



Technical Assistance of the Greek Export Promotion Action Plan

Grant Agreement SRSS/S2016/029

Deliverable Report 2.3

2.3.1 Comprehensive terms of reference for the tender process leading to the development of the help-desk

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List of Abbreviations

API	Application Programming Interface
CRM	Customer Relationship Management
B2B	Business-To-Business
BI	Business Intelligence
BMWi	Federal Ministry for Economy Affairs and Energy (Germany)
BoD	Board of Directors
EC	European Commission
EFQM	European Foundation for Quality Management
ELOT	Hellenic Organization for Standardization
EPANEK	Operational Programme “Competitiveness, Entrepreneurship & Innovation” 2014-2020 (Funding Authority)
EU	European Union
EG	Enterprise Greece
FAQ	Frequently Asked Question
GIZ	Gesellschaft für Internationale Zusammenarbeit GmbH
GSDP	General Secretariat for Digital Policy
ITC	International Trade Center
KPI	Key Performance Indicator
MFA	Ministry of Foreign Affairs Greece
MinAgric	Ministry of Rural Development & Food
MoE	Ministry of Economy and Development Greece
MoU	Memorandum of Understanding
OS	Operating System
PC	Personal Computer
SLA	Service Level Agreement
SRSS	Structural Reform Support Service
TA	Technical Assistance
ToR	Terms of Reference
VAT	Value Added Tax



1. Introduction

The present report covers the activity 2.3.1 “Preparation of ToR”. It is based on the findings and results of activities 2.1 and 2.2 (as reported in the respective deliverables), and forms the realisation of the GIZ proposals for the establishment of the help desk.

GIZ in cooperation with EG and the MoE conducted preparatory actions required for the support through the structural funds procedures with the relevant authorities (EPANEK), and consulting advice was sought after and contracted with a specialized company for the preparation of all necessary documents.

The results we report below (and their base in the deliverables 2.1 and 2.2) have been repeatedly discussed with the Greek partners. Some decisions upon the realization have therefore been taken, and found way into this report in detail, i.e. the use of an outsourced call-center solution for the start of the phone call-center operations’ Front Office.

This report gives a summary¹ in English language of what was submitted to the relevant Funding Authority (EPANEK) on 23rd of March 2018, after the formal decision by the Board of Directors (BoD) of EG (in mid of March) as a Technical Fiche, which – after its approval by the funding authorities in mid July 2018 – has been converted to the terms of references for the development of the help-desk.

The present report serves as a summary of the contents of the Technical Fiche as submitted electronically (in Greek language) to the funding authority. The copy of the Technical Fiche and accompanying documents has also been distributed to the Steering Committee.

¹ GIZ: The Greek language technical fiche is based on the more detailed elaborations in the GIZ deliverables 2.1 and 2.2.



2. ToR: Basic assumptions

Based on the findings and recommendations of the GIZ Team, the following assumptions should be taken into account in order to develop the terms of reference for the set-up of the help-desk system for exporters.

Those findings and recommendations are based on reviewing existing work and studies conducted by International Organizations & Greek bodies, as well as the preliminary study carried out by Intraway S.A., commissioned by the MoE, meetings, contacts and validation questionnaires exchanged with key stakeholders and representatives of Greek internationalized enterprises and benchmarking best practices of help-desks in the EU, based on three criteria: a) alignment with EU guidelines and initiatives, b) country of origin export performance and c) similarity with Greek economy size, composition of exports and public sector structure.

1. **Structure:** The help-desk will be integrated into Enterprise Greece and it will act as the central entry point for providing information to the interested exporters (existing and potential).
2. **Content:** The content of services is not necessarily generated within Enterprise Greece, but could be provided from other sources either publicly available or through dedicated sources and databases or material / information provided by other stakeholders / help-desks (including the Export Promotion IT System to be developed).
3. **Service delivery:** The main channel through which the help-desk can exchange data both ways is going to be initially the web interface of the EG website. Foreseeing compatibility with the Export Promotion IT System to be developed, a specific web interface of the help-desk needs to be developed as the entry point interface with exporters.

