Survey on eInclusion Actors in the EU27

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Executive Summary

This survey is a building block for a larger policy-oriented research project, '*Measuring the Impact of eInclusion Actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe*' (MIREIA)[1], co-funded by DG CONNECT and JRC IPTS. The project aims to improve our understanding of the role of eInclusion intermediary actors across the European Union and to create adequate measurement instruments to provide evidence on how they contribute to the achievement of the Europe 2020 goals from the eInclusion perspective.

The eInclusion policy, launched under the Lisbon 2010 strategy and revised under the Digital Agenda Flagship initiative under the Europe 2020 strategy, aims to *"reduce gaps in ICT usage and promote the use of ICT to overcome exclusion, and improve economic performance, employment opportunities, quality of life, social participation and cohesion."*

eInclusion intermediary actors can be defined as "*Public, private and third sector organizations which intentionally address social inclusion goals through ICTs or promote the use of ICTs to enhance the socio-economic inclusion of marginalized and disadvantaged groups and of people at risk of exclusion*".

This survey aims to contribute, with the first set of data ever collected, to the characterization and mapping of eInclusion intermediary actors in the EU27. This will improve our understanding of the types of organizations there are within the public, private or third sector, what organizational capacities they have (staff, budget levels, funding sources and network memberships), what ICT-enabled and other social services they provide and to which target groups, and finally, it will give us an estimation of the size of the sector.

The survey, performed in collaboration with Telecentre-Europe, was conducted online, between 2 January and 28 February 2013 and made available in 15 languages. A total of 2,352 organizations responded to the survey, which was complemented with 400 responses from a similar recent exercise in Germany, giving a total of 2,752 actors included in the map.

Key findings of the survey are:

- There is a **huge variety of eInclusion Intermediary actors and roles**. Most of these actors belong to the **public sector (58%) and mainly consist of public libraries, municipal/local government organizations and government-run telecentres. Third sector organizations make up almost 40%** of the sample and include **associations, charitable organizations, or foundations and NGOs combined**. The **private sector (6%) is mostly represented by private training organizations and cybercafés**.

- The majority of eInclusion intermediaries are small organizations with **less than ten employees** and operating budgets of **less than €100,000**. In addition, network membership seems particularly relevant as **60% of these organizations belong to one or more networks.**

- The services most often offered to users are a) **ICT access to computers and the Internet** (**88%** of the organisations offer this) and b) **Basic ICT digital literacy training** (**80%**). Employment-related training services are offered by half of the intermediaries. Finally, access to government and social services and access to online courses is offered by 45% of the organizations.

The research estimated that there are almost 250,000 eInclusion organizations in the EU27, or an average of one eInclusion organization for every 2,000 inhabitants.

In conclusion, the outcomes of this survey point to the importance of eInclusion intermediaries for policy makers and other actors working towards the digital, social and economic inclusion of the

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most vulnerable groups in society. **These organizations are playing a relevant role in achieving the goals of the Digital Agenda for Europe, in particular in two of its action areas: enhancing digital literacy, skills and inclusion and ICT-enabled benefits for EU society**. According to the last Eurostat survey, 30% of Europe's population has never used the Internet, partly because basic ICT skills and affordable access are lacking. Over 80% of the organizations mapped in this study provide access to computers and Internet and also to basic digital literacy training for their communities. Furthermore, the majority of organizations offer ICT-based, employment-related and social services.

There is a need for policy decision makers to recognize, empower and support the role and impact of these eInclusion intermediary actors, in support of the achievement of Europe 2020 economic and social goals.

Summary

JRC-IPTS and DG CONNECT are conducting a large-scale study, '*Measuring the Impact of eInclusion Actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe*' (MIREIA).[2] This is a policy-oriented research project which aims to better understand the role of eInclusion intermediary actors across the European Union and to create adequate measurement instruments to provide evidence about how they contribute to the achievement of European Europe 2020 goals, from the eInclusion perspective. The eInclusion policy, launched as part of the Lisbon 2010 strategy[3] and revised under the Digital Agenda Flagship initiative under the Europe 2020 strategy, aims to "*reduce gaps in ICT usage and promote the use of ICT to overcome exclusion, and improve economic performance, employment opportunities, quality of life, social participation and cohesion.*"

This study is a building block for this ambitious project. It aims to contribute to characterizing and mapping eInclusion intermediary actors in Europe in order to better understand who they are, how they operate, what services they provide to which target groups, and how they can be classified in terms of their organizational structure. The JRC-IPTS commissioned Telecentre-Europe (with the collaboration of the Technology & Social Change Group (TASCHA) of the University of Washington Information School) to implement an online survey and complementary desk research to develop a map of eInclusion actors operating in the 27 EU Member States. The online survey builds on the results of the Locality Mapping exercise, particularly on the typology of eInclusion actors, and on a previous Literature review on how Telecentres operate and have impact on eInclusion (other building blocks).

OBJECTIVES OF THE STUDY

Over the last few decades, governments, non-governmental organizations, and business entrepreneurs have invested significant human and financial resources in telecentres, public libraries and other community-based eInclusion initiatives. By providing different ICT-enabled and social services, these initiatives contribute to key digital, social, and economic policy goals in the European Union and elsewhere. The extent to which the programmes and services of eInclusion actors have an impact on the communities they work for can be limited or increased by many factors ranging from organizational resources, mission, the way a mission is implemented through its programmes, and contextual factors.

This study is the first attempt to build a comprehensive map of eInclusion actors in the European Union. The map addresses two important policy needs: 1) the need to characterize the diversity of actors from the public, third and private sectors currently providing eInclusion services for target groups; and 2) the need for evidence (and measurement tools) about the social impact of their eInclusion activities and programmes. The unit of analysis in this survey is the eInclusion intermediary actor can be defined as "a Public, private or third sector organization which intentionally address social inclusion goals through ICTs or promote the use of ICTs to enhance the socio-economic inclusion of marginalized and disadvantaged groups and of people at risk of exclusion". Against this backdrop, this survey aimed to:

1. Characterize the types of organizations within the public, third, and private sector that provide eInclusion services and programmes across the EU27, and how they operate (staff, budget level, funding sources, network membership, etc.);
2. Identify the different ICT-enabled and other social services they provide to which target groups and outline some examples of innovative practices in the delivery of these services;

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2   More information about the project: http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html
3   With the Riga Ministerial Declaration on 11 June 2006,
    http://ec.europa.eu/information_society/activities/ict_psp/documents/declaration_riga.pdf

3. Understand the type of user data they collect to measure their activities and their impacts, by what means and using which types of methodologies;

4. Determine a plausible estimate of the numbers and distribution of eInclusion actors across the EU27 countries.

This report presents the characterization of the actors, roles, structures, and activities of eInclusion Intermediaries. It includes an analysis of their typologies and their distribution across Europe. It provides evidence on how intermediaries address eInclusion challenges and describes the impacts they have through innovative design and delivery of ICT-enabled services. Finally, it sets out the policy and research implications of the survey findings.

METHODOLOGY

The map of eInclusion actors in the EU27 countries was developed with data collected through an online survey between 2 January and 28 February 2013 which was made available in 15 languages at the Telecentre-Europe (http://www.telecentre-europe.org/?page_id=5644). A total of 2,352 organizations participated in the survey. These data were complemented by 400 responses from a similar recent exercise in Germany, bringing the total to 2,752 actors mapped. The analysis shows that a myriad of actors from the public and third sectors, and to a lesser extent, the private sector play an important role as eInclusion intermediaries. Their services and activities advance many of the goals outlined in the Digital Agenda for Europe and other social and economic policy goals. Since the total number of eInclusion actors is unknown, the sample of organizations is based on a non-probabilistic sampling[4] strategy, and thus, it is not entirely representative of the map of eInclusion actors in EU27.

DESCRIPTION OF THE SAMPLE (N=2,752)

- Individual organizations represent close to 80% of the sample with the remaining 20% of the respondents represented by networks of organizations and organizations identifying themselves as both.

- Over half of the organizations belong to the public sector, close to 40% to the third sector and a small percentage to the private sector.

- The proportion of public sector organisations, however, varies significantly between individual countries. In Belgium, Finland, Lithuania, Poland, Romania, and Spain over 70% of the organizations belong to the public sector whereas less than 50% of the organisations belong to this sector in Bulgaria, Denmark, Germany, Hungary, Italy, and the United Kingdom.

- Public libraries and municipal/local government organizations represent the vast majority of organizations in the **public sector** (51% and 21% of the percentage of public sector respondents respectively). Government-run telecentres follow with 10% of those responses. National, Regional and State Agencies and Formal Educational Institutions have a very small representation of the respondents with 7% each.

- Associations, charitable organizations, or foundations and NGOs combined represent 77% of the survey respondents belonging to the **third sector**. Community organizations represent 13% and informal networks, cooperatives, federations, and other types of organizations represent 6% of the sample.

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[4] This sampling method involves identification of elements in the population based on a set of criteria and knowledge regarding the population of interest, in this case Telecentres. This sampling is particularly appropriate when the population number is unknown or can't be accurately determined; hence they have no opportunity for selection. This method does not allow for the calculation of sampling errors.

- Private training organisations and cybercafés are the most represented organisations in the private sector in the sample (52% and 21% respectively).

MAIN FINDINGS: HOW eIINCLUSION ACTORS OPERATE

The ability of eInclusion actors to provide a variety of ICT-enabled and other services to their target groups largely depends on their organizational capacity. Their staff numbers, operating budget, funding sources, and affiliation to networks and other kinds of larger associations define how these organizations operate and the type of resources they have at their disposal to make a variety of services available for their users.

- Over 50% of the eInclusion actors mapped are small organizations with 1-10 employees. The rest of the organizations are almost equally divided between medium-sized organizations with 11-50 employees and larger organizations with more than 50 employees.

- In the third sector, the majority of organizations have fewer than 10 employees. There is a very small percentage of larger organizations with more than 50 employees.

- Medium-sized organizations with 11 to 50 employees are distributed almost identically across the three sectors. As regards larger organisations, however, 24% of them are from the public sector whereas only 13% of them are from the private sector.

- Close to 50% of the organizations have **operating budgets** of less than €100,000 and only over 18% have budgets of between €100,000 and €1 million. A very small percentage of the organizations have higher budgets (11%). In the sectorial breakdown, 31% of respondents from the third sector have average budgets of less than €100,000, compared to only 21% in the public sector and 27% in the private sector

- Sixty per cent in total of organizations mapped **belong to one or more networks.** In the public sector, 62% of the organisations report network membership followed by 60% in the third sector. Only 35% of the organisations in the private sector reported that they belong to a network.

- Local governments appear to play a very important role as a **funding source** for eInclusion actors: almost 67% of organizations report this source as one of their top three. Local government funding was followed by national government funding (29%), European Union funding (25%), and usage/service fee revenue (22%) as the most important sources of funding.

MAIN FINDINGS: PROGRAMMES AND SERVICES

- The top five **target groups** served by the eInclusion actors mapped are general population (54%), adults (51%), senior citizens (49%), young adults (46%), and unemployed people (42%). Children, women, low-skilled people, and low income people are specifically targeted by just over a third of the organizations in the sample.

- The top two **ICT-enabled services** offered to users is ICT access to computers and the Internet and basic ICT digital literacy training. These two services are followed by employment-related training (online job seeking, application, and CV development) which is offered by half of the organisation. , 48% of organizations provide training on social media and other collaborative software and 45% of organizations offer supported access to government and social services and access to online courses.

- The top three additional social services provided by the eInclusion actors in the survey are employment-related services (provided by 55%), followed by other services and entrepreneurship-related services (offered by 26%).

MAIN FINDINGS: DATA COLLECTION FOR IMPACT ASSESSMENT

Evidence from the survey highlights the efforts by organizations in the sector to collect user data in order to improve their services and activities, measure the impact of these services on their users, and fulfil funding requirements.

- Over 60% of organizations reported **collecting user data information**. The most common user data collected is demographic information (76%), number of users accessing computers and Internet (75%), number of users starting ICT courses (64%), and followed closely by number of users completing ICT courses (59%).

- **Types of user information** less frequently collected include: economic and educational impact for the users (15%); numbers of users obtaining certifications such as ICDL and ECDL (19%); follow up on users' employment status after ICT training (17%); and follow up on entrepreneurs to learn about the impact of ICT use in their business (14.5%).

- Organizations **collecting user data usually have higher operating budgets**. Collecting this data is nonetheless an extended organizational practice. As much as 50% of the organizations with less than €10,000 budgets report collecting this data, as compared with 69% of organizations with budgets over €10 million.

- 'Public sector organisations collect 60% of their user information through electronic online means, whereas third sector organisations collect 65% of this data using manual means A combination of qualitative and quantitative methods is the most frequently cited for gathering user data by almost half of the organizations in the sample.

- For organizations in the public sector, the **top three barriers to collecting user data** are limited staff, time, and/or funding. For the organizations in the third sector, the single most common limitation is funding (48%), followed by staff and time limitations. Private sector organizations give similar reasons to the third sector but at lower rates.

ESTIMATION OF E-INCLUSION SECTOR SIZE AND DISTRIBUTION ACROSS THE EU27

A plausible estimate of the number of eInclusion organizations per typology and country was developed by combining different sources. Population statistics combined with eInclusion organization counts obtained in three small geographical areas during a locality mapping exercise suggested that **675,211 to 734,393** eInclusion organizations could be operating in EU27. A second estimate drastically reduced that number to **158,255** eInclusion organizations by using complementary figures from public libraries, municipalities, or NGO-run telecentres (obtained from secondary sources in some target countries) combined with survey sample frequencies. However, the first estimate pointed to a fact that research to date and available studies seem to ignore, which is **the granularity of eInclusion actors operating at grassroots levels**. Even in this survey sample, the percentage of micro-organizations (1-10 employees) represented (55%) is low if compared with the weight of micro-sized enterprises (<10 employees) in the total universe of European enterprises (92%).

This suggests that a more granular counting of the smallest organizations would produce a still reasonable estimate of **250,706** organizations operating in the eInclusion sector in EU27. This figure is important since it is the first sound pan-European inference of the size of the sector. It will be useful for further policy making, social investment (e.g. through initiatives motivated by corporate social responsibility) and more focused research to verify assumptions and refine the numbers that make up this key figure. Seen from a different angle, it would mean that there is, on average, **one eInclusion organization per every 2,004 EU27 inhabitants**.

The conservative estimate above was broken down first into countries and then into eInclusion typologies. A hypothetical distribution of organizations was achieved, inspired by the survey sample

frequencies and also refined with data obtained from desk research in a few countries where it is available. Italy, France, the United Kingdom, Spain, the Czech Republic, and Poland could have tens of thousands of eInclusion actors each. Public libraries are by far the most represented typology in the sample (more than 30%), followed by association-run telecentres and municipal centres (15% and 14% respectively).

In conclusion, the outcomes for this survey help to raise awareness and recognition of the role played by the eInclusion sector among policy makers and other actors working towards the social and economic inclusion of those more vulnerable. This sector is at the forefront of digital inclusion and empowerment, and of critical importance in today's digital society. It is evident that these organizations are helping advance the policy goals of the Digital Agenda for Europe, in particular in two of its action areas: enhancing digital literacy, skills and inclusion and ICT-enabled benefits for EU society. As pointed out in the Digital Agenda Scoreboard 2013 report[5], 30% of Europe's population has never used the Internet, partly because basic ICT skills and affordable access are lacking. Over 80% of the organizations mapped in this study provide access to computers and Internet and also to basic digital literacy training for their communities. Furthermore, the majority of organizations go a step further and offer employment-related training, training on the use of social media and other collaborative software to promote peer-to-peer learning and content generation, thus transforming many of their users from consumers into producers of information. All of these activities are at the heart of the Digital Agenda policy goals.

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[5] https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/DAE%20SCOREBOARD%202013%20-%20SWD%202013%20217%20FINAL.pdf

CHAPTER 1: Introduction

1.1   Research background

The JRC-IPTS in collaboration with DG-CONNECT is conducting research on Measuring the impact of e-Inclusion Actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe (hereinafter referred to as MIREIA). It includes the structuring of the policy landscape and the characterization of the various actors active on it, as well as the development of a conceptual and methodological framework and implementation strategy to gather data and assess impacts of specific ICT-enabled services in support of groups at risk of exclusion and to promote social inclusion, integration and employability.

A particular interest in this regard concerns the role of e-Inclusion Intermediaries (due to their multiplier effects) in promoting socio-economic inclusion at various levels (e.g. regional, local, community, thematic, etc.). In this respect, the MIREIA research aims to address two key issues:

a) The policy need to **understand and characterize the diverse set of actors** (from public, private and third sectors) involved in implementing the e-Inclusion policies;

b) The lack of both available **methodologies and practice in measuring the impact of ICT** for socio-economic inclusion, repeatedly reported in several studies since the e-Inclusion policy was established in 2006.

In order to contribute achieving these objectives, three complementary activities have been carried out in MIREIA, including:

1)   A literature review on the theories and frameworks across disciplines that address the impact of e-inclusion actors on social and economic inclusion by marginalized groups. And a literature review on impact assessment methods and available measurements conducted by the JRC-IPTS[6] (Task 1);

2)   An exhaustive locality mapping of e-Inclusion intermediaries and interventions in three selected areas carried out by three external local researchers for JRC-IPTS (Task 2) and;

3)   The Mapping of eInclusion organizations and networks operating across Europe, object of this specific report (Task 3).

While Tasks 1 and 2 addresses all eInclusion intermediary actors, Tasks 3 of MIREIA (i.e. this research study) aims to identify the variety of eInclusion intermediary actors in Europe but focusing on those types of organizations and network organizations identified as more representative of the eInclusion intermediary actors as, for example, Telecentres. Moreover, under Task 2 a specific typology of eInclusion intermediary actors has been developed:

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[6]   JRC-IPTS (2012), "Literature Review of how Telecentres operate and have an Impact on eInclusion. Exploratory study on explanations and theories of how Telecentres and other community-based e-Inclusion actors operate and have an impact on digital and social inclusion policy goals". Available at http://ipts.jrc.ec.europa.eu/publications/pub.cfm?id=5479

Government Sector	
a.	National, Regional, and State Agency [Social, Employment, Health]
b.	Municipal/City Government [Adult Education Centre, Electronic Village Hall, Training Room, etc.]
c.	Public Library
d.	Government-run Telecentre
e.	Formal Educational Institution [Primary, Secondary, High School, technical school, University]
Third Sector	
a.	Non-governmental organization
b.	Association, Charitable organization or Foundation
c.	Community organization
d.	Cooperative
e.	Federation
f.	Informal Network
g.	Trade Union
Private Sector	
a.	Cybercafé
b.	Private Training Organization
c.	Private Formal Educational Institution [Primary, Secondary, High School, technical school, University]
d.	Other [Private nursing home, privately-run social housing, etc.]

This typology has been validated to a certain extent by Task 3, and the results of such process together with suggestions for its refining and improvement are included in this report.

1.2   Objectives of the mapping of telecentres in Europe

As part of the MIREIA research, the JRC-IPTS sub-contracted to Telecentre-Europe (TE), in collaboration with the Technology & Social Change Group, University of Washington, the current study on **'Mapping of Telecentres in Europe'** (Contract Number 153023-2012-A08-BE).

The **general aim** of the contract consists of conducting research to provide a 'map' of Telecentres operating in Europe through gathering and analyzing relevant data and documentation for characterizing the typologies and role of key e-Inclusion intermediary actors and the socio-economic impact of their activities at European level. The map is intended to provide an illustrative picture (as much as possible representative) of the European landscape.

At this purpose, Telecentre-Europe and the University of Washington have previously delivered a first report **D1 – Methodological Approach** (final version dated on 11/12/2012) and have designed and implemented an online survey (open from 03/01/2013 to 28/02/2013) to collect and analyses quantitative data aimed to capture an *illustrative* (not *statistically representative*) and *diversified* sample of eInclusion Intermediaries. This Final Report builds extensively over them.

In line with the Technical Specifications of the contract with JRC-IPTS, this second deliverable titled **D2 – Draft Final Report** is intended to develop appropriate answers to the main questions posed by the research study:

1. What eInclusion actors are, which services they provide, to which targets groups, how they operate and innovate, and how they can be classified (typology)
2. What a plausible estimation of the size and distribution of the actors can be.

1.3   Structure of the report

This report is structured in the following way:

Chapter 1. Introduction is this section, which introduces the research background, objectives of this research piece and the structure of the report.

Chapter 2. Methodology the methodology describes how the research was designed and implemented and addresses the difficulties of defining the unit of analysis, the sampling strategy adopted, the process of designing and implementing the online survey, the dissemination strategy, channels and communication campaign.

Chapter 3. Online surveying: lessons learnt focus on the implementation of the fieldwork strategy and the lessons learnt from such process in view of further exercises. It summarizes the dissemination actions undertaken, channels used, type of organizations addressed; the online survey implementation in 15 languages; the most and less active countries in the process of collecting data; the difficulties to integrate and clean data; and in general, the challenges faced during execution and how they were sort out and which are the lessons learnt for the future.

Chapter 4. Data Analysis presents the results of the collected sample (2.357 responses plus 400 records extracted from a similar German sample taken few months ago). It covers the distribution by typology of e-Inclusion intermediaries, organizations and networks "demographics" and size, their programmes and activities, their target groups, and their user data collection practices. For each variable of analysis, the analysis of the total sample is followed by a note on the countries with most and less frequently occurrences.

Chapter 5 exposes the limitations encountered and possible way to overcome them. It revisits the typologies, proposing improvements based on field data; it addresses the difficulties of defining sample targets when exploring an unknown field, and the possible bias induced by the dissemination strategy; and which the lessons for the future could be.

Chapter 6 elaborates on a plausible estimation for eInclusion actors currently operating in the EU27 countries. The chapter describes the rationale behind the estimation and draws some conclusions regarding the size of organization advancing eInclusion goals in the region combining data collected through the survey with national statistics. It also includes a country profile for 10 [REVISE NUMBER] of the countries represented in the sample.

The report finalizes with the Conclusions and is supplemented with **Annexes** that include access to the database with the answers of the e-Inclusion Intermediary actors and the list of resources (including national or regional datasets) and references gathered through desk research, organized per topic and country.

CHAPTER 2: Methodology

2.1 Defining the unit of analysis: the many faces of eInclusion actors

The unit of analysis is represented by the eInclusion intermediary actor that can be defined as "a Public, private or third sector organization which intentionally address social inclusion goals through ICTs or promote the use of ICTs to enhance the socio-economic inclusion of marginalized and disadvantaged groups and of people at risk of exclusion".

In addition to this general definition, study participants were selected based on the following criteria:

1. The public nature of the space or service provided by the organizations, reflected in the fact that at least "access to Internet" service is available to the general public, or to everybody belonging to a socially-disadvantaged target group (e.g. a women association which provides access and training only to women). This definition excluded schools providing access and training to their students only.

2. The organization must have a social mission (independently of its for-profit or non-for profit character). In this way, specific categories like social enterprises providing paid services fall into the sample, while pure commercial cybercafés were not included in the sample.

3. If the organization provided other ICT-enabled services in addition to just access, for example ICT skills training.

As agreed during the design of the rationale of the study, , due to the exploratory character of this exercise the criteria above was applied in a flexible way, so schools and cybercafés responding to the survey were considered valid respondents and their answers analyzed as part of the sample.

Networks of eInclusion actors (informal or formal) come as a secondary unit of analysis. Network heads were also invited to fill in the questionnaire. A coding challenge was to manage to associate their responses with those from their individual members. This challenge is associated to the fact that individual organizations had to type the name of the specific networks to which they were associated with (open-ended question). This required, for each national sample, an effort of analysis and standardization of responses recorded in this specific field. The overall knowledge that local partners detent about their national eInclusion scene was important but producing a scientifically rigid standardization was not possible because of the different ways survey respondents answered to this open-ended question. In some instances, respondents provided actual names of the networks they belong to but the format of the answers were not consistent to inform the analysis.

2.2 Sampling strategy

The sampling method used for this project is a non-probability sampling[7]. This sampling method involves identification of elements in the population based on a set of criteria and knowledge regarding the population of interest, in this case eInclusion intermediary actors. This sampling is particularly appropriate when the population number is unknown or can't be accurately determined; hence they have no opportunity for selection. This method does not allow for the calculation of sampling errors.

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[7] Trochim W. & Donnelly J. (2007), *The Research Methods Knowledge Base* (3rd edition). Atomic Dog Publishing.

Following the requirements of the rationale of the study, the sample covered 5 organizations per each million people in the EU27 countries following the NUTS 3 typology for population distribution developed by EUROSTATS.

As outlined by Collet (2012)[8], the Urban-rural typology is based on a classification of grid cells of 1 km² as either urban or rural. To be considered as urban, grid cells should fulfill two conditions: a population density of at least 300 inhabitants per km² and a minimum population of 5 000 inhabitants in contiguous cells above the density threshold. The other cells are considered as rural. NUTS 3 regions have been classified into three groups based on the classification of these grid cells:

- **Predominantly urban regions/urban regions**: the rural population is less than 20 % of the total population.

- **Intermediate regions**: the rural population is between 20 % and 50 % of the total population.

- **Predominantly rural regions/rural regions**: the rural population is 50 % or more of the total population.

The research gathered 2,357 surveys following the sample distribution by country elaborated on Table 1 and 400 additional data entries for Germany that were integrated in part of the analysis from two already available datasets[9]. The sampled population was expected not to be statistically representative of the types of organizations that can be categorized as eInclusion Intermediary actor in each country because this population in unknown. Indeed, it is important to acknowledge that the number of organizations per country/per NUTS 3 region is an approximation since there is no guarantee that this amount of organizations is present in the countries. The sample distribution was modified adjusting the numbers of surveys available per country.

The rationale of the study required the identification of different types of organizations in each country. Since it is not possible to have a representative sample since the universe of organizations is unknown, the research design used as base the typology of organizations developed by JRC-IPTS based on previous research of 'Exhaustive Locality Mappings' in three selected areas (i.e. Barcelona in Spain, Sunderland in the UK, and Zemgale region in Latvia), as a starting point enriching it with other typologies available in the literature and the feedback of some of Telecentre-Europe member organizations. The revised version of the typology of organizations that resulted from this triangulation exercise was agreed upon with JRC-IPTS before the online survey was implemented.

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[8] Collet, I. (2012). *EUROSTAT Regional book 2012*. Luxembourg: Publications Office of the European Union, 2012. http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-HA-12-001/EN/KS-HA-12-001-EN.PDF

[9] See Chapter 3, Section 3.2.3 Note on German case for additional information

TABLE 1: INDICATIVE SAMPLE DISTRIBUTION BY COUNTRY AND EUROSTATS NUTS 3 REGIONAL TYPOLOGY [SOURCE: EUROSTATS 2010 AND 2011]

Country	Pop. 2011	Urban	% Total Population	# of Orgs URBAN	Intermediate regions	% Total Population	# of Orgs INTERM	Pred. rural regions	% Total Population	# of Orgs RURAL	Total Per Country
Belgium	10,951,266	7.406.250	68	37	2.599.276	24	13	945.740	9	5	55
Bulgaria	7,504,868	1.259.446	17	6	3.370.594	45	17	2.874.828	38	14	38
Czech Republic	10.532.770	2.522.136	24	13	4.536.108	43	23	3.474.526	33	17	53
Denmark	5.560.628	1.209.627	22	6	2.002.465	36	10	2.348.536	42	12	28
Germany	81.751.602	35.006.251	43	175	32.749.511	40	164	13.995.840	17	70	409
Estonia	1.340.194	:			696.010	52	3	644.184	48	3	7
Ireland	4.480.858	1.201.121	27	6		0		3.279.737	73	16	22
Greece	11.309.885	5.280.893	47	26	1.198.484	11	6	4.830.508	43	24	57
Spain	46.152.926	22.304.779	48	112	17.615.598	38	88	6.068.639	13	30	230
France	65.048.412	23.022.353	35	115	23.098.818	36	115	18.573.326	29	93	323
Italy	60.626.442	21.573.487	36	108	26.693.716	44	133	12.359.239	20	62	303
Cyprus	804.435	:			804.435	100	4	:			4
Latvia	2.229.641	1.089.767	49	5	296.529	13	1	843.345	38	4	11
Lithuania	3.244.601	838.852	26	4	1.014.511	31	5	1.391.238	43	7	16
Luxembourg	511.840	:			511.840	100	3	:			3
Hungary	9.985.722	1.733.685	17	9	3.586.721	36	18	4.665.316	47	23	50
Malta	417.617	417.617	100	2	:			:			2
Netherlands	16.655.799	11.884.588	71	59	4.664.690	28	23	106.521	1	1	83
Austria	8.404.252	2.907.688	35	15	2.227.776	27	11	3.268.788	39	16	42
Poland	38.200.037	10.813.913	28	54	12.965.379	34	65	14.420.745	38	72	191
Portugal	10.636.979	5.188.031	49	26	1.621.958	15	8	3.826.990	36	19	53
Romania	21.413.815	2.267.419	11	11	9.387.405	44	47	9.758.991	46	49	107
Slovenia	2.050.189	533.213	26	3	637.306	31	3	879.670	43	4	10
Slovakia	5.435.273	628.686	12	3	2.077.093	38	10	2.729.494	50	14	27
Finland	5.375.276	1.435.811	27	7	1.645.518	31	8	2.293.947	43	11	27
Sweden	9.415.570	2.054.343	22	10	5.277.833	56	26	2.083.394	22	10	47
United Kingdom	62.498.612	44.187.444	71	221	16.031.760	26	80	1.808.041	3	7	308
Total Sample				1.034			887			585	**2.506**

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2.3 Online survey design

The online survey was based on the questionnaire that JRC-IPTS co-designed with the University of Washington and Telecentre-Europe for a survey conducted by Telecentre-Europe among its community members (October 2011-April 2012), the exhaustive locality mapping[10] questionnaires used in the JRC-IPTS previous research to interview relevant stakeholders in specific local areas, and the questionnaires designed by Technology & Social Change Group, University of Washington for the Global Impact Study[11]. The participation of one of the three locality mapping's researchers as advisor of TE research team (Mara Jakobsone, Telecentre-Europe board member) and Maria Garrido who worked closely with IPTS and the researchers in the development of categories for organization types, target groups, and services enhanced the ability of the team to understand the rationale behind these instruments, as well as, the difficulties encountered in the implementation for the locality mappings.

The online survey consisted of a concise set of closed-ended questions with one open-ended question that helped the research team capture the aspect of innovation as required by the rationale of the study (see Annex 1 for the Survey in English). The survey was designed in English and translated into an additional 14 languages (See Table 2 below for the list of languages). Local partners in each country where responsible for translating the language from English and reviewing the online version of their language to ensure accuracy and identify mistakes made in the process of coding the different languages.[12]

TABLE 2: STRATEGY FOR SURVEY TRANSLATION

ID	EU 27 countries	Official EU languages	Translation by
1	Austria	German	partner in Germany
2	Belgium	French, Dutch	partner in Belgium
3	Bulgaria	Bulgarian	partner in Bulgaria
4	Cyprus	Greek	partner in Greece
5	Czech Republic	Czech	partner in Czech Republic
6	Denmark	Danish	partner in Denmark
7	Estonia	Estonian	Not translated. English version used
8	Finland	Finnish	Not translated. English version used
9	France	French	partner in Belgium / France
10	Germany	German	partner in Germany
11	Greece	Greek	partner in Greece
12	Hungary	Hungarian	partner in Hungary
13	Ireland	English	English version used
14	Italy	Italian	partner in Italy

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[10] For additional information of the Locality Mappings see:
http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html
[11] See: http://www.globalimpactstudy.org/2009/03/compendium-impact-assessment-ictd-projects/
[12] See Section III. Online surveying: lessons learnt for additional information on survey implementation

15	Latvia	Latvian	partner in Latvia
16	Lithuania	Lithuanian	partner in Lithuania
17	Luxembourg	French	partner in Belgium / France
18	Malta	Maltese	partner in Malta / English version used
19	Netherlands	Dutch	partner in Belgium / Netherlands
20	Poland	Polish	partner in Poland
21	Portugal	Portuguese	partner in Portugal
22	Romania	Romanian	partner in Romania
23	Slovakia	Slovak	covered by Czech / English version used
24	Slovenia	Slovene	Not translated. English version used
25	Spain	Spanish	partner in Spain
26	Sweden	Swedish	Not translated. English version used
27	United Kingdom	English	English version used

The questions followed a closed-ended format that included single and multiple option questions. The survey also included open-ended questions where organizations provided their name, contact information, and if they belong to a network or networks, multiple write-in fields where they could provide the names. The questionnaire was organized as follows (see Annex 1 for the Survey questionnaire in English):

1. **Introduction to the survey** (objectives)

2. **General information about the organization** (name, location, website, staff size, type of organization, mission, and yearly budget)

3. **Services provided and activities** carried out (ICT-enabled and general services)

4. **Data collection practices** (type of data collected, tools and purpose of data collection and barriers faced)

5. **Demographic information of survey respondent** (position at organization, gender, age, and how organizations heard about the survey)

The methodology was based on four pillars that have informed the decisions behind the design of the questionnaire at every step:

1. Simplicity of wording, flow and length of the questionnaire;

2. Quality of the translations by working, to the extent possible, with people that have experience in the area of eInclusion;

3. Identification of key actors in each country that ensured access to the people at the organizations that are the best suited to answer the survey; and

4. Using/adapting questions that have been already tested in previous studies to the extent possible.

Based on these pillars, the different parts of the questionnaire were designed in the following way:

Introduction to the survey

The introduction provides a general overview of the area of eInclusion and the role of different organizations providing ICT access, training, and services in advancing EU social and economic inclusion goals. The information included in the introduction is intended to incentive organizations to participate in the survey explaining how the data collected through the survey will be used for. As outlined in the study design, it was also included a brief paragraph describing MIREIA and mentioned its funding by the European Commission. In addition, information about the two organizations running the study with contact information in case there are questions or comments about the study and/or the survey was also included. To ensure data quality two filter questions were added at the end of the introduction: 1) A filter question that ensures the "right" organizations are filling up the survey (organizations that provide ICT-supported services) so it was avoided having too many missing fields in the dataset' and 2) A filter question that separated the two kind of respondents targeted (individual organizations and networks). In addition, a disclaimer was added informing participants on how the personal/organizational data was going to be used and provided guarantee for their confidentiality and respect of their privacy.

Part 1: General information of the organization

This section of the survey gathers the basic information of the organization/network from name to contact information, city, and country following by type of organization. The type of organization is perhaps the most important data point in this section. The questions to capture where the organization/network sits in the context of its structure were adapted from the Exhaustive Locality Mappings mentioned previously. The type of organization is divided into two questions: 1) Type of organization in terms of the sector where it works (government, third sector, or private sector); and 2) Within each aggregate sector a set of categories were included – the disaggregated categories for government and private sector organizations were borrowed verbatim from the categories used in the locality mappings. The category for Third Sector organizations was redesigned to account for the lessons learned and recommendations from the locality mappings researchers.[13]

The questionnaire also included questions to capture staff size, as well as, number of users on an annual base, and network/association membership. The set of questions for this part of the survey were borrowed from the Telecentre-Europe census survey[14] and TASCHA's Global Impact Study[15]., Moreover, a question on the financial capacity (average annual budget 2012) was also included followed by a question that captured the main sources of financing for the organization/network. In addition, the survey allows respondents to provide contact details in case validation of responses were necessary. This contact information will also serve to build a database of references for future studies. A disclaimer was added to allow making use of selected data for public disclosure emphasizing that personal contact data won't be shared with any third party. A consent clause is needed to allow part of the organizational data become publicly available (by publishing the database at a later stage).

Part 2: Programs and activities the organization/network offer

This section was designed to capture three main data points: 1) Main target groups served by the organization/network; 2) ICT-enabled services the organization or network offers; and 3) Additional support services not necessarily enabled by ICT which will help to capture the broad range of services as well as the importance of ICT-enabled services in the basket of services provided by the organization. All the questions included in this part with the exception of the support services were borrowed verbatim – with a couple of minor changes and simplification of language for ICT-enabled services – from the categories developed and tested in the locality mappings. In addition, this part

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[13]   See Questions 8 – 8.3 in the Questionnaire, available at http://www.telecentre-europe.org/?page_id=5644
[14]   For more information on the Telecentre-Europe census study see: http://www.telecentre-europe.org
[15]   For more information on the Global Impact Study see: http://www.globalimpactstudy.org/

included an open ended question that allowed respondents to share the most innovative aspects of their organization's ICT supported programs and services. A sample of the responses gathered through this question was qualitatively coded for the analysis.

Part 3: User data collection at the organization/network

This part of the survey captured the type of user data collected by the organization/network (if this is the case for all respondents – for those organizations which do not collect user data a question asking the main barriers is available). The question of the different user data an organization could capture was borrowed from the Telecentre Europe Census Survey with a minor modification that was discussed and agreed by research team: simplifying the very generic categories of economic impact, social impact, and community impact that were part of the previous list leaving only economic impact and educational impact for the citizens as options.

Part 4: Information about the respondent

This is the last part of the questionnaire and it was aimed to capture basic demographic information of the respondent, as well as, her/his position at the organization and the channels through which the responded knew about the survey for the dissemination strategy to be adapted accordingly.

Data Quality Assurance

The quality of the data relied on three strategies that are the pillars of the methodology design:

1. **Simplicity of the wording and design of the questions**
   The survey was designed using a simple straight forward language that avoids using jargon and convoluted sentences or terms. This strategy was critical to ensure that the responses had statistical validity avoiding too many missing questions or incoherent response patterns. A key component of this strategy was to keep the survey as short as possible to prevent respondents from getting fatigue and quitting the survey before completion

2. **Quality of the translations of the survey into the 15 languages**
   Quality control was carried out by equally qualified peers. In addition, the translation process followed a three-tier review for accuracy and proper contextualization of the questions; The online platform (Survey Monkey) used supports multi-language format, providing a Content Management System that enabled an efficient updating process. Additional information on the process of survey implementation is detailed in Section III. Online Surveying: lessons learnt of the report.

3. **Identification of key actors** that helped the research team reach the "right" people at the organizations that are knowledgeable of the areas cover in the survey

2.4 Dissemination strategy

The dissemination strategy combined direct dissemination targeting individual organizations in parallel with indirect dissemination targeting intermediary organizations (networks, associations, etc.) to engage and partner in the dissemination of the survey (See Annex 2 for the information of the national partners per country). Telecentre Europe (TE) or its members' direct knowledge of most of the addressed organizations was complemented with desk research. The latter was instrumental to the identification of potential partners and/or respondents in more problematic countries.

2.4.1 Dissemination channels

Target organizations for the indirect dissemination activities:

TELECENTRE-EUROPE (TE):

TE consisted (at the time of the MIREIA online survey) of 27 member organizations, divided among 20 countries of the EU27: Belgium, Bulgaria, Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Romania, Spain, Sweden & the UK.

TE members were requested to act like national dissemination partners, reaching out to organizations beyond their own networks. A first milestone was to sign agreements with TE members as national MIREIA partners, a second milestone was for the national partners to reach out to local organizations and deliver the minimum established target per country. An incentive scheme for national partners was established: 3 EUR per individual telecenter until the minimum target number was reached.

OTHER TELECENTRE NETWORK ORGANIZATIONS (non TE members)

For the delivery of national surveys in those countries where Telecentre-Europe didn't not yet had a member organization in place, Telecentre- Europe counted on the members of neighboring countries for desk research and to connect with Telecenters network organizations or individual telecenter organizations in the same region.

This was the case for Austria (through Germany), Cyprus (through Greece), Finland (through Sweden & Denmark), Luxembourg (through Belgium), Slovakia (through the Czech Republic) and Slovenia (through Croatia & Serbia).

As for Portugal, Telecentre-Europe had already established a partnership with the Foundation for Science and Technology (FCT), as this organization had already partner in TE's Get Online Week campaign.

Target organizations for the direct dissemination activities:

Next to telecenter network organizations, TE also connected with other (third party) (both European and Global organizations) for disseminating the survey through their channels. These organizations are listed in Annex 3 and include e-inclusion umbrella organizations, European associations, Certification providers, Media & communication providers, IT companies, national agencies in charge of Social Inclusion, Employment and welfare policies and additional relevant actors.

2.4.2 Communication campaign

The specific communication actions undertaken are explained below:

Branding

The project received a name, logo and hashtag. A first proposal was to name it Telecentre-Europe's TIME project "Telecentre Impact & Mapping in Europe", Twitter: #tcTIME, but a deeper reflection showed the importance to make more evident the link to MIREIA, from which this piece of research is a building block.

Therefore, it was decided to call it "MIREIA online survey", design a logo associated to MIREIA and use Twitter hashtag #eiMAP, combined with #MIREIA (since #MIREIA is already used in Catalonia for different purposes and could be misleading). A link to MIREIA and a mention to EC JRC-IPTS as funding body and research coordinator have been included in each communication piece.

Viralisation

To create a snowball effect, visitors that are landing on the project presentation page were invited to disseminate the survey to organizations they knew in their area and country. They were also invited to spread the word via Twitter & Facebook

2.4.3 Dissemination actions

The dissemination strategy was accomplished in three rounds:

Round 1:

Indirect dissemination actions: these included a call for partnership to TE members through TE's internal (members-only channels) such as TE's members-only newsletter, TE's members-only group on the community site. Intense follow-up was done through individual contacting by email and phone.

Direct dissemination actions: these included the publication of the announcement of the survey; its general promotion through TE's newsletter, TE's social media channels & TE's community site; and its general promotion through third party channels of (pan-European) umbrella organizations grouping eInclusion actors, etc.

The goal of this round was to gather 20% of the surveys and develop partnerships with enough organizations to increase the likelihood of achieving 59% of the surveys by gathering partnership agreements with as much TE member organizations as possible.

Round 2:

Indirect dissemination actions: these included the publication of a call for partnership towards non-TE members and its promotion through promotion through TE's newsletter, TE's social media channels & TE's community site. Intense desk research was done to identify possible partner in non-TE member countries, followed by individual contacting by email.

Indirect dissemination actions were also activated to monitor and encourage the dissemination actions performed by already engaged partners. This included the weekly publishing of a blogpost with preliminary results of the surveys per country and weekly individual contacts with partners to check on the progress of their target goals; additional social media outreach, etc.

It also included individual approaching of well performing partners with a request to write a blogpost on the national dissemination activities they performed to obtain their results, resulting in 1 weekly blogpost from a different partner each week.

The goal of this second round was to reach 80% of the target surveys (cumulative with Round 1) and ensure participation with enough organizations (TE members or not) as to reach 94% of the target total population.

Round 3:

Direct dissemination actions: This round focused on assisting country partners who had not yet reached their survey number targets.

2.5   Complementary desk research

The design of the methodology although primarily driven by the online survey was complemented by the consultation of secondary resources and desk research. The complementary desk research served three main purposes: 1) Allowed the research team to strengthen the dissemination strategy by identifying additional channels at the country and pan-European level to promote the survey, as thoroughly elaborated in the previous sections; 2) Helped identify the most relevant network organizations in each one of the EU27 countries (See Chapter 5, section 5.2); and 3) Served as the

foundation for the plausible estimation of eInclusion actors in the European Union elaborated on Chapter 5).

The identification of the most relevant network organizations in each one of the countries as well as any relevant reports characterizing and/or quantifying different types of eInclusion organizations in the countries relied for the most part on the expertise of the study's partner in each country. These efforts were complemented by additional desk research that focused primarily on identifying pan-European resources available either in English, French, or Spanish – languages accessible for the main research team.

Even though the national partners were at the center of these complementary activities, the research process had a slight variation between the two: On the one hand, the seeds for identifying the main network organizations in each country came from the responses provided to the eIMAP Survey question regarding organizations' network membership and affiliation triangulated with the national partner in each country ensuring relevance, reach, and completeness of the list. On the other hand, the efforts to locate and summarize any relevant reports that could help inform the plausible estimation of eInclusion actors in the European Union were primarily driven by the national partners with some limited contributions from the research team. The description of each of these research activities is outlined in the sections below.

2.5.1 Research process to identify the most relevant networks in each EU27 country

The online survey included a series of questions asking organizations about their network membership, and the names and size of the networks they are affiliated with either at the local, national, or cross-country level. The network data collected through these questions was quite rich with close to 60% of respondents reporting network membership and providing information on the networks that they belong to. These data was used as the seed to identify between 2 and 10 of the most relevant networks in each of the EU27 countries. The research process was organized as follows:

1. From the eIMAP data set, the research team extracted all the names of the network organizations identified by survey respondents as well as the names of the networks themselves that answered the survey (20% of the total sample). A list containing the names of the networks and the network size in each country was shared with the national partners in an excel file. This list didn't contain any identifiable information that could link the responses to the organizations participating in the survey.

2. National partners were asked to review the list of networks and add any additional network missing from the list using, when appropriate, the following criteria:

   - The size
   - The services (quality and quantity)
   - The impact (geographical coverage, people reached, recognizable impact in terms of employment, skills, and social inclusion
   - The reputation (how well is recognized by other eInclusion actors, how well is connected to other stakeholders, social media outreach)

3. In addition, they were asked to identify the geographical reach of the networks (local, regional, national, European, international).

