre of Excellence (public)	Assistive Devices Industry Office (ADIO) (private)	US General Service Administration (public)
<b>Legal background</b>	No special procurement legislation existing	No special procurement legislation on national level, existence of one regional procurement legislation	Special procurement legislation existing
<b>Target Groups</b>	public procurers, also helping tenderers	Purchasing managers, public procurers, manufactures, vendors	Public procurers

<b>Result/Impacts</b>	<i>information on its actual use and the impact does not exist yet</i>	<i>has been used in five major procurements and in two smaller procurements</i>	<i>Initial uptake was very good and users reported noticeable positive effects regarding the effectiveness of their procurement processes as well as an increasing success in adequately meeting all applicable requirements of Section 508 for a given product.</i>
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As the three learning examples and the summary in the table above show, the development of Procurement Toolkits can emerge from different backgrounds and therewith have different attributes and characteristics. For example in Canada a mainly “bottom-up” approach can be observed where the toolkit has been implemented by a private Industry Office trying to reach a wide audience including all relevant target groups and to meet all interests arising from a growing market and missing structure/voice of the “accessibility” market segment. On the contrary to this approach, the motor for the toolkit in the USA has been a concrete legislation (Section 508 of the US Rehabilitation Act) and can thus be seen as a “top-down” approach especially meeting the requirements mentioned in this particular legislation. Therefore the variety of addressed products is smaller and public procurees are the only target group, one-to-one reflecting the US Section 508. The Danish toolkit somewhere lies in-between these two approaches as it was mainly developed as part of an ICT policy strategy.

Although the toolkits are rather different with regard to their background, target groups and products addressed, they have been proven to be helpful instruments to ease a standardised procurement which fulfils accessibility standards.

All Toolkits focus on public procurement processes in the public sector. The public sector in all countries is a very important market segment being a big, financially potential purchaser of products and services. The fact that the public sector is more uncoupled from market requirements makes the public sector more interesting for the implementation of standards and toolkits, which may spread their influence into other sectors.