Besides this interface, web forms or email and the call center (in case of general guidance, delegation to other sources, responses to simple issues) can support the interaction between enterprises and the help-desk, while customized assistance can be provided by Key Account Managers / Thematic Specialists.

The use of a CRM tool in conjunction with a registered client and its requests can support the provision of personalized services and monitoring.

4. **Evaluation:** The evaluation of the help-desk will be based on periodical reports for several evaluation criteria:
 - Key Performance Indicators (KPIs) to measure performance against set target values – KPIs values should be reported by the CRM tool
 - Impact Indicators to measure the contribution of the help-desk to Exports increase, Job creation/preservation of jobs, Quality improvement, Innovation



Evaluation tools proposed by the GIZ Team include the following:

- Online and offline questionnaires
- Expert Interviews / questionnaires
- Website traffic and thematic “clicks”
- Phone, Web and Mail enquiries statistics
- Comparison (Benchmarking) with similar services
- Evaluation reports

Some of the above can be obviously implemented through the help-desk web interface and the use of the existing and upgraded CRM system. All the finally selected tools, their scope, the relevant data (input-output), the methodology to set targets and the monitoring and decision-making procedures should be defined in the help-desk management system, according to international standards (like ISO or EFQM) or national standards and guidelines (like ELOT).

5. **Publicity:** Certain activities should be implemented by EG, in order to raise awareness about the Export helpdesk services:

- Organization of regional events (Athens, Thessaloniki, Patra, Crete)
- Design and production of a video spot
- Design and production of a radio spot
- Social media promotion

3. ToR: Help-desk Structure

As already mentioned above, the help-desk will be integrated into Enterprise Greece and it will act as the central entry point for providing information to the interested exporters (existing and potential). Depending on information or service requested, the exporter could be delegated to other stakeholders, other help-desks or other sources of information.

Therefore, a type of cooperation agreement should be established between EG and the other stakeholders in order to ensure their regular involvement and provision of information / services regarding the operation of the help-desk. In certain cases², this agreement could be documented as a Service Level Agreement defining among others provision of services and the mutual obligations of the parties.

GIZ suggests a structure that requires development of internal hierarchies (front-desk, back-office, Key Account Managers, Thematic Specialists), in conjunction with a CRM system and a comprehensive IT-system for Export Promotion.

The development of the proposed necessary internal hierarchies in the Front Desk and Back Office as well as a group of Key Account Managers / Thematic Specialists could be addressed in view of the on-going plans to redesign the business operations of EG³.

² See GIZ Deliverable report 2.2, paragraph 2.3 “Division of Labor”.

³ GIZ: The plans for the operations redesign of EG, according to informal discussions, could include activities such as the improvement of its organizational operation, implementation of new procedures / operations, standardization of procedures, implementation of action plans constituting obligations of the country to the Institutions, etc. There is obviously also a connection with the recruitment of new employees and the need of embedding them into a new structural setting.



4. ToR: Human resources

Currently Enterprise Greece has scarce human resources allocated to help-desk services for exporters (2 employees), while enquiries received are not processed in a unified way, depending on the means of submitting them (by web form, by phone, by direct e-mail to personnel etc.). The core organization (EG) in the as-is situation also depends on outside sources and databases to compile or generate information (EL-STAT, business associations, MFA, MinAgric, ITC, ICAP, Kompass etc.), while lacking physical presence in form of offices outside Athens (and Thessaloniki) or Greece in general, thus having limited capacity both in guidance, advocating and empowering services.

For the initial set-up of the help-desk structure in EG, the following suggestions seem to satisfy the needs for controlling the help-desk processes and monitoring / evaluating the help-desk operation:

- Recruitment of 3 new employees, as back office staff
- Front desk services provided through the call center services
- Key Account Managers / Thematic Specialists services covered by EG existing personnel (the relevant job descriptions should also be foreseen)

The results of the continuous / periodical evaluation of the help-desk performance (especially during this initial phase) can document any necessary changes in the structure / number of personnel, relevant to changing enterprise's needs, export legislative framework, technological issues, reforming of public or other bodies involved in the export streamline.