This process of triangulation – using the network data provided by organizations in the survey enriched with the expertise of the national partners – derived in a very interesting list of the most relevant network working in the field of eInclusion in each EU27 country. The detailed description of these networks is provided in Chapter 6, Section 6.4.

2.5.2 Research process to identify relevant literature characterizing and/or quantifying eInclusion actors in the EU.

The process for locating studies that either characterize or quantify eInclusion actors in the European Union was perhaps one of the most challenging endeavors of this study. These challenges stem from the fact that there are very limited sources that estimate the number and type of organizations working on eInclusion in each country, and the studies available are limited in scope rendering any efforts to extrapolate the numbers and types to the entire country almost futile. At a pan-European level, with the exception of a recently published study by the Bill & Melinda Gates Foundation[16] that maps the number of libraries in the EU27 countries, and the country factsheets available through the platform ePractice.eu it was not possible to locate any additional relevant source. The research team also confronted the issue of multiple languages in which the sources were available making the participation of the national partners in this exercise not only necessary but central to this research task.

In order to mitigate, to some extent, the limited availability of relevant studies either at the country or pan-European level, the research team requested from national partners the following information:

1. To identify any relevant report that characterizes in terms of typology of organizations and estimates the number of eInclusion actors at the country or regional level. In addition to identifying these sources, national partners provided a link to the study as well as a summary of the findings that could help inform the plausible explanation of eInclusion actors elaborated in this study.

2. To provide the number of municipalities and the number of libraries in the countries in order to use these total numbers to formulate the plausible estimation of eInclusion actors in the country. Public libraries and municipalities were chosen as organizational categories because of the high participation of this type of organizations in the eIMAP survey.

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[16] The Bill and Melinda Gates Foundation Study on libraries was not publicly available at the moment of preparing this report.

CHAPTER 3: Online survey lessons learned

3.1 Dissemination campaign

3.1.1 Summary of actions undertaken, channels used, and type of organizations targeted for dissemination purposes

A. Indirect dissemination actions

- *Round 1:* **Partners engaged in countries with TE member organizations**

Telecentre Europe has members in 20 of the EU27 countries. If all would be engaged in partnership for disseminating the survey, they would be able to cover 59% of the total surveys to be delivered, only by calculating the number of individual telecenter organizations linked to them.

Members were approached with a request to partner in the dissemination of the survey immediately after our request to partner in the translation of the survey had been successful.

When the survey was launched on January 2nd, 17 TE member organizations signed an agreement to act as the national dissemination partner. The request for partnership did not result successful for our members in Estonia & Greece, and our member Germany made a different collaboration proposal (see note on the German case under 2.2). Non-TE member dissemination partners for Estonia were found on 18/1 and for Greece on 25/1.

- *Round 2: Partners engaged in countries with no TE member organizations*

In 7 countries of the EU27 TE has no member organizations. Slovakia, Luxembourg & Cyprus are among them, but our Belgian partner also signed for Luxembourg, our Czech partner for Slovakia and our Greek partner for Cyprus. For Portugal, a dissemination partner was already found before the survey was launched. For Finland, a partnership agreement was signed on 4/2. Despite a continuing research and after contacting a total of 18 organizations in Austria and 3 in Slovenia, no dissemination partner was ever found in those countries.

The call for partnership was also promoted through all TE channels:

- Through the dedicated MIREIA webpage on TE's corporate site
- Through 2 news items posted on TE's corporate site & community site
- Through TE's monthly newsletter of December

- *Round 2: Partners engaged to blog on their dissemination strategy*

To create knowledge exchange and generate a psychological snowball effect in enhancing the commitment of others, partner organizations that were successful in delivering surveys & obtaining their goals were invited to write a blogpost on TE's community site. Each week, a different partner was approached to give an overview of the type of organizations they reached and explain the dissemination strategy they used in their country. This resulted in 4 weekly blog posts: from Spain, France, Romania and Poland.

- *Round 2: Published a weekly blogpost on intermediate per-country results*

To create a Eurovision-like 'competition' atmosphere, a weekly blogpost was posted & shared on the community site (and promoted through TE's corporate website, social media channels & newsletter). The posts gave the overall result and named the best performing countries. They also contained an

overview of the accumulated survey numbers per country (as planned in the dissemination strategy), but this information was removed after week 4, as it was considered too confidential.

- ***Round 2: Followed-up with partners on results***

Upon the weekly results compiled each Friday, partners were contacted individually by email & phone to discuss the results and their dissemination strategy. All partners were asked weekly to report on the dissemination actions undertaken. Extra attention went to those partners that hadn't yet reached 20%, 40% and 60% of their goals in W2, W3 & W4.

- ***Round 3: Assisted partners with directly contacting individual organizations***

At the end of W4, those organizations that did not yet reached the delivery of 100% of the surveys they committed to deliver were offered assistance to directly contact individual telecenter organizations, but most of them declared they simply needed the remaining weeks before the end of the survey to contact the organizations themselves.

Finally, the TE team only contacted individual organizations at during the last two weeks before the extended deadline, through desk research and by approaching TE community members individually.

B. Direct dissemination actions

- ***Round 1: Published the survey announcement on TE's website***

The announcement of the survey including the links to all the language versions was published as a dedicated webpage on TE's corporate website, with a banner on the homepage leading to the page. The page contained all information about the contents, goals, targeted audience, benefits and social media spreading of the survey.

- ***Round 1: Promoted through TE channels***

Continuous promotion took place through TE channels:

  o Through 10 news items posted on TE's corporate site (which were also published as blog posts on the community site and shared with over 500 community members)
  o Through TE's monthly newsletter of January and February
  o Through 2 dedicated newsletters sent to around 600 subscribers (on January 9th and on February 18th)
  o Through TE's social media channels: 10 status updates on Facebook, 9 tweets on Twitter.

- ***Round 1: Promoted through third party channels***

A large list of 47 umbrella organizations & stakeholders, on both a European and a Global level, resulted from TE's desk research of possible third party channels: online communities, European associations, European project networks, European institutional players and industry players.

All were approached with a request to disseminate the survey through their channels (newsletters, email lists, websites & social media channels). Annex 3 lists the different third party channels used to further reach the target audience for the survey.

3.1.2 Challenges faced during implementation and how they were resolved

Low incentive for translation

The limited available funds forced TE to approach its members to do this pro-bono.

Low incentive for dissemination partnership

The biggest challenge was to engage partners to take up the national dissemination task against a cash grant that was purely symbolic considered the time consuming tasks this role involved. We decided to approach our members with this request only after our request to partner in the translation of the survey had been successful. This 2-phase strategy was successful, but many of our members were not happy with this methodology of not showing the full picture of our MIREIA requests from the very beginning.

Only a strong feeling of belonging to Telecentre-Europe can explain why in no more than 2 weeks' time 17 of our 20 member organizations agreed to become national partners for the dissemination of the MIREIA online survey.

This became even more clear when organizations not belonging to TE were approached with a request to partner for the national dissemination of the survey: with the exception of the Foundation for Science and Technology of Portugal (with whom TE has already been engaged in partnerships for Get Online Week 2010, 2011 & 2012), it was extremely time consuming to list and approach numerous organizations in Greece, Estonia, Finland, Slovenia and especially Austria.

Frequency of results reporting too low

After second week, it became clear that the frequency of weekly reporting of per-country results should be increased to enable partners to monitor more closely the results of their dissemination actions so they could take corrective actions in time. Also, partners asked to see the list of organizations that already filled the survey, so they could send reminders to those organizations that they contacted and did not yet fill the survey.

As it would have been too time-consuming to increase the frequency of the results and send respondent lists to the partners, we decided to use Survey Monkey's "Custom Report" option combined with the "Shared Responses URL" function to give our partners access at any point in time to both the summary of responses and the individual responses, filtered out with the contact details that were under privacy restriction.

Few contact persons for the listed third party channels

Listing third party channels through desktop research is a very time-consuming task, but the task of identifying the correct contact person is even harsher, as most organizations do not publish information on whom to approach for disseminating announcements through their channels (newsletters, email lists, websites & social media channels).

TE's board members were involved to help identify contact persons, as most of the organizations listed were already in touch or engaged with Telecentre-Europe, be it as stakeholders or sponsors.

As a result of this inquiry, for 33 out of 47 channels a contact person or any other means to channel our announcement was identified. This resulted in 26 dissemination results (see list under 1.1.2), but 13 were our posts on Facebook pages, that without any timeline posting or sharing from the administrator, hardly became viral.

Nevertheless, some of the results – and especially those published/disseminated by the European Institutional players – were without any doubt decisive in the dissemination of the survey. Indicators were not only the increased survey results, but also the ever increasing subscriptions to TE's newsletter and the feedback from our partners that said to have received the announcement of the survey through multiple channels.

Possible over representation of organizations linked to TE or its members

It is worth mentioning that one risk identified in advance to implementing this strategy was the possible bias induced by the fact that the main dissemination channels were TE members and

partners across countries, so there could be a tendency to over represent telecenters in the sample. This potential bias was mitigated with an important desk research effort to join umbrella organization and networks outside TE community, the result of which is reflected in Annex 3 list of Third-Party Dissemination Channels.

3.1.3 Lessons learned (in view of further similar research exercises)

Determine grants in line with efforts

Although our members did a wonderful job in disseminating the survey, TE cannot afford to repeat this kind of requests to its members. In the future, grants should be in line with the investment asked from our partners.

Start with giving the full picture of requests

The 2-phase strategy used to approach the members (first requesting them to translate pro bone and after requesting them to partner for dissemination) should not be repeated. TE cannot afford that its members somehow felt misled by not knowing the full picture of our MIREIA requests from the very beginning.

Avoid negative branding of partners' performance

The Eurovision-like 'competition' strategy was negative publicity for those partners that were not delivering immediate survey results in the first weeks. This strategy should not be repeated, also because partners didn't sign an agreement to deliver a targeted number of weekly results but to deliver a targeted end result.

Reserve more amount of budget for desk research & contacting of individual organizations. There was no time or budget for the TE team to assist partners in listing individual organizations and individually contacting them by phone or email in the languages covered by the team (English, French, German, Spanish, Italian, Dutch, Romanian, Hungarian, Catalan, and Latvian).

3.2 Data collection process

3.2.1 Online survey implementation in 15 languages

The data collection period encompassed a total of nine weeks starting on January 2nd closing on February 28th, 2013 for the purpose of this study. The online survey in all fifteen languages remains open to date allowing for organizations that did not have an opportunity to be included in the analysis to be added in the directory of eInclusion actors which Telecentre- Europe intends to developed after this project is finished.

There was no budget foreseen for the translation of the survey, so we had to approach our members to do this pro-bono. Moreover, the time left for translating the survey was very tight, due to the delay in finalizing the survey questions. Despite these very low incentives, only a strong feeling of belonging to Telecentre-Europe can explain why our members, agreed and succeeded to translate the English questionnaire *into 14 languages in a week time, and this on a voluntary basis.*

The project team decided to use an existent well-known survey platform called Survey Monkey after conducting thorough research on the technical options to develop an online platform and considering the methodological requirements and timeline for the study. Using an existent and reliable online

survey platform allowed the team for quicker implementation and easier access and management of the content. This platform is highly customizable, allowing the project staff to brand the survey with the required elements and availability of different features to support multiple languages. The survey responses were entered automatically into a well-structured database, exportable into Excel, SPSS, or CSV formats, for easy access and analysis. In addition, the survey platform offered some basic analytical tools that probed very useful to run descriptive analysis while the survey was being implemented. This real-time access to the results allowed the research team to assess if corrective measures in the dissemination strategy were needed.   The platform also supports a variety of question formats, skip patterns, and survey templates that were highly customizable for the needs of this project. The project team ran a number of tests on the Survey Monkey platform using the latest version of the survey available at the time and did not encounter any problem that required corrective measure in terms of question design.

The survey was coded into the fifteen languages starting with the English version. Each language was given its own permanent link to make the availability of languages visible to survey participants (See Table 3 for the list of languages and permanent links.). Once the survey was tested for correct skip patterns and reviewed for language accuracy, the links were published on the Telecentre-Europe site and disseminated across different channels.

TABLE 3: LIST OF LANGUAGES

Languages	Permanent Links
Bulgarian	http://www.surveymonkey.com/s/MIREIA_Bulgarian
Czech	http://www.surveymonkey.com/s/MIREIA_Czech
Danish	http://www.surveymonkey.com/s/MIREIA_Danish
Dutch	http://www.surveymonkey.com/s/MIREIA_Dutch
English	http://www.surveymonkey.com/s/MIREIA_English
French	http://www.surveymonkey.com/s/MIREIA_French
German	https://de.surveymonkey.com/s/MIREIA_German
Greek	http://www.surveymonkey.com/s/MIREIA_Greek
Hungarian	http://www.surveymonkey.com/s/MIREIA_Hungarian
Italian	http://www.surveymonkey.com/s/MIREIA_Italian
Polish	http://www.surveymonkey.com/s/MIREIA_Polish
Portuguese	http://www.surveymonkey.com/s/MIREIA_Portuguese
Romanian	http://www.surveymonkey.com/s/MIREIA_Romanian
Slovak	http://www.surveymonkey.com/s/MIREIA_Slovak
Spanish	http://www.surveymonkey.com/s/MIREIA_Espanol

3.2.2 Data collection: most and less active countries

Overall, all TE members did a great job in disseminating the survey and following-up the results of their activities. Some countries, like Poland, Sweden, Netherlands, Romania, Latvia, Lithuania, Spain, Portugal, Denmark, Finland, Malta, Ireland & Bulgaria showed great enthusiasm for this exercise, planned their actions well on before and took corrective actions when incoming results were not what they expected. Other countries like France, Belgium (& Luxembourg), Czech Republic (& Slovakia), Hungary needed a continuous encouragement to do desk research, general promotion or to reach out

to organizations they are not yet currently involved with. Few partners, like those in the UK & Italy (although TE members) had a lot of difficulties in delivering survey results. This was also the case for non-TE member partners in Estonia, Greece (& Cyprus). Finally, for Austria & Slovenia no dissemination partners were found, and individual organizations resulting from the desk research were directly approached to fill the survey.

At the end of the survey period, and after cleaning the dataset, there were 2352 valid surveys. The respondents reported from a wide variety of countries throughout the EU. Although from this survey data we would like to be able to extrapolate to form some picture of the total population of these actors, the distribution by country, and the impact on the users of these facilities, there are several issues that limit this kind of effort.

- The survey respondents heard about the survey from a variety of disparate sources, such as word of mouth, social media, Telecentre-Europe, or a mailing/newsletter. This prevents any sort of control by the survey administrators over which categories of organization or sector receive attention and by what source. Perhaps larger networks of organizations are more likely to receive mailings or emails, but smaller or individual organizations are watching social network pages or rely on word of mouth to participate in studies of this kind. One problem here is that without a controlled system of invitation to the surveys, there is no way of gauging the non-response rate.

- There is a wide spread in terms of sample sizes from each country. Some of the countries had a much larger response size (such as Spain), while a number of others had very small numbers (5 in Slovenia, 7 in Malta, 8 in both Cyprus and Estonia). Trying to get a sense of the population for each country with sample sizes this small simply won't work.

- In the analysis of the EU data, there are several comparisons that we make throughout the following sections. These are to look at responses based on the sector (public, third, or private), the organization type (individual or network), budget category, and staff size. Perhaps not surprisingly, in general there were larger differences between different sectors than between organizational types.

3.2.3 Note on German case

Collecting survey data from Germany presented a particular challenge. In recent months, the local partner organization Stiftung Digitale Chancen conducted a similar mapping exercise to provide an overview on Public Internet Access Points in the country. The database can be searched via Internet, the search criteria are location based like city name or Zip-Code but also related to specific target groups or specific needs. In addition the database serves as the basis for statistical analysis and studies on the provision of public access and media literacy courses.

The collection of data started in the year 2001 and with the most updated entries inputted in February 2013. Total number of accurate entries in the database totaled 7,150 organizations with Internet and 6,051 organizations without Internet-Terminals. Of the total, the distribution per type of organization as catalogued by Stiftung Digitale Chancen is as follows:

1. 34% libraries
2. 49% NGOs
3. 17% of all organizations catalogued

The local partner raised concerns about organizations' facing "survey fatigue" since the last data available was collected during the same first three weeks when the MIREIA survey was launched. The organization, however, offered to share a sample of their data with the questions that were similar to the online survey developed for this study. This issue was consulted with IPTS and it was agreed to include these data into the analysis reporting it separately from the online survey results.

In addition, the local partner gathered and shared for this study data from annual statistical report that is conducted by for libraries that is collected by the German Library Association (Deutscher Bibliotheksverband – dbv) regularly on an annual basis. The data for both NGOs and libraries were collected via telephone interviews. For the libraries, in addition, the local partner analyzed data from their annual statistical report and included these data into the data set that was prepared for this project.

In total, 400 records collected between *December 2012 and February 2013* were shared for this study mirroring the percentage distribution mentioned above and representing all the regions in the country:

1. 136 libraries
2. 196 NGOs
3. 68 commercial organizations

These data was included as part of the analysis, although reported separately, in the following parts: 1. Distribution of the sample by sector; 2. Distribution of the sample by organizational type within sector; 3. Target Groups; 4. ICT-enabled services; and 5. User data collection which only includes only libraries since this information is not available for NGOs or commercial organizations in the dataset,.

3.2.4 Data integration and cleaning

To combine the 15 separate surveys (corresponding to the 15 languages) each survey was downloaded from Survey Monkey in the SPSS format. Because the responses to each question were coded in the respective language of the survey, analysis would be pointless unless the responses were standardized to one language. Thankfully, this was possible because of the way data is stored in SPSS. For each of the multiple-choice questions, SPSS stores a dictionary of the possible responses, each assigned to an integer, and then the actual vector of responses is only stored using the integers. This saves space, and when viewed, the integers are replaced with the corresponding labels from the dictionary. What this means is that the data structure of the 15 surveys are the same, but with different labels applied depending on the language.

Thus, to combine the data sets, the English labels were applied to all 15 surveys. Of course, this did not apply to the write-in fields, only the multiple choice questions. To check that this indeed worked, the Spanish, French, and German datasets were used as test to compare the English labeling with the original language. The responses matched for these three languages.

However, after identifying some discrepancies with the total number of surveys available for the Netherlands it appeared that for the survey in Polish the Country names were translated (the other translations used country names in English), and this changed the order they appeared in the data, thus the database was assigning the Polish language responses to the Netherlands. This was remedied and a thorough check of all the other languages was done for the ordering of question responses to see if they matched the English version. They all appear to do so, which means that it was possible to use the English labels as before. To further check this, we downloaded the survey summaries provided by Survey Monkey for all the languages to compare the number of responses for each question with the tables made from the combined data. As a further note, the variable names assigned by Survey Monkey did not match that of the survey instrument, so this was remedied as the surveys were combined. A couple of variables also needed to be combined, such as Country, and this was done as well.

Once the 15 surveys were combined, some additional data cleaning needed to be done. A few surveys were not completed, and there were two methods were used to initially to trim these out.

1. The first method was based on noticing that we are given a start time and an end time for each survey, and that the difference of these two gives how long the survey took. Around 50

of the surveys lasted less than 2 minutes, and almost all of these were incomplete. Respondents would often answer the filter question, but nothing else.

2. The second method complements the first, and is based on 73 surveys that are missing the Country variable. Of these 73, all are incomplete, and as a bonus, include 50 surveys with very short duration. Thus removing the 73 also eliminated the surveys that were too short.

The resulting dataset was then visually inspected, and no additional rows were removed.   The resulting dataset contains 2352 responses. Additionally, some recoding of the variables was required. This is due to the way in which Survey Monkey outputs the survey data for the multiple choice questions.   When respondents can choose multiple answers to a multiple choice question, each possible answer is given its own variable name.   Then within each of these variables, only the respondents who gave the answer are marked in that variable, with the rest blank.   The problem arises that blanks are generally interpreted as missing, but for these questions actually mean "not that response".   However, this doesn't work when the blank is *actually* a missing value, as happens when no response is given for any choice.   Thus, "true" missing values for the variables were added in the coding. Furthermore, "Logical Skip" coding was added to the questions dealing with collection of user data by the actor.   Only respondents who answer "Yes" to question 23 (Q23) should have been asked Q24-Q26. (See Annex 1 for the Survey in all languages)

As a side note, the IP address of each survey is also recorded.   Initially, it was thought that the IP address would be unique to each survey, but that was not the case.   Secondly, it was found that if an IP address was listed twice, perhaps one of the surveys would be quite short (maybe the respondent initiated the survey in the wrong language and then started over).   However, neither of these was the case.   The language was often the same, and the duration of the multiple surveys were usually normal.   Thus, nothing was done for repeated IP addresses.

The open-ended questions presented a unique challenge for analysis, due to the many languages the survey was administered in.   The responses were not always in the English alphabet, and some of the characters used did not map nicely to an English version.   Perhaps this will not be an issue, if researchers simply use the original survey results from a specific language in their analysis, but it is something to keep in mind for presenting a combined dataset at some point.

The survey question for the estimated annual number of users was a particularly challenging variable to analyze.   Because this was an open-ended question, there was a wide variety of response types, including mixes of words, different number forms, and some abbreviations.   Thus, before any analysis could be done, it had to be manually cleaned.   There are several things in particular to note for the analysis about this cleaning process:

- When a range of values was given (e.g. 200-300 visitors per year), the larger number was taken (in this case 300). The choice to use the upper value (if a range was given) was based on two reasons. First, for those reporting a single number, it is doubtful they would round down the number of users they are reporting, especially since they often give very clean numbers (for example "500 000", even though they surely did not serve exactly this many users).   Thus using the upper value in the range is in line with how other values are reported.   Secondly, the spread in the ranges given is often small (e.g. 350-400), and they are much less common than single numbers, so any choice (using the lower number, the upper number, or the mean of the two) will have a negligible effect on the final averages. There were very few cases where ranges were given instead of an exact number so we don't foresee any impact on the analysis, in terms of underestimating or overestimating numbers of users.

- When the estimated *daily* number of users was given instead of the annual numbers, that response was discarded. Although we could have extrapolated to a yearly number, it would have introduced another source of variability in the response (since we can't actually know that whatever daily number they gave would be consistent for the whole year).

- There were a number of useless and confusing responses, and these were completely removed. Some respondents gave a number of organizations served rather than a number of users, and some gave responses that weren't even related to the number of annual users.

After cleaning this variable, there are 1616 valid responses. These responses were computed for the average for a variety of possible categories (sector, type, budget, etc.). This is to illustrate any broad trends, and should not be extrapolated beyond this, because all of these had very large standard deviations, meaning the data is quite spread out.

3.2.5 Lessons learned (in view of further similar research exercises)

Determine grants in line with efforts

Although our members did a wonderful job in translating the survey, TE cannot afford to repeat this kind of requests to its members. In the future, grants should be in line with the investment asked from our partners.

Complexity of language translation process

The complexity of the process was sorted out thanks to the collaboration with partners that are experienced in the eInclusion field. In case of involving professional translators, the quality check should be performed by practitioners who understand not only the eInclusion field but also are very knowledgeable of the different social contexts of their countries.

Problem with open-ended questions format (Year organization was founded, innovation, and numbers of users)

The difficulties experienced, particularly with regard to languages with a different alphabet, could have been avoided by making these three questions close-ended. Any future exercise of this kind must take this into serious consideration to avoid invalid responses that are not suitable for analysis because of the different ways in which survey respondents answer this type of questions, particularly those that ask for numeric responses. A more suitable approach is to use pre-defined ranges for the year the organization was founded and the number of users it serves. In addition, there is an inherent discrepancy between the year the organization was founded and the year when it began providing ICT-enabled services. This discrepancy was very clear with the public libraries that participated in the survey that were founded, in many cases, in the 1800s and it is unknown when they began providing ICT-enabled services. This discrepancy can be solved by including two close-ended questions: One that captures when the organization was founded and another that captures when the organization started providing ICT-enabled services.

Based on the experience with the eIMAP survey there is one main improvement to the survey design:

- Questions regarding number of users served must include different ranges that organizations can choose from instead of a written-in option. This is also the case for capturing the year in which the organizations were founded.

- A question to capture the year the organization was founded must be divided into two separate close-ended questions; 1) Year range when it was founded; and 2) Year range when it started providing ICT-enabled services.

- A revision for typologies of organizations in the private sector is needed since a significant percentage of e-Inclusion actors within this sector selected "Other" as their organizational type.

CHAPTER 4: Mapping eInclusion actors in the EU

4.1 Description of the sample

The analysis is mainly based on 2352 valid survey responses collected in the period of over two months from January 2nd – February 28th, 2013 from all EU27 countries (See Table 4 for responses distribution by country). In addition, the analysis includes 400 data entries for Germany extracted from two databases (Stiftung Digitale Chancen Internet Point Database and the Germany Library Association[17]) in those instances where there is compatibility with the survey designed for this research.

Since the research is based on a non-probability sample strategy and the universe of eInclusion actors in the region is unknown, there are some issues of overrepresentation and inherent biases that must be considered in the process of data interpretation and analysis. Three issues merit particular attention:

1. The sample sizes from each country are wide spread with some countries having much larger response rates (i.e. Spain, Poland, Romania, France, the Netherlands, and the Czech Republic) while a number of others have very small number of responses (i.e. Austria, Slovenia, Malta, Cyprus, and Estonia) rendering the analysis at a country level statistically insignificant for these countries. The landscape of eInclusion actors as defined by this mapping exercise favors, at an aggregate EU27 level, the typologies of organizations from countries with larger sample sizes.

2. There is an overrepresentation of sectors and types of organization favoring the largest number of responses to the public sector due to the high participation in the survey of public libraries and municipal/city organizations representing close to 50% and 23% of the public sector sample respectively. Furthermore, some countries drive the analysis for these types of organizations representing a higher proportion of the sample. In the case of public libraries, over 50% of responses come from Poland, Romania, Lithuania, and Bulgaria. For municipal/city government eInclusion actors, 73% of the sample is represented by France, Spain, and Poland. In addition, it is possible that in some countries there is a regional bias with certain regions within country having higher representation than others. For example, in Spain a large proportion of the organizations in the sample belong to the Guadalinfo network – a network of local government organizations in the region of Andalusia –.

3. There were thirteen cases where organizations selected multiple countries as geographical presence. Since this category represents a very small proportion of the total sample (less than 0.5%) each case was added to the corresponding country.

4. The dissemination campaign and channels used to promote the survey at the national level could have possibly introduced some biases in the selection of organizations. However, given the fact that the vast majority of national partners (See Annex 2 for the information of the partners per country) belong to the third sector and the organizations that participated in the survey represent a wide spectrum of organizations from both the public and third sector there is not a really significant bias that could be identified from the dissemination strategy. The only caveat perhaps was the efficiency of the dissemination campaign to reach organizations in the private sector that could inherently underrepresent their participation in the overall sample.

Taking into account these considerations, the analysis was conducted both in an aggregated and at a country level form to avoid, to the extent possible, any over or underrepresentation of the landscape of eInclusion actors in a given country.

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[17] [17] See Chapter 3, Section 3.2.3 Note on German case for additional information

TABLE 4: SURVEY RESPONSES DISTRIBUTION BY COUNTRY (TOTAL N= 2752)

Country	Survey response N
Austria	12
Belgium	72
Bulgaria	99
Cyprus	9
Czech Republic	103
Denmark	29
Estonia	8
Finland	53
France	218
Germany**	411
Greece	27
Hungary	65
Ireland	28
Italy	102
Latvia	26
Lithuania	68
Luxembourg	2
Malta	9
Netherlands	127
Poland	282
Portugal	100
Romania	211
Slovakia	27
Slovenia	5
Spain	432
Sweden	94
United Kingdom	133
TOTAL	2752

Notes:* Includes 400 data entries from the German Library Association (Deutscher Bibliotheksverband – dbv) and the Stiftung Digitale Chancen Internet Points database shared by this organization for the study.

The bulk of the data for the analysis presented below is composed by responses from individual organizations representing close to 80% of the sample with the remaining 20% of the responses coming from networks of organizations and organizations identifying themselves as both (See Figure 1). This proportion applies at a country level in most of the cases, except Spain and Italy where network of organizations represent over 30% of the survey responses. For Bulgaria, Finland, Hungary, Poland, Portugal, and Latvia the proportion for individual organizations is even higher reaching 90% and over of the survey responses for these countries. (See Table 5)

FIGURE 1: SURVEY DISTRIBUTION BY INDIVIDUAL ORGANIZATIONS AND NETWORKS AGGREGATED (TOTAL N= 2352)
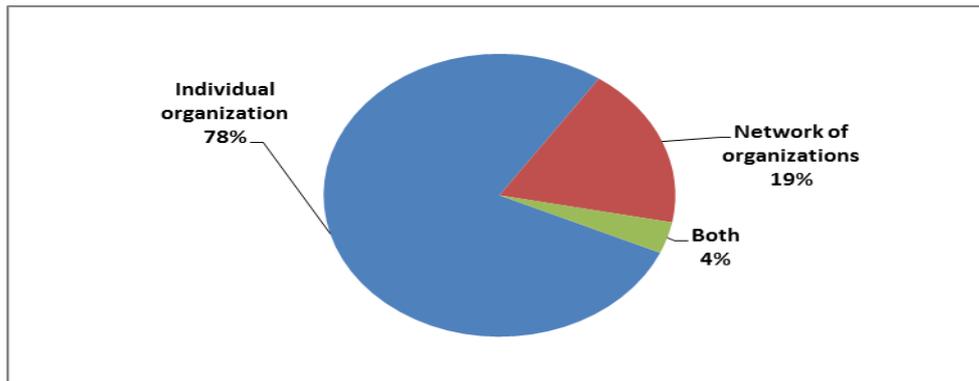
TABLE 5: SURVEY DISTRIBUTION BY INDIVIDUAL ORGANIZATIONS AND NETWORKS BY COUNTRY (TOTAL N= 2752)

Country	Individual organization	Network of organizations	Both	Total N
Total EU27	77.9	18.5	3.6	2752
Austria	66.7	33.3	0.0	12
Belgium	74.0	24.7	1.4	72
Bulgaria	94.9	4.0	1.0	99
Cyprus	100.0	0.0	0.0	9
Czech Republic	90.3	7.8	1.9	103
Denmark	71.0	25.8	3.2	29
Estonia	62.5	25.0	12.5	8
Finland	92.3	7.7	0.0	53
France	74.4	20.5	5.0	218
Germany*	90.9	9.1	0.0	411
Greece	74.1	25.9	0.0	27
Hungary	90.6	9.4	0.0	65
Ireland	75.0	25.0	0.0	28
Italy	59.8	32.4	7.8	102
Latvia	95.8	4.2	0.0	26
Lithuania	88.1	11.9	0.0	68
Luxembourg	100.0	0.0	0.0	2
Malta	71.4	14.3	14.3	9
Netherlands	73.0	23.8	3.2	127
Poland	92.6	7.1	0.4	282
Portugal	90.0	8.0	2.0	100
Romania	76.8	5.2	18.0	211
Slovakia	81.5	18.5	0.0	27
Slovenia	100.0	0.0	0.0	5
Spain	59.0	39.6	1.4	432
Sweden	79.8	19.1	1.1	94
United Kingdom	85.6	10.6	3.8	133

Notes:* Includes 400 data entries from the German Library Association (Deutscher Bibliotheksverband – dbv) and the Stiftung Digitale Chancen Internet Points database shared by this organization for the study.

The analysis is organized in the following way: The first section provides the distribution of the data by sector and type of organization within each sector represented in the sample. The second section gauges at the way these organizations operate analyzing their staff size, budget, funding sources, and number of users served on an annual basis. The third section describes the range of ICT-enabled

services and other social services organizations provide and maps the range of target groups they serve. The last section analyzes the type of user data organizations collect as well as the most common methods used and the motivations and limitations they face to gather information of their users.

4.2 Distribution by typology of e-Inclusion intermediaries (pan-EU)

4.2.1 Distribution by sector

The map outlined by this research effort draws a diversity of organizations from the public, third, and private sector providing eInclusion services for a wide variety of users across the European Union. Most of the organizations in draw on this map have a long tradition serving their communities, especially those in the public and third sector – with almost 50% of organizations in the former and close to 40% in the latter – which were founded over 15 years ago. Over a third of the organizations in the public sector and 20% of organizations in the third and private sector have at least 10 years of experience providing different services to their target groups (See Figure 2.1)

At an aggregate level, over half of the organizations represented in the survey belong to the public sector (58%) with 36% of the sample representing third sector organizations and a small percentage from the private sector (See Figure 2 for aggregated distribution by sector).

FIGURE 2: DISTRIBUTION OF ORGANIZATIONS BY SECTOR AGGREGATED (N=2752)
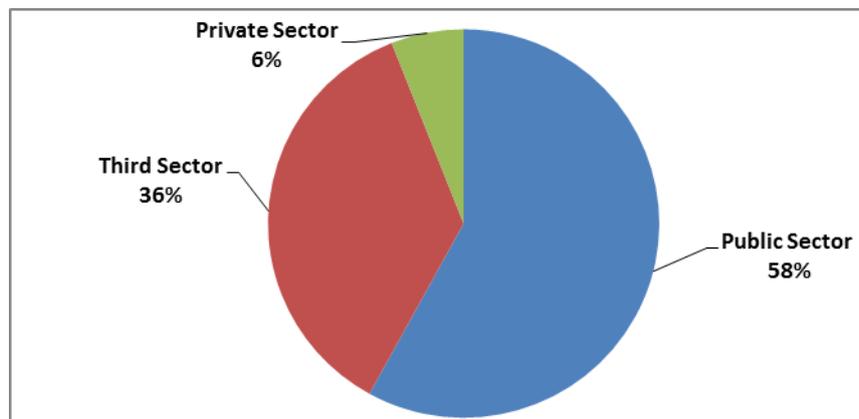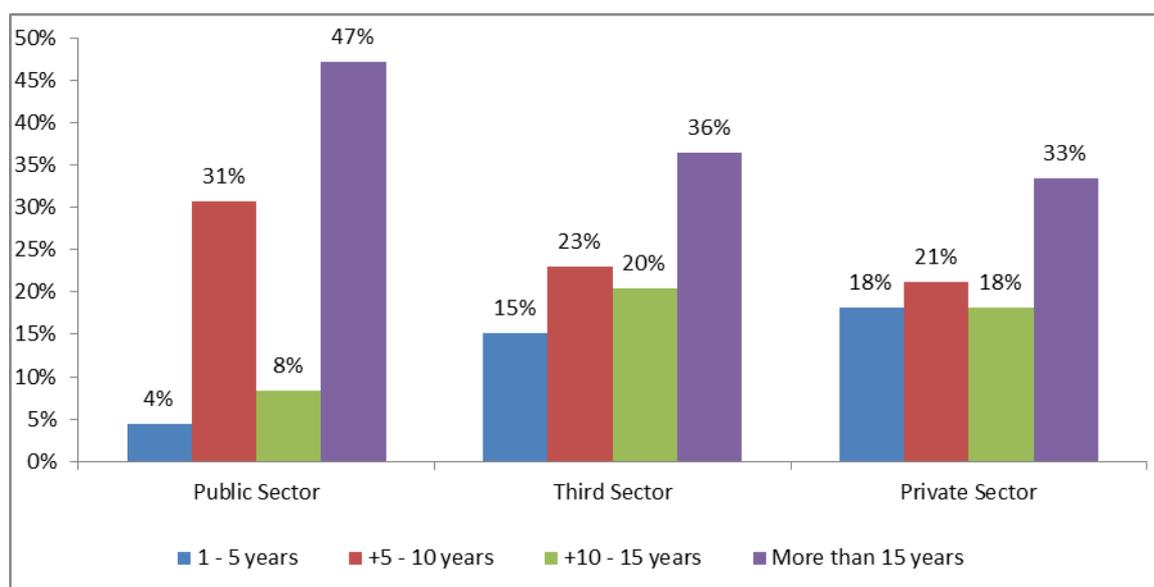
This proportion varies significantly in Belgium, Finland, Lithuania, Poland, Romania, and Spain where over 70% of the organizations belong to the public sector and less than 50% in Bulgaria, Denmark, Germany, Hungary, Italy, and the United Kingdom (See Table 6 for distribution by sector by country). Higher representation of organizations in the public sector derives, in part, by the participation of libraries in the study in general and a high proportion of organizations belonging to Guadalinfo[18], a network of local government organizations in the case of Spain. The following section analyses the proportion of survey responses by type of organization within each sector. A thorough analysis by organizational type within each sector and by country is provided in Chapter 5 and Chapter 6.

TABLE 6: DISTRIBUTION OF ORGANIZATIONS BY SECTOR BY COUNTRY (N=2752)

Country	Public Sector	Third Sector	Private Sector	Total N
Total EU27	58	36	6	2752
Austria	25	58.3	16.7	12
Belgium	72.6	26	1.4	72
Bulgaria	52.5	43.4	4	99
Cyprus	12.5	87.5	0	9
Czech Republic	17.5	65	17.5	103
Denmark	41.9	48.4	9.7	29
Estonia	25	75	0	8
Finland	80.8	17.3	1.9	53
France	68	30.1	1.8	218
Germany*	34	49	17	411
Greece	29.6	59.3	11.1	27
Hungary	31.2	68.8	0	65

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18 For more information on Guadalinfo (in Spanish): http://www.guadalinfo.es/quienes_somos

Ireland	21.4	67.9	10.7	28
Italy	43.1	49	7.8	102
Latvia	62.5	29.2	8.3	26
Lithuania	85.1	14.9	0	68
Luxembourg	50	50	0	2
Malta	28.6	71.4	0	9
Netherlands	18.3	73.8	7.9	127
Poland	86.9	12.1	1.1	282
Portugal	73	23	4	100
Romania	83.4	16.1	0.5	211
Slovakia	25.9	55.6	18.5	27
Slovenia	60	20	20	5
Spain	83.1	15.5	1.4	432
Sweden	62.8	28.7	8.5	94
United Kingdom	21.2	71.2	7.6	133

Notes: * Includes 400 data entries from the German Library Association (Deutscher Bibliotheksverband - dbv) and the Stiftung Digitale Chancen Internet Points database shared by this organization for the study.

The vast majority of organizations across all three sectors are individual organizations (81% and 72% respectively) with a higher proportion of network of organizations belonging to the third sector (23% compared to 16% in both public and private sectors). (See Table 7 for distribution by type vs. sector)

TABLE 7: DISTRIBUTION OF THE SAMPLE BY TYPE VS. SECTOR (N=2357)

Type	Public Sector	Third Sector	Private Sector
Individual organization	80.5	72.7	82
Network of organizations	16.4	22.7	16
Both	3.1	4.6	2
Total %	**100**	**100**	**100**
Total N	**1469**	**788**	**100**

Note: The total N does not include the 400 countries for the Germany databases since this information is not available.

4.2.2 Distribution by organizational category including most and less frequently represented typologies

For the entire sample, public libraries and municipal/local government organizations represent the vast majority of organizations in the **public sector** (51% and 21% of the percentage of responses respectively). Government-run telecentres follow with 10% of the survey responses. National, Regional and State Agencies and Formal Educational Institutions have a very small representation of

the responses with 7% each. This distribution doesn't necessarily represent the actual landscape of eInclusion actors in the European Union. The heavier representation of some type of actors, in this case libraries and municipal/city government agencies can be the result of the inherent biases brought in by the dissemination channels that were used to disseminate the survey. It does, however, give us a prospective of the multiplicity of organizations in the public sector that are actively garnering the potentials of information and communication technologies to advance social and economic goals. The figure below shows the breakdown by organizational categories within the public sector. A country level analysis for organizational categories is provided on Chapter 5 of the report.

FIGURE 3: DISTRIBUTION BY ORGANIZATIONAL CATEGORIES IN THE PUBLIC SECTOR AGGREGATED (N=1605)
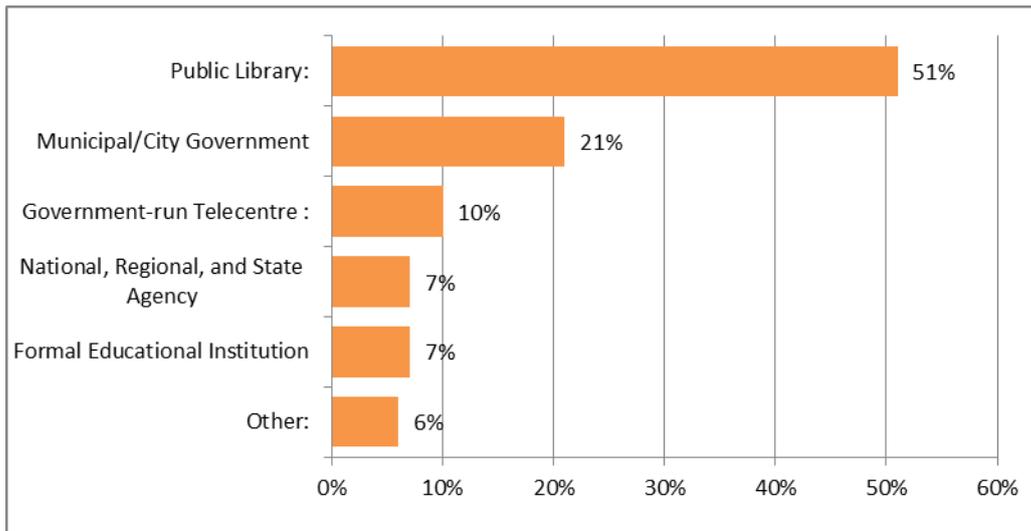
Note: Includes 136 data entries from the German Library Association (Deutscher Bibliotheksverband – dbv) gathered by Stiftung Digitale Chancen for this study.

In the case of the **third sector**, at an aggregate level Associations, Charitable organizations or Foundations and NGOs combined represent 77% of the survey responses. The rest is represented by community organizations (13%) and informal networks, cooperatives, federations, and other type of organizations representing a small 6% of the sample. Trade unions are the least represented category within the third sector (See Figure 4). A country level analysis is provided in Chapter 5 of this report.
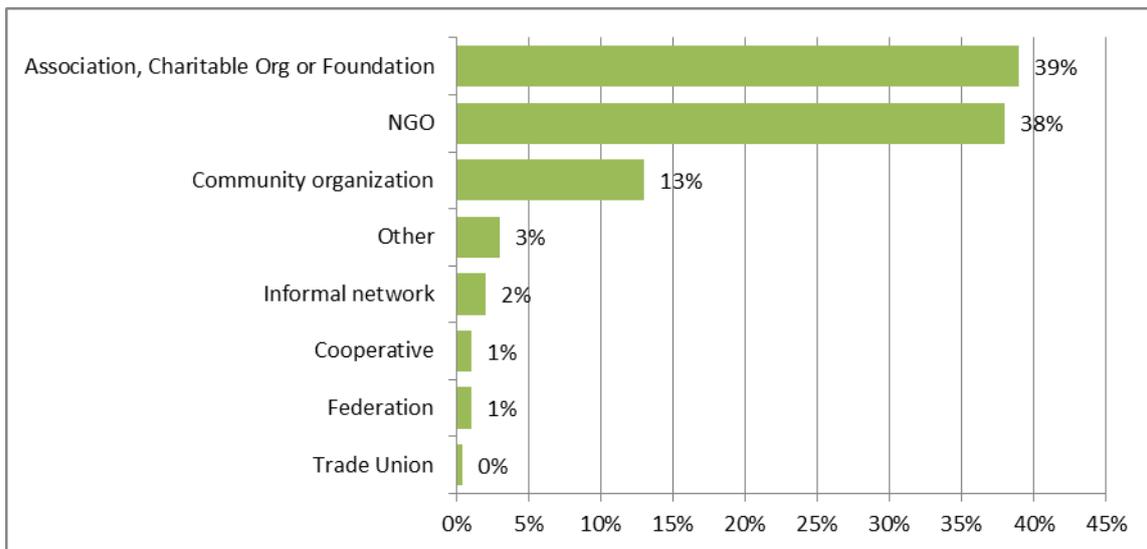
Note: Includes 196 NGO entries from the Stiftung Digitale Chancen Internet Points database shared by this organization for the study.