The help-desk processes can be further supported by EG administrative personnel. All the help-desk personnel should be trained through thematic seminars and especially through training visits in foreign help-desks identified as best practices by the GIZ Team.

5. ToR: Knowledge base

The content of services shall not necessarily be generated within Enterprise Greece, as information might be available from other sources, either already publicly available (i.e. Export Promotion IT System to be developed, the main source of information) or through dedicated sources and databases (i.e. ITC, Kompass, Euromonitor) or material / information provided by other stakeholders / helpdesks.

Aligning the findings of benchmarking help-desks in EU with the Main Services Categories already identified above, content of services should include:

- Guiding (potential exporters) towards sources of export related information and data, including the IT System for Export Promotion and external databases
- Advocating regulatory compliance (procedures & formalities, documentation) at a pre-customs level and across borders, as well as conformity assessment (quality/technical requirements)
- Empowering exporters through networking with other public and private sector bodies (consulting, coaching, mentoring, training)
- Contributing to the improvement of coordination within the public sector and interaction of private and public sector.
- Whistleblowing in all above fields.



EG should ensure the provision of the information needed to respond to client's requests and/or guide them properly to other sources, stakeholders, help-desks. In this context, EG should get access / obtain to market/sector surveys, studies, reports & business registry data (ICAP, Kompass, Euromonitor, etc.), including the Exports prospects methodology of the International Trade Center. The relevant license rights may include the right to disclosure of information accessed / obtained / customized through the help-desk interface, if such a license available / applicable.

Moreover, EG may provide How-to Exports learning Guides regarding several issues for the exporters, such as setting up an export company, export procedures, documentation, introduction to international trade issues, tax and procedural issues, etc.

EG may ensure that most of the content provided (if not all) should be presented in Greek language in order to facilitate its understanding / prevent any misunderstanding.

6. ToR: Technical Solutions

The operation of the help-desk will be supported by technical solutions which ensure the streamline of its services.

6.1 Call center / Front Desk

As recommended by the GIZ Team, the Front Desk has two main tasks:

- To provide general information to exporters as far as to inform them where to search for or find the information inquired or to orientate themselves to better focus on their enquiries etc. The front desk shall also cope with incoming electronic enquiries.
- To delegate certain and concrete enquiries either to the back office or directly to the Key Account Managers for further processing. In some cases, it is the front office that might receive enquiries through stakeholders (say regional chambers) or delegate exporters directly to stakeholders/partners to receive assistance on their specific enquiries.

The above services of the Front Desk will be supported by a Call Center (besides the other electronic means of communication: web form/ email). The Call Center structure and infrastructure could either be integrated in EG or provided as a service from an external provider. During the initial phase of the help-desk, it is recommended EG to outsource the Call Center services and re-evaluate its integration to EG after two years of operation, unless there are certain indications for such an action earlier, depending on the volume of work carried out by the Call Center.

The specific requirements for the outsourced Call Center Services are suggested to include the following:

- Outbound calls to enterprises (enquiry follow up, provide additional information, publicity of events, implementation of field research, customer satisfaction research, etc.)
- Outbound calls to stakeholders / partners / helpdesks (delegation of enquiries)
- Interconnection and Interoperability with CRM tool



6.2 Customer Relations Management (CRM) tool

The CRM Tool will be at the heart of the help-desk services, supporting the following issues:

- Work flow management of the help-desk services
- Validating KPIs for monitoring and reporting
- Registration procedure (exporter, request)
- Knowledge base building
- Interconnection and Interoperability with the Export Promotion IT System / Web Portal to be developed, the help-desk web interface, the Call Center Services
- Maintenance services should be provided

The CRM Tool should be a user-friendly web-based application that facilitates all the above.

The procurement of the CRM Tool is already in progress by EG.