More than half of **private sector** organizations are represented mostly by private training organizations and 20% of survey responses by cybercafés. Private formal educational institutions compose only 3% of the survey responses. The private sector shows the largest percentage of organizations identifying themselves as "Other" (25% compared to 3% in the third sector and 6% in the public sector sample). This could be a reflection of the limited categories provided as options for organizations within this sector. (See Figure 5)

FIGURE 5: DISTRIBUTION BY ORGANIZATIONAL CATEGORIES IN THE PRIVATE SECTOR AGGREGATED (N=168)
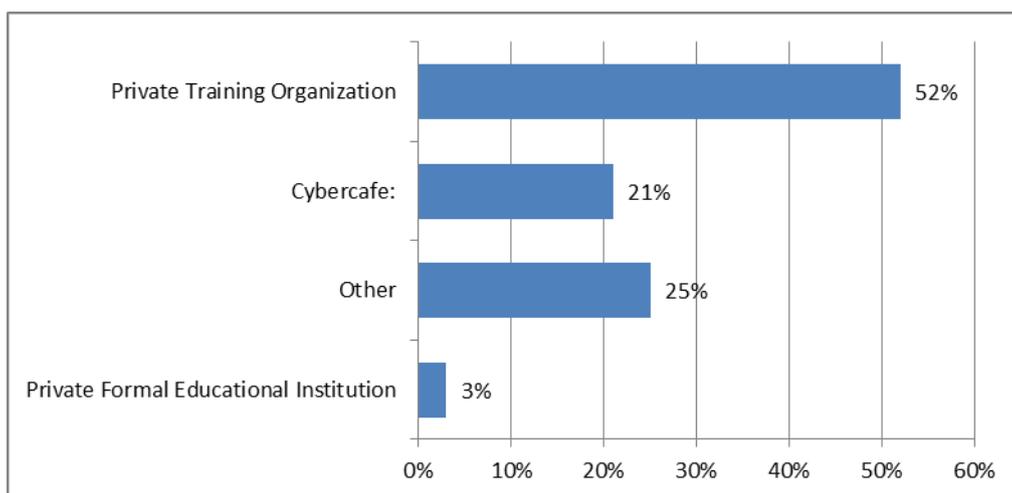
4.3 How eInclusion actors operate

The ability of eInclusion actors to provide a variety of ICT-enabled and other services to their target groups is highly determined by their organizational capacity. Their staff size, operating budget, funding sources, and affiliation to networks and other kind of larger associations define how

organizations operate and the type of resources they have available to make a variety of services available for their users. This section analyzes eInclusion actors from the perspective of their organizational capacity highlighting similarities and differences between individual organizations and networks, across sectors and types of organizations within sectors, and across the EU27 countries.

4.3.1 Staff size by country and aggregate

The majority of the sample is represented by small organizations with staff sizes of 1-10 people. The rest of the organizations are almost equally divided between medium-size organizations with staff reaching between 11-50 people and larger organizations with staff capacity of over 50 people. (See Figure 6 for distribution by staff size). Not surprisingly, individual organizations report smaller staff sizes (57% report 1-10, compared with 49% of networks), while only 17% of individual organizations report having more than 50 in their staff compared to 28% of networks. (See Table 8)

FIGURE 6: DISTRIBUTION BY STAFF SIZE AGGREGATED (N=2289)
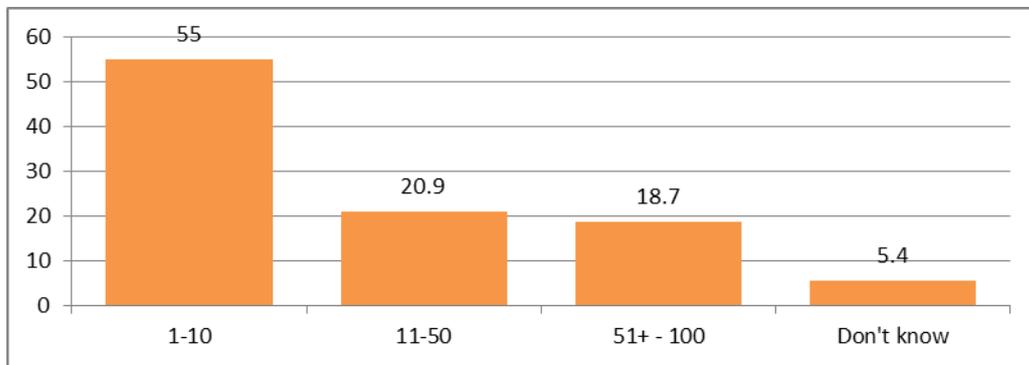
TABLE 8: STAFF SIZE BY INDIVIDUAL ORGANIZATIONS VS. NETWORKS (N= 2289)

Staff Size	Individual organization	Network of organizations
1-10	56.6	48.6
11-50	22.1	15.3
51+	16.9	27.8
Don't know	4.4	8.3
Total %	**100**	**100**
Total N	**1785**	**424**

In terms of differences of staff size by sector, *the third sector* has the highest proportion of small organizations with 62% reporting staff capacity of between 1-10 people and a very small percentage of larger organizations with more than 50 people as staff. Medium organizations with staff capacity of 50 people or less are distributed almost identically across the three sectors with a slight difference in the public sector where only 20% of the organizations are in this category (compared to 23% in the third and private sector). Organizations within the public sector tend to have the largest staff capacity with 24% of them reporting staff sizes of over fifty people (See Figure 7 below) followed by 13% of organizations within the private sector.
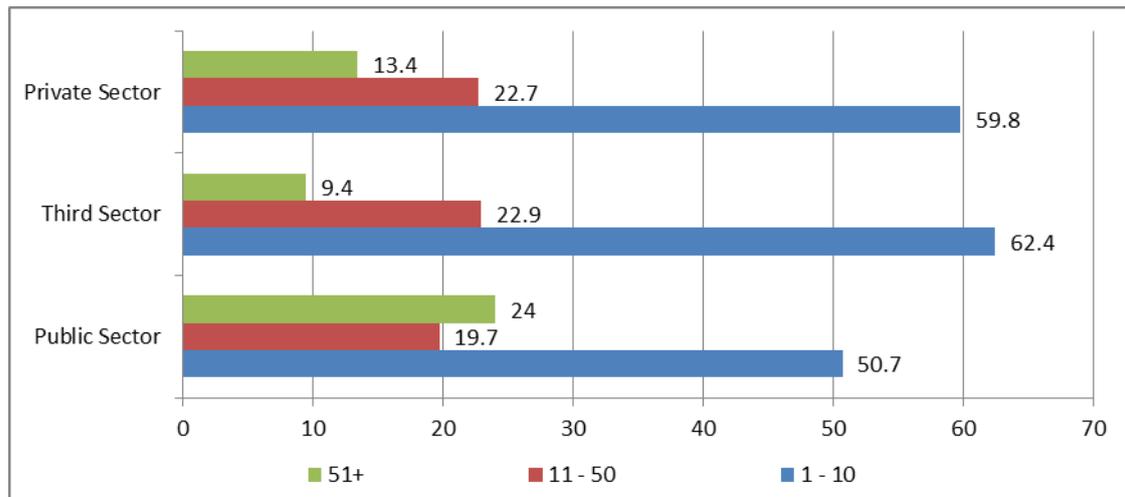
Within *public sector organizations*, formal educational institutions and national, regional and state agencies report the largest staff capacity with 62% in case of the former and almost 50% in the latter having a staff size of over 50 people, followed by 21% of government-run telecentres (compared with 16% of municipal/city government agencies and public libraries).

For third sector organizations, over 60% across all categories are small organizations with 1-10 people in staff capacity reaching over 70% for NGOs. A similar proportion holds true for medium size organizations across all categories with a slightly higher percentage of associations, charitable organizations or foundations and community organizations (over 20%) in this category. Larger organizations with more than fifty people as staff compose 11% of the associations, organizations or foundations and only 6% of NGOs and community organizations. For the other categories of organizations with staff size of over 50 people, the total number of responses is too small to make any statistically significant inferences of these data.

In the *private sector*, private training organizations and organizations classifying themselves as "Other" make up the bulk of the data for the analysis of staff size since the database provided by Stiftung Digitale Chancen for Germany does not include information on staff capacity. Considering the small total sample size, similar proportions of staff size are evident from the data with the 66% of private training organizations having staff size of less than 10 people.

At the country level, Belgium, France, Hungary, Latvia, Poland, and the United Kingdom have the largest proportion of organizations with staff capacity of less than ten people (over 65% of the organizations). For Hungary, the percentage reaches over 90%. Medium size organizations with staff size of less than fifty people make up over a third of the sample in countries such as Denmark, Greece, Lithuania, the Netherlands – where the percentage reaches over 40%– Portugal, and Sweden. Lithuania has the highest proportion of organizations with staff capacity of over fifty people (41%) followed by Denmark (36%), Finland (33%), and Italy (31%). (See Table 9)

Country	1-10	10-50	51+	Don't know	Total N
Total EU27	55	20.9	18.7	5.4	2290
Austria	45.5	18.2	36.4	0	11
Belgium	65.8	21.9	9.6	2.7	72
Bulgaria	56.7	26.8	13.4	3.1	97
Cyprus	75	12.5	12.5	0	9
Czech Republic	59.6	30.3	10.1	0	101
Denmark	17.9	39.3	35.7	7.1	28
Estonia	71.4	0	14.3	14.3	7
Finland	48.1	19.2	32.7	0	53
France	66.7	22.5	8.5	2.3	213
Germany	63.6	9.1	27.3	0	11
Greece	43.5	30.4	26.1	0	23
Hungary	91.4	5.2	3.4	0	58
Ireland	53.6	25	21.4	0	28
Italy	47.9	19.1	30.9	2.1	94
Latvia	60.9	21.7	17.4	0	26
Lithuania	19.7	36.4	40.9	3	68
Luxembourg	50	0	50	0	2
Malta	28.6	42.9	28.6	0	8
Netherlands	31.7	40.8	22.5	5	121
Poland	61.9	22.4	11.7	3.9	281
Portugal	57.4	36.2	4.3	2.1	94
Romania	57.6	18.7	11.8	11.8	203
Slovakia	65.4	7.7	23.1	3.8	26
Slovenia	20	60	20	0	5
Spain	51.8	5.4	30	12.9	427
Sweden	45.2	30.1	20.4	4.3	93
United Kingdom	60	18.5	19.2	2.3	131

4.4 Network membership

Affiliation to networks can provide e-Inclusion actors with additional resources, visibility, and a space where ideas and practices are shared. Clearly, the type, size, and nature of the networks' mission shape the landscape of resources – financial, human, and otherwise – available for member organization. Sixty per cent of organizations in the sample reporting belonging to one or multiple networks with the highest proportion of organizations in the public sector reporting network membership (62%) compared to 60% in the third sector. The private sector reported the lowest network membership with only 35% of the organizations within the sector belonging to a network.

Within the public sector, government-run telecentres show the highest level of network membership with 88% of organizations reporting some form of network affiliation. This high percentage, however, is driven for the most part by the experience of telecenters belonging to the Guadalinfo network in Spain and does not depict fully the experience of this type of organizations in the rest of the EU27 countries. National, regional, or state agencies followed closely by municipal/city government organizations showed the second and third highest level of network membership (67% and 65% respectively). (See Figure 9 for network membership for organizations within the public sector).

FIGURE 8: NETWORK MEMBERSHIP FOR ORGANIZATIONS WITHIN THE PUBLIC SECTOR (N=905)
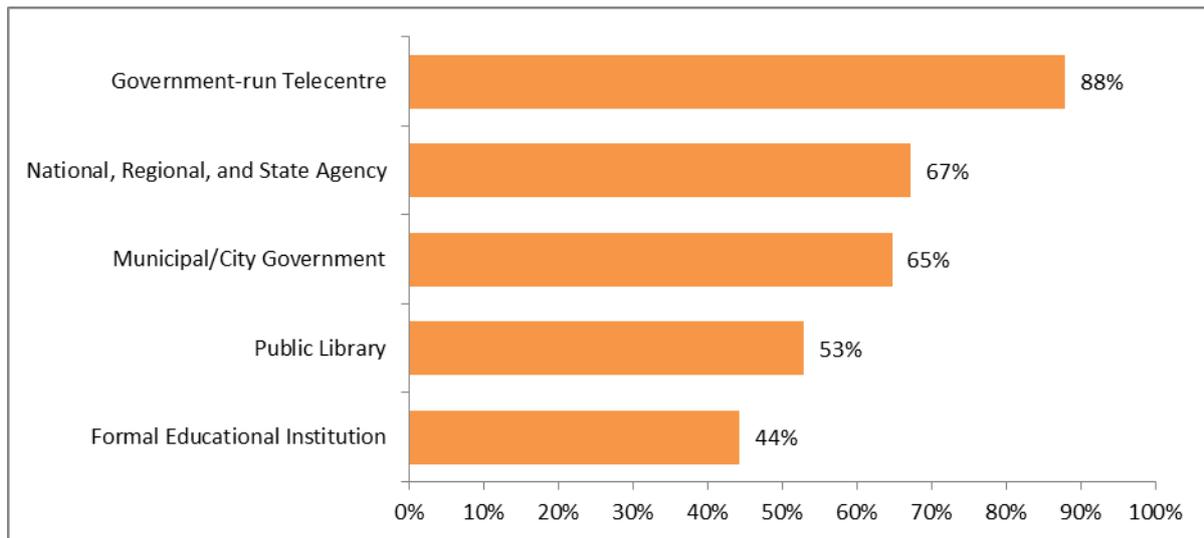
As mentioned above, 60% of organizations within the third sector reported membership to one or more networks. Cooperatives reported the highest level of network membership (80%) followed by NGOs and Associations, Charitable Organizations or Foundations (68% and 62% respectively). Federations, informal networks, and trade unions all reported very high level of network membership. However, the number of cases in each of these categories of organizations is small to make any statistical inferences. (See Figure 9)
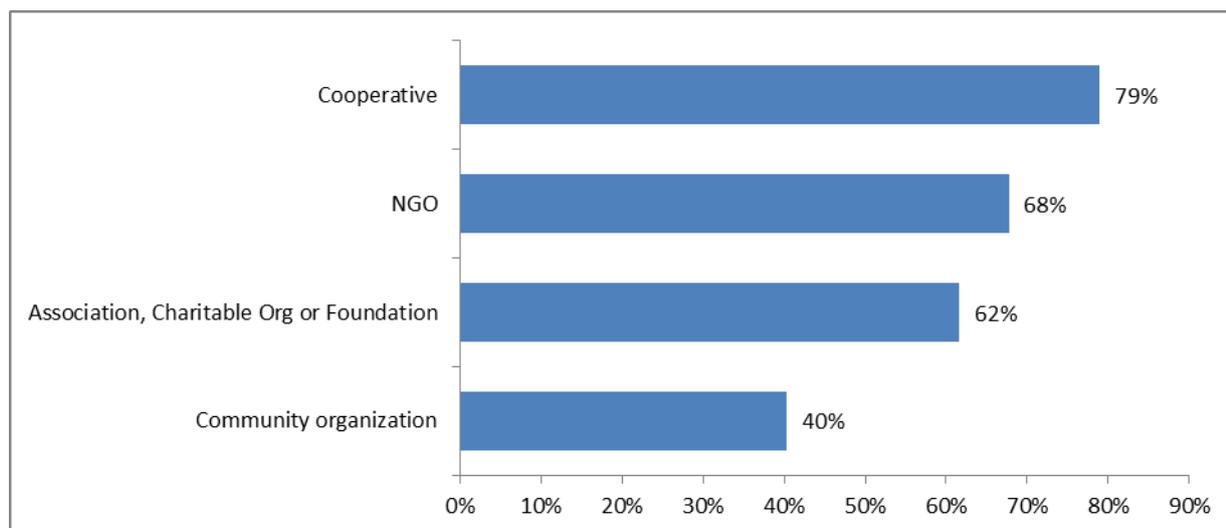
Some differences in network membership appear at a country level ranging from over 70% of organizations in Bulgaria, France, Hungary, and Spain belonging to one or multiple networks compared to Italy, the Czech Republic and Germany where network memberships is below 40%. Poland reported the lowest network membership of the entire sample with less than 25% of organizations belonging to a network (See Table 10 network affiliation by country).

TABLE 10: NETWORK MEMBERSHIP BY COUNTRY (N=2351)

Country	Yes	No	Don't know	Total N
Total EU27	59.8	31.4	8.7	2351
Austria	41.7	41.7	16.7	12
Belgium	63	24.7	12.3	72
Bulgaria	70.7	18.2	11.1	99
Cyprus	62.5	37.5	0	9
Czech Republic	32	59.2	8.7	103
Denmark	64.5	25.8	9.7	29
Estonia	50	50	0	8
Finland	55.8	30.8	13.5	53
France	74.4	18.3	7.3	218
Germany	36.4	54.5	9.1	11
Greece	74.1	18.5	7.4	27
Hungary	82.5	12.7	4.8	65
Ireland	60.7	35.7	3.6	28
Italy	42.2	52	5.9	102
Latvia	62.5	37.5	0	26
Lithuania	65.7	22.4	11.9	68
Luxembourg	0	100	0	2
Malta	57.1	42.9	0	9

Netherlands	65.1	28.6	6.3	282
Poland	24.8	64.2	11	100
Portugal	61	31	8	211
Romania	66.8	27	6.2	27
Slovakia	48.1	48.1	3.7	5
Slovenia	40	60	0	432
Spain	81.5	10.4	8.1	94
Sweden	60.6	18.1	21.3	133
United Kingdom	40.2	50.8	9.1	12

4.4.1 Size of networks in terms of size of membership

Networks not only vary in mission and resources available for their members but also in size of membership. In terms of network size, bigger networks with over 500 members represent almost 25% of the total universe of responses followed by networks with 51-200 members (22% of the sample) and smaller networks with 10-20 members only (20%). (See Figure 10 below).

FIGURE 10: NETWORK SIZE AGGREGATED (N=1362)
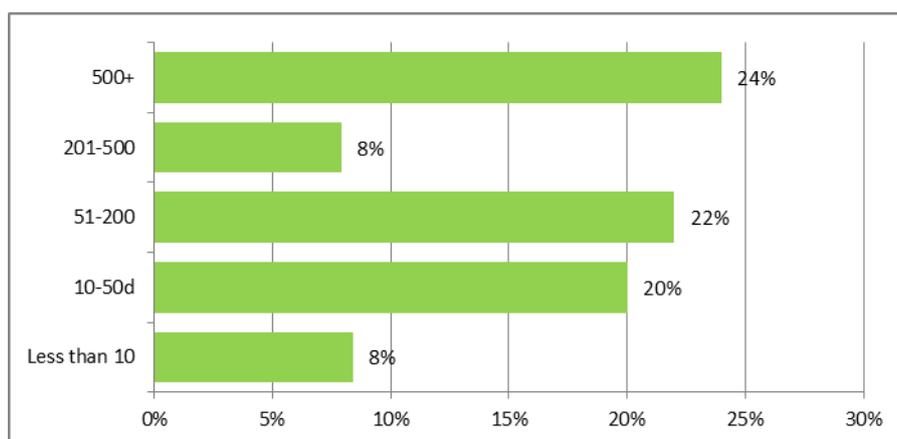
Network size varies slightly by sector, with the exception of networks with over 500 members that tend to be more prevalent among public sector organizations (29%). Almost 30% of third sector organizations belong to networks of medium size (with 51-200 members) and over 34% of private sector organizations. Similarly, a highest proportion of organizations in the private sector belong to smaller networks (17%) compared to public sector and third sector organizations (8% respectively). (See Table 11 below).

50

Network size	Public sector	Third sector	Private sector
Less than 10	8	8.4	17.1
11-50	18.1	24.3	11.4
51-200	18.1	28.7	34.3
201-500	6.1	11	11.4
500+	29.1	13.7	17.1
Total N	874	453	35

There are some differences across countries in terms of network size. Greece, Lithuania, and Sweden show the highest proportion of organizations belonging to smaller networks with less than 10 members. On the opposite extreme, Bulgaria shows the largest percentage (63%) of organizations belonging to big networks with over 500 members followed by Spain (46%), Poland (30%), and Italy (21%). (See Table 12 for network size by country).

TABLE 12: NETWORK SIZE BY COUNTRY (N=1362)

Country	Less than 10	11-50	51-200	201-500	500+	Don't know	Total N
Total EU27	8.4	20	22	7.9	23.6	18.1	1362
Austria	0	75	0	25	0	0	4
Belgium	6.8	25	54.5	2.3	4.5	6.8	44
Bulgaria	1.4	12.9	7.1	5.7	62.9	10	70
Cyprus	0	20	20	0	40	20	5
Czech Republic	6.2	40.6	25	6.2	18.8	3.1	33
Denmark	0	18.8	18.8	18.8	25	18.8	16
Estonia	33.3	33.3	33.3	0	0	0	3
Finland	14.3	35.7	17.9	10.7	10.7	10.7	29
France	6.9	27	31.4	6.9	8.8	18.9	159
Germany	50	25	25	0	0	0	4
Greece	17.6	11.8	23.5	11.8	11.8	23.5	18
Hungary	2	7.8	37.3	17.6	11.8	23.5	51
Ireland	12.5	43.8	18.8	18.8	6.2	0	16
Italy	2.4	23.8	42.9	9.5	21.4	0	42
Latvia	7.1	57.1	28.6	0	0	7.1	15
Lithuania	16.7	33.3	35.7	4.8	0	9.5	42
Malta	0	25	50	0	0	25	5
Netherlands	12.5	17.5	20	26.2	6.2	17.5	80
Poland	6.1	22.7	10.6	1.5	30.3	28.8	66
Portugal	15.8	17.5	26.3	19.3	3.5	17.5	57
Romania	7.4	22.8	22.8	5.9	16.2	25	136
Slovakia	8.3	33.3	41.7	0	16.7	0	12
Slovenia	0	50	0	0	0	50	2
Spain	8.6	11.5	10.6	2.9	46.6	19.8	348
Sweden	14.3	14.3	25	12.5	8.9	25	56
United Kingdom	4.1	16.3	22.4	8.2	16.3	32.7	49

4.5   Budget and funding sources

As it has been shown in the analysis of staff size, over fifty per cent of individual organizations and networks that participated in the network tend to be smaller organizations with staff capacity of ten or less people. It is only expected that their budget will also be small and this is precisely the case. Close to 50% of the organizations have operating budgets of less than €100,000 and only over 18% reaching budget levels of between €100,000 and €1 million. A very small percentage of the organizations have higher budgets (11%) (See Figure 11). An interesting note is that almost a quarter of the survey respondents reporting not knowing their operating budget and most of them are public sector organizations.

FIGURE 11: BUDGET LEVELS AGGREGATED (N= 2220)
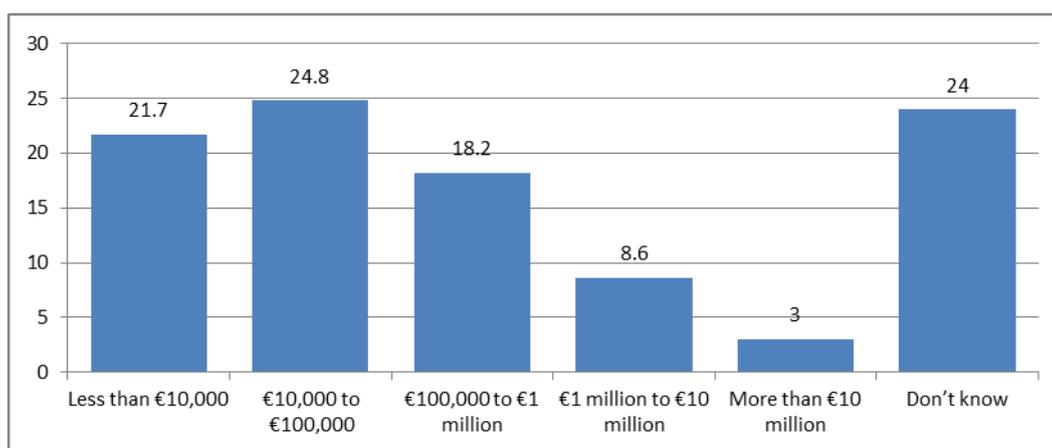
Comparing budget by sector, mostly small differences are seen. The largest difference is that 56% of respondents from the third sector have average budgets of less than €100,000 compared to 40% on the public sector and almost 35% on the private sector. The highest proportion of organizations with budgets of more than €10 million is, not surprisingly, found in the private sector with 4% of the organizations managing an operating budget of this size. (See Table 13 for budget level by sector).

TABLE 13: BUDGET LEVEL BY SECTOR (N=2220)

Budget level	Public Sector	Third Sector	Private Sector
Less than €10,000	19.9	25.4	18.4
€10,000 to €100,000	21.4	30.8	26.5
€100,000 to €1 million	16.3	21.5	18.4
€1 million to €10 million	7.6	9.9	14.3
More than €10 million	3.5	1.9	4.1
Don't know	31.3	10.5	18.4
TOTAL %	**100**	**100**	**100**
TOTAL N	**1373**	**749**	**98**

Budget level within each sector, varies depending on the type of organization. For organizations within the third sector the variation is very small with over 50% of NGOs, Associations, and Community Organizations reporting budget levels below €100,000. A higher proportion of Associations or Foundations report budgets over €1 million but the difference is small compared to NGOs. Fewer than 2% of Community organizations reported having budget capacity of €1 million. The rest of the organizational categories (Informal networks, Cooperative, Trade Union, and Federation) within the third sector have a small number of responses to run any significant analysis. (See Figure 12 below)

FIGURE 12: BUDGET LEVEL BY TYPES OF ORGANIZATION WITHIN THE THIRD SECTOR (N=788)
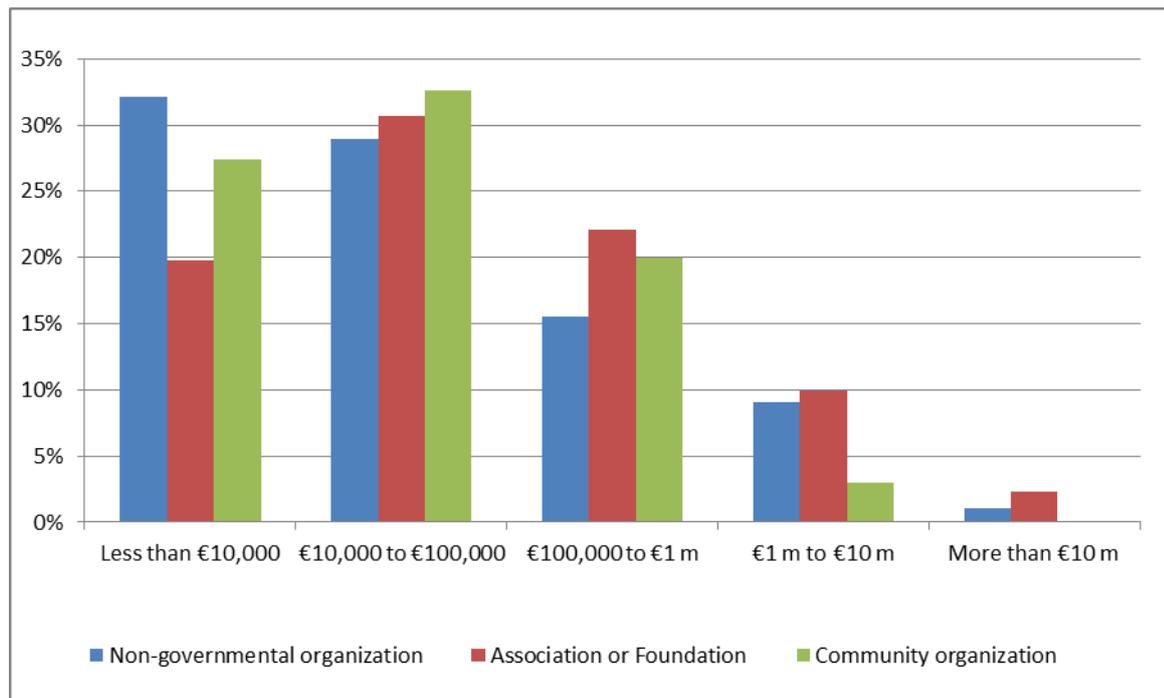
Organizations within the *public sector* show on average higher budget levels than in the third sector. Over 4% of public sector eInclusion actors reported an operating budget of more than €10 million compared with only 1% of organizations in the third sector. National, Regional and State Agencies and Formal Educational Institutions comprise most of the organizations that reported this budget level. Municipal or City Government and Public libraries represent the highest percentage of organizations within this sector with budgets of less than €10,000 (24% and 22%, respectively). However, public libraries also reported the highest percentage within the budget range over €100,000 to €1 million. These differences may be explained by regional variations within and across the EU countries. Over a third of government-run telecenters reported an operational budget of less than €100,000 but this figure may not represent accurately the level of financial resources for this type of organization since over 54% of survey respondents declared they don't know the budget of their organization. (See Figure 13 for Budget level by types of organization within the third sector)
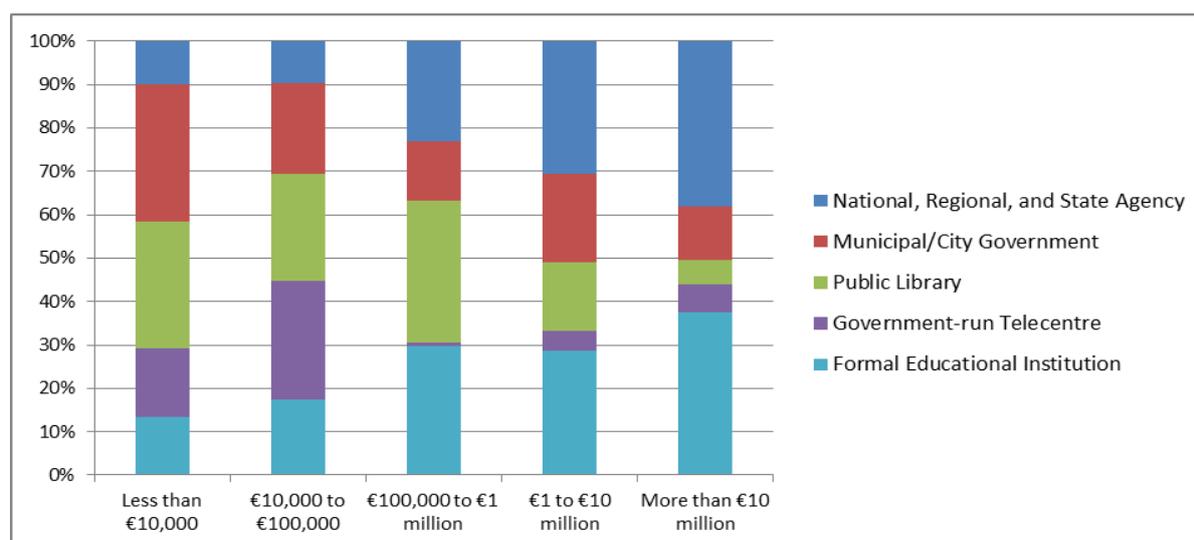
Across countries there are some small differences even though over half of the organizations have operating budgets of less than €100,000 across the board. A higher percentage of organizations in Finland, Greece, Italy, Lithuania, and Slovakia report having medium operating budgets of less than €1 million. Over 45% of organizations in Finland have large operating budgets of over €1 million followed by Ireland with almost 30% and Latvia and Italy showing 21% and almost 20% of the organizations respectively on the same budget level (See Table 14 for budget level by country).

TABLE 14: BUDGET LEVEL BY COUNTRY (N=2221)

Country	Less than €10,000	€10,000 to €100,000	€100,000 to €1 million	€1 million to €10 million	More than €10 million	Don't know	Total N
TOTAL EU27	21.7	24.8	18.2	8.6	3	23.7	2221
Austria	27.3	18.2	0	9.1	18.2	27.3	11
Belgium	23.3	16.4	21.9	9.6	0	28.8	73
Bulgaria	43.5	28.3	16.3	1.1	0	10.9	92
Cyprus	0	37.5	37.5	0	0	25	8
Czech Republic	20.4	32.3	29	9.7	4.3	4.3	95
Denmark	12	12	16	40	8	12	25
Estonia	14.3	28.6	28.6	0	28.6	0	7
Finland	0	11.5	44.2	36.5	7.7	0	53
France	17.4	36.2	24.9	5.6	3.8	12.2	213
Germany	22.2	22.2	22.2	11.1	0	22.2	9
Greece	9.5	23.8	33.3	9.5	4.8	19	21
Hungary	45.9	36.1	4.9	3.3	0	9.8	62
Ireland	7.1	17.9	28.6	17.9	10.7	17.9	28
Italy	15.2	23.9	30.4	15.2	4.3	10.9	92
Latvia	26.1	21.7	26.1	17.4	4.3	4.3	24
Lithuania	10.6	19.7	43.9	10.6	0	15.2	66
Luxembourg	0	0	0	100	0	0	2
Malta	28.6	14.3	14.3	14.3	0	28.6	9
Netherlands	42	11.8	7.6	16	2.5	20.2	121
Poland	24.5	35.7	14.9	9.7	3	12.3	269
Portugal	24.1	30.1	6	1.2	1.2	37.3	83
Romania	39.7	13.1	13.6	2	0	31.7	199
Slovakia	16.7	37.5	29.2	12.5	0	4.2	24
Slovenia	0	40	40	20	0	0	5
Spain	10.9	20.7	6.2	4.4	2	55.8	405
Sweden	8.6	15.1	28	12.9	5.4	30.1	93
United Kingdom	17.7	33.1	23.1	10	7.7	8.5	132

There is a wide variety of funding sources ranging from local government agencies to private sector contributions and usage/service fees. At an aggregate level, local governments appear to be playing a very important role as a funding source for eInclusion actors with almost 67% of organizations reporting this source as one of their top three sources. Local government is followed by national government (29%), European Union (25%) and usage/service fees (22%) as the most important sources of funding. (See Figure 14 below)

FIGURE 14: MAIN FUNDING SOURCES AGGREGATED (N= 2272)
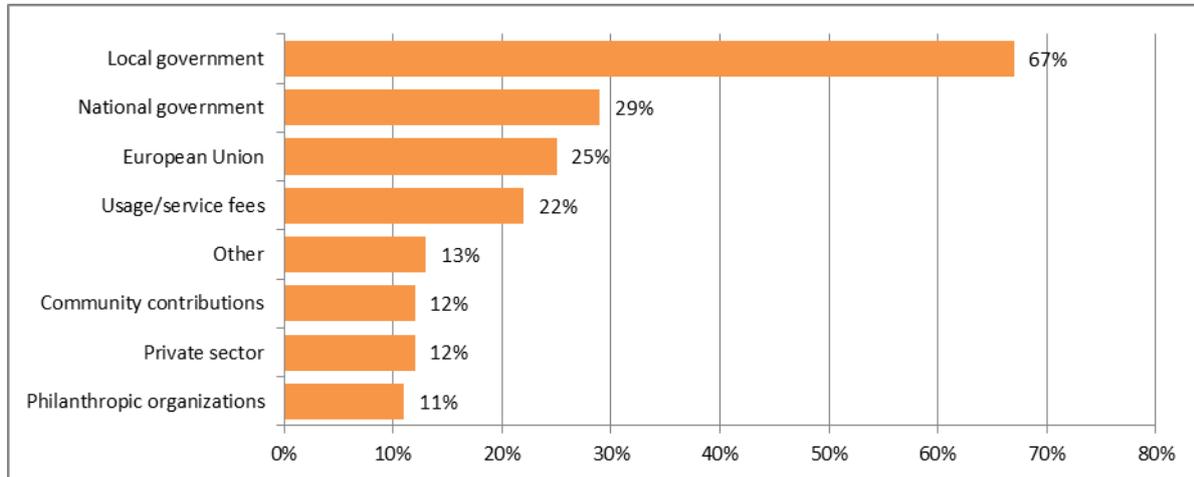
Now looking at main funding sources by sector, some not too surprising features emerge. Eighty-tree per cent of respondents in the *public sector* report local government as a main funding source, compared with 43% of third sector and 24% in the private sector. Nineteen per cent of third sector organizations cite philanthropic organizations as a main funding source, compared with 6% in the public sector and 7% in the private sector. Also not surprising is that private companies and usage/service fees are main funding sources for organizations in the private sector. As an interesting feature, however, all three sectors report similar levels of funding from National government and the European Union. (See Table 15 for sources of funding by type of sector)

TABLE 15: SOURCES OF FUNDING BY TYPE OF SECTOR (N= 2272)

Sources of Funding	Public Sector	Third Sector	Private Sector
Local government	82.7	42.7	24.2
National government	28.1	32.1	27.3
European Union	23.4	28.2	28.3
Philanthropic organizations	6.4	19.4	7.1
Private sector	3.7	22	52.5
Community contributions	8.7	20.1	3
Usage/service fees	13.4	36.3	43.4
Other	9.2	18.3	18.2
Don't know	3.2	2.8	2

Note: Each cell is the proportion of organization in that sector that chose that funding source as one of their top three.

Looking at funding sources by individual organizations vs. networks there are few differences in general. Both report similar funding sources. However, one noticeable difference is that the European Union is cited as a main funding source for 22% of individual organizations, but a much higher percentage (39%) for networks. Overall, usage/service fees are also high (over 20% of funding sources for both types of organizations). (See Figure 15 below)

FIGURE 15: MAIN FUNDING SOURCES BY INDIVIDUAL ORGANIZATION VS. NETWORK OF ORGANIZATIONS (N=2272)
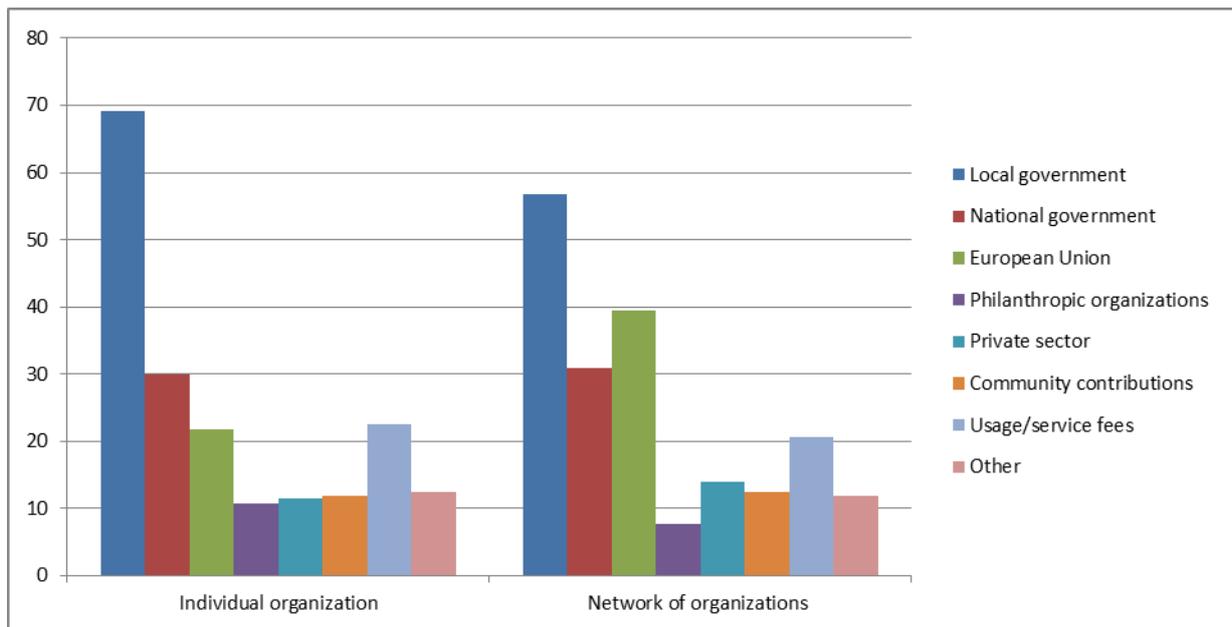
Note: Each cell is the proportion of organization in that sector that chose that funding source as one of their top three.

At a country level, a very diverse picture emerges. For some countries, the local government represents the first more important source of funding for over 60% of the organizations in Finland, Italy, Latvia, Lithuania, Romania, Spain, and Sweden and a staggering 80% for organizations in Belgium and Poland. National Government follows as the second most cited funding source except in the Netherlands, Romania, and Spain where less than 15% of organizations selected this source. The European Union appears to be the most important source of funding in Greece and second most important in Latvia. A very interesting finding is the role that usage and service fees play as a source of funding in many countries. For example, in Belgium, Finland, United Kingdom, Slovakia, and Ireland fees were cited as an important source of funding by over 20% of the organizations. This percentage is even higher – reaching over 40% - in the Czech Republic, Denmark, and France and close to 80% for organizations in the Netherlands (See Table 16 for main sources of funding by country).

TABLE 16: MAIN FUNDING SOURCES BY COUNTRY (N= 2272)

Country	Local government	National government	European Union	Philanthropic organizations	Private sector	Community contributions	Usage/service fees	Other	Total N
Total EU27	66.7	29	25.2	10.8	12	12.2	22.4	12.7	2272
Austria	27.3	46	18.2	9.1	36.4	18.2	9.1	36.4	11
Belgium	83.6	40	11	5.5	4.1	9.6	27.4	15.1	73
Bulgaria	52.1	48	12.5	16.7	10.4	29.2	12.5	17.7	96
Cyprus	25	38	87.5	25	62.5	0	0	12.5	8
Czech Republic	36.1	45	29.9	22.7	44.3	21.6	40.2	10.3	98
Denmark	48	32	0	20	12	4	44	12	25
Estonia	28.6	43	42.9	0	14.3	14.3	0	28.6	7
Finland	63.5	83	5.8	1.9	1.9	21.2	32.7	3.8	53
France	84	26	15.5	5.2	8.5	17.8	41.3	5.2	213
Germany	36.4	27	18.2	9.1	9.1	36.4	45.5	27.3	11
Greece	4.3	65	73.9	8.7	39.1	17.4	34.8	0	24
Hungary	42.6	26	26.2	13.1	13.1	14.8	52.5	14.8	61
Ireland	7.1	71	17.9	14.3	28.6	3.6	25	10.7	28
Italy	65.3	40	42.1	11.6	22.1	17.9	16.8	21.1	95
Latvia	60.9	30	52.2	26.1	21.7	4.3	17.4	17.4	25
Lithuania	71.2	59	25.8	15.2	24.2	6.1	9.1	16.7	67
Luxembourg	0	50	0	50	0	0	0	0	2
Malta	14.3	57	57.1	14.3	0	42.9	42.9	14.3	9
Netherlands	45	12	1.7	3.3	11.7	6.7	75.8	7.5	121
Poland	88.8	20	14.4	11.9	2.5	4.3	12.2	11.5	278
Portugal	74.7	32	18.7	3.3	3.3	8.8	12.1	9.9	91
Romania	79.4	10	16.2	13.7	11.3	9.3	13.7	20.1	204
Slovakia	19.2	31	38.5	19.2	26.9	19.2	23.1	23.1	26
Slovenia	60	80	60	0	20	40	0	0	5
Spain	77.7	19	56.4	4.8	9.4	6	4.1	8.2	417
Sweden	65.6	38	5.4	6.5	8.6	12.9	12.9	14	93
United Kingdom	40	32	13.1	30	9.2	25.4	28.5	22.3	131

Notes: * Includes organizations with operations in multiple countries: Cyprus, Czech Republic, Finland, Greece, Italy, Lithuania, Latvia, Luxembourg, Malta, the Netherlands, and UK.

4.6 Programmes and activities

4.6.1 Target groups

Actors in the field of eInclusion serve a wide variety of groups depending on their staff capacity, mission, social composition and needs of the communities where they are embedded. The top five groups target by organizations in the sample are general population (54%), adults (51%), senior citizens (49%), young adults (46%), and unemployed people (42%). (See Figure 16). Children, women, low-skilled people, and low income people are targeted by a slightly over a third of the organizations in the sample.

FIGURE 16: TARGET GROUPS AGGREGATED (N=2300)
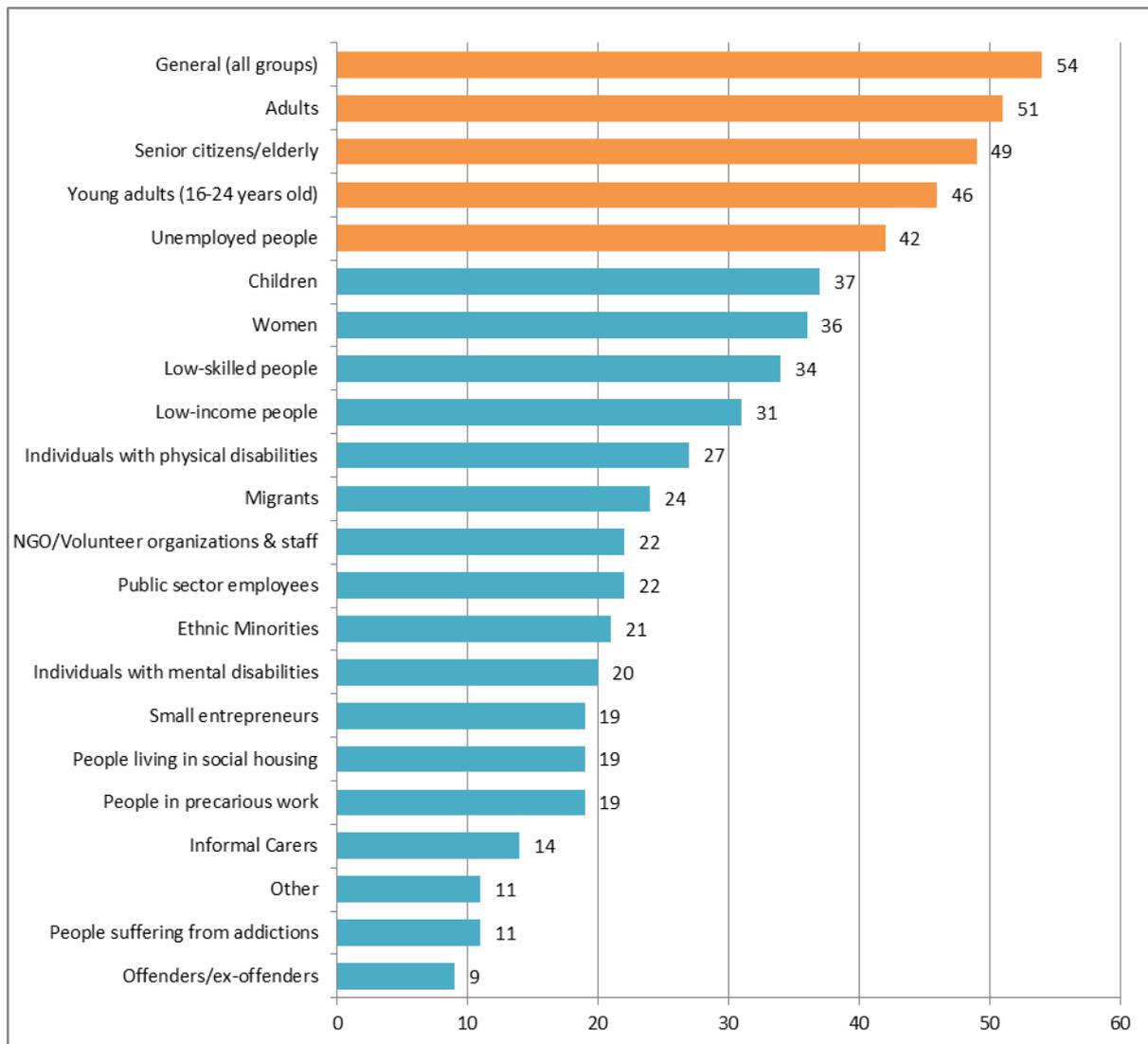
As a general finding the type of sector (public, third or private) plays a much bigger role in the differences in terms of target groups served than by organization type (individual organization versus network). Sixty eight per cent of public sector organizations report targeting all groups, compared with 33% of third sector organizations and 30% of private organizations. However, the public sector still targets most other groups at similar levels to the other sectors. (See Table 17 below)

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Target Group	Public Sector	Third Sector	Private Sector
General (all groups)	68	32.5	30
Children	42.6	30.6	14
Young adults (16-24 years old)	46.8	46.1	37
Adults	48.7	53.8	60
Senior citizens/elderly	46.1	54.4	54
Migrants	22.8	24.9	23
Ethnic Minorities	19.9	23.4	14
Women	35.5	37.7	35
Individuals with physical disabilities	25.8	28.4	26
Individuals with mental disabilities	18.8	24.1	15
Unemployed people	41.9	41.7	40
Low-skilled people	32.5	37.4	32
People in precarious work	19.5	18.4	17
Offenders/ex-offenders	9.4	10	6
People suffering from addictions	11.3	10.4	6
Low-income people	30	35.5	21
People living in social housing	18.6	20.3	10
Public sector employees	25.7	14.2	25
Informal Carers	15.3	12.6	7
Small entrepreneurs	20.3	14.5	29
NGO/Volunteer organizations & staff	17.8	29.4	17
Other	10.2	10.8	19

Note: Each cell is the proportion of organization in that sector that target that group.

Within the public sector, over fifty per cent of all the different types of organizations provide services for the general population with public libraries and government-run telecenters representing the highest percentage for this target group. Public libraries also serve children at a higher percentage than any of other organization in the public sector followed closely by municipal/city government organizations. Not surprisingly, close to 70% of formal educational institutions target primarily young adults and adults. Seniors represent one of the main target groups for municipal/city government organizations (50%) and also for public libraries and government-run telecenters with 43% and 45% of this type of organizations respectively offering services for this group. Government-run telecenters target migrants and women at a higher rate than any other type of organization in the sector. Unemployed people are mostly served by municipal/city government organizations, government-run telecenters (almost 50% provide services for this group) and to a lesser extent public libraries (38%) (See Figure 17)
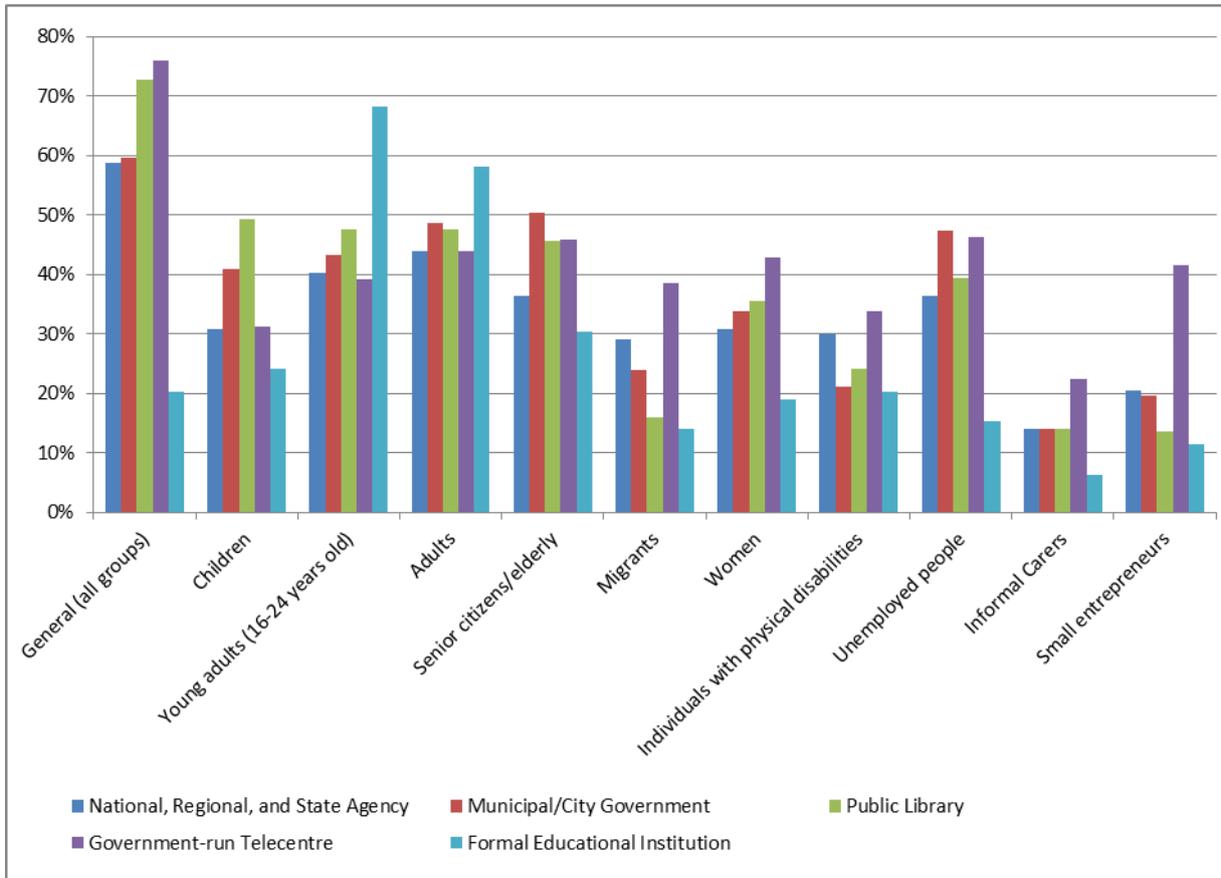
Organizations within the third sector are more equally divided in terms of the main target groups they serve presenting not significant differences across the three main types of organizations that conform this sector. The only visible difference comes from NGOs that seem to target youth adults at much higher percentage than either Associations/Foundations or Community Organizations. Similarly, a higher proportion of community organizations selected informal carers as one of the main target groups (close to 45% compared to 30% and 23% of associations/foundations and NGOs respectively). (See Figure 18)
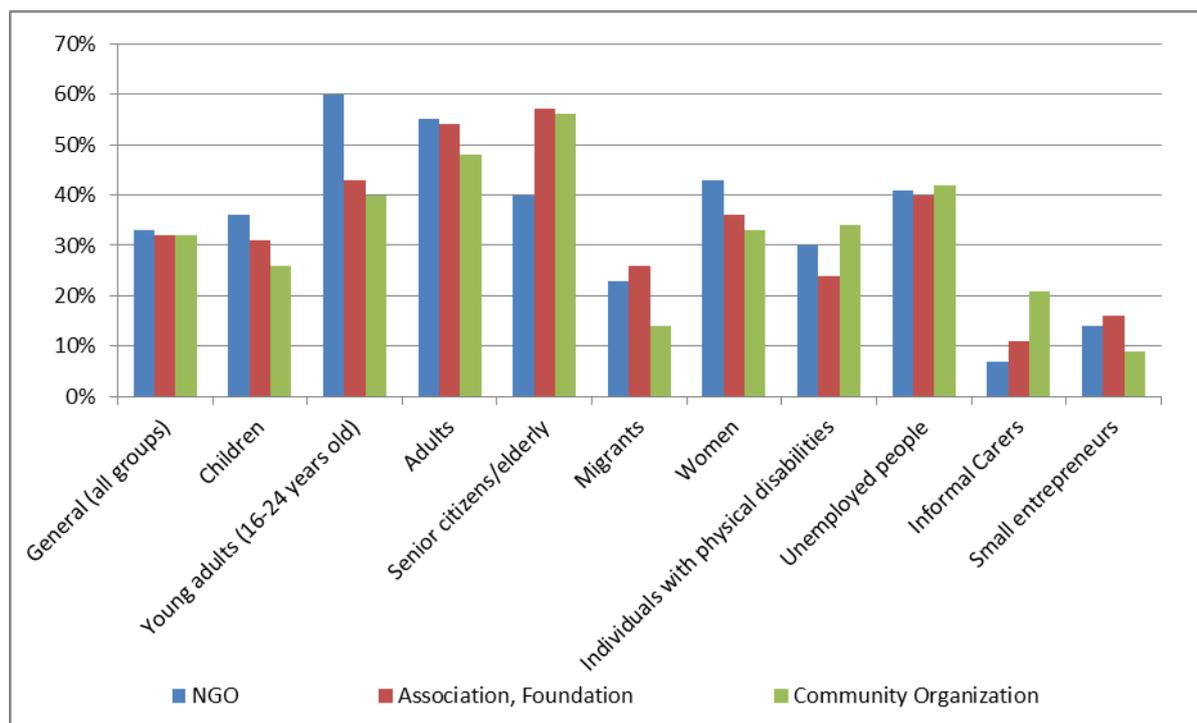
4.6.2 Number of users served

As it was described in the methodology, the survey question for the estimated annual number of users was a very challenging variable to analyze. Because this was an open-ended question, there was a wide variety of response types, including mixes of words, different number forms, and some abbreviations. Thus, before any analysis could be done, it had to be manually cleaned. After cleaning this variable, there were 1,616 valid responses. Below we present the average of users served on an annual basis per organization computed for a variety of possible categories (sector, type, budget, etc.). This, however, it is only to illustrate broad trends, and should not be extrapolated beyond this point, because all of these had very large standard deviations[19], meaning the data is quite spread out. For this very same reason, number of users per area of work could not be computed.

An average of over 55,000 users are served by eInclusion actors on annual basis. Organizations within the public sector report the highest annual number of users, with an average of 124.782 users per organization per year. This is followed by organizations in the third sector at 29.274, and the private sector averaging just 4.535 per year. If we look at the averages by organizational type (individual or network), the numbers aren't clear. From this it seems that individual organizations report more annual users (92.806) than networks (56.969), while both are beat by those that selected both options (average 134.898 visitors per year). (See Figures 19 and 20 below)

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[19] Detailed in Annex 4
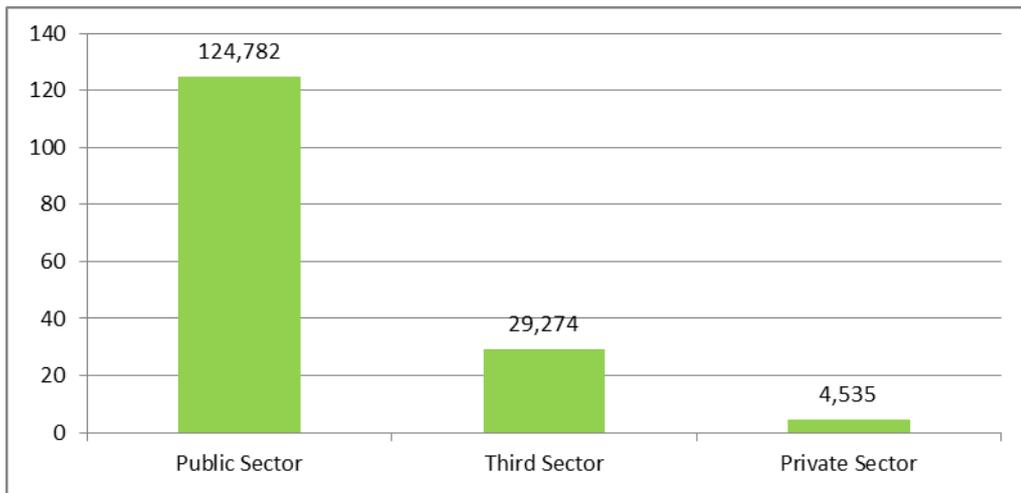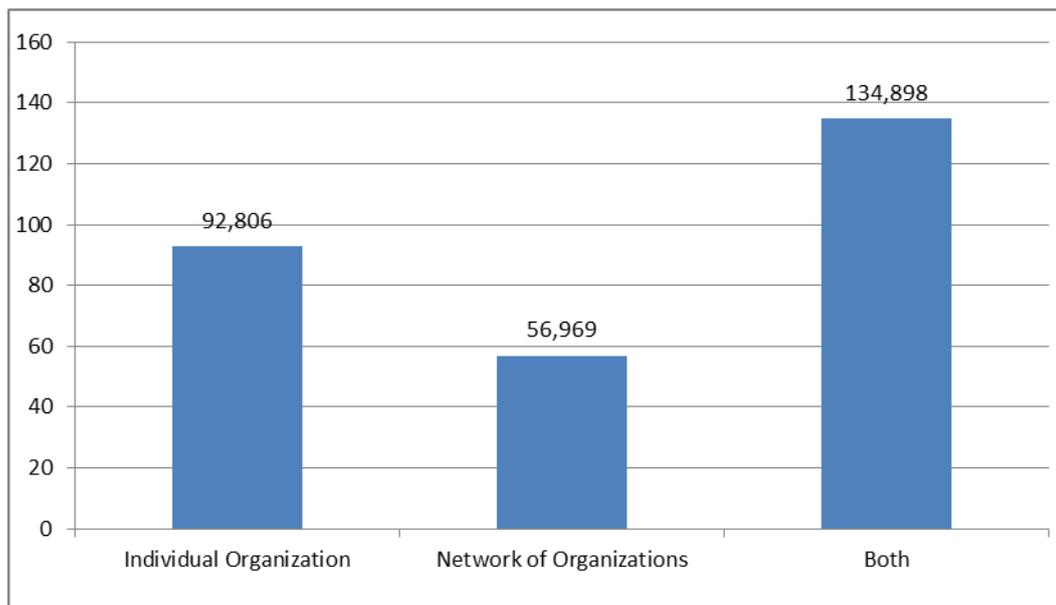
If instead we look at the number of users by budget level and staff size, the trend is consistent with what we had expect from larger and/or better funded organizations serving higher numbers of users. What we see is just that as budget level or staff size increases, so does the average number of annual users. (See Table 18 and Figure 21)

Budget level	Average users per organization
Less than €10,000	5282
€10,000 to €100,000	25501
€100,000 to €1 million	38968
€1 million to €10 million	137853
More than €10 million	2094404
Don't know	63136

FIGURE 21: ANNUAL AVERAGE NUMBER OF USERS BY STAFF SIZE
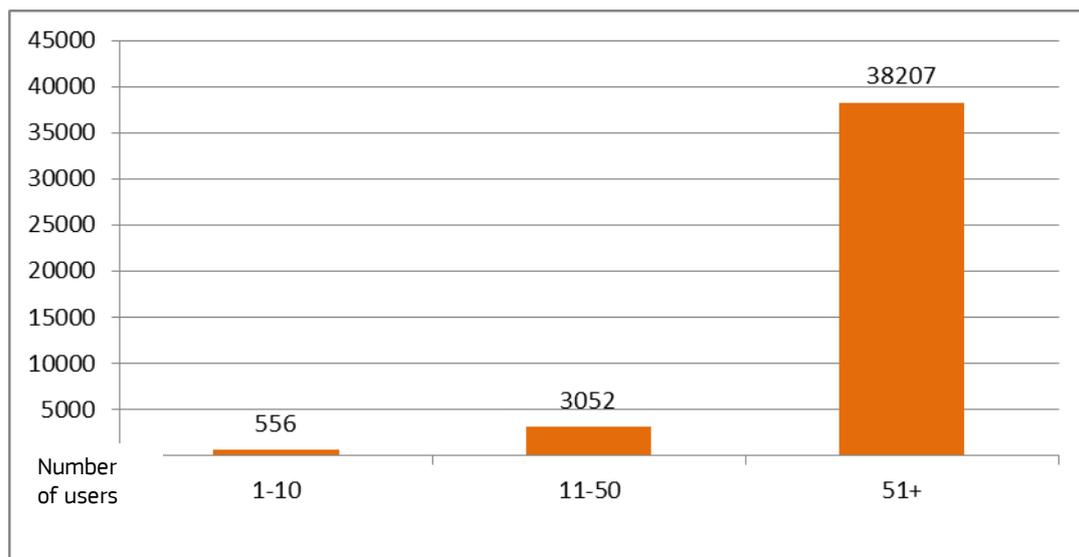
Looking at the average annual number of users per type of service provided, the table below outlines the differences across sectors (See Table 19 for average number of annual users by different type of ICT-enabled service).

TABLE 19: ANNUAL AVERAGE NUMBER OF USERS BY DIFFERENT TYPES OF ICT-ENABLED SERVICES

Type of sector	Access to Internet Average number of users	ICT Training Average number of users	Certification of ICT competences Average number of users
Public Sector	24369	6483	275
Third Sector	15574	1870	348
Private Sector	27710	1153	110

The survey included two questions to understand the range of services that eInclusion actors in the sample provide. Two main groups of services are represented in this analysis: ICT-enabled services and other social services.

4.6.3 ICT-related services

Not surprisingly, the vast majority of organizations (over 80%) provide as a service to their users ICT access to both computers and the Internet and also basic ICT digital literacy training. Half of the organizations offer employment-related training (online job seeking, application, and CV development) and also on social media and other collaborative software. On the other extreme, Certification training on ECDL and ICDL as well as ICT training targeting small and medium entrepreneurs show the lowest percentage of service coverage in the sample – 17% and 24% respectively. (See Figure 22)

There are some differences in the ICT-services provided by sector. The top three services offered by the public Sector are ICT access, Basic ICT Training, and Training in online job seeking. For the third sector, ICT access, Basic ICT Training, and Training on social media/Training in online job seeking top the list of the basket of services. The private Sector offers Basic ICT Training, ICT Access, and not surprisingly, Advanced ICT Training.

FIGURE 22: PERCENTAGE OF EINCLUSION ACTORS THAT OFFER DIFFERENT ICT-ENABLED SERVICES (N= 2255)
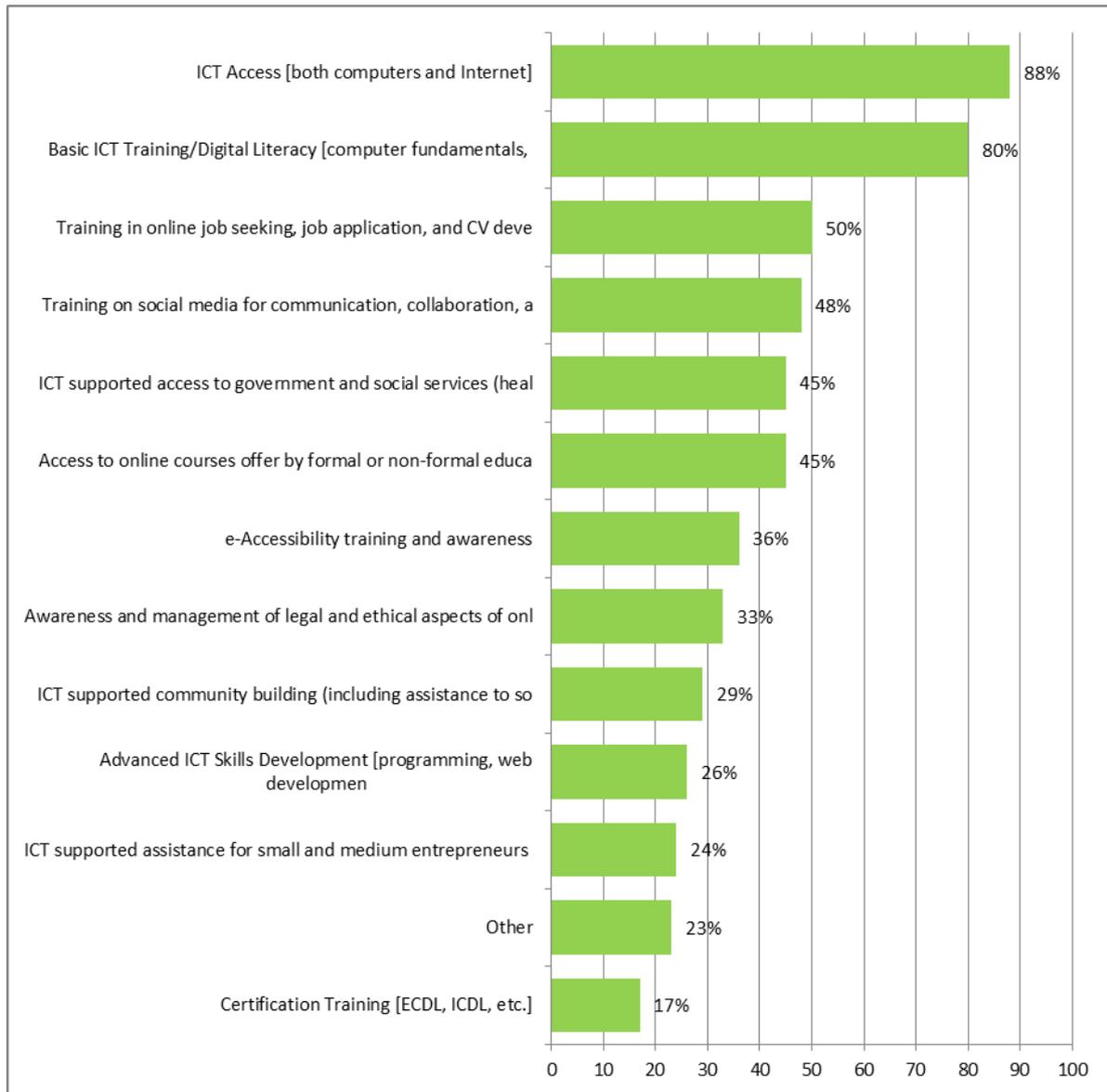
Naturally, public sector organizations are more likely to offer e-Accessibility training and ICT supported access to government social services compared with organizations in the other two sectors. Private sector organizations are more likely to offer Certification training than either public or third sectors but less likely to offer ICT-supported access to government and social services and community building. (See Table 20). Not surprisingly, networks of organizations almost universally were more likely to offer all categories of service than individual organizations.

TABLE 20: AVAILABILITY OF ICT-ENABLED SERVICES BY SECTOR (N=2255)

ICT-enabled services	Public Sector	Third Sector	Private Sector
	% of organizations that offer the service		
ICT Access [both computers and Internet]	95	77	72
Basic ICT Training/Digital Literacy	83	74	77
Advanced ICT Skills Development	26	23	46
Certification Training [ECDL, ICDL, etc.]	16	16	30
Access to online courses offer by formal or non-formal educational institutions	49	38	39
Training on social media for communication	50	46	44
Training in online job seeking, job application, and CV development	52	46	42
e-Accessibility training and awareness	40	30	31
ICT supported access to government and social services	49	39	29
Awareness and management of legal and ethical aspects of online	37	24	36
ICT supported assistance for small and medium entrepreneurs	28	16	30
ICT supported community building (including assistance to social services)	29	30	18
Other	24	23	25

Note: Each cell is the proportion of organization at that budget level that offer that service.

Organizations within the public sector provide a variety of services but they differ depending on the type of organization. Across all types of organization within this sector, ICT Access and Basic ICT training are the two most common services provided. Not surprisingly, formal educational institutions have the highest percentage of organizations providing Advanced ICT skills training. Government-run telecenters follow closely. Only a small portion of public libraries provide this type of training (less than 20%). Access to online courses is provided by more than half of all the organizations within the public sector except public libraries where only a 40% of this type of organization makes this service available to the public. Employment-related training is also available across all organizations with a higher proportion of government-run telecenters (over 80%) offering online job seeking, job application and other ICT-enabled services related to the employment outcomes. As it is mentioned several times in the report, the data from government-run telecenters reflect more accurately the

experience of organizations in Spain that comprise 84% of the data for this type of organization. (See Figure 23 below)

FIGURE 23: ICT-ENABLED SERVICES OFFERED BY EINCLUSION ACTORS IN THE PUBLIC SECTOR (N= 1468)
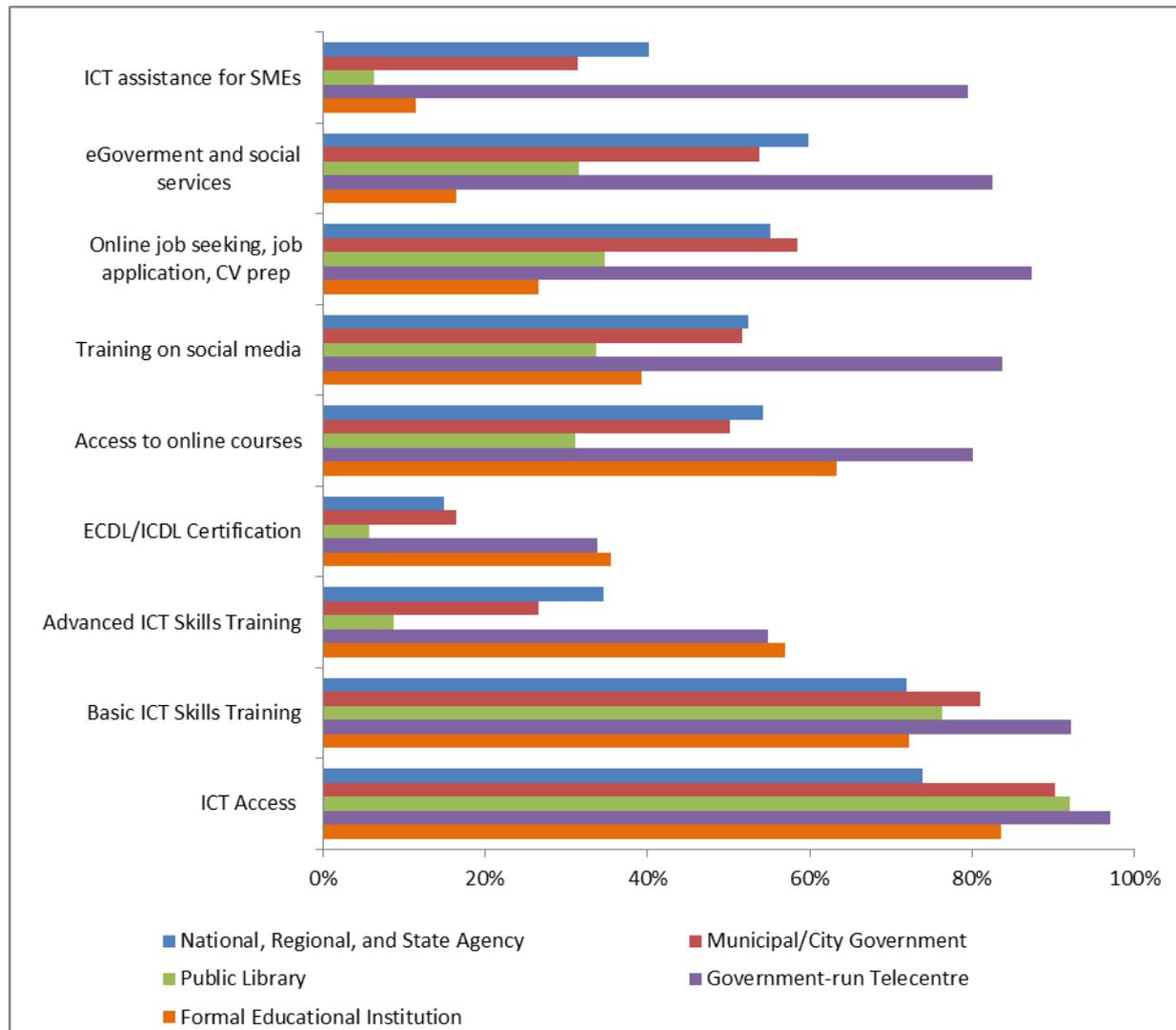
Note: Percentages represent the proportion of organizations in the public sector that offer that service.

Third sector organizations show a similar basket of services distributed very similarly across services and types of organizations. (See Figure 24 below)
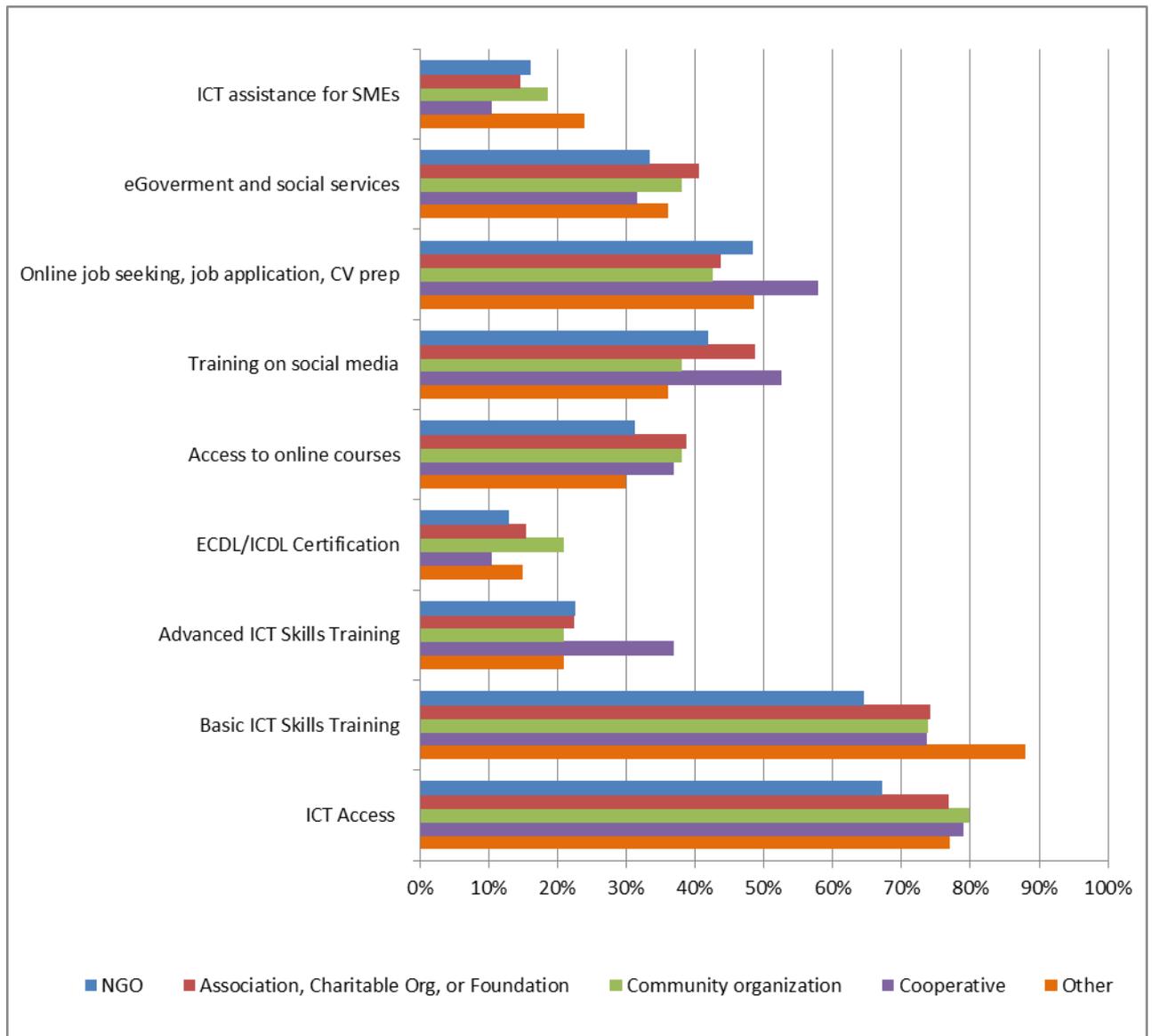
As we might expect, there is a fairly consistent trend that as budget increases, so does the proportion of organizations offering each ICT-enabled service. This trend is much more consistent than in terms of target groups by budget level, and could be due to the respondent having a better idea of what their organization offers than who their organization is targeting. It could also be the result that having larger budgets naturally allows organizations to offer a wider variety in their basket of services. (See Table 21 below).

TABLE 21: ICT ENABLED SERVICES AVAILABLE BY ORGANIZATION'S BUDGET LEVEL (N=2255)

ICT-enabled services	Less than €10,000	€10,000 to €100,000	€100,000 to €1 million	€1 million to €10 million	More than €10 million
ICT Access [both computers and Internet]	87.7	87.8	88	80.4	83.3
Basic ICT Training/Digital Literacy	76.6	81.7	80.8	76.2	80.3
Advanced ICT Skills Development	17.2	26.9	22	31.7	36.4
Certification Training [ECDL, ICDL, etc.]	9.1	18.3	13.8	21.2	27.3
Access to online courses offer by formal or non-formal educational institutions	33.5	47	38.6	48.7	47
Training on social media for communication	38.4	48.9	47.8	51.9	56.1
Training in online job seeking, job application, and CV development	46.3	49.8	44.5	43.9	47
e-Accessibility training and awareness	28.5	38.5	31.7	33.3	39.4
ICT supported access to government and social services	36.5	46.3	43.2	39.2	54.5
Awareness and management of legal and ethical aspects of online	25.3	33.5	32.5	24.9	33.3
ICT supported assistance for small and medium entrepreneurs	14.4	24.3	13.6	24.3	28.8
ICT supported community building (including assistance to social services)	20	33.9	22.3	25.9	31.8
Other	24.4	21.5	24	24.9	24.2

Note: Each cell is the proportion of organization at that budget level that offer that service.

4.6.4 Additional services

In terms of additional social services provided by eInclusion actors, the top three offered by organizations in the sample are Employment related services which are provided by 55% followed by Other services and Entrepreneurship-related services offered by 26% of organizations. The category of "Other" in this question is particularly high (close to 45%) which merit consideration in order to expand the limited list in future exercises of a similar nature. Figure 25 shows the proportion of organizations in the sample that provide different social services.

FIGURE 25: OTHER SOCIAL SERVICES PROVIDED BY ORGANIZATIONS AGGREGATED (N=2255)
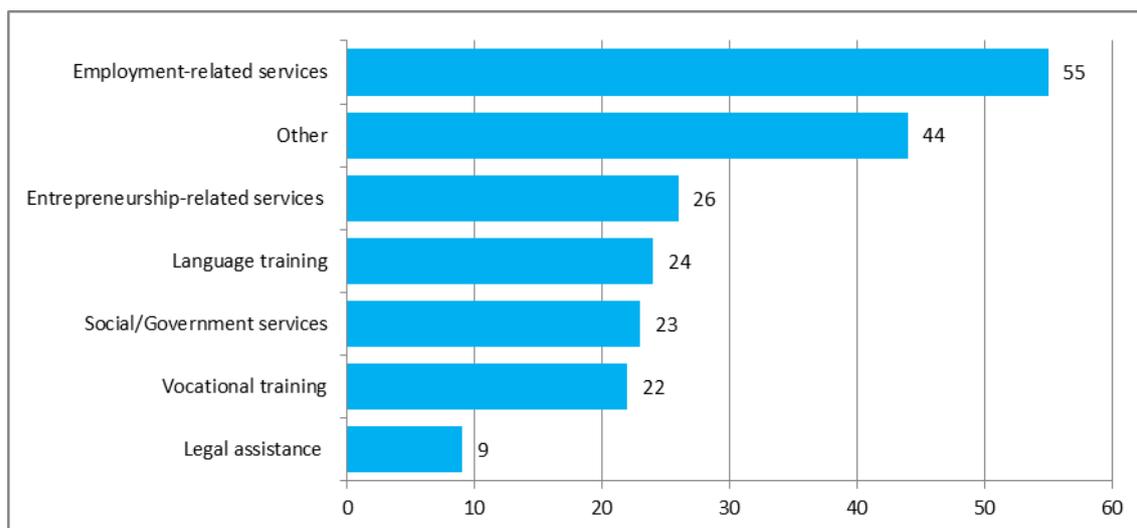
In terms of differences by sector, third sector organizations are more likely to offer social and government services (30% of them do) compared to only 19% of public sector and 14% of private sector organizations. However, 42% of private sector organizations offer vocational training compared with 28% of third sector, and 18% of public sector (See Table 22 below for the service breakdown by sector)

TABLE 22: OTHER SOCIAL SERVICES BY SECTOR (N=2255)

Other social services	Public Sector	Third Sector	Private Sector
Social/Government services	19.4	29.5	14.4
Employment-related services	58.6	51	42.3
Entrepreneurship-related services	26.7	24.3	33
Language training	24.7	22.7	29.9
Vocational training	17.5	27.7	42.3
Legal assistance	7.4	12.4	4.1
Other	41.7	47.2	44.3

In terms of other social services offerings by budget level some categories (Social/Government services, for example), show an increase in the number of organizations offering that as budget increases. Others, such as employment –related services, have a peak in the 10,000 to 100,000 category and then less for the higher budgets. Vocational training is offered much less at the lowest budget level than at any of the others. Most of the other services show smaller differences by sector.

4.6.5 Innovative aspects of ICT-enabled programmes and services

The survey asked for the most innovative aspects of the ICT-supported programs and services available at organizations (e.g. new programs, products, or services created to meet social needs or create economic value, promote new social relations or forms of economic collaboration). A total of 1,200 respondents (out of 2,357) answered this open-ended question. To process those answers the research team started by screening the answers (with help of an automatic translator) to discover that while an important number of answers was too much synthetic as to allow any analysis, another significant part was rich and varied, showing a diversity of innovation examples across countries.

As the innovative character of the organization's work is highly dependent on the context it is produced (in the sense that it brings a new solution for a local need), for a proper selection of innovation examples the research team asked the collaboration of national partners to read the national samples in details, select those 10-15 which were more relevant to the national context and translate them to English whenever this was necessary. In doing so, national partners were requested to illustrate the range of innovations locally produced by reflecting as much as possible the diversity of the national "innovation" sample, at the same time prioritizing those more detailed explanations which would facilitate a better qualitative analysis. As a result, while in some countries it was hard to reach the target number (due to the small sample of respondents), in others like in Poland or France the local partners provided samples largely bigger than expected. The research team depured and clustered the translated innovation examples into somewhat coherent analytical categories from a qualitative analysis of these data. The seven analytical categories are the following:

1. Innovation in rural areas
2. Innovation in the provision of general services
3. Innovation in the provision of targeted social and civic services
4. Innovation in skills provision and certification
5. Innovation in targeted employment and entrepreneurship services
6. Innovation on capacity building for the eInclusion sector:
7. Innovation in local partnerships for eInclusion

As previously mentioned, innovation in this study refers to new solutions for an actual problem in a delimited context, so something that is innovative in a village, for example, might not be relevant or innovate in a big city. From this perspective, the examples below (a combination of synthetic notes and respondent quotations) show the types of innovation developed by eInclusion actors to fulfill the needs of their users and how similar or diverse those innovative solutions can be across EU27. Supplementary, in Section 6 innovation examples (respondent quotations only) are provided for these seven categories (whenever available) for the 14 selected countries which are analyzed more into details in that section.

So the overall innovation sample distribution looks like in the Table 22.1 below:

TABLE 22.1: INNOVATION SAMPLE DISTRIBUTION

Country	Number of selected & translated Innovation examples	Selected Innovation examples (14 countries)							Total
		1. Innovation in rural areas	2. Innovation in the provision of general services	3. Innovation in the provision of targeted social and civic services	4. Innovation in skills provision and certification	5. Innovation in targeted employment and entrepreneurship services	6. Innovation on capacity building for the eInclusion sector:	7. Innovation in local partnerships for eInclusion	
Austria	4								
Belgium	14								
Bulgaria	11	1	2	1	2	3	2	0	11
Cyprus	1								
Czech Republic	8								
Denmark	10	1	4	4	0	1	0	0	10
Estonia	2								
Finland	11	1	2	3	1	1	2	1	11
France	22	2	7	5	2	2	4	0	22
Germany*	5	0	2	3	0	0	0	0	5
Greece	1								
Hungary	11	1	4	2	0	3	0	1	11
Ireland	8								
Italy	17	2	3	5	3	1	3	0	17
Latvia	11	0	2	3	2	1	2	1	11
Lithuania	10	1	4	1	1	1	0	2	10
Luxembourg	1								
Malta	6								

Netherlands	20							
Poland	28	2	7	8	1	2	6	2	28
Portugal	6							
Romania	11	0	6	2	1	1	1	0	11
Slovakia	1							
Slovenia	3							
Spain	17	2	7	0	1	2	1	4	17
Sweden	11	0	7	2	0	0	0	2	11
United Kingdom	15	1	5	4	0	2	2	1	15
Total EU27	265	14	62	43	14	20	23	14	190

This is a multi-country selection of innovation examples grouped per analytical category:

1. Innovation in Rural areas:

The most innovative practices mentioned by survey respondents for advancing eInclusion goals in rural areas revolve around access to telecommunications infrastructure, efforts to bring services and educational opportunities to remote areas that are located far away from urban centers, different uses of proximity technologies (videoconferencing, touch-screen terminals, etc.), and mobility referring to physical mobility of the actual telecentre (mobile telecentre) to reach a variety of communities in rural areas. Some of the examples cited are listed below.

- *Access:* Guifi.net is a bottom-up broadband initiative consisting on the development of telecommunications infrastructure in a rural area with investment and participation from stakeholders (individuals, companies, municipalities) for the development of an open, free and neutral public telecommunications network that guarantees an access of quality regardless of people's place of residence or their level of income, and opportunities for work, maintenance of their jobs or stimulation of entrepreneurship (Spain)

- *Proximity services:* "our village location is far from big city, we trying to provide new services, educational programs and consultancy for local people, which can't afford to travel to the big city" (Bulgaria)

- *Local support:* "We are a municipal in a rural area spreading over a large area – lacking a bit in good infrastructure. This year we have widened our teaching so that it also takes place in village assembly houses. In this project we take in volunteers in teaching and we hope that they afterwards will become the local digital contact persons that citizens in the villages can contact for help with using e-government." (Denmark)

- *Connecting and meeting:* touch-screen terminals in rural schools and rural post offices for accessing e-government services (Hungary); free access Wi-Fi network in community places located in villages (Italy); videoconferencing, co-working and an encountering place in a rural village (France)

- *Mobility:* "Our telecentre is mobile and fully independent. It is installed in a delivery van going from village to village. The material is then set up in city halls rooms. The van is equipped with a satellite internet connection. This services aims at being close to citizens. It is the public service which is going near the citizens". "A truck equipped with laptops, satellite antenna for Internet and a generator to provide independence from a fixed structure. Recycling of old PC's with free software. Specific activities for elderly, children and unemployed." (mobile telecentres in Belgium)

- *Teleworking:* the Estonian Smartwork Association supports teleworking at rural areas and consult organizations how to organize effectively telework. (Estonia)

- *Training:* e-Centres programme, which resulted in the establishment of more than 400 Rural Distance Learning Centres and the e-learning portal e-centra.pl (Poland)

- *Innovating:* creation of a smart community in a mountain area (Italy)

- *Community building:* "Our main focus is on getting connections to people who can't get connected through any other means. We are deeply rural community. To do this we use all the skills latent within the community, we provide training and help people get qualifications or the skills to do work and provide employment or a career for them in the future. They start off as volunteers, then work for shares, then get paid a wage. From tiny acorns grow mighty oaks, and the whole community is working together to help themselves and others. It is creating economic value by its existence, meeting social needs and building cohesion, and it promotes social relations between classes, between

geographical areas of our network build out and is collaborating with many other companies to achieve its aims" (UK)

- *Advocating:* spread the knowledge on the role of digital literacy in the socio-economic development of the country among decision makers and local leaders in rural areas and in small towns (Poland)

2. Innovation in General Services

Innovative practices in the provision of general services combined a variety of resources to make available ICT access and training for wider segments of the population in the countries. These resources range from innovative uses of free and Wi-Fi access to provide online courses and accessibility to training materials in public libraries, the use of different social media tools to engender peer-to-peer learning, online participation and development of user-generated content, to the creation of collaborative Wikis for citizens to document physical and virtual public spaces and jointly create common heritage, promote events, and share good practices. Some examples by country are listed below.