6.3 Business Intelligence (BI) tool

The use of a web-based BI Tool will facilitate the customization of data provided, their presentation to the exporters through different channels and the further collection, integration, analysis of obtained data to create insightful and actionable business information for all the involved export stakeholders and exporters. BI tools are data-driven Decision Support Systems helping users and viewers to document their relevant decisions.

The BI Tool is suggested to include the implementation of a B2B match making tool between Exporters - Foreign Importers / Markets, based on the data analysis provided through the BI Tool. The match making tool should be linked to the Help-desk web interface, in order to be available to its visitors.

6.4 E-learning platform

The e-learning platform could facilitate the knowledge building of the existing / potential exporters. Moreover, it could be used to present educational material (customized for specific target group or thematic subject) to those interested, including existing work and studies, reports, surveys conducted by International Organizations & Greek bodies, as well as the How-to Export Learning Guides to be developed. It could be linked to the help-desk web interface.

6.5 Web interface

The web interface of the helpdesk would be the entry point interface with exporters. It should be user-friendly, easily navigated for anyone interested in obtaining information regarding export issues and act as an initial guide for them in order to get the best fitted services they need.

The main functional areas of the web interface include the following:

- Presentation of the Export Helpdesk, its mission and the services available



- Export Helpdesk FAQs
- Export Helpdesk Knowledge Center (publicly available information of processed data, market / sector surveys, studies, reports, etc.)
- Match making tool
- Links / Communication info to export stakeholders / partners / helpdesks
- Export Helpdesk specific announcements / news / events
- Contact & Registration area
- Interconnection and Interoperability with the Export Promotion IT System / Web Portal to be developed, the Call Center Services, the CRM tool

6.6 Working equipment for new personnel

The new personnel should be provided with the proper equipment (3 desktop PC sets, including OS and office automation software and a medium size laser colour all-in-one business printer/ scanner/ fax).



7. ToR: Financial sustainability

Project's feasibility and sustainability must be comprehensively justified in the Technical Bulletin. GIZ has estimated that at the end of the funding period, help-desk's financing needs will amount to 98,000.00 € per year, which is under 1% of the EG's total annual budget. The cost allocation has as follows⁴:

CATEGORY OF EXPENDITURE	DESCRIPTION / COMMENTS	AMOUNT	UNIT	COSTS (VAT excl.)
Human Resources / Staff	Cost already foreseen in the annual budget covering new recruitments (+50 staff)	36	MM	64.800,00 €
Call Center (incl. the required interconnections / interoperability)	Outsourced as a service	12	Months	24.000,00 €
Business Intelligence (BI)	Software as a service (per year)	1	Lump sum	10.000,00 €
Match Making Tool	Development of match making Tool			
Knowledge Center	Equal amount to the AS-IS status	1	annual subscr.	30.000,00 €
Export Prospects Methodology (International Trade Center-ITC)		1	annual subscr.	25.000,00 €
How-to Export Learning Guides	Update of guides and FAQs tree	1	Lump sum	10.000,00 €
Quality Assurance certification	Acquiring Quality Assurance certification	1	Lump sum	1.000,00 €
Help-desk web interface	Technical support & maintenance foreseen for EG website			2.000,00 €
Staff training	For help-desk service provision, new and existing personnel	1	Lump sum	18.000,00 €
Publicity & social media	For raising awareness on help-desk	1	Lump sum	10.000,00 €
TOTAL COST				98.000,00 € + 96.800,00 € = 194.800,00 €
ACTUAL ANNUAL COST				98.000,00 €

⁴ GIZ: Total employment cost is estimated at 1.800€ per person per month. Man-Month (MM) is estimated at 3.000€ (VAT excl.).