- *ICT access and training*
    o The ICTforALL programme offers individuals (particularly those who risk unemployment, lack basic literacy skills, and those who risk social exclusion) the chance to familiarize themselves with different ICT applications and learn how to apply these in their everyday life (Malta government)

    o Free access to Internet and Wi-Fi 24/7 and to online courses and training materials in the network of public libraries (covers all territory of country; nearest access point in less than 20 minutes) (Latvia)

    o The possibility of communication between the participants of computer courses and special-interest groups through a blog that is kept by many people at the same time (Google+ stream), videoconferences (Hangouts) and YouTube channels making it possible to publish movies to present the achievements of group members and document the library's activities. Thanks to this, the participants within the group can support each other in the following: learning new skills, getting to know the new Internet related content, but also in life matters, and the local community is informed about the current activities of the institution. (library in Poland)

    o National program for the development of libraries aimed to the modernization and diversification of the services in the public libraries (Romania).

- *Social services:*
    o Use social media tools to replace former proximity services with internet connections (communication with relatives, social services, banks, health advisory, reservations, available jobs etc.) (library in Finland)

    o Implementation of solidarity mobile phone to allow access to mobile communication in order to facilitate social inclusion. Provide a fair and sustainable access to telecommunications for persons encountering financial difficulties in order to facilitate their social inclusion and create social links. Solidarity offer (mobile cards, mobile phones) and advices on communications choices. (France**)**

    o ICT courses in libraries gave a range of people an opportunity to: find job, pay taxes, fix appointments with doctor, buy various products, communicate with their relatives and friends abroad and more (Lithuania)

    o Access to Internet for those who can´t afford it, personal guidance how to find the information one needs, personal help when applying for a job, renting an

apartment, buying travel tickets and other personal affairs. For immigrants and those with other languages than Swedish, possibility to read newspapers on-line and watch TV on line from their home countries (Sweden)

- o Digital Inclusion project to help bring retirement tenants online through 42 online retirement schemes (UK)

- o Member based services aimed to create links between providers of services in Care Homes and in Housing with care (UK)

- o Innovative and award-winning resources that combine social welfare law advice services with online delivery (UK)

- *Citizenship and community building*

    - o Community empowerment through information services (Hungary)

    - o Free, collaborative wiki site for citizens to document physical and virtual public spaces, common heritage, events, good practices. (Italy)

    - o Digital dossiers in which Information about specific topics is archived to get a complete picture of public projects that last for years (e.g. changes in infrastructure, construction of installations that impact on the environment, etc.) (Netherlands)

- *e-Government*

    - o e-Government training combined with the opportunity to create new networks in the social sphere (telecentre in Denmark)
    - o Accessibility of e-government information services, providing the information in easy-to-understand language. Short videos on the use of e-government services (Hungary)
    - o Service in several municipalities to support disadvantaged groups (also at home, with possible implications in healthcare and telemedicine) to access to public administration online. Specific information services for youth maintained by municipalities (Italy)

- *Environment*

    - o Accompany the design and development of innovative digital projects to fight against food waste (support of social enterprise in the deployment on the Ile-de-France to a digital platform linking distributors and associations combating poverty) or to better control expenditures and consumption energy in social housing (social org. in France)

3. Innovation in targeted social and civic services

The innovation practices included in this analytical category cover a wide range of services and target groups ranging from parents, children, elderly, people with physical disabilities and others. Among the most innovative practices mentioned, different services that bridge the digital gap between parents and their children are among the most mentioned in the sample answers selected. Organizations offer multilingual classes for parents regarding media education and provide training courses for women in addition offering child care as an option to lower the obstacles faced by many women to participate in learning activities. Some examples per country are provided below.

- *Families:*

- o Multilingual courses for parents regards media education, low threshold courses only for women in parallel with child care (Germany)

- o In the Commune of Lubin, 100 families at risk of e-exclusion have obtained a complete computer terminal with free Internet access, 200 people from those families have been trained in the computer and Internet basics, 20 computer terminals with free Internet access have been installed in 19 communal entities (schools, day care rooms, libraries) (Poland)

- o Help young people communicating digitally with public authorities (Denmark).

- o Classes with children and young people during which they are taught to find quality educational and recreational websites, to use the web safely and culturally and to observe the copyright (library in Poland)

- o Development of children's ICT skills and reading comprehension (primary school in Slovenia)

- o Integrated path for digital inclusion with training activities, counseling, family conciliation like nursery services, support of ICT volunteers and the collaboration of labeled "partner companies" to facilitate the purchase of computers.

- o *Family caregivers:* e-learning and validation of competences acquired informally (ICT-based). Caregivers database to promote certification of their skills (Italy)

- *People with disabilities:*
  - o Development of accessibility, testing public websites for accessibility, user tests for accessibility (Denmark)

  - o The Estonian Chamber of Disabled People, In cooperation with the University of Tallinn, offers several combined trainings to different target groups, which include traditional lectures, online lectures and homework, including self-control tests (Estonia)

  - o "Celia serves people with print disabilities. We provide our users with accessible materials, such as talking books, e-books and Braille books. We are a part of the International Daisy Consortium, which works towards standards in accessible publishing. E-books and their delivery is on the rise in Europe, but accessible publishing of digital materials needs to be addressed more often. Big e-projects and digitization projects too often forget all about accessibility! Just because something is digital does not mean it is accessible for people with visual impairment or cognitive disabilities, such as dyslexia. These are not minorities, but may add up to 10% of the European population! IFLA Section for Libraries for Persons with Print Disabilities is one (global) network with many European members, who actively work towards realizing an accessible digital reality." (library in Finland)

  - o ICT accessibility for the hearing impaired: learning and using ICT, job-searching, seeking for information, establishing and maintaining relationships. (Hungary)

  - o iPad training for community groups including disability groups. (Ireland)

  - o Advice line with a Freephone number and locally based communities of IT volunteers around the UK who can help people in their own homes, free factsheets about computing and disability, free online self-assessments and free webinars for cost effective dissemination of information to disabled people and workers in this field (Luxembourg-based organization)

  - o Three programmes run jointly by the members (people with mental diseases) and a few staff members: 1. Social Skills (culinary activities, shopping, crafts, plant

nurturing at home and in the garden, maintaining an aquarium, health promotion and cooperation with people and institutions in the health area); 2. Education and Employment (running a Work and Education Club, implementation of the Temporary Employment Programme, international cooperation); 3. Administrative Skills (handling members' matters from the start, preparing information and promotional materials, handling correspondence and supporting members in obtaining public assistance, and cooperation with organizations/institutions offering it). All the programs involve co-management of the institution, contact with those members who have not shown up for a long time as well as keeping documentation and monitoring all the activities. (Poland)

o A Foundation conducts a number of innovative activities addressed primarily to people with disabilities who are looking for a job, including: the e-employee project (training project implemented in the Opolskie Province which enables people with disabilities to take up a job of an "Internet promotion and sales specialist"); project entitled Education and Professional Development Centres for People with Disabilities (involving the establishment of five centers for the development of people with disabilities using a wide range of IT tools); the College of Graphic Design and Multimedia in Białystok. (Poland)

o Planning and social integration management of children with disabilities through mentoring relationships: ICT-based training course that takes into account their positive effects in society (community) by involving them in community activities (education), facilitating intellectual, physical and social development of these children with special needs. Group Interaction during the course helps to build a shared vision of the integration, with emphasis on socio-behavioral, skills and visualization of stimulating self-esteem and positivism. (Romania)

o Free technical support for disabled people helps them to access the internet, technology and assistive technology. Advice line with a Freephone number and locally based communities of IT volunteers around the country help people in their own homes. Free factsheets about computing and disability available online or by post, free online self-assessments and free webinars for cost effective dissemination of information to disabled people and workers in this field.

- *Elderly people:*
    o "Short Facebook-courses for elderly have been quite popular opening them a new world and encouraging them to use computers in general, especially internet and probably also other social media services. In the basic education for using computers – some groups targeted especially for the elderly, some for anybody interested – the computer as a tool is introduced, the MS Office -programmes are taught and also internet for fun and more serious use are explored all this together giving quite good basic tools for using computers for all needs; tablet computers and smart phones are new items this year in the course programme – not too popular yet; taking digital photos and processing them and producing digital photobooks have been in the programme for a couple of years and are popular – those also encouraging for more varied use of computers in general" (adult center in Finland)

    o "One of the major needs in our society is that adults and senior citizens are lonely and sometimes also far away from their children and relatives. We try to train them in social media and bring their relatives and children near them through email, Skype phones and other manners. For the working age people our training means that they have possibility of searching jobs through internet and have better opportunities. For the general community members our training and

courses gives free-time hobbies and social contacts every week where they do not need too much of their own resources." (adult education center in Finland)

o Inter-generational workshop to allow sharing of know-how through ICT's mediation. ICT's workshops in elderly homes (games on tablets, Skype) in partnership with primary school pupils (telecentres in France)

o Support of digital inclusion of the elderly, especially in rural areas, telecentres in close connection to the homes of elderly (senior initiative in Germany)

o Developing training curriculum for young people how to disseminate their ICT knowledge to older generations (Hungary)

o Several secondary schools provide digital literacy courses to senior people with help of young students, breaking isolation of the firsts and facilitating preparation to labor market of the seconds. (Italy)

o Digital literacy paths to combat the risk of digital divide and support access to online services, especially of social and sanitary type (regional eInclusion project in Italy)

o "Connect Latvia!" is a CSR initiative launched on the occasion of Latvia's 90th anniversary in 2008 and is the largest nationwide cost-free computer literacy program for seniors. It united various partners (government, 100 IT teachers, 60+ counties, media). It plans to educate at least 30 000 seniors in 10 years. (Latvia)

o myHealth service enables a person to access information regarding blood test results, imaging results, receive message alerts for appointments etc. (local government in Malta)

o "The practical teaching students bedridden at home on their own laptop. Within Care Centers familiarized seniors with the Internet on their own laptop" (Netherlands)

o "Digital Poland of Equal Opportunities" is helping 60.000 adults aged 50 and over to make the first step into the digital world. This will be achieved thanks to involvement of 2.600 certified volunteers, "Lighthouse Keepers" – trusted, creative local community leaders/animators. Each digital champion creates a concept of his/her own initiative, realized in cooperation with NGOs and local authorities, to encourage adults to enter the digital world in their own community. All Lighthouse Keepers participate on voluntary basis, but important contribution to the programme is made by partners supporting their actions, i.e. local governments and NGOs (Poland) Access through digital technologies to services and information that might not otherwise use (Italy)

o Digital provision for Polish migrants: Media literacy, digital village (Netherlands)

o Use of a virtual school tool to train Roma communities from the city of Braga in basic ICT skills and online access to public services (Portugal)

o "Thanks to Internet courses, our Seniors can communicate with their grandchildren. They can make a bank transaction, borrow a book from the library, buy a book and stay in touch with people having similar passions and interests without leaving home." (library in Poland)

o Activities are addressed to seniors and young people who want to work with them. Innovative educational methods are used such as e.g. organizing International Seniors' Computer Olympics, developing materials and printing books (computer typesetting); the principle is work "with" seniors rather than "for"

seniors, the exchange of experiences at the European level, the effective formation of partnerships. (Poland)

- o A cycle of training courses entitled "About finances ... in a library" was provided for people aged 50+ as part of cooperation with the Library Development Program (Poland)

- o Prevention of elderly isolation by increasing their use of social networks through teaching them ICT use, including Facebook and Skype (Sweden)

- *Immigrants and Ethnic Minorities:*

  - o *Research* on the needs of underprivileged groups regards the use of ICT, development of new fields of research (university social research institute in Germany).

4. Innovation in Skills and Certification:

The innovative practices in this category cover a range of activities from linking libraries to universities and schools to provide additional support for students to do their homework, learn different study subjects, register for exams, and even to engage with teachers and other students in a more peer-to-peer learning environment. In addition, organizations offer different official skill certifications such as the ECDL, which is recognized across Europe and other national certificates to help people be better positioned in the labor market. Some of these activities per country are described below:

- Develop skill for searching and using sources with specific information, which improves the education for students and improvement of scientific careers (Bulgaria)

- ICT and Internet use promotion in an integrated way, through projects promoting reading (with libraries), local heritage (with Parish Councils) or architecture (with architects ' offices). (Portugal)

- Thanks to ICT libraries are supporting universities by allowing student solve at their space their homework and elect optional subjects of study, specialization and theme that they want to choose for the license exam, register for examinations, require certificates without having submit the request on paper, ask questions to teachers and to the various departments, express opinions, give suggestions, discuss with colleagues, announce and organize events etc. (Romania)

- "We provide free nationally accredited on line learning in three major awards at L2 and L3 on the Irish Framework of Qualifications. www.writeon.ie serves a range of people who typically have left school early or have gaps in their knowledge. The target group are introduced to online learning and build their capacity to use ICT for a range of purposes. We also supply accreditation in an ICT major Award. This has enabled people to learn anywhere, anytime according to their needs. It has also enabled learning to take place in non-traditional learning environments. The programme has been evaluated a number of times during its evolution and has been cited by experts in adult learning internationally as an innovative solution to advancing the adult learning agenda. It is doing the same with respect to advancing digital inclusion and is recognized as such by INDIE. The site has low maintenance costs and is supporting the delivery of labor market activation programmes to more people where state services are not able to cope with demand." (National Adult Literacy Agency in Ireland)

- European Computer Drive License is a *de facto* standard for digital skills which supports eInclusion, It enhances social inclusion, the productivity of workers, facilitate European mobility and foster the employability of future and current workers, through a direct reference to achieved learning outcomes. Upon successful completion of, the ECDL programme, an individual is able to demonstrate a level of ICT competence, in the

practical sense, in an array of commonly used applications. These measurable outcomes can therefore be immediately demonstrated to, for example, a prospective employer, irrespective of what country the candidate/individual was certified in. By certifying workers' ICT skills to an internationally recognized standard, employers can develop a more productive workforce (as less time will be spent resolving ICT-related difficulties). Certifying workers' ICT skills to an internationally recognized standard, provides the employers with a measurable yardstick of the workers' skill levels, and in turn enables them to deploy the workers in a more effectively and productive manner within their organizations.   (pan-European network for digital skills certification).

5. **Innovation in Targeted services for Employment and Entrepreneurship:**

Innovative practices under this category refer to different services designed in particular for women, youth, unemployed people and people in precarious labor situation, and small entrepreneurs. Many of these practices include skills training in web 2.0 applications from cloud computing, to tables and smartphones to advance employment-related goals. In addition, it includes the development of digital services by employment offices in many countries integrating these services with in-person consultations and information search. See the examples per country below for additional details.

- *Women:*
    o Training programme aimed at offer development of skills in the use of web 2.0, cloudcomputing, tablets, smartphones in order to improve women employability by the development of new skills (training center in Belgium)

- *Youth:*

    o Focus on the use of web 2.0 applications for employability, language learning, active participation and online privacy. "On February 2013 we will launched a training course entitled "Social Media and Employment". The goal of the project is to educate young people from different countries of Europe how to use rationally the social networks and increase their employability using non-formal education methodologies. (enterprise from Cyprus)

    o "Last summer we piloted new training program for NEETs. It was interactive training programme with summer camps, employability training and consulting." (Estonian Smartwork Association)

- *Unemployed and people in precarious labor situation:*

    o "The Solid'Rnet project aims at developing uses of ICT's by Supplementary Welfare Allowance beneficiaries, persons accompanied by social workers and precarious salaried persons working in Rehabilitation by economic activities structures. The accompaniment can lead to equipment through the use of recycled computers by an insertion company (les Ateliers du Bocage : http://www.ateliers-du-bocage.com) . All this material is operating on free software operating system (Linux and applications). A financial help for Internet access can be provided for low income families with pupils. Accompany, equip, and connect is the project carried by 11 facilitators and several volunteers on the concerned territory." (France)

    o Support to the implementation of training digital professionalization (in the IT sectors) to destination of low-skilled young people or people undergoing economic restructuring (social org. in France)

    o "With the down turn in the economy and the rising unemployment people are having to up skill in any way possible to ensure they have some chance when they apply for jobs. It is with this in mind that people have turned to IT training in all forms. We trained many Benefit 3 courses last year and the demand or 2013

is already there. The Benefit 3 program was used by many people as a stepping stone to more advanced courses and gave them the understanding and confidence to embark on the new path of learning. We also do a lot of Website training for small and medium enterprises (G.I.B.O). 50% of trainees we trained last year have been looking for more of the same and the other 50% want to progress but at a slower pace than some of the other stakeholders are offering. The same trainees view their learning experience in two ways, one is to expand their knowledge and in the same note it is very much a social occasion too." (enterprise in Ireland)

- o "With the assistance of FIT we provide access to basic IT training which helps individuals to get connected to the internet, set up a web site and undertake an online transaction. Our main service is in providing one to one career guidance and direction to long term unemployed people and other key target groups. We can quickly identify those that would benefit from basic IT training to complement their job seeking skills. Such clients are then referred internally to basic IT training. There is significant and continuous demand for this level of support." (local area partnership in Ireland)

- o Click and Type: inform jobseekers on the net by social internships (facilitation and support); provide tailored information cheaply, or facilitate this through consultations with third parties (oral, written or electronic media) (Netherlands)

- o Training services for unemployed people; rich offer put forward in cooperation with the Centre for Information and Career Planning (library in Poland)

- o Key Competencies for All (KC4All), a project supported through the EU programme Lifelong Learning, provided an Employment Toolkit to improve employability through an ICT-based learning approach. It was designed as a pathway leading the jobseeker from the choice of a profession to a job application. KC4All also provided telecentre facilitators and teachers with a set of structured online tools and workshops. (Spain, UK, Belgium, Latvia, Romania)

- *Professionals and SMEs:*
  - o Help SMEs to use e-government services (Denmark)

  - o Provide Internet digital devices in workplace, mobile phones and iPads for tourism businesses, booking administration, tourist guides, digital maps, hotel information (Educational center for women in tourist sector in Greece)

  - o Support to farmers in obtaining subsidies (Library in Romania)

  - o ICT-based social Innovation model that stimulates telecentres' users and eFacilitators to become digital entrepreneurs with a community sense, offering them a space and a methodology to start-up their ideas and turn them into real projects (Spain)

- *Digital services offered by Employment offices:*
  - o Assist people who have no previous ICT experience by facilitating them with the skills to use the internet, word and email. Training in Social media (due to employers advertising their vacancies via this medium). Facilitating clients to do certification in IT training. (Local employment service in Ireland)

  - o Online courses with minimal assistance on ICT for unemployed people (Public employment office in Italy)

  - o "[Public employment] service model has been turned around: instead of e-service delivery being an add-on to physical service delivery, it is now in a comprehensive and pervasive sense the fundament of the entire service delivery, with the

ambition to reach all clients in that way. Only a small minority of clients is identified as in need of a direct physical contact with the organization in order to manage the procedures around their social allocations and with regard to their labour market operations." (Netherlands).

6. Innovation on capacity building for the eInclusion sector

One of the most important elements of organizations working in the eInclusion sector is the need for constantly updating their services and programs and build the capacity at the organizational level – either through their own organization or with partners – to be able to quickly update their user trainings, offer more and better services, and trained their staff. Most of the innovative examples within this category point to the development of eLearning training modules for e-facilitators or trainers and volunteers, developing collaborative networks of eInclusion and social workers for peer learning using social networking sites, and implementing new ICTs and new ways for using these technologies within organizations, especially in the third sector. Examples per country are provided below.

- *E-Facilitators:*
    - o "Within the framework of the European projects VET4e-Inclusion and RAISE4e-Inclusion we have developed e-learning training modules for e-facilitators to accompany people far from uses of ICT's" (France)

    - o Train the Trainer opportunities for those who wish to return or find employment as ICT trainers within the community (social organization in Ireland)

    - o Voluntary citizens or libraries operators are formed as e-Facilitators to offer support to people in browsing the internet and the use of on-line services within public libraries, social centers, cultural associations, etc. (Regional government in Italy)

- *Social workers, mediators, educators:*
    - o "We promote new ways of using existing internet and social media resources in creating collaborative networks between professionals working on themes linked to preventing exclusion: our training includes setting up yammer groups for regional decision makers, Facebook groups and Skype meetings for educators, second life for service innovators etc." (university center for training and development in Finland)

    - o Support for accommodation centers for social rehabilitation to facilitate access and ownership to the digital tools of the people hosted by training digital mediators within the teams of social workers (social org. in France)

    - o Media Coach, a training program for professionals in education, libraries and youth work (Netherlands)

    - o Computer applications for teachers and schools as institutions - tools to facilitate teachers' work, e.g. tools for assessing pupils' development. Training to motivate teachers representing all stages of education to use ICT during lessons. (Poland)

    - o Elaboration of educational programmes for the introduction of videogames in classrooms aimed at education professionals. Pedagogical innovation through the use of critical pedagogies in projects related to art work, technology and video games for children and youth. (Spain)

- *Volunteers:*
    - o ICT used to structure the volunteering offer (non-ICT NGO in Bulgaria)

- o Use of Internet/social networks to meet the demand and supply of would-be volunteers and voluntary associations. (Italy)

- o Use the potential of volunteers in the development of the digital competencies of the society (including elderly people). Support grassroots educational initiatives (Poland)

- *ICT for NGOs:*
  - o "We are creating a GNU/Linux distribution tailored for telecentres. We are creating and documenting resources on practices and uses of digital tools. And we are creating a French Fablab cartography." (enterprise in France)

  - o Social media training, web based funding grants search database for grant makers to nonprofits, user generated content space on home page (Ireland)

  - o Real-time sharing of interventions carried out for marginalized people by organizations belonging to a network (NGO in Italy)

  - o University students make practice in an NGO to then help other NGOs in the region to use ICT, write blogs, press releases, create organization profile pages (Latvia)

  - o Participation in establishing an independent Internet TV addressed to the Third Sector, based on citizen journalism (Poland)

  - o "Lasa has been at the forefront of VCS initiatives to improve support for the strategic development of ICT within the sector. We have run several successful circuit rider projects, and we work with other organizations around the UK and internationally as lead organization for the UK circuit rider movement." (UK)

7. Local partnerships for eInclusion

As organizations developed in times of Internet and operating in an increasingly networked society, one of the capacities eInclusion intermediary organizations have developed more is to network and collaborate with other organizations operating in their local territory, forming ad hoc or stable partnerships with a range of educational, social and economic agents. The examples per country provided below show some expressions of that capacity.

- *Multi-stakeholder partnerships:*
- o "Easy access to major distribution in urban and rural areas, very neighbourhood-oriented through libraries. In cooperation with local and regional partners, including sheltered employment, welfare organizations, municipalities, educational institutions." (Netherlands)

- o Development of courses and tools in partnership with ICT sector and government institutions (ICT association in Latvia)

- o "With the implementation of new internet technologies, the library staff was able to create a digital library of cultural heritage (launched in 2010, www.pasvalia.lt), also, a website for local farmers to promote their activities and produce (launched in 2012, www.pasvaliodirva.lt). During the implementation of these two projects the library was able to engage in a new partnership with local museums and educational institutions, farmers associations and agricultural organizations, local municipality members. The successful partnership has resulted in a new project to be implemented this year in the library – the creation of the local business information point, involving entrepreneurs from Lithuania and neighbouring Latvia." (Lithuania)

- *Collaboration with banks:* a county public library is collaborating with bank corporations to train on electronic banking, e-government services, an idea emerged during a collaboration process between libraries and the State Tax Inspectorate (Lithuania).

- *Civic forum:* keep topics of information society, elderly, e-Inclusion, and inter-generation solidarity an issue in the media and a target of advocacy (civic forum in Hungary)

- Partnership of a public regional telecentre network with local institutions, social groups and professional organizations to develop the Information Society: training on new devices (tablets, eBooks, GPS,...), tests for the certification of e-competences, training in e-Administration, creation of virtual communities, facilitation of associations and NGOs presence on the web, dissemination and use of free open software (Spain)

4.7 User data collection

The purpose of collecting user data is to explore how these organizations are measuring their impacts on eInclusion. There were a group of questions in the online survey aimed at investigate on type of data collected, tools and purpose of data collection and barriers faced.

4.7.1 Type of data collected

Over 60% of organizations that participated in the study reported collecting user data information. The most common user data collected is demographic information (76%), Number of users accessing computers and Internet (75%), number of users starting ICT courses (64%), followed closely by number of users completing ICT courses (59%). Less frequent type of user information collected revolved around economic and educational impact for the users, users obtaining certifications such as ICDL and ECDL, follow up on users' employment status after ICT training, and follow up on entrepreneurs to learn about the impact of ICT use in their business. See Figure 26 for data collected by organizations at the aggregated level.
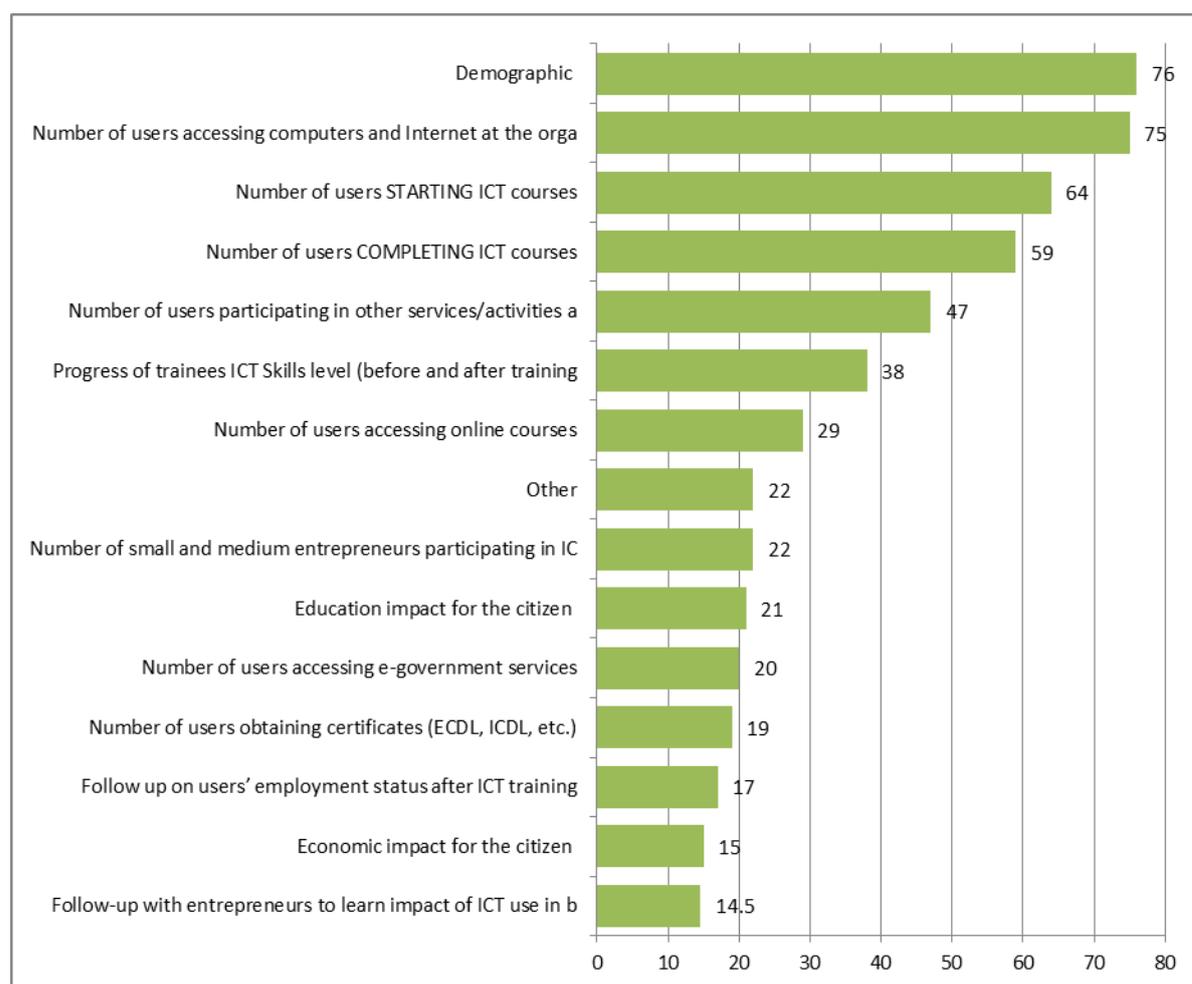
In terms of type of organization, there are few differences in terms of data collection. The most interesting feature here is that 71% of networks collect data compared with 56% of individual organizations (See Table 23 below). This probably is due to the higher access to resources available to the networks.

TABLE 23: USER DATA COLLECTED BY INDIVIDUAL ORGANIZATIONS VS. NETWORKS

Type of organization	Yes	No	Don't know	Total N
Individual organization	56.2	32.9	10.9	1723
Network of organizations	70.6	20.9	8.5	411
Both	70	22.5	7.5	80

Delving deeper in the type of sector, we can first look at the different types of organizations within the public sector. Here we see that government run telecentres are very likely to collect user data, with 86% of them doing so. Compare this with public libraries, where only 49% of

them collect user data. There is much less variability between different kinds of organizations within the third sector, with between 57% and 67% reporting collecting data. Organizations in the private sector are even more difficult to compare, due to the overall small number or organizations that fall into this category. Of the 59 that specify they are a "Private Training Organization", 64% report collecting user data. Other categories have much lower sample sizes. (See Figure 18 below)

In this general view, looking at what specific types of user data are collected for each of the three sectors, some general (although not too surprising) trends emerge. Organizations in the Private Sector overall record fewer types of data: only 57% record demographic data, compared with 79% of the public sector and 71% of the third sector. Even more dramatic is that while 86% of public sector organizations record the number of users accessing computers and Internet, 59% of third sector organizations do so, and only 44% of those in the private sector. Where private sector organizations are more likely to record user data is where we'd expect them to, such as in terms of "Follow up on users' employment status after ICT training", where 26% of private sector organizations record this data, and only 16% of public sector ones and 19% of third sector ones. Similarly in terms of recording the number of users obtaining certificates (ECDL, ICDL, etc.), 18% of public sector organizations do, 19% of third sector organizations do, and 30% of private sector organizations do. Data from these areas is likely recorded as part of the normal business of the organization. (See Figure 27)

FIGURE 27: USER DATA COLLECTION BY TYPE OF SECTOR (N= 1315)
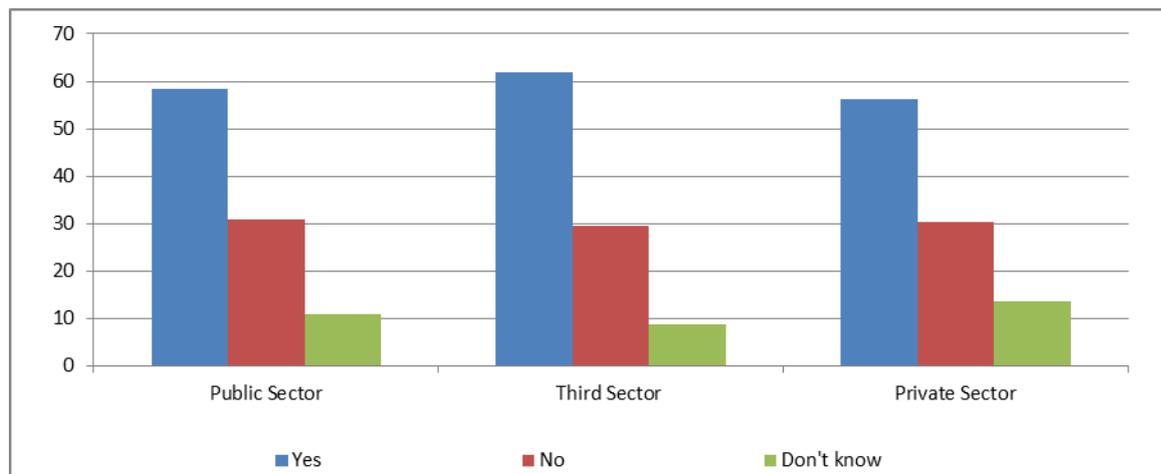
As it might be expected, the percentage of organizations collecting user data increases as budget level increases, although it starts off quite high at 50% of organizations with less than 10,000 Euro budgets collecting data, and peaks with 69% of organizations collecting data when they have budgets over 10 million Euros (See Figure 28). If we look at the funding sources, most of the categories show similar levels of data collection, of between 56% and 68%. However, a notable exception is that 80% of organizations citing the EU as a main funding source collect data, the highest collection rate.
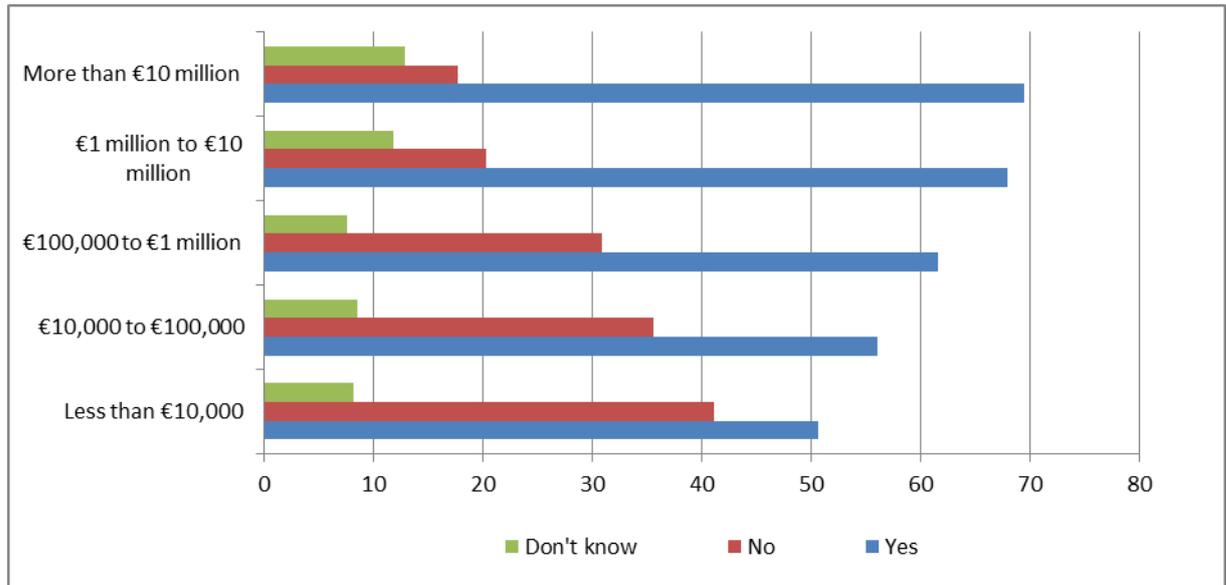
Comparing data collected with ICT-enabled services provided, there is an overall high percentage of the organizations offering each type of eInclusion service record basic demographic data and data on the number of users accessing computer and the Internet. Beyond this, however, results are much more mixed, but with some results as expected based on the specific services some of the organizations offered. For example, only 19% of organizations offering ICT Access record data on the number of users obtaining certificates (ECDL, ICDL, etc.) compared with 63% of organizations who actually offer certification training for these certificates. Similarly, while only 15% of organizations who offer ICT Access follow up with entrepreneurs to learn the impact of ICT use, 38% of organizations who offer ICT supported assistance for small and medium entrepreneurs record this information.

4.7.2 Main means for collecting data

Organizations collect data through different means depending on their staff capacity, resources, and purposes for collecting user information. From the organizations represented in the sample, 56% reporting collecting electronically through online surveys or reporting systems and the same percentage reported collecting user data manually (on paper). Only 23% of organizations collecting user data do so electronically offline using spread sheets. (See Figure 29 below)
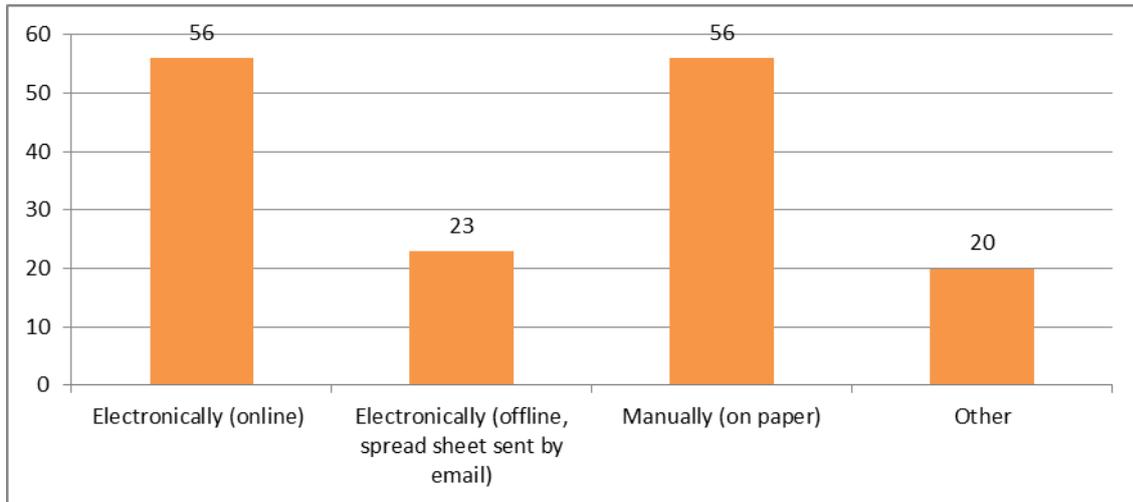
In terms of different means for collecting data across sectors, organizations within the public sector show a highest percentage of use of electronic online means (60%) to collect user information. Third sector organizations have the highest percentage reporting using manual means (on paper) to collect user data (close to 65%). See Table 24 below:

TABLE 24: MEANS FOR COLLECTING DATA BY SECTOR (N=1315)

Means for collecting data	Public Sector	Third Sector	Private Sector
Electronically (online like surveys or reporting systems)	59.8	48.7	51.9
Electronically (offline, like spread sheet sent by email)	19.4	26.8	33.3
Manually (on paper)	50.9	64.5	59.3
Other	20.4	18	22.2

4.7.3 Methods for collecting data

There are a wide variety of methods organizations can implement for collecting user data. These methods can be qualitative or quantitative in nature and in many instances a combination of both. At an aggregate level, a combination of qualitative and quantitative is the most frequently cited method to gather user data by almost half of the organizations in the sample. Quantitative approaches to user data collection are second with almost 20% of organizations selecting this as the most common method. (See Figure 30 below)
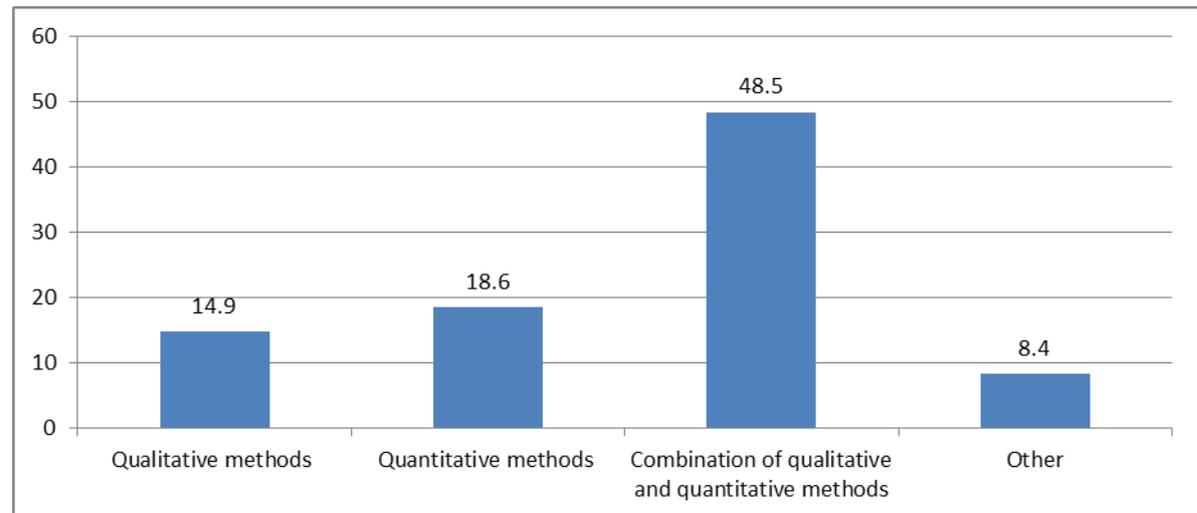
At the sector level, some differences clearly surface especially around the use of qualitative or quantitative methods. Third sector and private sector organizations show a much higher use of qualitative methods to gather user data than organizations in the public sector. In turn, a higher percentage of organizations in the public sector use quantitative methods (almost 23% compared to slightly over 10% in the third and private sector). The percentage levels out in the use of combination of methods (quantitative and qualitative) where almost 50% of organizations reporting using this type of method across the three sectors. (See Table 25)

TABLE 25: METHODS FOR COLLECTING DATA BY SECTOR(N=1315)

Methods for data collection	Public Sector	Third Sector	Private Sector
Qualitative	11.8	20.9	20
Quantitative	22.7	13.3	14
Combination of qualitative & quantitative	49	50.9	54
Other	9.4	8.2	2
Don't know	7.2	6.7	10
TOTAL %	**100**	**100**	**100**
Total N	**780**	**450**	**50**

The selection of certain data collection method over other invariably is dependent upon the resources available for the organization (financial and human), the expertise of person or organization responsible for selecting it, and also on the type of information that organizations need to collect from their users. Looking at methods of data collection by organizations' budget we get an interesting picture emerges. Organizations with operational budgets of less than €10,000 are more likely to use qualitative methods (23% of the organization in this budget category) than quantitative or a combination of both. For organizations in the next budget level (€10,000 to €100,000) the selection of methods appears equally spread across the three methods with over 25% in each category. (See Table 26 below)

TABLE 26: METHODS FOR COLLECTING DATA BY BUDGET LEVEL (N=1315)

Budget level	Combination quantitative & qualitative	Qualitative	Quantitative
Less than €10,000	14.6	22.8	15
€10,000 to €100,000	24.2	26.5	23.9
€100,000 to €1 million	20.5	18.5	17.5
€1 million to €10 million	10.1	8.5	13.2
More than €10 million	5	1.1	3
Don't know	25.5	22.8	27.4
TOTAL %	**100**	**100**	**100**
Total N	**623**	**189**	**234**

4.7.4 Motivation and barriers to collect data

For organizations in the public sector, the top three barriers to collecting user data are limitations in their staffing capacity, time capacity, or funding. For the organizations in the third sector, the single most common limitation is funding (48% of organizations give this reason), followed by staff and time limits. Organizations in the private sector report similar reasons but at lower rates, with only 36% of them saying they don't have funding, followed by 29% saying staff capacity and 28% time capacity.(See Figure 31)

Comparing individual organizations versus networks of organizations, overall networks are less likely to report barriers to collecting user data (only 20% of the network organizations that participated in the study reported having barriers for collecting user data compared to close to 40% of individual organizations in the sample) . Perhaps this could be due to the fact that networks having more resources in general than individual organizations and in the different nature of the data networks may collect (members instead of users). Over 34% of individual organizations say they don't have staffing capacity, compared with 24% of networks. Similarly, 37% of individual organizations don't have funding for collecting data, while 29% of networks report not having funding as their main barrier.

FIGURE 31: BARRIERS TO COLLECT USER DATA (N= 2357)
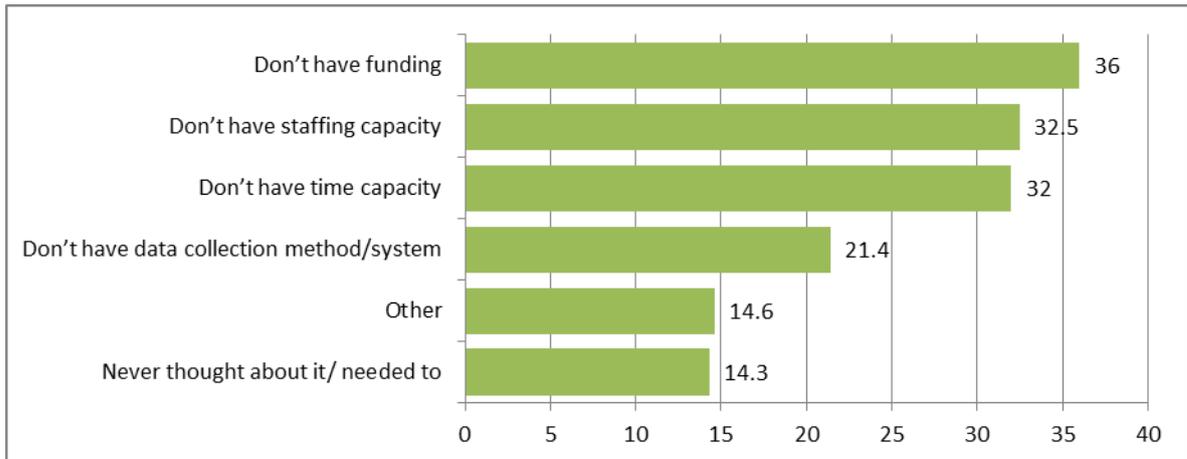
Tying in with the sector and type of the organizations, we see that with budget there is actually no consistent trend of a decrease in the percentage of organizations reporting a certain barrier as the budget level increases. We might have expected that organizations with a large budget would experience fewer barriers to collecting data, but that does not seem to be the case. In fact, in terms staffing/time capacity, organizations with large budgets report that barrier with the same if not higher frequency as small budget ones. On the other hand, 45% of organizations with less than 10,000 budgets report the limitation of funding, compared with 32% of organizations with budgets over 10 million. In the same way, 17% of organizations with budgets over 1 million (including the "over 10 million" category) say they don't have a data collection system, compared with 22% to 29% for lower budget categories.

FIGURE 32: MOTIVATIONS FOR USER DATA COLLECTION (N=1315)

FIGURE 32: MOTIVATIONS FOR USER DATA COLLECTION (N=1315)
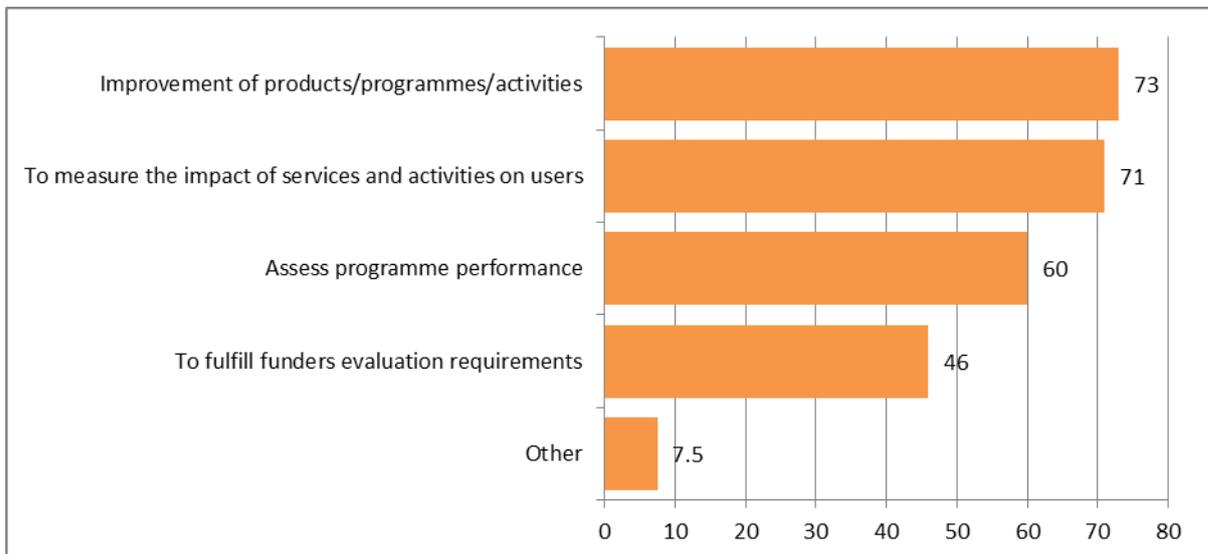
CHAPTER 5: Data analysis per country

5.1 Organization typologies per country and more and less represented categories

As described earlier in the report, at an aggregate level over half of the organizations represented in the survey belong to the public sector (58%) with 36% of the sample representing third sector organizations and a small percentage from the private sector.

At the country level, public sector organizations are highly represented by libraries. The high representation of libraries is driven mainly by Bulgaria, Denmark, the Netherlands, Poland, Portugal, Romania, and Sweden where over 70% of the organizations in the **public sector** are libraries. Germany has the highest proportion of public libraries in the sample because it includes 136 entries from the Germany Library Association database. Municipal/City Government organizations have a higher representation in Spain with 32% of responses, and in Ireland and Hungary where over a third of organizations reported belonging to this category. National, Regional, or State Agencies represent less than 10% of the sample in the countries except in Italy where the percentage is significantly higher (22%) and in Spain, and Sweden where this category takes 11% and 17% of the responses. Italy also shows the highest percentage of formal educational institutions represented in the public sector with almost half of the responses in the country. (See Table 27 below).

TABLE 27: DISTRIBUTION BY ORGANIZATIONAL CATEGORIES IN THE PUBLIC SECTOR BY COUNTRY (N=1611)

Country	National, Regional, or State Agency	Municipal/City Government	Government-run Telecentre	Public Library	Formal Educational Institution	Other
Total EU27	7	21	10	51	5	6
Austria	0	0	0	0	66.7	33.3
Belgium	3.8	37.7	3.8	45.3	3.8	5.7
Bulgaria	9.6	1.9	0	67.3	9.6	11.5
Cyprus	0	0	0	100	0	0
Czech Republic	11.1	16.7	0	50	16.7	5.6
Denmark	7.7	15.4	0	76.9	0	0
Estonia	0	100	0	0	0	0
Finland	7.1	35.7	0	50	4.8	2.4
France	6.7	51	2.7	29.5	0.7	9.4
Germany*	0	0	0	96	0.02	0.02
Greece	37.5	0	0	0	62.5	0
Hungary	10	35	35	20	0	0
Ireland	33.3	33.3	0	0	33.3	0
Italy	22.7	13.6	0	6.8	45.5	11.4
Latvia	20	26.7	0	33.3	20	0
Lithuania	7	3.5	0	86	3.5	0
Luxembourg	0	0	0	0	0	100
Malta	0	50	50	0	0	0
Netherlands	8.7	4.3	0	73.9	13	0
Poland	2.4	22.4	0	70.2	2.9	2
Portugal	0	15.1	1.4	78.1	1.4	4.1

Romania	0.6	1.7	4.5	89.2	2.8	1.1
Slovakia	0	0	0	14.3	71.4	14.3
Slovenia	0	0	0	66.7	33.3	0
Spain	11.4	31.8	39.3	3.3	0.3	13.9
Sweden	16.9	8.5	0	67.8	0	6.8
United Kingdom	0	14.3	3.6	50	28.6	3.6

Notes: * Includes 134 public library entries from the Stiftung Digitale Chancen Internet Points database provided by the organization for this study

In the case of organizational categories within the **third sector** the distribution follows a very similar proportion than at the aggregate level except in the Czech Republic and Ireland where community organizations have a higher representation than any other category (66% and 58% respectively). In the United Kingdom, this category of third sector organization is the second largest after associations, charitable organizations or foundations. In Bulgaria, Germany, Greece, Hungary, Latvia, Lithuania and Romania NGOs represent the highest percentage of organizations within the third sector. The proportion ranges from 68% of the sample in the case of Bulgaria to over 70% of third sector organizations in Germany, Greece, Latvia, and Romania. Trade Unions are the least represented category in the sample with most of the data coming from Estonia and Denmark but the sample sizes are too small (N=6) to make any inferences from the data. (See Table 28)

TABLE 28: DISTRIBUTION BY ORGANIZATIONAL CATEGORIES IN THE THIRD SECTOR BY COUNTRY (N=984)

Country	NGO	Association, Charitable Org or Foundation	Community organization	Cooperative	Federation	Informal Network	Other	Trade Union	Total N
Total EU27	**38**	**39**	**13**	**2**	**1**	**1**	**3**	**0.04**	**984**
Austria	57.1	42.9	0	0	0	0	0	0	7
Belgium	21.1	52.6	5.3	0	5.3	5.3	10.5	0	19
Bulgaria	67.4	4.7	20.9	0	0	2.3	4.7	0	43
Cyprus	85.7	14.3	0	0	0	0	0	0	7
Czech Republic	22.4	9	65.7	0	0	0	3	0	68
Denmark	13.3	40	20	0	13.3	0	6.7	6.7	15
Estonia	50	33.3	0	0	0	0	0	16.7	6
Finland	33.3	66.7	0	0	0	0	0	0	10
France	0	93.9	1.5	0	1.5	0	3	0	66
Germany*	98	2	0	0	1	0	0	0	200
Greece	75	12.5	0	6.2	0	0	6.2	0	16
Hungary	52.3	34.1	4.5	2.3	4.5	2.3	0	0	45
Ireland	15.8	10.5	57.9	5.3	5.3	0	5.3	0	19
Italy	10	62	0	20	0	4	2	2	50
Latvia	85.7	14.3	0	0	0	0	0	0	7
Lithuania	60	40	0	0	0	0	0	0	12
Luxembourg	100	0	0	0	0	0	0	0	1
Malta	40	60	0	0	0	0	0	0	5
Netherlands	1.1	79.6	11.8	0	0	2.2	5.4	0	93
Poland	26.5	52.9	0	5.9	2.9	2.9	8.8	0	34
Portugal	4.3	73.9	8.7	4.3	4.3	0	4.3	0	23
Romania	73.5	26.5	0	0	0	0	0	0	34
Slovakia	13.3	13.3	60	0	6.7	0	6.7	0	15
Slovenia	100	0	0	0	0	0	0	0	1
Spain	10.4	74.6	6	0	4.5	3	1.5	0	67
Sweden	51.9	11.1	14.8	7.4	0	3.7	11.1	0	27
United Kingdom	2.1	52.1	35.1	1.1	0	1.1	7.4	1.1	**94**

Notes:

* Includes 196 NGO entries from the Stiftung Digitale Chancen Internet Points database provided by the organization for this study

At a country level, Germany, the Czech Republic, and the Netherlands have the highest number of organizations belonging to the **private sector**. With the exception of Germany where most of the organizations are cybercafés and the data was extracted from an already available source (Stiftung Digital Chancen Internet Point Database) the total number of responses at a country level renders the analysis statistically insignificant. (See Table 29)

TABLE 29: DISTRIBUTION BY ORGANIZATIONAL CATEGORIES IN THE PRIVATE SECTOR BY COUNTRY (N=168)

Country	Cybercafé	Private Formal Educational Institution	Private Training Organization	Other	Total N
Total EU27	46.4	3	36.3	15.4	168
Austria	0	0	100	0	2
Belgium	100	0	0	0	1
Bulgaria	0	50	50	0	4
Cyprus					0
Czech Republic	0	0	89	11	19
Denmark	0	0	33	67	3
Estonia					0
Finland	0	0	100	0	1
France	25	0	50	25	4
Germany*	40	0	40	20	70
Greece	33	0	33	33	3
Hungary					0
Ireland	0	0	67	33	3
Italy	0	0	50	50	8
Latvia	0	0	50	50	2
Lithuania					0
Luxembourg					0
Malta					0
Netherlands	10	0	80	10	10
Poland	33	0	33	33	3
Portugal	0	0	50	50	4
Romania	0	0	100	0	1
Slovakia	0	0	80	20	5
Slovenia	0	0	100	0	1
Spain	17	0	33	50	6
Sweden	0	38	38	25	8
United Kingdom	20	60	0	20	10

Notes:

* Includes 68 commercial entries from the Stiftung Digitale Chancen Internet Points database provided by the organization for this study

The discussion regarding improvements in the organizational typology for public, third, and private sector organizations is elaborated in the next section.

5.2 Revisiting the organizational typologies

5.2.1 Typologies accordingly to Locality Mapping vs. Online Survey

The organizational typologies in the public, third, and private sector used for this study were adapted from the categories developed for MIREIA's Locality Mapping[20], for which JRC-IPTS hired three local experts to interview relevant stakeholders in three specific local areas showcasing the landscape of eInclusion actors in a neighborhood in a big-size city (El Raval in Barcelona, Spain); an industrial medium-size city (Sunderland, UK); and a rural region (Zemgale, Latvia). For the design of the survey questionnaire the categories were revised in consultations with Telecentre-Europe members and some changes were made, particularly to the typology for third sector organizations. The typology used for third sector organization in the Locality Mapping was too long and it included categories that seemed very relevant for the contexts where mappings were done but were not fully applicable for a wider set of contexts. The typology developed for the eIMAP (eInclusion Map) survey was simplified and included other type of organizations that were not considered for the locality mappings (trade unions, federations, and informal networks). The typologies for public sector and private sector organizations were left unchanged for the eIMAP survey. The tables below (30 and 31) show the organizational typologies for both projects.

TABLE 30. ORGANIZATIONAL TYPOLOGIES FOR THE LOCALITY MAPPING

GOVERNMENT	National, Regional, and State Agencies [Social, Employment, Health]
	Municipal/City Government [Adult Education Centers, Electronic Village Halls, Training Rooms, etc.]
	Public Libraries
	Government-run Telecenters
	Formal Educational Institutions [Primary, Secondary, High School, technical school, University]
	Other [Ad hoc projects –Terminated projects – would fit here?]
THIRD SECTOR	NGO-run Telecenters
	Neighborhood Community Centers/Associations
	Voluntary Support Organizations
	Youth Centers
	Migrant and Minority Support Organizations [Refugee & Asylum seekers, BME Support orgs]
	Other
PRIVATE SECTOR	Cybercafés
	Private Training Organizations [Support Government programs, NGOs, etc.]
	Formal Educational Institutions [Primary, Secondary, High School, technical school, University]
	Other [Private nursing homes, privately-run social housing, etc.]

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[20] For additional information of the Locality Mappings see:
http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html

TABLE 31. ORGANIZATIONAL TYPOLOGIES REVISED FOR THE eIMAP SURVEY

PUBLIC SECTOR	National, Regional, and State Agencies [Social, Employment, Health]
	Municipal/City Government [Adult Education Centers, Electronic Village Halls, Training Rooms, etc.]
	Public Libraries
	Government-run Telecenters
	Formal Educational Institutions [Primary, Secondary, High School, technical school, University]
THIRD SECTOR	Association, Charitable organization or foundation
	Non-governmental organization
	Community organization
	Cooperative
	Federation
	Trade Union
	Informal Network
	Other
PRIVATE SECTOR	Cybercafés
	Private Training Organizations [Support Government programs, NGOs, etc.]
	Private formal Educational Institutions [Primary, Secondary, High School, technical school, University]
	Other [Private nursing homes, privately-run social housing, etc.]

5.2.3 Possible adjustments to the proposed typology

Generally speaking, the organizational categorization seems to be applicable for most organizations at the country and sector level. The private sector organizational typology offers perhaps the most limited options to capture the range of eInclusion actors that belong to this sector. For future iterations and similar research projects a revision of this category is highly recommended. Since the participation of private sector actors in the survey was considerably smaller than actors from the public and private sector it is difficult to pin point which categories from the current typology are more relevant and which are not. However, future efforts to continue mapping and identifying eInclusion actors may consider including an open ended option where different actors in the private sector can describe themselves in their own words and add new categories to the existing list using a grounded theory approach (from the bottom up).

5.3 Targets by country: "diving in the dark"

5.3.1 Limitations of the sampling strategy

As described thoroughly in the methodology section, the sampling strategy was based on the criteria outlined in the rationale of the study to cover at least 5 organizations per each million people in the EU27 countries. In order to operationalize these criteria, the EUROSTATS NUTS 3 typology for population distribution was used to calculate the number of surveys per country. Since the population of eInclusion actors in the EU27 is unknown, the criterion upon which the sampling strategy was based has some underlying assumptions that make any claims on representativeness and generalization very problematic.

The most important assumption that is critical to consider for interpreting the analysis of the EU27 mapping presented in this study and for future efforts is the fact that the proportion of 5 organizations/million people assumes that regardless of context (urban, semi-urban, or rural) beyond population size a certain number of eInclusion actors are present and providing ICT-related services, which may not be the case in every single corner of the EU27 countries. This proportion was based loosely on the experiences with the Locality Mapping which cover very specific contexts with certain characteristics that are not easily replicable in other places.

Even though the social and economic conditions of a post-industrial city like Sunderland in the UK and the Zemgale region in Latvia (high unemployment of youth, economic migration, etc.) can be found in other countries, the landscape of eInclusion actors in each case is also determined by government programs, EU funding, and a whole different set of factors that manifest themselves differently depending on the location. In a nutshell, the complexity of extrapolating the results of the Locality Mapping to the eIMAP sampling strategy must be taken into consideration for interpreting the results of the latter effort. It is important to acknowledge that the effort to create a map of eInclusion actors in the EU27 is the first of its kind in Europe and as with all first attempts there are limitations in the results. However, these limitations do not overshadow the fact that this is the first map of this kind and its contribution represents a very important foundation for future projects.

5.3.2 Possible bias induced by the dissemination strategy

As thoroughly described in Chapter 4 of the report, the dissemination strategy consisted in finding "seed" organizations in each country through which the survey could be widely distributed. The seed organizations were the most important channel to reach eInclusion actors in the country and based on the type of organization and sector which they belonged inherently brought biases to the selection of survey participants. The table below shows these seed organizations and the type of sector they belong to. From this data, we can conclude that third sector organizations were probably most likely to hear about the survey that either public or private organizations. However, this varied by country. The sample has high representation of the public sector in almost all the countries lead by municipal agencies and libraries that heard about the survey through other unknown channels. (See Annex 2 for the list of organizations)

Looking at the channels through which survey participants learned about the survey we find a coherent distribution based on the dissemination strategy. More than third of survey participants heard about the survey through an organization in their country (the seed organization). Equally important was mailing lists or newsletters which were mentioned by 30% of the respondents. (See Figure 33 below).
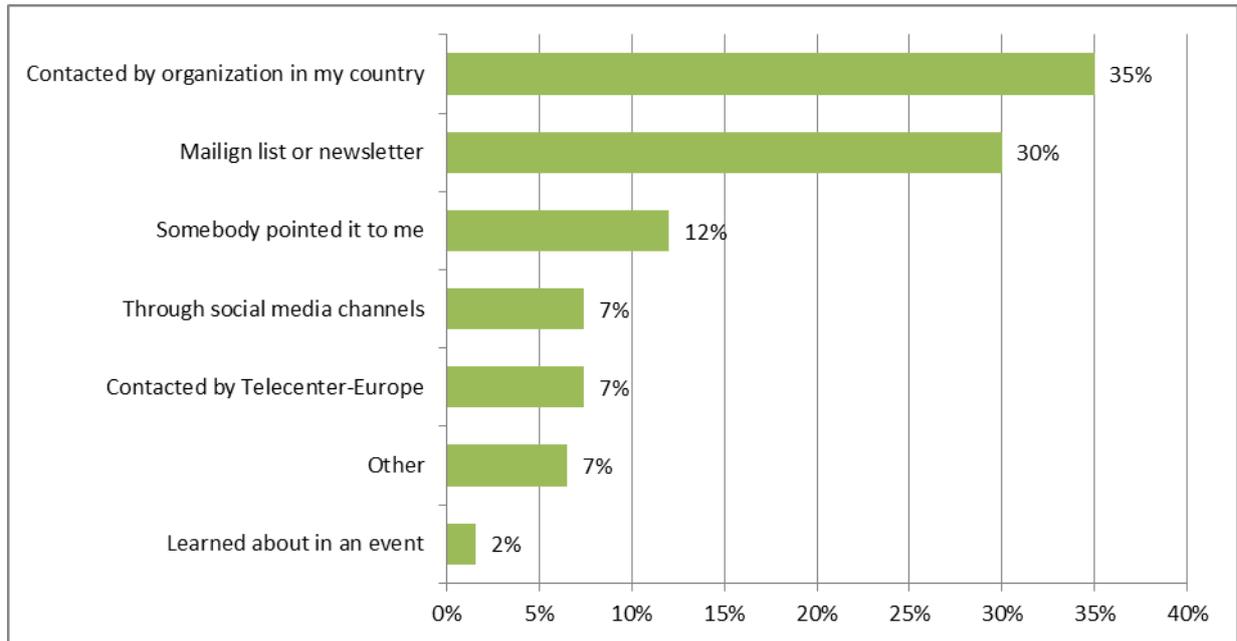
CHAPTER 6: An estimation of the size of the eInclusion sector in the EU27

This chapter starts building a plausible estimation of the quantity of eInclusion organizations per typology and country, developed from two different angles (scenarios). The first scenario is congruent with the estimations made in small geographical areas selected for a locality mapping exercise (one dense urban area in Spain, one sub-urban area in UK and one rural area in Latvia). This exercise zoomed into the 3 areas to discover an unexpected number and granularity in terms of micro and small eInclusion organizations. A total of **675,211 to 734,393** eInclusion organizations is the estimated size of the eInclusion sector (including micro-organizations) deducted from combining the locality mappings counts with Europe population statistics, which means one eInclusion organization per every **713 inhabitants**.

The second scenario, instead, relies on sound national counts and estimations of public library and telecentre types of eInclusion organizations combined with survey sample frequencies, and depicts an estimation of around **158,255** eInclusion organizations, that is, around 9 – 10% of the size estimated at scenario 1. The percentage of micro-organizations represented in the sample (58.2%) is surely lower than in reality. If we take as a valid reference the micro-sized enterprises (<10 employees) which represent 92.2% of the total enterprises in Europe[21], with a more accurate counting of the smallest organizations the estimation of Scenario 2 could increase proportionally and reach **250,706** organizations. This means an average of one eInclusion organization per every **2,004 inhabitants**.

A conservative approach suggests taking Scenario 2 as a more robust basis for further action (for example, for policy making) while further research should be oriented to refine the numbers through extensive fieldwork at local level (for example, multiplying the locality mapping exercises to cover all EU27 countries and a wider diversity of local settings, with a special focus on mapping the smallest organizations which are the hardest to reach).

This chapter later goes through an individual country profile performed in countries where secondary sources could be identified by desk research. These **14 countries** (Bulgaria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, Poland, Romania, Spain, Sweden, United Kingdom) represent **83%** of the total EU27 population and **81%** of the respondents to the survey. The estimations are refined for those countries where quantitative data could be identified through desk research for a few categories (municipal centers, public libraries, government-run or NGO-run telecentres), combining them with eIMAP survey sample frequencies when appropriate. Additionally, the individual country profile presents a selection of secondary sources, identify the 2 to 10 more relevant network organizations per country, and illustrate the kind of innovation produced in each country through examples provided by respondent.

For the remaining **13** sampled countries (which represent **less than 20%** of EU27 in terms of population or survey sample), the 2 to 10 more relevant network organizations per country are identified as well. The selection for each country results from a combined procedure of extraction of network organizations from the survey sample (either those which answered the survey or those mentioned by respondents as the networks that their organizations are members of) and a process of validation and completion performed by each national partner based on their direct knowledge of the local eInclusion panorama and desk research.

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[21] Source: Eurostat. Available at
http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Small_and_medium-sized_enterprises]

6.1 Plausible estimation of the number of eInclusion organizations in Europe

The following exercise is speculative and is based on limited available quantitative information coming from a few number of available sources. However, it offers for the first time a comprehensive estimation of the size of the eInclusion sector in Europe and its single countries. Scenario 2 is more developed since it was considered more robust and reliable than Scenario 1.

Scenario 1

The Locality Mapping exercise counted a number of e-Inclusion Organizations in small geographic areas. This is used here to calculate a weighting factor per geographic type (ratio of number of inhabitants per eInclusion organization):

Mapping Type	Total No. of Orgs in location	Type of Organization
URBAN (Raval neighborhood, Barcelona/Spain) Population: 48,485 Weighting factor: 613.7	**79** Organizations in sample = 11	Cybercafé = 30 Municipal Wi-Fi = 20 School =7 Library = 6 High School = 4 Technical School = 4 Telecentre = 3 Civic Centre = 2 University = 2
INTERMEDIATE URBAN (Sunderland city/UK) Population: 283,500 Weighting factor: 1,143.1	**248** Organizations in sample = 39	City Council Facilities = 26 Community Youth Centers = 43 Formal Educational Institutions =93 Edu, Training and Employment =32 Black and Minority Ethnic Groups =8 Social Housing = 20 Health and Social Care = 20 Business/Business Support = 13
RURAL (Zemgale region/Latvia) Population: 100,686 Weighting factor: 641.3	**157** Organizations in sample = 54	Libraries = 68 School libraries = 25 Municipal Adult Ed. Cen = 3 Primary & Secondary = 53 State Agency Social = 2 State Agency Jobs = 2 Private Institutions = 4

Indicative sample distribution by country and EUROSTATS NUTS 3 regional typology and *Survey responses distribution by country* (Total N= 2,357) plus 400 imported responses for Germany are used here to build a second weighting factor (collected survey responses/targeted response Organizations).

The result of this process is shown in Table 32, suggesting a minimum and maximum number of eInclusion Organizations per Country, as the table in following page shows. However, the limited number of available small area samples (only 3) suggests the need to consider as highly speculative any quantification based on them, since any peculiar characteristic of each of the three areas would be amplified in the general estimations. For example, El Raval neighborhood (Small Area 1) belongs to Ciutat Vella, the district with highest level of social inequality in Barcelona[22], and it is locally well

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known as a traditional hosting area for organizations providing social inclusion services not only for the neighborhood but for other districts in the city and beyond. Therefore, the density of social organizations (including those providing eInclusion services) in El Raval is probably higher than in the rest of Barcelona, or watched from the opposite angle, the ratio of inhabitants per organization derived from the El Raval population (613,7:1) is lower than the ratio for the whole city. This suggests that the derived estimations for urban population for the whole continent could be expressing a distorted reality.

TABLE 32: HYPOTHETICAL MINIMUM AND MAXIMUM NUMBER OF EINCLUSION ORGANIZATIONS PER COUNTRY

Country	MIN.	MAX.	Total Population 2011	Urban	Intermediate Urban	Rural	URBAN Weighting Factor 613.7 inhabitants per organization	INTERMEDIATE URBAN Weighting Factor 1,143.1 inhabitants per organization	RURAL Weighting Factor 641.3 inhabitants per organization	TOTAL Orgs Weighted per Locality Mapping factors	Target respondent Orgs per Country (1/200k)	Survey response N	Weighting factor (% of Target)	TOTAL Organizations weighted per Locality Mapping and Survey response factors
Austria	3,367	11,784	8,404,252	2,907,688	2,227,776	3,268,788	4,738	1,949	5,097	11,784	42	12	29%	3,367
Belgium	15,817	20,706	10,951,266	7,406,250	2,599,276	945,740	12,068	2,274	1,475	15,817	55	72	131%	20,706
Bulgaria	9,484	24,707	7,504,868	1,259,446	3,370,594	2,874,828	2,052	2,949	4,483	9,484	38	99	261%	24,707
Cyprus	704	1,232	804,435	:	804,435	:		704		704	4	7	175%	1,232
Czech Rep,	13,496	26,228	10,532,770	2,522,136	4,536,108	3,474,526	4,110	3,968	5,418	13,496	53	103	194%	26,228
Denmark	7,385	7,649	5,560,628	1,209,627	2,002,465	2,348,536	1,971	1,752	3,662	7,385	28	29	104%	7,649
Estonia	1,613	1,844	1,340,194	:	696,010	644,184		609	1,004	1,613	7	8	114%	1,844
Finland	7,356	14,167	5,375,276	1,435,811	1,645,518	2,293,947	2,340	1,440	3,577	7,356	27	52	193%	14,167
France	86,683	58,504	65,048,412	23,022,353	23,098,818	18,573,326	37,514	20,207	28,962	86,683	323	218	67%	58,504
Germany	107,515	108,041	81,751,602	35,006,251	32,749,511	13,995,840	57,041	28,650	21,824	107,515	409	411	100%	108,041
Greece	17,186	8,141	11,309,885	5,280,893	1,198,484	4,830,508	8,605	1,048	7,532	17,186	57	27	47%	8,141
Hungary	13,237	16,944	9,985,722	1,733,685	3,586,721	4,665,316	2,825	3,138	7,275	13,237	50	64	128%	16,944
Ireland	7,071	9,000	4,480,858	1,201,121		3,279,737	1,957	0	5,114	7,071	22	28	127%	9,000
Italy	26,182	77,777	60,626,442	21,573,487	26,693,716	12,359,239	35,153	23,352	19,272	77,777	303	102	34%	26,182
Latvia	3,350	7,310	2,229,641	1,089,767	296,529	843,345	1,776	259	1,315	3,350	11	24	218%	7,310
Lithuania	4,424	18,525	3,244,601	838,852	1,014,511	1,391,238	1,367	888	2,169	4,424	16	67	419%	18,525
Luxembourg	448	299	511,840	:	511,840	:		448		448	3	2	67%	299
Malta	680	2,382	417,617	417,617	:	:	680			680	2	7	350%	2,382
Netherlands	23,612	35,845	16,655,799	11,884,588	4,664,690	106,521	19,365	4,081	166	23,612	83	126	152%	35,845
Poland	51,450	75,963	38,200,037	10,813,913	12,965,379	14,420,745	17,621	11,342	22,487	51,450	191	282	148%	75,963
Portugal	15,840	29,887	10,636,979	5,188,031	1,621,958	3,826,990	8,454	1,419	5,968	15,840	53	100	189%	29,887

Romania	**27,124**	**53,488**	21,413,815	2,267,419	9,387,405	9,758,991	3,695	8,212	15,218	**27,124**	107	211	197%	**53,488**
Slovakia	**7,098**	**7,098**	5,435,273	628,686	2,077,093	2,729,494	1,024	1,817	4,256	**7,098**	27	27	100%	**7,098**
Slovenia	**2,798**	**1,399**	2,050,189	533,213	637,306	879,670	869	558	1,372	**2,798**	10	5	50%	**1,399**
Spain	**61,218**	**114,984**	46,152,926	22,304,779	17,615,598	6,068,639	36,345	15,410	9,463	**61,218**	230	432	188%	**114,984**
Sweden	**11,213**	**22,427**	9,415,570	2,054,343	5,277,833	2,083,394	3,347	4,617	3,249	**11,213**	47	94	200%	**22,427**
UK	**38,077**	**88,846**	62,498,612	44,187,444	16,031,760	1,808,041	72,002	14,025	2,819	**88,846**	308	132	43%	**38,077**
Total Sample			502,539,509							**675,211**				**734,393**

Scenario 2: Libraries with public access computer services / Municipal Centres / All typologies

This scenario builds on the more solid figures that have been identified through desk research. Firstly, the number of public libraries which can be retrieved from official records in most of the countries. A recent pan-European study[23] provides a sound estimation of the percentage of them offering e-Inclusion type of services (called "public access computer" services in the study) in 17 countries. Secondly, the number of municipalities which can also be retrieved from official records in most of the countries. Even when big cities can host dozens of municipal centers, most of the municipalities largely correspond to small towns and villages which host one or zero municipal e-inclusion center, so this research team founded reasonably to assume that the total number of municipal centers can't be higher than the number of municipalities. Therefore, the number of municipalities is used to limit the maximum number of municipal centers per country. Finally, a few secondary sources identified in a few countries allowed refining estimations in those selected countries.

a) Libraries

A combination of three different sources was used to produce a plausible estimation of the number of the libraries offering eInclusion services in EU27:

- the sample of this survey
- desk research conducted with help of its network of national partners
- the *Cross-European survey to measure users' perceptions of the benefits of ICT in public libraries* released at the time this report was being finalized (March 2013), hereby referred as *BMGF study* [24]

A complex process of calculation was used for the estimations, which is explained step by step below:

[Step 1] The total number of public libraries and an estimation of the percentage of them offering public access computer (PAC) services in 17 European countries was extracted from the country reports included in the *BMGF study*;

[Step 2] This allowed calculating an estimation of the *percentage of libraries offering PAC services at EU27 level* (74.7%);

[Step 3] This research team found out the number of public libraries through desk research conducted by its network of national partners in 20 countries. A comparison of this data with data at [Step 1] shows some small differences in certain countries. The research team selected the source apparently more reliable for each country (numbers highlighted in orange);

[Step 4] The number of libraries offering PAC services was calculated per all the 22 countries where the number of public libraries was known. For the 5 countries not sampled in BMGF study but investigated by this research team (Estonia, Hungary, Ireland, Slovakia and Sweden) the estimation was made against the *EU27 average percentage* (74,7%) and is highlighted in light green);

[Step 5] For the other remaining 5 countries (Austria, Cyprus, Luxembourg, Malta and Slovenia) the number of libraries with PAC services was estimated by calculating first the *number of EU27 inhabitants per library with PAC services* (10,202)

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[23] See next footnote for its reference

[24] Quick S., Prior G., Toombs B., Taylor L. and Currenti R. (2013), "Cross-European Survey to measure users' perception of the benefits of ICT in public libraries". Final report (March 2013) prepared by TNS under commission by Bill and Melinda Gates Foundation.

[Step 6] With an estimated number of libraries with PAC services per all the 27 Members States, the total number of *Public Libraries* as a typology of eInclusion intermediary organizations was estimated for EU27 (50,452).

TABLE 33: ESTIMATED LIBRARIES WITH PAC SERVICES IN EU27

Country	Number of Public Libraries per Member State (source: national partners)	Number of Public Libraries per Member State (source: BMGF survey)	Estimated % of Libraries providing e-Inclusion services (source: BMGF survey)	Estimated number of Libraries providing e-Inclusion services (17MS)	Estimated number of Libraries providing e-Inclusion services (+5MS)	Total Population 2011	Estimated number of Libraries providing e-Inclusion services (27MS)
Austria						8,404,252	824
Belgium	1,222	1,250	100%	1,222	1,222		1,222
Bulgaria	2,351	3,000	40%	940	940		940
Cyprus						804,435	79
Czech Republic	6,000	5,408	90%	4,867	4,867		4,867
Denmark	482	449	90%	434	434		434
Estonia	562				420		420
Finland	787	836	100%	787	787		787
France	7,500	7,530	75%	5,648	5,648		5,648
Germany	3,000	9,550	30%	2,865	2,865		2,865
Greece	46 + branches	491	80%	393	393		393
Hungary	2,351				1,756		1,756
Ireland	391				292		292
Italy	46 + branches	7,639	90%	6,875	6,875		6,875
Latvia	874	819	100%	874	874		874
Lithuania	1,276	1,301	96%	1,225	1,225		1,225
Luxembourg						511,840	50
Malta						417,617	41
Netherlands		1,063	100%	1,063	1,063		1,063
Poland	8,890	8,261	83%	7,379	7,379		7,379
Portugal	301	510	93%	474	474		474
Romania	2,876	2,876	68%	1,941	1,941		1,941
Slovakia	1,989				1,486		1,486
Slovenia						2,050,189	201
Spain	4,074	4,164	89%	3,626	3,626		3,626
Sweden	1,188				887		887
United Kingdom		4,089	93%	3,803	3,803		3,803
Total Sample	**65102**		**74.7%**	**44,416**	**49,257**		**50,452**

EU27 inhabitants:	*502,539,509*
EU27 inhabitants per Library with PAC services:	**10,202**

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b) Municipalities

A key assumption for the following estimations is that the diversity of eInclusion organization is reasonably represented in the eIMAP sample. While in certain countries the typology of the national dissemination partner could have biased the sample getting higher representativeness of certain typologies, the diversity of profiles of those partners across EU27 guarantees a more balanced sample when observed as a whole.

[Step 1] By correlating the number of total respondent libraries (N = 680) and municipalities centers (N = 334), it was estimated that in EU27 there are 2.03 libraries every each municipal center offering e-Inclusion services. This allowed a first estimation of municipal centers offering eInclusion services in EU27.

[Step 2] This research team found out the number of public libraries through desk research conducted by its network of national partners in 19 countries.

[Step 3] Municipalities and libraries are both public funded and have a comparable level of penetration across Europe (cf. 65,102 public libraries counted in 22 countries vs. 69,618 municipalities counted in 19 countries). These two common characteristics justify the assumption that the percentage of public libraries and or municipal centers offering PAC services at EU27 level should be similar (74.7%). Therefore, a second estimation was made, this time only for the 19 countries with known number of municipalities.

[Step 4] An average quantity per country was obtained by combining the two estimations (in 19 countries). This led to an estimated total number of Municipalities as a typology of eInclusion intermediary organizations for EU27 (40,115).

TABLE 33: ESTIMATED MUNICIPAL CENTERS PROVIDING E-INCLUSION SERVICES IN EU27

Country	Estimated number of Libraries providing e-Inclusion services (27MS)	Deducted number of Municipal centers providing e-Inclusion services (27MS) *	Number of Municipalities (source: desk research) (19MS)	Estimated number of Municipal centers providing e-Inclusion services (19MS) **	Average estimated number of Municipal centers providing e-Inclusion services (27MS) **
Austria	824	406			406
Belgium	1,222	602	589	440	521
Bulgaria	940	463	264	197	330
Cyprus	79	39			39
Czech Republic	4,867	2,398	6,253	4,671	3,534
Denmark	434	214	98	73	143
Estonia	420	207	215	161	184
Finland	787	388			388
France	5,648	2,782	36,700	27,415	15,098
Germany	2,865	1,411	2,064	1,542	1,477
Greece	393	193	325	243	218
Hungary	1,756	865	264	197	531
Ireland	292	144	387	289	216
Italy	6,875	3,387	8,092	6,045	4,716
Latvia	874	431	119	89	260
Lithuania	1,225	603	60	45	324
Luxembourg	50	25			25
Malta	41	20			20
Netherlands	1,063	524			524
Poland	7,379	3,635	2,479	1,852	2,743
Portugal	474	234	308	230	232
Romania	1,941	956	104	78	517
Slovakia	1,486	732	2,890	2,159	1,445
Slovenia	201	99			99
Spain	3,626	1,786	8,117	6,063	3,925
Sweden	887	437	290	217	327
United Kingdom	3,803	1,873			1,873
Total Sample	**50,452**	**24,853**	**69,618**	**52,005**	**40,115**

(*) 2,03 libraries per each municipal center (source: eIMAP sample)

(**) reduced to 74,7% (percentage of libraries offering PAC services at EU27 level)

c) All typologies

Back to the assumption that the diversity of eInclusion organization is reasonably represented in the eIMAP sample, the estimated weight of each typology in the sample was calculated.

According to the eIMAP sample the two larger categories of eInclusion organization are Libraries (29%) and Municipal centers (14.2%), exactly those categories for which a more accurate breakdown estimation per country has been produced. As the Municipal centers estimation is partially based in Libraries estimation, only the Libraries estimation (the largest category in the sample) is used as a driver to produce a breakdown of the other typologies per country. (See Tables 34 and 35 below)

For this procedure, and in order to neutralize the possible biases produced at country level (already discussed), the calculation method is based on the number of e-Inclusion public libraries estimated per country (which is a reliable estimation) and the weight (%) of each typology in the total sample.

[Step 1] It consists on estimating the total number of eInclusion intermediary organizations in each country, assumed that 29% are public libraries. **This leads to a total estimation of the number of eInclusion organizations in EU27 (N = 173,971) which is significantly smaller (1:10) than the estimations produced in Scenario 1 based on the Locality Mapping**.

[Step 2] The weight (%) of each typology in the total sample is used to breakdown the estimation of eInclusion organizations per typology in each country.

TABLE 34: WEIGHT (%) OF EACH TYPOLOGY IN THE TOTAL SAMPLE

	PUBLIC SECTOR						THIRD SECTOR												
	National, Regional, and State Agency	Municipal/City Government	Public Library	Government-run Telecentre	Formal Educational Institution	Other	NGO	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cybercafé	Private Training Organization	Private Formal Educational Institution	Other	TOTAL
AUSTRIA	0	0	0	0	2	1	4	3	0	0	0	0	0	0	0	2	0	0	12
BELGIUM	2	20	24	2	2	3	4	10	1	0	1	1	0	2	1	0	0	0	73
BULGARIA	5	1	35	0	5	6	29	2	9	0	0	1	0	2	0	2	2	0	99
CYPRUS	0	0	1	0	0	0	6	1	0	0	0	0	0	0	0	0	0	0	8
CZECH REP.	2	3	9	0	3	1	15	6	44	0	0	0	0	2	0	16	0	2	103
DENMARK	1	2	10	0	0	0	2	6	3	0	2	0	1	1	1	1	0	2	32
ESTONIA	0	2	0	0	0	0	3	2	0	0	0	0	1	0	0	0	0	0	8
FINLAND	3	15	21	0	2	1	3	6	0	0	0	0	0	0	0	1	0	0	52
FRANCE	10	76	44	4	1	14	0	62	1	0	1	0	0	2	1	2	0	1	219
GERMANY	0	0	3	0	1	1	1	2	0	0	1	0	0	0	1	0	0	1	11
GREECE	3	0	0	0	5	0	12	2	0	1	0	0	0	1	1	1	0	1	27
HUNGARY	2	7	4	7	0	0	23	15	2	1	2	1	0	0	0	0	0	0	64
IRELAND	2	2	0	0	2	0	3	2	11	1	1	0	0	1	0	2	0	1	28
ITALY	10	6	3	0	20	5	5	31	0	10	0	2	1	1	0	4	0	4	102
LATVIA	3	4	5	0	3	0	6	1	0	0	0	0	0	0	0	1	0	1	24
LITHUANIA	4	2	49	0	2	0	6	4	0	0	0	0	0	0	0	0	0	0	67
LUXEMBOURG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MALTA	0	1	0	1	0	0	2	3	0	0	0	0	0	0	0	0	0	0	7
NETHERLAND	2	1	17	0	3	0	1	74	11	0	0	2	0	5	1	8	0	1	126

POLAND	6	55	172	0	7	5	9	18	0	2	1	1	0	3	1	1	0	1	282
PORTUGAL	0	11	57	1	1	3	1	17	2	1	1	0	0	1	0	2	0	2	100
ROMANIA	1	3	157	8	5	2	25	9	0	0	0	0	0	0	0	1	0	0	211
SLOVAKIA	0	0	1	0	5	1	2	2	9	0	1	0	0	1	0	4	0	1	27
SLOVENIA	0	0	2	0	1	0	1	0	0	0	0	0	0	0	0	1	0	0	5
SPAIN	41	114	12	141	1	50	8	51	4	0	3	2	0	1	1	2	0	3	434
SWEDEN	10	5	40	0	0	4	14	3	4	2	0	1	0	3	0	3	3	2	94
UK	0	4	14	1	8	1	2	49	33	1	0	1	1	7	2	6	0	3	133
TOTAL N	**107**	**334**	**680**	**165**	**79**	**98**	**187**	**381**	**134**	**19**	**14**	**12**	**4**	**33**	**10**	**60**	**5**	**26**	**2348**
%	**4,6%**	**14,2%**	**29,0%**	**7,0%**	**3,4%**	**4,2%**	**8,0%**	**16,2%**	**5,7%**	**0,8%**	**0,6%**	**0,5%**	**0,2%**	**1,4%**	**0,4%**	**2,6%**	**0,2%**	**1,1%**	**100,0%**

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal /City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cybercafé	Private Training Organization	Private Formal Educational Institution	Other
%	*100.0%*	*4.6%*	*14.2%*	*29.0%*	*7.0%*	*3.4%*	*4.2%*	*8.0%*	*16.2%*	*5.7%*	*0.8%*	*0.6%*	*0.5%*	*0.2%*	*1.4%*	*0.4%*	*2.6%*	*0.2%*	*1.1%*
Austria	2,841	129	404	824	200	96	119	226	461	162	23	17	15	5	40	12	73	6	31
Belgium	4,214	192	599	1,222	296	142	176	336	684	240	34	25	22	7	59	18	108	9	47
Bulgaria	3,243	148	461	940	228	109	135	258	526	185	26	19	17	6	46	14	83	7	36
Cyprus	272	12	39	79	19	9	11	22	44	16	2	2	1	0	4	1	7	1	3
Czech Rep.	16,783	765	2,387	4,867	1,179	565	701	1,337	2,723	958	136	100	86	29	236	71	429	36	186
Denmark	1,496	68	213	434	105	50	62	119	243	85	12	9	8	3	21	6	38	3	17
Estonia	1,448	66	206	420	102	49	60	115	235	83	12	9	7	2	20	6	37	3	16
Finland	2,714	124	386	787	191	91	113	216	440	155	22	16	14	5	38	12	69	6	30
France	19,474	887	2,770	5,648	1,368	655	813	1,551	3,160	1,111	158	116	100	33	274	83	498	41	216
Germany	9,879	450	1,405	2,865	694	332	412	787	1,603	564	80	59	50	17	139	42	252	21	109
Greece	1,354	62	193	393	95	46	57	108	220	77	11	8	7	2	19	6	35	3	15
Hungary	6,056	276	861	1,756	426	204	253	482	983	346	49	36	31	10	85	26	155	13	67
Ireland	1,007	46	143	292	71	34	42	80	163	57	8	6	5	2	14	4	26	2	11
Italy	23,707	1,080	3,372	6,875	1,666	798	989	1,888	3,847	1,353	192	141	121	40	333	101	606	50	263
Latvia	3,014	137	429	874	212	101	126	240	489	172	24	18	15	5	42	13	77	6	33
Lithuania	4,224	192	601	1,225	297	142	176	336	685	241	34	25	22	7	59	18	108	9	47

Luxembourg	173	8	25	**50**	12	6	7	14	28	10	1	1	1	0	2	1	4	0	2
Malta	141	6	20	**41**	10	5	6	11	23	8	1	1	1	0	2	1	4	0	2
Netherlands	3,666	167	521	**1,063**	258	123	153	292	595	209	30	22	19	6	52	16	94	8	41
Poland	25,444	1,159	3,619	**7,379**	1,788	856	1,062	2,026	4,129	1,452	206	152	130	43	358	108	650	54	282
Portugal	1,636	75	233	**474**	115	55	68	130	265	93	13	10	8	3	23	7	42	3	18
Romania	6,694	305	952	**1,941**	470	225	279	533	1,086	382	54	40	34	11	94	29	171	14	74
Slovakia	5,123	233	729	**1,486**	360	172	214	408	831	292	41	31	26	9	72	22	131	11	57
Slovenia	693	32	99	**201**	49	23	29	55	112	40	6	4	4	1	10	3	18	1	8
Spain	12,503	570	1,779	**3,626**	879	421	522	996	2,029	714	101	75	64	21	176	53	319	27	138
Sweden	3,060	139	435	**887**	215	103	128	244	497	175	25	18	16	5	43	13	78	7	34
UK	13,113	598	1,865	**3,803**	921	441	547	1,044	2,128	748	106	78	67	22	184	56	335	28	145
Total Sample	**173,971**	7,928	24,747	**50,452**	12,225	5,853	7,261	13,855	28,230	9,929	1,408	1,037	889	296	2,445	741	4,446	370	1,926
		108,467						**58,089**								**7,483**			

Using this procedure the number of municipal centers diminishes almost a 40% (from 40,115 to 24,747).