8. ToR: Timeline

Regarding the time plan of the implementation of the helpdesk set-up & operation and the relevant costs incurrence, the following assumptions are considered:

1. The cost of the new personnel recruitment and of the call center services procurement is estimated for a duration of a suggested two-year implementation period
2. The staff training is placed in the first months of the helpdesk operation
3. Preparations and preliminary actions for the procurement of the working equipment and the assignment of the development of the helpdesk web interface is foreseen to take place in the month before the beginning of the two-year implementation period, in order to speed up initial operational capacity of helpdesk.
4. The development of the BI tool, the match making tool and the e-learning platform are assumed to be ready before the end of the first year of operation.
5. The access to the knowledge base data provided from third parties is ensured near the middle of each year of operation.
6. The contract for the development of the how-to export learning guides should be completed before the deployment of the e-learning platform. Then, their updates are prepared before the end of each year of operation.
7. The preparation for the quality assurance mechanism and its certification incur before the end of each year of operation.
8. The publicity activities, including the helpdesk promotion through social media are implemented throughout the relevant helpdesk operation, after it is well established.

A draft time plan for a two-year funding period is available in Annex 10.2.



9. Funding procedures

9.1 EPANEK Operational Programme 2014-2020

The “Competitiveness, Entrepreneurship and Innovation” (EPANEK) Operational Programme is one of the five sectoral operational programmes of the Partnership and Cooperation Agreement (the new NSRF) for the period 2014-2020, which along with the 13 Regional Operational Programmes, were approved on 18/12/2014 by the European Commission. The pivotal strategic objective is to enhance the competitiveness and extroversion of enterprises, to facilitate transition to quality entrepreneurship with innovation and the growth of domestic added value as the cutting edge.

Currently, there is an open Call for proposals (#073) from the Management Authority of the Operational Programme Competitiveness, Entrepreneurship and Innovation 2014-2020 (EPANEK), which focuses in upgrading Public Administration Operations to Support the Business Environment and Business Extrusion.

EG is eligible as a beneficiary of a helpdesk project proposed for funding, in the context of the above-mentioned Call.

9.2 Draft funding proposal

Following the specific requirements of the EPANEK Call #073 and considering all the issues mentioned above, including the fact that EG is already in progress to evaluate offers for a CRM Tool and proceed in assigning the specific contract to an external provider, the funding of the help-desk could be addressed as described in Annex 10.1.

According to the EPANEK rules, this project can be implemented by EG “own means / own supervision” (αυτεπιστάσια). This procedure describes the fact that most of the supplies can be procured by EG without a formal tendering process, unless the cost of an individual procurement exceeds the amount of 60.000€ (VAT excl.). If this would be the case, a different sub-project should be included in the proposal. As depicted in Annex 10.1, in some categories of expenditure, the relevant cost is close or equal to 60.000€ (VAT excl.). In order to avoid the time-consuming formal tendering procedure, it is recommended to verify if the actual cost can be reduced so that the implementation of the help-desk project can be accelerated.

Another requirement of the Call #073 is that certain expenditure regarding software / hardware can be funded using the capability of joint support of the EU Funds (flexibility clause), therefore the BI tool, the match making tool and the e-learning platform can be included in a separate sub-project⁵.

EG’s application for funding the helpdesk set-up and operation in the context of the above-mentioned Call, the following documentation will be submitted (electronically) to the Management Authority of EPANEK:

⁵ GIZ: Each orange border indicates separate selection / assignment procedures. In the case of the BI tool, the match making tool and the e-learning platform, it refers to a separate sub-project.



1. Application Form
2. Project Formal Technical Description
3. EG eligibility for the implementation of the export helpdesk
4. EG administrative decisions / approvals for the export helpdesk project
5. Cost breakdown and analysis
6. Documentation for the project feasibility and the exploitation of its results
7. Project time plan (GANTT)
8. Detailed formal description of the project activities to be implemented by EG own means
9. Management capacity documentation
10. Market research results for the equipment / software procurement
11. Other material dealing with neutral issues

According to the existing funding framework, a Monitoring-of-implementation Committee needs to be established. Project Coordinator, Project Manager, Project Contact Person and Committee members should be appointed from EG high and middle management and staff, by decision of the BoD.

Committee's work and responsibilities consist of monitoring tender documentation and procedures (when needed), compliance with funding guidelines, budget and timeline, as well as regularly reporting back to the Funding Authority progress made.