The following step consists on coming back to the countries and compare these figures with those obtained from local secondary sources in a limited number of countries (14) and for a few eInclusion typologies found out through desk research.

6.2   Selected country profiles

This first set is composed of 14 countries where the desk research process allowed identifying complementary sources as to allow analyzing or refining the figures hypothesized in 6.1

1. BULGARIA

We learnt from the survey that In Bulgaria, the predominance in the sample of public sector organizations vs. third sector organizations is less acute than in other countries (10% gap). Among public sector organizations libraries are highly represented in the sample (over 70%), while NGOs represent the highest percentage of organizations within the third sector (68%).

Bulgaria is one of the countries where the proportion of individual organizations (vs. network organizations) represented in the sample is higher than the average (80%) reaching 90% and over. However, a great percentage of individual organizations reports network membership (over 70%, vs. countries reporting less than 40%).

Bulgaria shows the sample's largest percentage (63%) of organizations belonging to big networks with over 500 members.

If we move to secondary sources of information, we found that the Global Library Bulgaria conducted a recent survey on libraries which are the major network providing ICT services to the population. Most of the libraries are members of BLIA (Bulgarian Library Information association) www.lib.bg. Global Library Bulgaria report can be found here http://www.glbulgaria.bg/upload/docs/Summary_Repport_LNA_EN.pdf

IFLA World Report 2010 (for which BLIA is contributing data) is another important source. IFLA full report can be found here: http://www.ifla-world-report.org/cgi-bin/static.ifla_wr.cgi. Some outcomes of the study for Bulgaria are that:

Approximately 21-40% of public and school libraries offer Internet access to their users, while 81-100% of university libraries and 61-80% of government-funded libraries do so. **This confirms that our estimation of 940 libraries providing eInclusion services is a reliable (rather conservative) one. It is based on the estimation (provided by BMGF study) that around 40% of the public libraries are offering PAC services, for a total number of libraries estimated by that study in around 3.000, number that was adjusted here to 2.351 after finding out that number in a public source.** So we ratify the estimation already presented for Bulgaria:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Bulgaria	3,243	148	461	940	228	109	135	258	526	185	26	19	17	6	46	14	83	7	36

On another note, it is worth mentioning that an *average* amount of local content published by local educational institutions, local non-governmental organizations and local industry (ranging from large companies to small, medium and micro-enterprises) is available on the Internet, while *much* of the local content online derives from the government or government agencies, newspapers, magazines, general broadcasters and locally originating tourist information. *Very much* of the local content on the Internet is available in Bulgarian.

IFLA study makes reference to these two relevant sources:

- CIA World Factbook, 2009 Edition (https://www.cia.gov/library/publications/the-world-factbook/index.html)
- Internet World Stats, as of 31 December 2009 (http://www.internetworldstats.com/)

Most relevant network organizations in the country: in Bulgaria there is no fully independent organization on country level which is major actor dealing with e-inclusion. Here is a list of few organizations/projects which have been working last years towards e-inclusion on national level:

1. **Bulgarian Library and Information Association** (BLIA), www.lib.bg

2. **Global Libraries project**, an initiative of Bill and Melinda Gates Foundation working to open the world of knowledge, information, and opportunity to many more people through 960 libraries in Bulgaria, http://www.glbulgaria.bg

3. **The National Business Development Network** (NBDN), an association of 42 business centers and business incubators established under the JOBS project, with the support of the Ministry of Labour and Social Policy, the United Nations Development Program (UNDP) and the local municipalities, http://www.nbdn-bg.org

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*Our village location is far from big city, we try to provide new services, educational programs and consultancy for local people, which can't afford to travel to the big city*	9%
2. Innovation in the provision of general services	*1. Through ICT services the access to scientific information is improved and new e-services, accessible via Internet, are created* *2. Training for users of the library, the primary computer skills; -New electronic services through the website of the library; -The new service "information counter of entrepreneur"; -New services "e-health" and "e-culture" (creation of local digital content); -Information about vacancies.*	18%
3. Innovation in the provision of targeted social and civic services	*We are in an extremely close relationship with the national rehabilitation center for the blind in Plovdiv. They are sending their members who may receive the ECDL certificate.*	9%
4. Innovation in skills provision and certification	*1. Developed skill for searching and using sources with specific information, which improves the education for students and improvement of scientific career*	18%

		2. This certificate [ECDL] provides them with the opportunity for professional development within the European Union, but also gives a certain prestige in the community.	
5.	Innovation in targeted employment and entrepreneurship services	1. Beneficiaries [i.e. blind people accessing to ECDL certification] have the self-confidence and the real opportunity to monetize on the labor market, although the Bulgarian mindset of most employers avoid hiring people with disabilities. 2. For the first time in 2012 we offered the service training for unemployed persons between 40 and 60 years in ICT and motivational behavior. As a result of the project 44 people started to work, increased their activity in the labor market, gained new skills and self-esteem, they came out of social exclusion.	27%
6.	Innovation on capacity building for the eInclusion sector	1. Our organization is not ICT related. The only common thing is developing and presenting presentation from our volunteers, need for some of our services 2. Vocational training and training in information and communication technologies for Librarian profession to enable librarians in the libraries to work as qualified specialists who will realize their effective functioning and have the knowledge and skills to provide modern facilities for the people of the locality.	18%
7.	Innovation in local partnerships for eInclusion		

2. DENMARK

We learnt from the survey that in Denmark there is not predominance of public sector organizations over third sector organizations like in the general sample. Among public sector organizations, libraries are highly represented in the sample (over 70%). On the other hand, this is one of the only two countries where Trade Unions (the least represented category in the sample) are represented.

Medium size organizations with staff size of less than fifty people make up over a third of the sample in this country, while another third has staff capacity of over fifty people.

If we move to secondary sources of information, we learnt than there is no national register of telecentres, nor a study of their impact in the whole country. However, the Danish Agency for Culture has published "Biblioteksbarometer for folkebiblioteker 2011" ("Library barometer") which is the latest survey of libraries, which are the most extended typology of e-Inclusion actors in the country. The survey can be found (only in Danish) at:

http://www.kulturstyrelsen.dk/fileadmin/user_upload/dokumenter/bibliotek/statistik/biblioteksstatistik/Folkebiblioteker/2011/Biblioteksbarometer_for_folkeb iblioteker_2011.pdf.

The survey states that 90.7 % of the Danish libraries provide courses in e-government for citizens, 81.4 % of libraries provide courses in general use of ICT, 45.4 provide courses in social media, and 48.5 % of them provide courses in using tablets, smartphones etc.

The Danish central government, the municipalities and the regions are in the process of transforming the public sector so that public service delivery becomes much more digital in the future. 80 per cent of written communication between citizens/companies and the public sector must take place online by 2015.

In the coming years, all Danish citizens will need to use the Internet from cradle to grave – from registering a birth to obtaining funeral assistance. It is of course crucial that citizens who need help can obtain it. Those who need help will receive it in the citizen service centers, the libraries or in the data rooms located around the country. And in special circumstances, citizens may be exempted from the requirement to use the digital self-service and the digital letter box if this is deemed justified.

As the level of digitization reached by public libraries (90%) was confirmed by desk research, therefore we ratify the estimation already presented for Denmark:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Denmark	1,496	68	213	434	105	50	62	119	243	85	12	9	8	3	21	6	38	3	17

Most relevant network organizations in the country: In 2009, the then Ministry of Science gathered the most predominant e-inclusion actors in the Learn more about ICT-network, and with a change in government in 2012, the network now is under the Ministry of Finance, Agency for Digitisation. The network listed as number 1 also includes the networks listed as numbers 2-6.

1. **Learn more about ICT network** (Lær mere om it) supported by the Danish Agency for Digitisation, 20 member organizations, national scope. Find out more: http://www.lærmereomit.dk/servicemenu/english

2. **The Association of Danish Senior Citizens** (Aeldremobiliseringen), a member of Telecentre-Europe, national scope. Find out more: www.aeldremobiliseringen.dk

3. **DaneAgeAssociation** (Ældre Sagen) http://www.aeldresagen.dk/om-os/in-english/Sider/default.aspx

4. **The Danish Agency for Culture** (Kulturstyrelsen) http://www.kulturstyrelsen.dk/english/

5. **The Danish Library Association** (Danmarks Biblioteksforening): http://db.dk/english

6. **Danish Adult Education Association** (Dansk Folkeoplysnings Samråd) http://www.daea.dk

Relevant examples of ICT-driven Social Innovation as informed by respondents:

A number of testimonies in Denmark refer to innovation in the promotion of e-Government services' adoption by citizens:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*This year we have widened our teaching so that it also takes place in village assembly houses, We are a municipal in a rural area spreading over a large area - lacking a bit in good infrastructure, In this project we take in volunteers in teaching and we hope that they afterwards will become the local digital contact persons that citizens in the villages can contact for help with using e-government.*	10%
2. Innovation in the provision of general services	*1. The telecentres increasingly supply training in e-government, But the special strength in our telecentres is still that apart from the training, they give participants the opportunity to create new networks in the social sphere,* *2. Computer training in residential areas. IT training for specific groups such as ethnic minority/older/socially vulnerable groups. Mobile data rooms.* *3. Development of accessibility. Testing public websites for accessibility, user tests for accessibility.* *4. Development of mobile solutions (smartphone, etc.) both for the library and as public self service solutions*	40%
3. Innovation in the provision of targeted social and civic services	*1. EPCD is a transnational NGO and association of the Fountain House type Clubhouses in Europe for people with mental disorders and mental health problems, as well as of other stakeholders in the field of psychosocial rehabilitation supporting the social, economic and cultural inclusion and empowerment of members of Clubhouses. ICT-skills training programmes are available in all about 80 European Clubhouses based on peer support and special ICT courses.* *2. We are in a project which will focus on helping young people communicate digitally with public authorities.* *3. Our task in relation to the IT sector, is to motivate the older section of the population in the use of ICT and the internet. Make visible the possibilities and features the Internet has, and thus ensure the elderly the opportunity to participate in society on an equal footing with all others. At the same time, it is essential for the Organization that all older people have equal opportunities in Denmark, whether one is on the Internet or not.* *4. Most teaching of senior citizens for, among other things. to make them ready for the public sector digitization*	40%
4. Innovation in skills provision and certification		
5. Innovation in targeted employment and entrepreneurship services	*We are entering the national project focusing on helping SMEs use e-government services.*	10%
6. Innovation on capacity building for the eInclusion sector		
7. Innovation in local partnerships for eInclusion		

3. FINLAND

We learnt from the survey that in In Finland around 80% of the organizations represented in the survey belong to the public sector (vs. 58% at EU27 level). Finland is one of the countries where the proportion of individual organizations (vs. network organizations) represented in the sample is higher than the average (80%), reaching 90% and over.

Medium size organizations with staff size of less than fifty people make up a third of the sample in this country. Here, the local government represents the first more important source of funding for over 60% of the organizations. This is one of the few countries where usage and service fees play as a source of funding (cited by survey respondents as an important source of funding by over 20% of the organizations)

If we move to secondary sources of information, we learn that one of the most relevant reports related to the Information Society in Finland is the *SADe Services and Project Report* dated in 2009 (available at http://www.vm.fi/vm/en/04_publications_and_documents/01_publications/04_public_management/20100107SADeSe/name.jsp). Its summary (the only piece available in English language) depicts the e-government state-of-art in the country:

"The most frequently used eServices in the public sector include services offered by the labor administration, weather forecasts, route guides in metropolitan Helsinki area and university web services related to studying and media information. The web services of big cities are also used quite frequently. Electronic services designed for businesses are very comprehensive and widely used. The Social Insurance Institution and the tax administration authorities have devised new services for citizens and the use of these services is rising. Many public organizations do not actively promote their eServices on their websites. The implementation of eServices is also often fragmented and many services still require registration."

This report says nothing that allows estimating the size and type of e-Inclusion intermediary organization operating in the country, so we keep invariable the estimation already presented for Finland:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Finland	2,714	124	386	787	191	91	113	216	440	155	22	16	14	5	38	12	69	6	30

Most relevant network organizations in the country: probably due to the country's long tradition on Adult Education, a number of relevant e-Inclusion actors identified comes from the lifelong learning and non-formal education sector:

1. The **Finnish Association of Adult Education Centres** (Kansalaisopistojen liitto KoL) acts as an umbrella organization for the **adult education centers** in Finland. Find out more: http://www.ktol.fi/index.php?k=21860

2. The **Association of Summer Universities** in Finland (Suomen kesäyliopistot ry) aims to take care of the interests of **summer universities**. Find out more: http://www.kesayliopistot.fi/koulutustarjonta/in_english

3. The **Training Alliance** (Bildningsalliansen) is a Swedish umbrella organization for the promotion of Nordic adult education values and liberal education. Find out more: http://www.bildningsforum.fi/start/

4. The **Finnish adult education Association** (VSY) promotes non-formal education in Finland by negotiations, initiatives and development work. Find out more: http://www.vsy.fi/en.php

Other organizations:

1. **The International Federation of Library Associations and Institutions** (IFLA) is the leading international body representing the interests of library and information services and their users. It is the global voice of the library and information profession. Many of the other smaller networks mentioned by survey respondents are libraries (kirjasto or bibliotek) represented by IFLA. Find out more: http://www.ifla.org/

2. **Finnish Clubhouse Coalition** formed by 20 clubhouses. Find out more: http://www.fh-klubitalot.fi/in_english.html.

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*One of these courses [for elderly people] is in small village (60 km from center). Students take their own laptops to course and learn to use them. It has been a very successful way to learn.*	9%
2. Innovation in the provision of general services	*1. Using the social media tools to contact distant relatives, replacing former near services with internet connections (social services, banks, health advisory, reservations, available jobs etc.)* *2. For the general community members our training and courses gives free-time hobbies and social contacts every week where they do not need too much of their own resources.*	18%
3. Innovation in the provision of targeted social and civic services	*1. Short Facebook -courses for elderly have been quite popular opening them a new world and encouraging them to use computers in general, especially internet and probably also other social media services. In the basic education for using computers - some groups targeted especially for the elderly, some for anybody interested - the computer as a tool is introduced, the MS Office -programmes are taught and also internet for fun and more serious use are explored all this together giving quite good basic tools for using computers for all needs; tablet computers and smart phones are new items this year*	27%

		in the course programme - not too popular yet; taking digital photos and processing them and producing digital photobooks have been in the programme for a couple of years and are popular - those also encouraging for more varied use of computers in general	
		2. Celia serves people with print disabilities. We provide our users with accessible materials, such as talking books, e-books and Braille books. We are a part of the International Daisy Consortium, which works towards standards in accessible publishing. E-books and their delivery is on the rise in Europe, but accessible publishing of digital materials needs to be addressed more often. Big e-projects and digitization projects too often forget all about accessibility! Just because something is digital does not mean it is accessible for people with visual impairment or cognitive disabilities, such as dyslexia. These are not minorities, but may add up to 10% of the European population! IFLA Section for Libraries for Persons with Print Disabilities is one (global) network with many European members, who actively work towards realizing an accessible digital reality.	
		3. One of the major need in our society is that adults and senior citizens are lonely and sometimes also far away from their children and relatives. We try to train them in social media and bring their relatives and children near them through email, Skype phones and other manners.	
4.	Innovation in skills provision and certification	Our customers can digitize their old videos, photographs, cassettes etc.	9%
5.	Innovation in targeted employment and entrepreneurship services	For the working age people our training means that they have possibility of searching jobs through internet and have better opportunities.	9%
6.	Innovation on capacity building for the eInclusion sector	We promote new ways of using existing internet and social media resources in creating collaborative networks between professionals working on themes linked to preventing exclusion: our training includes setting up yammer groups for regional decision makers, Facebook groups and Skype meetings for educators, second life for service innovators etc.	18%
7.	Innovation in local partnerships for eInclusion	Co -operation with the organizations of senior citizens in organizing ICT training programs.	9%

4. FRANCE

We learnt from the survey that the number of municipal/city government eInclusion actors in French sample is significantly higher than in most of the countries. France is one of the countries where a great percentage of individual organizations reports network membership (over 70%, vs. countries reporting less than 40%).

 This is one of the countries with the largest proportion of organizations with staff capacity of less than ten people (over 65% of the organizations). A very interesting finding is the role that usage and service fees play as a source of funding in this countries (over 40% of respondent organizations).

If we move to secondary sources of information, the best source to investigate the typologies of telecentres in France is probably the national directory of telecentres (http://www.netpublic.fr/net-public/espaces-publics-numeriques/repertoire-national/?cmq_path=liste) with 4.972 sites registered. The site also offers a presentation of the different networks: http://www.netpublic.fr/net-public/espaces-publics-numeriques/programmes-reseaux-labels

Our estimation was that there are 1.368 government-run telecentres, plus 5.822 eInclusion organizations from the Third Sector (NGOs, Associations, Charitable organizations, Foundations, Community organizations) which typically run telecentres as well. **All in all, we estimated about 7.000+ telecentres, a number that is not in contradiction with the almost 5.000 telecentres registered in the French directory**.

If we take a look to our French sample, public libraries (N=44, 20%) representation is below the hypothesized level at EU27 level (29%). The most represented typologies in the French sample (N=219) are municipal centers (N=76, 35%) and telecentres (N=4+62+1, 30%). Combining the 4.972 entries from the French telecentre directory with the percentage of telecentres in the sample (government-run, NGOs, Associations and Community organizations), but maintaining the number of public libraries providing PAC services as estimated by the BMGF study (75% of 7.530), we can improve our estimation for France to:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
France (old)	19.474	887	2.770	5.648	1.368	655	813	1.551	3.160	1.111	158	116	100	33	274	83	498	41	216
France (new)	19.681	839	6.376	5.648	297	84	1.175	0	4.601	74	0	84	0	0	168	84	168	0	84

On another note, recent studies that concern e-Inclusion actors characterization in France comprise as well:

- A survey done in 2012 about the "400 something" EPN in Région Rhône-Alpes: http://www.rhonealpes.fr/include/viewFile.php?idtf=12605&path=0a%2FWEB_CHEMIN_12605_1351504220.pdf
- A survey done in 2012 about the EPN in Région Provence Alpes Côte d'Azur: http://emergences-numeriques.regionpaca.fr/fileadmin/ERIC_Groupe_de_travail/Eric_page_public/brochure-enquete-eric-DEF_1_.pdf
- Main results of an assessment done in Region Basse-Normandie: http://fr.slideshare.net/jlamache/120112-evaluation-politique-epn-bassenormandie
- Les carnets de la mediation numérique, a publication released in 2012 which is an outcome of the 2011 Assises de la médiation numérique:: http://www.google.fr/url?sa=t&rct=j&q=&esrc=s&source=web&cd=2&cad=rja&ved=0CDcQFjAB&url=http%3A%2F%2Fassmednum.corse.fr%2Ffile%2F126420%2F&ei=rml-UbDTN8iUOPuvgcAF&usg=AFQjCNH510vGYRpO3TcQZOCNzN3vOi5jDg&sig2=wfiG-SpnNt_JS0Wk4jOthg

Most relevant network organizations in the country: a combination of respondent networks and desk research led the research team to organize these networks in two groups according to their geographical scope:

National:

1. **Créatif,** a network of networks and stakeholder's. Around 20 networks gathered. Find out more: http://www.creatif-public.net

2. **Réseau des cyberbase**, with around 700 telecentres. Find out more: http://www.cyber-base.org/institutionnel/home.do

3. **Netpublic** – not a network as such, it is the name of the national online resources center. Carried by the Délégation aux usages de l'Internet, it has a directory of 4 700 telecentre registered. Find out more: http://www.netpublic.fr

4. **Union nationale des PIMMS** with its 54 telecentres. Find out more: http://www.pimms.org/weblib/page.jsp?currentNodeId=7

5. **Villes Internet,** a network of cities dealing with ICT. Find out more: http://www.villes-internet.net/

Regional:

6. **Cybercommune Région Bretagne** http://www.bretagne.fr/internet/jcms/c_17313/des-nouveaux-usages-pour-tous

7. **CORAIA** (Coordination Rhône-Alpes de l'Internet Accompagné et les réseaux membres de cette coordination) which represents 400 telecentres on the concerned territory, even if not all them are network members. Find out more: http://www.coraia.org

8. **Réseau des EPN de Basse-Normandie,** which groups 115 telecentres. Find out more: http://epn.region-basse-normandie.fr

9. **Réseau Information Jeunesse,** which groups more than 100 telecentres. Find out more: http://www.cidj.com/reseau-ij/le-reseau-information-jeunesse-national

10. **Réseau des ERIC (Region Provence Alpes Côte d'Azur)** with 157 EPN (digital public spaces). Find out more: http://emergences-numeriques.regionpaca.fr/fileadmin/ERIC_Groupe_de_travail/Eric_page_public/brochure-enquete-eric-DEF_1_.pdf

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*1. We have a running project as there is no more driving school in our rural area since 1999, unless persons manage a 30 km journey to the closest existing school. We are going to offer an online training program to pass the theoretical exam and we will organize with a close by driving school on our premises.* *2. We provide videoconferencing coworking and an encountering place in a rural village*	9%
2. Innovation in the provision of general services	*1. Through the use of ICT's and eLearning tools, increase awareness to environmental issues and sustainable development issues, as well as social and solidarity-based economy.* *2. Implementation of solidarity mobile phone to allow access to mobile communication in order to facilitate social inclusion* *3. The telecentre is opened to the users of an emergency shelter to allow encounters with local inhabitants (social, cultural and age variety)* *4. Training sessions for the use of readers and tablets. Digital treasure hunts build in a cross over and intergenerational way to facilitate development of skills.* *5. We give recycled computers to socially disadvantaged persons or low income persons. We receive this computers from local councils and local companies and hence take part in a sustainable economy. We recycle this material using free software (e.g.: Ubuntu). We then link beneficiaries with close by telecentres or other structures providing accompaniment.* *6. Solidarity mobile phone has the mission to provide a fair and sustainable access to telecommunications for persons encountering financial difficulties in order to facilitate their social inclusion and create social links. Solidarity mobile phone provides a solidarity offer (mobile cards, mobile phones) and advices on communications choices (what offer to choose? Where to find the "right offer", how to read phone invoices ?). Beneficiaries are identified by social workers partners of the project. More than 2.300 persons have benefited from this double side project:; access and uses.* *7. We provide awareness sessions to OpenData for citizens and associations*	32%
3. Innovation in the provision of targeted social and civic services	*1. To organize workshops in close relation with medical social center, to help persons with important social difficulties to gain ICT skills and to use on line public services* *2. Inter-generational workshop to allow sharing of know-how through ICT's mediation.* *3. We offer adapted training for visually impaired persons, we do VJ'ing activities, we propose video game and 3D programmation* *4. Serious games to increase teenagers awareness, collaborative tools to invite them to take part in social issues debates - e-accessibility tools for kids - cross-media awareness programs targeted to children, parents and educators -interactive*	23%

		onsite installation - interactive mediation tools to prepare, facilitate, train teachers and educators	
		5. ICT's workshops in elderly homes (games on tablets, Skype) in partnership with primary school pupils.	
4.	Innovation in skills provision and certification	*1. We have activities which allow people to express and create through multimedia tools: video, editing, computer-assisted music* *2. The WordPress workshop we offer to associations and individuals has allowed sharing of ideas, sometimes around the creation of activities. We are looking forward to amplify this sharing of experiences in a "coworking space approach".*	9%
5.	Innovation in targeted employment and entrepreneurship services	*1. We are developing a "digital public writer" project : it will allow people to receive help for job hunting and will facilitate IT skills development for unemployed persons.* *2. The Solid'Rnet project aims at developing uses of ICT's by Supplementary Welfare Allowance beneficiaries, persons accompanied by social workers and precarious salaried persons working in Rehabilitation by economic activities structures. The accompaniment can lead to equipment through the use of recycled computers by an insertion company (les Ateliers du Bocage : http://www.ateliers-du-bocage.com) . All this material is operating on free software operating system (Linux and applications). A financial help for Internet access can be provided for low income families with pupils. Accompany, equip, and connect is the project carried by 11 facilitators and several volunteers on the concerned territory.*	9%
6.	Innovation on capacity building for the eInclusion sector	*1. Within the framework of the European projects VET4e-Inclusion and RAISE4e-Inclusion we have developed e-learning training modules for e-facilitators to accompany people far from uses of ICT's* *2. Implementation of a territorial scheme organized with two streams of actions: providing equipment and providing accompaniment; Beneficiaries are: pupils, associations, persons in social rehabilitation, libraries, and elderly homes.* *3. In a near future we are developing website creation for local organizations and a "local fablab" to discover programmation* *4. We are creating a GNU/Linux distribution tailored for telecentres. We are creating and documenting resources on practices F47and uses of digital tools. And we are creating a French Fablab cartography.*	18%
7.	Innovation in local partnerships for eInclusion		

5. GERMANY

We learnt from the survey that in Germany less than 50% of the sampled organizations belong to the public sector (vs. 58% in the total sample). Within the third sector, NGOs represent the highest percentage of organizations (over 70%). Regarding the private sector, Germany is one of the countries with the highest number of organizations belonging to this sector. Network membership appear to be comparatively low (below 40% of the sampled organizations).

If we move to secondary sources of information, we know that in 2001 the German Ministry of Economics and Technology assigned Stiftung Digitale Chancen for the set-up of a nationwide database of telecentres (PIAPs – Public Internet Access Points) in Germany. The database is updated permanently on a regular basis since 2001, and can be consulted (in German language) at http://www.digitale-chancen.de/einsteiger.

- As of 2013 the database has 14,775 entries.
- Thereof 7,147 are complete and in use for requests to the database
- 2,756 are entries of institutions known as providing access to the Internet for the public. These entries are not yet completed, but will be completed step-by-step in the time to come.
- 4,872 are entries of institutions that have been providers of Internet access to the public previously but are currently no longer in operation.

All entries are based on a telephone interview with staff in the institutions and updated via e-Mail and additional phone calls on a regular basis. Thus high quality and updating of the data is ensured. A complete entry in the database covers the following information:

- Name of institution
- Address
- Phone, E-Mail, URL (if applicable)
- Type of institution
- Opening hours
- Target group of institution
- Restrictions of Access
- Number of PCs connected to the Internet
- Fee for Internet usage
- Provision of courses (incl. fees)
- Use of Filtering Software
- Accessibility of institution and equipment
- Language skills of staff
- Additional services

In addition to the more or less permanent work of the telecentres in the database, Digital Inclusion work is also done by temporary projects. At present an estimated number of 350 – 500 suchlike projects are run by a broad variety of institutions all over Germany. Approximately 250 projects are to be found in the web platform of Stiftung Digitale Chancen, allocated to their target groups and topics at www.digitale-chance.de/experten. A new mapping of digital literacy projects in Germany was started in April 2013 and will be concluded by the end of this year.

As for the estimated universe of eInclusion organizations in Germany, from the total number of accurate entries in the database facilitated by Stiftung Digitale Chancen (N=7.147) the distribution per type of organization looks as follows:

4. 34% libraries
5. 49% NGOs
6. 17% others

As this is a large national sample, we can improve our original estimation using this source. Firstly, the weight of libraries is higher than originally estimated (34% vs. 29%) which suggests that the total number of eInclusion organizations is lower (as it was originally deducted from the number of libraries offering PAC services as per BMGF study). In absolute term we are speaking of 2,430 registered libraries vs. 2,865 estimated by BMGF (or 3,000 estimated by SDC), so we keep the estimated absolute number of libraries but vary the total universe of actors for Germany. Secondly, the fact that the database is maintained by a NGO suggests that this typology is well represented in the sample. 49% NGOs means 3,502 entries in the database, which we estimate that represents 85% of the total eInclusion NGOs in the country (as libraries do), i.e. 4,120 organizations. Like with France, we use these two values to adjust our estimation.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector									Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Germany (old)	9.879	450	1.405	2.865	694	332	412	787	1.603	564	80	59	50	17	139	42	252	21	109
Germany (new)	8.408	103	321	2865	159	76	94	4120	366	129	18	13	12	4	32	10	58	5	25

Most relevant network organizations in the country: in Germany, the e-Inclusion sector is diversified:

1. Federal Association of Adult Education organizations (Deutscher Vokshochschulverband), with more than 1.000 members. Find out more: http://www.dvv-vhs.de

2. Digital Opportunities Foundation (Stiftung Digitale Chancen), responsible for digital inclusion in Germany, running a database of Public Internet Access Points on behalf of the Federal Ministry of Economices and Technology (> 6.000 entries). Find out more: http://www.digitale-chancen.de

3. Federal Library Association (Deutscher Bibliotheksverband) with more than 2.000 libraries. Find out more: http://www.bibliotheksverband.de

4. Regional network of Digital Literacy Activities in Northrhine-Westphalia (Medienkompetenznetzwerk NRW), with a range of 500 to 1.000 entries and regional scope. Find out more: http://www.mekonet.de/t3/index.php?id=85

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Note: since most of the German sample comes from a previous survey which didn't contain a question about innovation, only a few innovation answers were obtained as part of the reduced number of new surveys gathered. Thus, the scarce number of examples cited below.

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas		
2. Innovation in the provision of general services	*1. Production of Videos for citizens TV in North-Rhine Westphalia* *2. Digital literacy training, training for reading and writing, Promotion of E-Participation*	40%
3. Innovation in the provision of targeted social and civic services	*1. Research on the needs of underprivileged groups regards the use of ICT, development of new fields of research* *2. Support of digital inclusion of the elderly, especially in rural areas, telecentres in close connection to the homes of elderly* *3. Multilingual courses for parents regards media education, low threshold courses for women only with child care in parallel*	60%
4. Innovation in skills provision and certification		
5. Innovation in targeted employment and entrepreneurship services		
6. Innovation on capacity building for the eInclusion sector		
7. Innovation in local partnerships for eInclusion		

6. HUNGARY

We learnt from the survey that in Hungary, third sector organizations double in the sample the number of respondents from public sector organizations. Municipal/City Government organizations have a higher representation, where over a third of organizations reported belonging to this category. Hungary is one of the countries where the proportion of individual organizations (vs. network organizations) represented in the sample is higher than the average (80%) reaching 90% and over. And it is the country which by far has the largest proportion of organizations with staff capacity of less than ten people (over 90%).

If we move to secondary sources of information, some relevant studies and research papers on e-Inclusion actors were identified in Hungary:

1. The Hungarian Telecottage Association conducted an overarching research in 2006 on telecentres and other community access points (available in Hungarian language at http://www.telehaz.hu/images/tudastar/telehaz_kutatas_vegleges.doc). More than 400 telecentres were involved in the research that analyzed their operational, infrastructural and financial conditions. The research study draws conclusions and makes recommendations on how to improve sustainability of telecentres in Hungary. The Hungarian Telecottage Association developed and published its strategy for the period of 2007-2013 (available in Hungarian language at http://www.telehaz.hu/images/dokumentumok/modulok/telehaz_strategia_2007-13%5B1%5D.pdf) describing the development of the network, terms of telecentres, membership types and conditions, and programmes and services the Association aims to provide to its members.

2. Edit Fabulya, a telecentre manager and regional network coordinator from South Hungary wrote a thesis paper in March 2010 at Eötvös Loránd University about e-inclusion actors (available in Hungarian language at https://skydrive.live.com/redir?page=view&resid=F98AA7DD5BE898FC!453&authkey=!AB10x-h0r1oMLkI). It describes existing networks (Telecottages and Telecentres, eHungary Points, Integrated Community Service Spaces, Youth Info Points, Employment Info Points, etc.) and discusses the parallel development of these networks and efforts to integrate and sustain existing infrastructure at both central and local levels. The thesis paper presents an initiative of key e-Inclusion actors to create an Info-Coalition (http://www.telehaz.hu/index.php/projektek/14-tamop-infokoalicio). It describes an extensive research among member organizations of Info-Coalition aimed at identifying various goals and interests of e-inclusion actors, mapping financial, technical, and human resources as well as professional aspects and methodologies. The research sought to support the Info-Coalition in order to better represent the interests of members as well as to effectively build the capacity of individual organizations.

3. The Information Society and Trend Research Institute (ITTK) is a research institute of the Budapest University of Technology and Economics. Available research studies on information society and e-inclusion actors:

- Hungarian Information Society Report (2004, 2005, 2006, 1998-2008)

- World Progress Report - Annual Report of Information Society (2004 + annexes, 2005, 2006, 1998-2008)

- Hungarian e-Government Report (2005, 2006, 2007, 2008)

- Hungarian e-Inclusion Report (2007, 2008)

- Mobile World Development Report ([2004](#))

4. The Hungarian e-Inclusion Report 2008 (available in English language at http://www.ittk.hu/images/stories/bme/evkonyv/ittk_hungarian_einclusion_annual_report_2008.pdf) provides a broad overview on the status of information society development in Hungary, presents government programmes and other sector initiatives, and provides an insight to successful programmes and initiatives such as:

- Grandparent-Grandchild Informatics Competition
- Digital Equal Opportunities Programme
- Wi-Fi-village Programme in Roma Communities
- Telecottages and IT-mentors
- Digital Secondary School

Based on those studies and the records of the organizations themselves, the following major e-Inclusion networks can be reasonably quantified in Hungary as follows:

Telecentres ("teleházak")

Website: www.telehaz.hu

Number of centers: 360 (searchable database: http://www.telehaz.hu/index.php/kapcsolattartok)

Network: Hungarian Telecottage Association (former member of Telecentre-Europe, presently not operational). Composed by seven regional networks still in operation.

Funding: international donors (until 1998) then by government development programmes (until 2004)

Type: community access, training, community development and support

Location: typically at rural areas, in villages, hosted by NGOs, cultural centers, community centers, schools, local governments, folk houses, libraries

Ownership: most telecentres are operated by NGOs (approx. 70%), but many telecentres belong to local governments, local governmental institutions, or local enterprises.

e-Hungary Points ("e-Magyarország pontok")

Website: www.emagyarorszag.hu

Number: 2000 centers (database: http://www.emagyarorszag.hu/index.php/eMagyarorszag-Pontok)

Network: not networked, partly represented by the Hungarian Telecottage Association. Administrative management body: NT Non-profit Public Benefit Co. (former member of Telecentre-Europe, presently not operational)

Funding: government programme (2004-2006)

Type: no new institution established, computer and internet access distributed at 2000 publicly accessible places

Location: local governments, schools, local public institutions, hotels, churches, NGOs

Ownership: eHungary Points are miscellaneous institutions providing public internet access

Integrated Community Access Spaces ("Intergrált Közösségi Szolgáltató Terek" – "IKSZT")

Website: www.ikszt.hu

Number: 335 centers (database: http://www.ikszt.hu/ikszt_open/file_open.php?number=qxscjfgysj)

Network: not networked, administrative management body: National Agro Advisory, Training and Rural Development Institute ("Nemzeti Agrárszaktanácsadási, Képzési és Vidékfejlesztési Intézet")

Funding: government programme (since 2008)

Type: revitalization and development of existing local institutions such as telecentres, community centers, libraries

Ownership: IKSZTs are owned by local governments or local public institutions (72%), NGOs (26%), and churches (2%)

Mandatory services: provision of community internet access, operation of youth information services, general information services for entrepreneurs and citizens

Libraries ("könyvtárak")

Number of public access libraries (excluding specific professional libraries): 1053 (database: http://ki.oszk.hu/sites/ki.oszk.hu/files/dokumentumok/teljesnykj_0.xls, provided by the Library Institute, 2012)

Network: Library Institute (http://ki.oszk.hu), Alliance of Libraries and Information Institutes (www.iksz.shp.hu), National Alliance of Public Collections (http://www.oksz.eu)

Ownership: local governments (95%), regional governments, universities, churches, other public institutions

With those figures obtained from desk research we refine our forecast for Hungary:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Hungary (old)	6,056	276	861	1,756	426	204	253	482	983	346	49	36	31	10	85	26	155	13	67
Hungary (new)	3,631	80	708	1,053	467	67	0	662	375	50	40	80	40	0	7	0	0	0	2

In Hungary the most important e-Inclusion networks are:

1. **Hungarian Telecottage Association** (Magyar Teleház Szövetség) and its seven regional branches:
   - South-Great-Plain region (www.telehaz-del-alfold.hu; dte@vnet.hu)
   - North-Great-Plain region (eszak-alfold@telehaz.hu)
   - North Hungarian region (eszak-magyarorszag@telehaz.hu)
   - Central Hungarian region (kozep-magyarorszag@telehaz.hu)
   - South-Trans-Danubian region (del-dunantul@telehaz.hu)
   - Central-Trans-Danubian region (kozep-dunantul@telehaz.hu)
   - Western-Trans-Danubian region (nyugat-dunantul@telehaz.hu)

   Their scope of work is national and regional, respectively. The national network has 364 active telecentre members; and they all belong to one of the seven regional networks. Each network contains 60-80 telecentres; the most active ones are the South-Great-Plain and the South-Trans-Danubian regions. Find out more: www.telehaz.hu

2. **eHungary Points** (eMagyarország Pontok), a national network of 2,000 access points that provide citizens with free access and support to eGovernment services. Find out more: http://www.emagyarorszag.hu

3. **Forum for Hungarian Information Society** (Informatikai Érdekegyeztető Fórum), a national network of 17 ICT networks, associations and think-thank organizations to increase the benefits and social inclusion of information society in Hungary. Find out more: http://www.inforum.org.hu/

4. **Alliance of Libraries and Information Institutes** (Informatikai és Könyvtári Szövetség), a national alliance of libraries to support information society development. Number of members:
    1. county-scope libraries: 20
    2. city libraries: 101
    3. scientific and special libraries: 67
    4. workplace libraries: 7

    Find out more: www.iksz.shp.hu

5. **DemNet Foundation,** which aims to support the financial-human-institutional sustainability of telecentres, to strengthen their social embeddedness and the role they play in promoting community innovation. Not a membership-based organization, but established 31 telecentres and represents Hungarian telecentres in Telecentre-Europe. International scope. Find out more: www.demnet.hu

Relevant examples of ICT-driven Social Innovation as informed by respondents:

A number of testimonies in Hungary highlight innovation for local community development and e-Government adoption:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*Establishing touch-screen terminals in rural schools and rural post offices for accessing e-government services.*	9%
2. Innovation in the provision of general services	*1. Preparing community knowledge inventory, supporting education and research, internet courses for citizens, organizing "Internet Fiesta" - a national programme with the participation of 200 libraries.* *2. Accessibility of e-government information services, providing the information in easy-to-understand language.* *3. Community empowerment through information services.* *4. Digital registry and documentary applications of micro and small enterprises. Creating and maintaining statistical registry to support social workers.*	36%
3. Innovation in the provision of targeted social and civic services	*1. Developing training curriculum for young people how to disseminate their ICT knowledge to older generations.* *2. Providing ICT accessibility for the hearing impaired: learning and using ICT, job-searching, seeking for information, establishing and maintaining relationships.*	18%
4. Innovation in skills provision and certification		
5. Innovation in targeted employment and entrepreneurship services	*1. Increasing ICT skills of low-income, disadvantaged youth and senior people.* *2. Informing youth and unemployed, providing legal assistance, supporting job-seekers (e.g. writing CVs).* *3. Job-seeking, especially abroad. Helping in related administration.*	27%

6.	Innovation on capacity building for the eInclusion sector		
7.	Innovation in local partnerships for eInclusion	*Keeping topics of information society, elderly, e-Inclusion, and inter-generation solidarity an issue in the media and a target of advocacy.*	9%

7. ITALY

We learnt from the survey that the proportion of represented Third Section organizations is slightly higher than of Public Sector ones. National, Regional, or State Agencies represent a percentage (22%) which is significantly higher than in most of the countries. Italy also shows the highest percentage of formal educational institutions represented in the public sector with almost half of the responses in the country.

Italy is one of the two countries in the sample where network of organizations represent over 30% of the survey responses (vs. 20% general). In terms of network size, 21% of organizations belongs to big networks with over 500 members. However, less than 40% of the organizations report network membership.

Almost a third part of respondent organizations expresses a staff capacity of over fifty people. In terms of funding, the local government represents the first more important source for over 60% of the respondent organizations.

If we move to secondary sources of information, we need to refer to the CISIS – "Centro Interregionale per I Sistemi Informatici, Geografici e Statistici", the Interregional Center for Information, Geographical and Statistical Systems born from an association between the Italian Regions and Autonomous Provinces that has just published the report **RIIR 2012: Rapporto 2012 sull'Innovazione nell'Italia delle Regioni** available on the following link: http://www.cisis.it/

This **Report on Innovation of the Regions in Italy 2012 (RIIR)** offers an overview of the main innovations of information and technology and was designed and built as a dynamic instrument to access data and indicators at the regional level that are the basis of interpretation and analysis of the Report. The objective of the Report is to facilitate, by means of dynamic representation, the display of information at regional level and thus enabling a comparative analysis of regional performance.

The report is composed of the following four chapters in order explore the different policies implemented by the Italian regions:

- FRAMEWORK (Regional policies for an Information Society; Actors (page 29 of the report) Information Society Regional Governance and Community network)
- INFRASTRUCTURES AND SAFETY
- E-GOVERNMENT, E-HEALTH AND OPEN DATA
- DIGITAL SKILLS (e-Inclusion and school) – page 88 of the Report

According to this report, a 2012 novelty from the point of view of governance was the launching of a management cabinet dedicated to the Digital Agenda. For each region in its territory, the *community networks* are the governance tool to transfer nationally-defined innovations and standards defined at the interregional level, to the local level. Sixteen regional community networks are operative.

Some of the community networks are aimed to promote digital inclusion (six regions). Among others:

- The project P3@Veneti is aimed at the realization of public access centers in the municipalities that can offer its citizens a place of infrastructure oriented to meet the needs of connection and computer literacy.
- Internet Social Point project of the Basilicata region (Internet access points and training)
- Toscana with TRIO, Abruzzo with ComNET-RA, Basilicata on the site Basilicatanet (development and promotion of training kits and e-learning platforms)
- In Emilia Romagna, within the framework of the community network, there is a specific Thematic Communities "Web Solutions for E-inclusion" which promotes the adoption of web tools at all institutions.