The estimated budget for a two-year funding period is available in Annex 10.1.



ANNEX



10.1 Annex: Funding of the help-desk development

CATEGORY OF EXPENDITURE	DESCRIPTION	COMMENTS	AMOUNT	UNIT	Sub-projects w/ own means	Sub-project IT tools
Human Resources	Recruitment of 3 new staff		72	MM	129.600,00 €	
Call Center Services	Outsourced as a service. Continuity of service will be evaluated at the end of the funding	Distinct Sub-project, mention specific terms for defining cost (incl. relevant offers)	24	Months	48.000,00 €	
Business Intelligence (BI) Tool	Supply of BI tool	Cost allocated in Sub-project (IT)	1	Lump sum		52.000,00 €
Match Making Tool	Development of MM tool	Cost allocated in Sub-project(IT)	1	Lump sum		10.000,00 €
Knowledge Center	Get access (or obtain) market/ sector surveys, studies, reports & business registry data (ICAP, Kompass, Euromonitor etc.)	2-year subscriptions mentioning the specific data/processing differentiating each provider, mention the special pricing for EG	2	annual subscr.	60.000,00 €	
Export Prospects Methodology (International Trade Center-ITC)	Get access (or customization) of International Trade Center's methodology	2-year subscription mentioning the specific data/processing and the relevant licensing rights, mention the special pricing for EG	2	annual subscr.	50.000,00 €	
How-to Export Learning Guides	Get access (or obtain) information for guidance & empowerment of (potential) exporters	Includes the FAQs Tree	1	Lump sum	40.000,00 €	
E-learning platform	Development of an e-learning platform for (potential) exporters	Cost allocated in Sub-project (IT)	6	MM		18.000,00 €
Quality Assurance Mechanism	Setting up procedures to follow quality standards (ISO, EFQM etc.)	Includes the preparation / adjustments for the 2 nd year certification	1	Lump sum	6.000,00 €	
Quality Assurance (certification)	Acquiring Quality Assurance certification	2 years certification	2	Lump sum	2.000,00 €	
Help-desk web interface	Development of Help-desks web interface	Includes social media accounts & users forum/chat	5	MM	15.000,00 €	
Staff training	For service provision, new and existing personnel	Educational visits in European Export Helpdesks identified as best practices & vocational training seminars	1	Lump sum per activity	18.000,00 €	
Publicity& social media	For raising awareness on help-desk	If <60.000 to be included in HelpDesk subproject – otherwise allocated in distinct subproject	1	Lump sum per activity	60.000,00 €	
Working equipment for new personnel	3 PCs + All-in-One laser colour printer		1	Lump sum	3.500,00 €	
Sub-totals					432.100,00 €	80.000,00 €
TOTAL					512.100,00 €	



10.2 Annex: Timeline for the development of the help-desk

CATEGORY OF EXPENDITURE	Preparations (in brackets estimated duration in months)	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24	M25
Human Resources	Selection procedures for new personnel (2)																									
Staff training	Course / helpdesk site visit selection and arrangements																									
Working equipment for new personnel	Market research and procurement																									
Help-desk web interface	Request for offer, selection & contract assignment (1)																									
Call Center Services	Request for offer, selection & contract assignment (2)																									
Business Intelligence (BI) Tool	Preparation of the RFP, selection & contract assignment procedures (4)																									
Match Making Tool																										
E-learning platform																										
Knowledge Center - ICAP	Contract assignment (1)																									
Knowledge Center - Kompass	Contract assignment (1)																									
Knowledge Center - Euromonitor	Contract assignment (1)																									
Export Prospects Methodology (International Trade Center-ITC)	Contract assignment (1)																									
How-to Export Learning Guides	Request for offer, selection & contract assignment (2)																									
Quality Assurance Mechanism	Contract assignment (1)																									
Quality Assurance (certification)	Market research and contract assignment (1)																									
Publicity & social media	Market research and contract assignment (1) / per activity																									