At least 1,275 Public Internet Access Points have been activated by regional governments in Italy:

	Project name	Number of centres PAAS-PIAP activated in the territory
	Projecs for the activation of pubic access centres in the Regions	
Liguria	CIS – Centri Informatizzati di Socializzazione	56
Lombardia	no projects*	-
P.A. Bolzano	no projects	20
P.A. Trento	Sale multimediali	12
Veneto	P3@Veneti	166
Friuli Venezia G.	PASI – Punti di Accesso Servizi Innovativi	102
Emilia-Romagna	Pane e Internet	nd
Toscana	Rete dei PAAS	280
Umbria	no projects	-
Marche	no projects	-
Abruzzo	CAPSDA	15
Molise	Progetto attivo	nd
Campania	SAX e CAPSDA	221
Puglia	CAPSDA	132
Basilicata	Progetto ISP	149
Sicilia	CAPSDA	18
Sardegna	Intervento @ll-in	104

(*) planning under development
Source: CISIS, 2012 (data non available for all Regions)

[Regional projects for digital inclusion]

	Number of Projects	Typology					Examples
		e-democracy	Digital citizenship	Social inclusion	Assisted public access	Territorial Inclusion	
Piemonte	1	X					CRPNET
Valle d'Aosta	3			X			Computer in famiglia, PC per anziani, Tablet politiche sociali
Liguria	3	X		X			SESAMO
Lombardia	2			X			Eldy Lombardia
P.A. Trento	3			X			Eldy, Net Carity
Veneto	6	X	X		X		P3@Veneti, EG$G
Friuli Venezia G.	3	X	X	X			Pasi, Eldy FVG
Emilia-Romagna	4	X		X	X	X	Pane e Internet, Io parecipo, OPTA
Toscana	7	X	X	X	X	X	PAAS, TELEP@B
Lazio	2					X	e-citizen
Abruzzo	2	X			X		SAXB, SAXP
Molise	4				X		CAPSDA, SAXB, SAXP
Campania	7		X	X		X	Allarga la rete
Puglia	7	X	X	X			Easywalk, Emoticons
Basilicata	2	X		X	X		STARS, Internet Social Point
Calabria	1		X				Cittadinanza digitale attiva
Sicilia	2	X		X	X		CAPSDA, EDARS
Sardegna	5	X	X	X	X		e-Democracy, Surdlin sardinia

Source: CISIS, 2012 (data non available for all regions)

We had estimated that there were 1,080 National, Regional, and State Agency eInclusion centers while this report is showing that there are at least 1,275 PIAPs activated by regional governments. Even if both figures are not so different, the second one will help adjusting the Italian estimations, as already happened with France and Germany. If we take a look to our sample, this typology of organizations has a weight of 4.6% of the total. Applied to Italy, this

means incrementing the estimation of the sector size to 27,717 units. This combined with the number of public libraries providing PAC services as estimated by the BMGF study leads to this adjusted estimation for Italy:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Italy (old)	23,707	1,080	3,372	6,875	1.666	798	989	1,888	3,847	1,353	192	141	121	40	333	101	606	50	263
Italy (new)	27,717	1,275	4,189	6,875	2,070	991	1,229	2,345	4,779	1,681	238	176	151	50	414	125	753	63	326

Other interesting report is called *Citizens and New Technologies* (*Cittadini e Nuove Tecnologie* in original language) and has been published by ISTAT (Italian National Institute of Statistics) in 2011. Unfortunately it doesn't estimate the quantity of e-Inclusion actors at country or regional level.

Most relevant network organizations in the country: In Italy, the e-Inclusion field is fragmentary and diverse, probably due to the limited role played by the central government in this field. The selection below reflects that diversity:

1. **Auser** is a voluntary association of social promotion, committed to promoting active ageing of the elderly and to grow the role of seniors in society (>500 members, national scope). Find out more: www.auser.it

2. **ANCI** (Associazione Nazionale Comuni Italiani) is the National Association of Italian Municipalities and groups 7,300 municipalities which represent 90% of the population (> 500 members, national scope). Find out more: www.anci.it

3. **Federsolidarietà** Is the branch of Confcooperative (the confereration of cooperatives) representing the political and labor interests of social cooperatives and social enterprises (>500 members, national scope). Find out more: www.federsolidarieta.confcooperative.it

4. **Eurodesk** is the branch of the Youth in Action programme dedicated to provide information and guidance on youth programmes and is promoted by the European Union and the Council of Europe. (201-500 members, European scope). Find out more: www.eurodesk.it

5. **UPI** (Unione Province Italiane) is the Italian Provinces Union and through its programme Rete Informagiovani Provinciale aims to promote integrated youth policy initiatives and develop coordinated strategies and policies in favor of young people, involving the various institutional levels, youth associations and all actors dealing with young people (201-500 members, national scope). Find out more: www.upinet.it

6. **ARCI** is a membership network of around 6.000 cultural clubs and prominent organization of the civil sector (>500 members, national scope). Find out more: http://www.arci.it/

7. The **Regional Government of Toscana** is the promoter of TRIO, a public e-Learning network with an offer of more than 1.700 online training courses (51-200 members, regional scope). Find out more: http://www.progettotrio.it/trio/

8. The **Regional Government of Emilia Romagna** is the promoter of PANE E INTERNET, a network devoted to provide digital literacy and e-government training (10-50 members, national scope). Find out more: http://www.paneeinternet.it/

9. **Stati Generali Innovazione** is an informal network of organization that develop and promote social and digital innovation (51-200 members, national scope). Find out more: http://www.statigeneralinnovazione.it/online/chi-siamo/

10. **Fondazione Mondo Digitale** hosts an informal network of almost 200 schools devoted to promote digital literacy, active ageing and intergenerational learning through ad hoc projects in 13 regions (51-200 members, national scope). Find out more: www.mondodigitale.org

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*1. Wi-Fi network free access in rural villages, located in [services] aggregation spaces* *2. Having created a smart community in mountainous area of an inner area of southern Italy (convergence objective)*	12%
2. Innovation in the provision of general services	*1. We are simple "users" who use and provide access to new technologies but do not develop software or specific or particularly innovative programs; we use a database for the intersection of supply and demand work ("Ferrar@lavoro") created specifically by our Administration's computer services, which is very simple and quite used. In addition, we use another database designed specifically for finding lodgings addressed in particular to the youngsters but open to all ("Sottotetto"); and of course we run a Web site, mailings, newsletters, Facebook page ...-all this has enabled us to improve our work and make it more effective* *2. We are currently developing a service in 10 municipalities (160,000 inhabitants) for accompanying the access to online services of public ammnistrazioni for weak population ranges, we also have a similar service to play at home for those who are not able to move themselves, even with possible implications in healthcare and telemedicine* *3. Welcome to spaziopubblico a free collaborative wiki site that deals with physical and virtual public spaces and common heritage. Are you the protagonist or witness to events and best practices of active citizenship or virtuous administrations? Would you document studies and research? Do you want to update the calendar of events? Meanwhile you can read the program and the scope of this project. Anyone can contribute. Would you try? Source: http://www.spaziopubblico.it*	18%
3. Innovation in the provision of targeted social and civic services	*1. For the elderly, enabling paths of computer literacy (Pane e Internet project) allows not only to combat the risk of digital divide but also to support access of this type of user to online support services, especially those of social and sanitary type.* *2. Regional information system project for young: http://www.informagiovanionline.it/emiliaromagna*	29%

| | | 3. Meet a social need, typical of modern society, allowing to establish a new type of relationship between young students and adults over 60 years, two social categories excluded from employment.

4. We offer to a target who was excluded [i.e. the migrants] the opportunity to access, through digital technologies, to services and information that they might not otherwise use. This is done through an educational approach that puts them immediately in contact with the typical interactive mode of new technologies.

5. Adults and sixty plus' computer literacy to allow them participate of technological progress and to avoid their isolation | |
|---|---|---|---|
| 4. | Innovation in skills provision and certification | 1. For young people who attend our training courses (Emilia-Romagna system project for vocational education and training paths), the targeted use of ICT enables to use innovative learning didactics that exploits the potential of digital natives (easiness to use the digital) proposing an integration to a highly motivating and innovative environment that contrasts the risk of school dropout. The digital natives use in this way in an integrated way a by doing didactics (strongly based on experimentation) with an innate ability to handle digital communication cooperatively.

2. Database creation for the inclusion of caregivers to promote certification of their skills

3. E-learning and validation of informally acquired skills (ICT-based) for family caregivers | 18% |
| 5. | Innovation in targeted employment and entrepreneurship services | The possibility for an unemployed person to use his non-work time to acquire specific and general skills including basic computing and ICT, also by self-training or minimally assisted internet classroom, in order to stay active and improve his level of employability | 6% |
| 6. | Innovation on capacity building for the eInclusion sector | 1. Use the Internet, especially through social networks, in order to meet the demand and supply of would-be volunteers and voluntary associations.

2. Training for digital facilitators, voluntary citizens or operators of libraries: they are trained to offer support to people in browsing the internet and the use of on-line services within the public libraries and other [services] aggregation places (social centers, cultural associations, etc.)

3. www.anthology.eu The latest system designed for real-time sharing of interventions carried out by organizations in our network about marginalized people. See also www.onds.it | 18% |
| 7. | Innovation in local partnerships for eInclusion | | |

8. LATVIA

We learnt from the survey that in Latvia, Public Sector respondents double Third Sector respondents. NGOs represent the highest percentage of organizations within the third sector (over 70%).

Latvia is one of the countries where the proportion of individual organizations (vs. network organizations) represented in the sample is higher than the average (80%) reaching 90% and over. And it is one of the countries which has the largest proportion of organizations with staff capacity of less than ten people (over 65%).

The local government represents the first more important source of funding for over 60% of the organizations in Latvia, followed by the European Union.

If we move to secondary sources of information, we notice that there is no a study on eInclusion actors in general but there is a study of library impact: *Economic value and impact of public libraries in Latvia (2012)* http://www.kis.gov.lv/download/Economic%20value%20and%20impact%20of%20public%20libraries%20in%20Latvia.pdf. BMGF study and this study share sources so there is no additional data that allows improving the accuracy of our estimations in Latvia.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Latvia	3,014	137	429	874	212	101	126	240	489	172	24	18	15	5	42	13	77	6	33

Most relevant network organizations in the country: the e-Inclusion networks with real, national scope impact in Latvia are :

- **Latvian Information and communication association (LIKTA)** is a professional association, founded in 1998, that regroups over 80 important ICTE product and service providers and educational institutions, as well as about 140 individual professional members of the ICTE industry sector in Latvia, namely in computer hardware and software, electronics, and telecommunications infrastructure and service providers. LIKTA is a non-governmental, democratic organization, national coordinator of e-Skills week and Get-Online week in Latvia, direct partner to Latvia government and NGOs in all policy and strategy issues connected with Information society, e-services, e-government and ICT sector development in Latvia. LIKTA is a members of Telecentre Europe, CEPIS and ECDL foundation. Size: 221 members. Geographical scope: national. Find out more: : www.likta.lv

2. **Latvia @World network** consists of mixed type of organizations: NGO's, Municipal institutions, Educational institutions (which provide lifelong education), Private companies who provide cost- based e-Skills and e-services trainings and certifications. Since 2005 more than 125,000 citizens have been trained or tested for different kind of ICT skills programmes. Members of L@W network are certified for 4 (four) different level trainings and several additional programmes and services. Training centers of L@W network works on basis of agreement with LIKTA. Size: Latvia@World (L@W) network gathers 31 training centers all over Latvia. Geographical scope: the network is established since 2005 and covers all the regions of Latvia (national scope) but is especially important in regions outside capital Riga. Find out more: www.eprasmes.lv

3. **State Agency "Culture information systems"** through the implementation and management of libraries project "Trešais tēva dēls"- 3TD, a library digitalization project. The following objectives have been achieved for the duration of the project's implementation: 4,000 computers with connection to Internet installed (an average of 3.4 computers per library), equipping many libraries for the blind and site-impaired users; Training of all librarians in the use of basic computer skills, in user support and undertaking innovative activities in libraries. Size: 874 public libraries. Geographical scope: national, present in every smaller municipality. Find out more: http://www.3td.lv/index.php/en

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas		
2. Innovation in the provision of general services	*1. Training on social media in order to foster collaboration and networking, self-expression via ICT in order to foster involvement and integration* *2. Free access to Internet and Wi-Fi 24/7 in the network of public libraries (covers all territory of country; nearest access point in less than 20 minutes); Free access to online courses and training materials*	18%
3. Innovation in the provision of targeted social and civic services	*1. The database www.iespejukarte.lv providing information on free of charge opportunities and other social inclusion activities that also provides possibilities for video conferences and is developed every year by suggestions from the target groups and users.* *2. Training programme for homeless people (piloted at the social day care center)* *3. As two out of three seniors aged 55+ don't have computer literacy skills causing social exclusion, Lattelecom developed „Connect Latvia!", the largest cost-free computer literacy program for seniors and within this nationwide project united various partners – government, 100 IT teachers, 60+ counties, media. During 2012 almost 7,000 seniors (equivalent – this is 1/3 of all Latvian first graders in 2012) were educated and 81% seniors confirm – quality of life has improved, they feel like a part of modern society, 85% would like to continue studies. This CSR initiative was launched on the occasion of Latvia's 90th anniversary (in 2008). Until the 100th anniversary it is planned to educate at least 30,000 seniors.*	27%
4. Innovation in skills provision and certification	*1. A special training program has been developed about Internet Safety for children. Trainers train teachers, librarians and social workers who are then providing that specific knowledge to children and adolescents. The program will be licensed in the Ministry of Education and Science; 2) Special Internet Safety related resources have been developed regularly for teachers to use in class (video blogs, video spots, lesson plans etc.)* *2. Combining classroom and e-learning training. Developing of modular courses for different level of ICT skills and target audience needs*	18%
5. Innovation in targeted	*Training on on-line job seeking and CV development for women with less opportunities*	9%

	employment and entrepreneurship services		
6.	Innovation on capacity building for the eInclusion sector	*1. We involve students from Vidzeme University, they take a practice in our organization and they help other NGO's in our region to work with computer, write blogs, press releases, create organization profile pages in i-net. So they learn and learn other society.* *2. Nationwide project united various partners – government, 100 IT teachers, 60+ counties, media. This CSR initiative was launched on the occasion of Latvia's 90th anniversary (in 2008). Until the 100th anniversary it is planned to educate at least 30,000 seniors.*	18%
7.	Innovation in local partnerships for eInclusion	*Development of courses and tools in partnership with ICT sector and government institutions.*	9%

9. LITHUANIA

We learnt from the survey that this is one of the countries where the survey was massively answered by libraries (73%), which may be inducting some biases (see e.g. staff capacity below). NGOs represent a 60% of respondent organizations from the Third Sector.

In terms of network size, Lithuania shows one of the highest proportion of organizations belonging to smaller networks with less than 10 members; medium size organizations with staff size of less than fifty people make up over a third of the national sample; while 41% of organizations has a staff capacity of over fifty people (41%), which is one of the highest proportions of this category in the sample.

The local government represents the first more important source of funding for over 60% of the organizations in the country.

If we move to secondary sources of information, we need to cite the last survey provided on Lithuanian libraries (which are the most extended typology of e-Inclusion actors in the country) in the frame of the project Libraries for innovation. At the end of http://www.bibliotekospazangai.lt/en many links address to survey results from various subjects. In particular, this study provides a comprehensive picture of this predominant e-Inclusion intermediary actor in the country: *Project "Libraries for Innovation" – Factual Data Collection of Libraries 2012* http://www.bibliotekospazangai.lt/media/public/Atsisiuntimui/TyrimuAtaskaitos/WEB_ENG/2011/2011_Library_facts_report.pdf

BMGF study and this study share sources so there is no additional data that allows improving the accuracy of our estimations in Lithuania.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Lithuania	4,224	192	601	1.225	297	142	176	336	685	241	34	25	22	7	59	18	108	9	47

Most relevant network organizations in the country: in Lithuania, libraries are the predominant e-Inclusion actor, as the list below shows:

1. **County Public Libraries Association** (Apskričių Viešųjų Bibliotekų Asociacija) (formal network with national scope)

2. **Municipality public libraries association of Lithuania** (Savivaldybių viešųjų bibliotekų asociacija) (formal network with national scope)

3. **Lithuanian Librarians' Association** (Lietuvos bibliotekininkų draugija) (formal network with national scope). Find out more: http://www.lbd.lt/

4. Rural internet access points association (Asociacija "Viešieji interneto prieigos taškai") (formal network with regional scope). Find out more: http://www.vipt.lt/cms/app?service=external/index&sp=5664&sp=5061

5. Martynas Mazvydas national library of Lithuania (Lietuvos nacionalinė Martyno Mažvydo) (informal network of public libraries with national scope). Find out more: www.lnb.lt

6. Association "Langas I Ateiti" (Associacija Langas į ateitį) (informal network of e-inclusion actors with national scope). Find out more: www.langasiateiti.lt

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*Rural development, vocational training, agricultural competitiveness*	10%
2. Innovation in the provision of general services	*1. Nowadays Kaunas County Public Library is stimulating community to create virtual information matter in virtual encyclopedia of our region (www.grazitumano.lt), also in communication social website of seniors (www.esenjoras.lt). These activities are actualizing national project „Bibliotekos pažangai" („Libraries for Innovation"). As well as there were organizing video broadcast, virtual meetings, reviews of films about different social problems in our society.* *2. Allow users to take books and other materials off the premises temporarily, free computer and Internet access, publications related to Sirvintos region, exhibitions* *3. ICT training in our library, which includes learning basic information about PC, internet, e-government, e-commerce, e-medicine services, social networking, various programs usage (Gimp, Picasa, Movie maker and etc.) and other services, which gave the people more knowledge, simplifying their lives. These courses gave them an importunity to: find job, pay taxes, register to doctor, buy various products, and communicate with their relatives and friends abroad and more.* *4. With the implementation of new internet technologies, the library staff was able to create a digital library of cultural heritage (launched in 2010, www.pasvalia.lt), also, a website for local farmers to promote their activities and produce (launched in 2012, www.pasvaliodirva.lt).*	40%
3. Innovation in the provision of targeted social and civic services	*Basic ICT training; training on social media for communication; e-accessibility training and awareness*	10%
4. Innovation in skills provision and certification	*New training and certification on safer internet product 2. Online training materials 3. a set of methods to reach remote user*	10%
5. Innovation in targeted employment and entrepreneurship services	*The successful partnership has resulted in a new project to be implemented this year in the library - the creation of the local Business information point, involving entrepreneurs from Lithuania and neighboring Latvia.*	10%
6. Innovation on capacity building for the eInclusion sector		
7. Innovation in local partnerships for eInclusion	*1. Our organization is collaborating with few bank corporations „Ukio bankas" and „Swedbank". Also there are proposing training about electronic banking, e. government services. The idea of these trainings was created in the collaboration process between libraries and State Tax Inspectorate Under the Ministry of the Republic of Lithuania.* *2. During the implementation of these two projects the library was able to engage in a new partnership with local museums and educational institutions, farmers associations and agricultural organizations, local municipality members.*	20%

10.   POLAND

We learnt from the survey that this is one of the countries where public sector organizations are predominant, and are highly represented by libraries (over 70%). Also the representation of municipal/city government eInclusion actors is not indifferent, compared with other countries.

The proportion for individual organizations is higher than average (80%) reaching 90% and over of the survey responses. However, Poland reported the lowest network membership of the entire sample with less than 25% of organizations belonging to a network. Poland is one of the countries with the largest percentage of organizations belonging to big networks with over 500 members (30%).

The local government represents the first more important source of funding for over 80% of the organizations in the country.

If we move to secondary sources of information, we need to mention that the Polish Ministry of Administration and Digital Affairs has just published the report on Polish telecentres (PIAPs – Public Internet Access Points) (available from https://mac.gov.pl/badania at the bottom of the page). The study was made within preparation for the next financial perspective in Poland, however it will probably not be taken into account by the Ministry of Regional Development in programming works.

Some key findings are provided below, thanks to the selection and translation provided by FRSI (national partner in Poland):

- there is more than 8500 telecentres (as a generic category that includes public libraries) in Poland,
- more than 61% telecentres in Poland are localized in rural areas,
- most of them are small (one room), having up to 10 computers,
- in 40% of telecentres, computers have up to 4 years old, 13% – 4-5 years old, in more than 36% telecentres – more than 6 years. Additional equipment at disposal of telecenters is poor, mainly they have only printers or small multifunctional devices (fax, scanner, printer, copier in one),
- the Internet connection in 62% telecentres is up to 6Mb/s,
- only about 21% telecenters offer training or e-learning, mainly for seniors (about 20%), but also for youth (about 10%) and unemployed (about 7%). Themes: 40% – in basic usage of computers with Internet access, 16% – language courses, 8,8% - advanced usage of computers with Internet access, 6,4 % other
- 69% telecentres have budget up to 15 000 PLN per year (about 3660 EUR),
- above 64% telecentres don't see threats for their functioning in the closest future (period of the next 5 year).

In total the ministry received 2890 answers to the questionnaire, but most of them were received after the deadline, so the study is based on analysis of 1862 filled questionnaires before the deadline.

The study mentions 6 largest telecentre networks in Poland:

1. **Public libraries** – 1267 received questionnaires – 68.05%. In total there is about 8500 public libraries (main headquarters + branches) in Poland. Each self-government unit has an obligation to run a library, so if we count only headquarters there are at least 2875 libraries in Poland

2. **Distance Learning Centres in villages** *(Centra Kształcenia na Odległość na Wsiach)* – 132 questionnaires – 7,09%. Nationwide project implemented with EFS fund in years 2007-08 by a consortium composed by among others Ecorys Poland and the <u>Foundation Supporting Physically Disabled Mathematicians and IT Specialists</u>. In total 404 centers were created

3. **Internet Villages** *(Wioski Internetowe)* – 101 questionnaires – 5.42%. Project implemented with EFS fund by among others the Foundation of Regional Agency for Employment Promotion. In total 631 centers were created.

4. **Community Information Centres** *(Gminne Centra Informacji) – 101 quest. – 5.42%* - telecenters created by local government units since 2000; in years 2002-05 within the project financed by the Polish Ministry of Labour, with key objective to provide information for job seekers. In total at least 874 centers were created, but not all are still functioning

5. **Internet Educational Centres** in villages *(Internetowe Centra Edukacyjno-Oświatowe na Wsi)* – 40 quest. – 2.15%. Nationwide project financed by EFS in years 2007-08 by the consortium including among others the University in Bialystok and the Association of Voluntary Fire Brigades. In total, 480 centers were created.

6. **Other networks** (including PIAPs built in the „Expansion of broadband Internet access infrastructure and PIAP network in Warmia and Mazury region" project) – 85 quest. – 4.56%

7. **T**elecentres not belonging to any networks – 136 quest. – 7.30%

The estimation of the size of the total universe made by the Ministry (N=8.500) seems to be rather conservative if we consider that there were 2.890 respondent organizations. However, we deduced from BMGF study that there are approximately 7.379 libraries offering PAC services in Poland. Applying the sample frequencies of the ministerial survey, where libraries represent a 68.05%, the size of the e-Inclusion sector could increase in Poland to 10.843 units. In case the ministerial sample was biased due to its easier reach of public sector respondents like public libraries, that total estimation would increase. However, we respect the findings of that study to redistribute the Polish universe as follows:

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	**Public Libraries**	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Poland (old)	25,444	1,159	3,619	**7,379**	1,788	856	1,062	2,026	4,129	1,452	206	152	130	43	358	108	650	54	282
Poland (new)	10,843	1,125	489	7,379	242	116	144	404	480	196	28	21	18	6	48	15	88	7	38

Most relevant network organizations in the country: in Poland, the following are the most representative networks operating in the e-Inclusion sector:

1. **Network of public libraries** ("sieć bibliotek publicznych") (informal network with national scope)

2. **All-Poland Federation of NGOs** ("Ogólnopolska Federacja Organizacji Pozarządowych") (formal network with national scope). Find out more: www.ofop.eu

3. **Union of Voluntary Fire Brigades** ("Związek Ochotniczych Straży Pożarnych") (formal network with national scope). Find out more: http://zosprp.pl/

4. **Local networks** like "Stowarzyszenie LGD Kanał Augustowski i Rospuda" [Association Local Action Group of the Augustowski channel] and Rospuda, formal association, local scope, http://lgd-rospuda.pl/] or "Dolnoodrzańska Inicjatywa Rozwoju Obszarów Wiejskich" [Initiative for Rural Areas Development of lower Odra, formal association, local scope http://www.dirow.pl] – both are **Local Action Group functioning within EFRD**

5. **Nation-wide associations** like "Wspólnota Robocza Związków Organizacji Socjalnych" [Working Community of Associations of Social Organizations, www.wrzos.org.pl, formal network, national scope] or "Związek Miast Polskich" [Union of Polish Cities, formal network, national scope, http://www.zmp.poznan.pl] or "Polski Związek Bibliotek" [Polish Union of Libraries, formal network, national scope, www.biblioteka.koszalin.pl/pzb]

6. **People association** like "Stowarzyszenie Bibliotekarzy Polskich" [Polish Librarians' Association] (formal network with national scope). Find out more: www.sbp.pl

7. **FRSI** runs the Library Development Program ("Program Rozwoju Bibliotek") which hosts an informal network of thousands of libraries across the country (mostly in rural areas). Find out more: www.biblioteki.org

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*1. The HotSpot service - free Internet access for residents in the sectioned off areas of the town of Tuliszków* *2. In the wider context, project spreads the knowledge on the role of digital literacy in the socio-economic development of Poland among decision makers and local leaders in rural areas and in small towns. The project was launched in Nov. 2011 and it is foreseen to conclude in June 2014. More information: http://latarnik.mwi.pl/english*	

2.	Innovation in the provision of general services	1. Services relating to free Internet access which are offered to our users are primarily aimed at supplementing the broadly defined information. The Beskidzka Library runs computer classes. They are attended by people from groups threatened by social exclusion, elderly people (50+) and pensioners. These are the people who find it difficult to navigate the surrounding "virtual" world due to unfamiliarity with information technologies.	
		2. The possibility of communication between the participants of computer courses and special-interest groups through a blog that is kept by many people at the same time (Google+ stream), videoconferences (Hangouts) and YouTube channels making it possible to publish movies to present the achievements of group members and document the library's activities. Thanks to this, the participants within the group can support each other in the following: learning new skills, getting to know the new Internet related content, but also in life matters, and the local community is informed about the current activities of our institution.	
		3. Online catalogue, digitization of special collections for the Digital Archive, Internet-based reservation and orders, using barcodes on readers' cars and books, the Culture Card as a card to be accepted by all the libraries of the Pomorskie Province	
		4. Activities using ICT for e-government; we will be striving to promote them, e.g. we will be helping to fill in and send tax returns online.	
		5. Access to many e-learning platforms thanks to the established Distance Learning Centres, thereby creating opportunities for the improvement of knowledge and qualifications in different areas by the local community. In addition, organizing training in computer and Internet skills from scratch for seniors.	
		6. In concert with other libraries united in the Lower Silesian Library Collection (DZB), free access to more than 1,000 publications in inbuk.pl has been bought for readers, thereby saving the time and money of the latter.	
		7. The launch of radio based Internet access for our users on the premises of our institutions	
3.	Innovation in the provision of targeted social and civic services	1. A cycle of training courses entitled "About finances in a library" was provided for people aged 50+ as part of cooperation with the LDP [Library Development Program]	
		2. Three programmes run jointly by the members (people with mental diseases) and a few staff members: Social Skills - culinary activities, shopping, crafts, plant nurturing at home and in the garden, maintaining an aquarium, health promotion and cooperation with people and institutions in the health area; Education and Employment - running a Work and Education Club, implementation of the Temporary Employment Programme, international cooperation; Administrative Skills - handling members' matters from the start, preparing information and promotional materials, handling correspondence and supporting members in obtaining public assistance, and cooperation with organizations/institutions offering it. All the programs involve co-management of the institution, contact with those members who have not shown up for a long time as well as keeping documentation and monitoring all the activities.	
		3. The Public Library of the City and Commune of Dębno has provided three editions of a course in computer and Internet skills entitled "An Active Senior"; each of them was attended by ca. 14 people over 50 years of age, who met in the library twice a week for two months. The course covered the basics of computer skills, a text editor, e-mail, an Internet communicator and Internet navigation.	
		4. Implementation of the project "Counteracting e-exclusion in the Commune of Lubin" (ICT facilities have been developed, 100 families at risk of e-exclusion have obtained a complete computer terminal with free Internet access, 200 people from those families have been trained in the computer and Internet basics, 20 computer terminals with free Internet access have been installed in 19 commune entities (schools, day care rooms, libraries).	

		5. Services, i.e. computer courses. Thanks to Internet courses, our Seniors can communicate with their grandchildren. They can make a bank transaction, borrow a book from the library, buy a book and stay in touch with people having similar passions and interests without leaving home.	
		6. Classes with children and young people during which they are taught to find quality educational and recreational websites, to use the web safely and culturally and to observe the copyright	
		7. The majority of activities are addressed to seniors and young people who want to work with them. Innovative educational methods are used such as e.g. organizing International Seniors' Computer Olympics, developing materials and printing books (computer typesetting); the principle is work "with" seniors rather than "for" seniors, the exchange of experiences at the European level, the effective formation of partnerships.	
4.	Innovation in skills provision and certification	Coordination of a "self-learning group" in the area of ICT (New Technologies Group). The participants share their knowledge of the latest trends and tools (webinars, Creative Commons licenses, social networking media) with others on a voluntary basis.	
5.	Innovation in targeted employment and entrepreneurship services	1. The Foundation conducts a number of innovative activities addressed primarily to people with disabilities who are looking for a job, including: the e-employee project (training project implemented in the Opolskie Province which enables people with disabilities to take up a job of an "Internet promotion and sales specialist"); e-Centres programme, which resulted in the establishment of more than 400 Rural Distance Learning Centres and the e-learning portal e-centra.pl; project entitled Education and Professional Development Centres for People with Disabilities (involving the establishment of five centers for the development of people with disabilities using a wide range of IT tools); the College of Graphic Design and Multimedia in Białystok. In addition, we are planning to expand our business activity by creating appropriate conditions in terms of office space, equipment and staff for the operations of the Teleservice Agency (outsourcing of broadly defined IT services/data processing for businesses).	
		2. Training services for unemployed people, people over 18 years old, who can take advantage of our rich offer put forward in cooperation with the Centre for Information and Career Planning	
6.	Innovation on capacity building for the eInclusion sector	1. Key actions within the PCRS include: • Involvement & certified training of 2600 "Lighthouse Keepers" – trusted, creative local community leaders/animators tasked with introducing 50 + adults from their own communities into the digital world. Each digital champion creates a concept of his/her own initiative, realized in cooperation with NGOs and local authorities, to encourage adults to enter the digital world in their own community.	
		2. Computer applications for teachers and schools as institutions - tools to facilitate teachers' work, e.g. tools for assessing pupils' development. Training to motivate teachers representing all stages of education to use ICT during lessons.	
		3. Participation in establishing an independent Internet TV addressed to the Third Sector, based on citizen journalism	
		4. Programme entitled "Trainers of Digital Poland" - 5 librarians/ staff members from our 4 institutions, who obtained the Certificate, familiarized themselves with the new form of sharing the knowledge of e-competencies with the local community that uses the Library's services	
		5. Using the potential of volunteers in the development of the digital competencies of the society (including elderly people) - supporting grassroots educational initiatives	
		6. Training for librarians who work in field libraries.	

7.	Innovation in local partnerships for eInclusion	*1. All Lighthouse Keepers participate on voluntary basis, but important contribution to the programme is made by partners supporting their actions, i.e. local governments and NGOs. • Establishment of National Competence Centre/Social portal, equipped with corresponding technical infrastructure, web portal, research team and experts complementing actions by Lighthouse Keepers. • Grant awarding scheme - 18 month of support, for local educational projects selected in an open procedure, benefitting best ideas by Lighthouse Keepers acting in coordination with NGOs and local governments.* *2. Services/activities are provided and conducted in a partnership, and to a large extent they concern nearly the whole region (province).*	

11. ROMANIA

We learnt from the survey that this is one of the countries where the survey was massively answered by libraries (83%), which may be inducting some biases. NGOs represent the highest percentage of organizations within the third sector (over 70%) in the country. The local government represents the first more important source of funding for over 60% of the organizations. Oppositely, National Government (second source in the total sample) is one of the less cited funding source with less than 15% of organizations selecting this source.

If we move to secondary sources of information, no report that includes all the e-inclusion actors was found because in Romania there is a wide diversity of e-inclusion actors, and they not are gathered under one single umbrella. However, basic figures were elaborated from a number of sources by EOS Foundation, national partner for this study:

- There are **255 Public Internet Access Points** that were developed through the project Knowledge Based Economy project – sustained by the Ministry of Communications and Information Technology – *number which is well aligned with our original estimation for National, Regional, and State Agency organizations (305);*

- From the **2,876** public libraries established in the country **around 2,000** were equipped with internet and computers for the public through Biblionet project which was developed by Bill and Melinda Gates Foundation – *number which is supported by BMGF study (1,941 libraries with PAC services);* **41 ICT training center** were developed within the County public libraries within the same project

- **More than 1,000 schools** are offering ICT training for their students and community members in order to overlook digital divide – *this is quite higher than the 225 formal education institutions originally estimated*

- There are **31 Europe Direct Information Centres** in the country;

- There are a lot of private organizations, private companies and training centers that are offering courses and are helping people in Romania in the e-inclusion field, nut there is not a clear evidence of their number and the access to some sources of information is restricted.

To adjust our estimation to the number of schools offering eInclusion services, the percentage of formal education organizations in our Romanian sample is not useful since this typology is hardly represented on it. On the other side, 90% of the Romanian sample is formed by public libraries (74% of Romanian respondents, quite over the 29% of library respondents in the total sample) and third sector organizations (NGOs plus associations equal to 16%), which gives no room to increase the estimation for other actors without a proof. Therefore, our adjustment of the Romanian estimation consists on increasing the number of formal education organizations to 1,000 without increasing the total number of eInclusion actors, but redistributing the numbers according to these criteria:

- the sample suggests some redistributions between sub typologies under Public Sector (since government-run telecentres double municipal centers, opposite to our original estimation) and Third Sector (NGOs triple Associations, opposite again to our original estimation)
- we keep the total estimated number of Public Sector organizations as for 3 of its sub-typologies we got verified numbers
- Public Sector respondents to the survey sum up 83.4%, weight that is reflected in our estimation by decreasing the total size from N=6,694 to N=5,002
- in absence of contrasted figures from desk research we decrease the total estimated number of Third Sector main categories (NGOs + Associations + Community organizations) to reflect their proportions in the sample (from N:2,234 to 421); to calculate such reduction we reproduced the correlation between public libraries and third sector organizations obtained through the survey since it shows a more sounded relation (4.61) located in between that obtained through desk research (7.61) and our original estimation (around 1:1)
- the remaining number is equally distributed among the remaining sub-typologies which have no representation in the sample

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Romania (old)	6,694	305	952	1,941	470	225	279	533	1,086	382	54	40	34	11	94	29	171	14	74
Romania (new)	5,002	305	214	1,941	570	1.000	142	310	111	40	40	40	40	40	40	40	49	40	40

Most relevant network organizations in the country: in Romania, the following are the most representative networks operating in the e-Inclusion sector:

1. **ANBPR**, the National Association of Public Libraries and Librarians in Romania (national scope), and its Biblionet project run in partnership with IREX (USA) and funded by the Global Libraries programme of the Gates Foundation (USA). Find out more: www.anbpr.org.ro

2. **e-centre network in Romania**, developed by EOS Romania through Unlimited Potential Program (national scope). Find out more: www.eos.ro

3. **Junior Achievement Romania**, a chapter of the international organization (international scope). Find out more: www.jaromania.org

4. **Economic network of local communities**, through the Knowledge Based Economy project sustained by the Ministry of Communications and Information Technology (national scope). Find out more: www.ecomunitate.ro, http://www.rapido-fp6.eu/download/romania_knowledge_based_economy_paraschiveanu_ro.pdf

5. **Digital Alliance for Romania** (Alianta Digitala pentru Romania) (national scope). Find out more: www.aliantadigitala.ro

6. **Europe Direct information centres network** (European scope). Find out more: http://europa.eu/europedirect/meet_us/interactive_map/romania/index_en.htm

7. **TechSoup Global**, an international NGO which donates software from relevant ICT developers (Microsoft, etc.) to other NGOs (international scope). Find out more: http://www.techsoup.ro/

8. The **Ministry of Education** (national scope). Find out more: www.mects.ro

9. **Rures**, a rural spaces and social economy network funded by Soros Foundation (national scope). Find out more: http://www.soros.ro/en/program.php?program=47

10. **Info region**, a non-formal education network (national scope)

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas		
2. Innovation in the provision of general services	*1. e-learning platforms for languages - multimedia products as didactic materials for schools and individuals who are looking for a new job - networks of cultural tourism using ICT*	55%

		2. Memory and local knowledge - promoting local culture in all its diversity - "Biblionet program" - national program for the development of libraries - goal: modernization and diversification of the services in the public libraries; ICT initiation programmes for seniors.	
		3. In this moment, in the library, the role of the book is not anymore priority, due the fact that the importance of the electronic document increased a lot. Library took over some activities that cannot be included in the librarian field but contribute to its solid integration into university life. Internal computer network and personal accounts gives students the opportunity to use the computer for school situation, online courses, information for internal use should contact the Secretariat and other departments. At the Library, student FEAA solve their homework and elect optional subjects of study, specialization and theme that they want to choose for the license exam, register for examinations, require certificates without having submit the request on paper, ask questions to teachers and to the various departments, express opinions, give suggestions, discuss with colleagues, announce and organize events etc.	
		4. Education program pilot, Initiation in IT of adults 50+ in the non-formal system (10 beneficiaries) and informal system (37 beneficiaries). Formation of a group of 11 volunteers certified as trainers for adults training who have ensured the development of the program, the reproduction and the use of support course for initiation IT.	
		5. "Biblionet" Programme has managed a giant leap in library opening opportunities offered by the Internet users. The first service that we offer to community members was the free access to computers, then introductory courses in computer use (digital literacy)	
		6. Digital literacy programs offered free of various social groups - Internet access - possible to make photo printing scanner - consulting services for writing projects for farmers - support in creating a resume and sending it to prospective employers -	
3.	Innovation in the provision of targeted social and civic services	*1. PLANNING AND SOCIAL INTEGRATION MANAGEMENT OF CHILDREN WITH DISABILITIES THROUGH MENTORING RELANTIONSHIPS. Training courses that have as main theme the planning and the social integration management of the children with disabilities. Benefits of the socio-cultural idea of children with disabilities will take into account their positive effects in society (community) by involving them in community activities (education), facilitating intellectual, physical and social development of these children with special needs. Group Interaction during the course helps to build a shared vision of the integration, with emphasis on socio-behavioral, skills and visualization of stimulating self-esteem and positivism.* *2. IT Training and curriculum adaptation for people with special needs such as people with physical and mental disabilities. Accredited courses for disadvantaged groups: young people from shelters, unemployed, low-income people.*	18%
4.	Innovation in skills provision	*Multimedia in education - 25 CPT, accredited by OM 6546 of 12.12.2011 - Performance teaching in the socio-*	9%

		human field - 90 CPT, accredited by OM 3600 of 03.23.2012 (target group: teachers from the pre-university sector that are qualified to teach using the curriculum from the area "Human and Society"); - Library Management and Marketing;- IT initiation Course; - Communication 2.0. School librarian blog - Stimulating interest in reading through emotional education - Culture information in the school library / CD	
5.	Innovation in targeted employment and entrepreneurship services	Support to farmers in obtaining subsidies. Participation in job fairs (unemployed people seeing in us a partner in Jobs search activity). Complete collection of documents for people with disabilities visual.	9%
6.	Innovation on capacity building for the eInclusion sector	Community Development Consultants Association is a professional association that operates both nationally and internationally, and the 33 members of the association have expertise in community development. Services: • organizing training and mentoring for ICT users • supporting and developing networks between 255 rural communities. For more details: www.ecomunitate.ro • facilitate cross-border cooperation • organizing national education campaigns • providing advice to any associations, individuals, legal persons under public law and private business sector	9%
7.	Innovation in local partnerships for eInclusion		

12.   SPAIN

We learnt from the survey that Government-run telecentres and Municipal/City Government organizations have a high representation in Spain with 32% and 26% of responses respectively. This could be biased by the massive answer to the survey from organizations belonging to **Guadalinfo**[25], a network of local government organizations in Southern Spain. National, Regional, or State Agencies are also well represented (22%), especially if compared with the total sample (less than 10%).

In terms of network membership, over 70% of the organizations belongs to one or multiple networks, which is a high indicator. In terms of network size Spain shows the largest percentage (63%) of organizations belonging to big networks (46%).

The local government represents the first more important source of funding for over 60% of the organizations in the country. Oppositely, National Government (second source in the total sample) is one of the less cited funding source with less than 15% of organizations selecting this source.

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[25] For more information on Guadalinfo (in Spanish): http://www.guadalinfo.es/quienes_somos

If we move to secondary sources of information, Spain represents one of the countries where telecentres are more largely established, both in terms of absolute numbers and geographical coverage (perhaps only comparable to online centre in UK). The most representative example in the country is the Spanish Community of Telecentre Networks, which represents more than 3.300 telecentres according to the last update provided by this nation-wide association (April 2013):

Region	Telecentre Network	Quantity of TCs		Typology
Andalucía	**Consorcio Fernando de los Ríos** Centros Guadalinfo + Telecentros	*757 + 161*	**918**	***Regional govt.***
Asturias	**Consorcio Asturiano Servicios Tecnológicos**	**75**		***Regional govt.***
Cantabria	**Fundación Centro Tecnológico en Logística Integral Cantabria**	**175**		***Regional govt.***
Castilla La Mancha	**[regional netwrok]**	**548**		***Regional govt.***
Islas Canarias	**Red Semilla**	**27**		***Municipal centres***
Castilla y León	**Junta de Castilla y León**	*9*	*118*	***Regional govt.***
	Diputación de Burgos	*109*		***Regional govt.***
Cataluña	**Dirección Telecomunicaciones y Sociedad de la Información de Cataluña**	*723*	*771*	***Municipal centres***
	Fundación Esplai	*48*		***NGOs***
Extremadura	**NCC + Diputación Badajoz**	*45 + 175*	*220*	***Regional govt.***
Murcia	**Dirección General de Telecomunicaciones y Sociedad de la Información**	**151**		***Regional govt.***
Navarra	**Fundación Dédalo**	**11**		***Municipal***
País Vasco	**Kzgunea**	**270**		***Regional govt.***
Galicia	**Xunta de Galicia (Red Cemit)**	**94**		***Regional govt.***
TOTAL TELECENTRES		*3,378*		

With exception of a network of 48 telecentres which is NGO-run, all the other 3,330 telecentres are government-run. On the other hand, Government-run telecentres in Spain may include other two sample sub typologies: National, Regional, and State Agency and Municipal/City Government. Therefore we are confronting 570+1,779+879 centers, i.e. 3,228 centers, with 3,330 real telecentres. This number will allow a minor adjustment to the estimation for Spain.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Spain (old)	12,503	570	1,779	3,626	879	421	522	996	2,029	714	101	75	64	21	176	53	319	27	138
Spain (new)	12,718	1,011	771	3,626	1,558	428	531	1,013	2,064	726	103	76	65	22	179	54	325	27	141

Relevant e-Inclusion studies in Spain comprise:

The Spanish Community of Telecentre Networks commissioned to CTIC a study on the Socio-Economic Impact of its Telecentre Networks, a quantitative and qualitative study carried out between November 2010 and March 2011. The study was aimed to assess the socio-economic impact of the Regional Telecentre Networks of the Community Association of Telecentre Networks, looking at the projects' actions and their impact in the region, in order:

- To get a fixed picture of the Regional Telecentre Networks: partial and aggregate.
- To identify and evaluate the most important actions.
- To discover what the main indicators of each Telecentre Network are and how they have evolved, as well as the main investment sources.
- To relate the indicators of use and investment to the socioeconomic and social impact in the national territory, with details for each of the participating Autonomous Communities.

The main conclusion of the study is that Telecentres are effective "accelerators" of regional development because:

- ICTs and the Telecentres reduce barriers and bring markets closer
- Through the Telecentres the local business fabric is provided with telecommunications infrastructures, digital capacities and lifelong training, which offers companies new productive possibilities

- At the Telecentres knowledge transfer policies are directed to the people and agents in the regions.
- The Telecentres and ICTs are mechanisms for achieving greater development and generating wealth and employment in the regions, particularly in those with most difficulties. Making policy for Telecentre support and development is a decision that goes beyond investment: it affects small towns and villages in increasingly depopulated and aging rural areas and decreasing economic vitality.

The 2,529 centers that make up the sample represent 63% of the estimated total for all the networks (which was estimated in 4.000+). Their distribution varies significantly according to each one of them. 52.79% of the telecentres are located in population centers with less than 5,000 inhabitants (greater intensity of effort in rural areas).

In monetary terms, every euro invested in a telecentre equals €1.80 in terms of Gross Value Added for its immediate region. (The €172 M invested in the 11 Networks is helping to improve the economic growth potential, estimated at 0.014%/year). Productivity of each euro invested in ICT is times greater than that of the construction of railway or motor highway infrastructures (impact on GVA), being its Impact on employment estimated in 2,800 jobs (78.82% direct employment)

The total budget for the period considered (2008-2010) and the group of networks analyzed raised to 172.78 million euros. This works out as an average annual budget of approximately 57.6 million euros. Great disparity of investment among the networks was noticed (above the average are: Andalusia, Catalonia, Basque Country and Extremadura). The average annual budget per centre was estimated in €22,773 EUR.

The network types were defined in this study to reflect their annual investment:

- Type 1: Networks with annual investments of between 6 and 22 million euros: dynamic networks, well equipped and financed
- Type 2: Networks with annual budgets of less than 4 million euros.

Differences between both types are due to the size of the area covered, the staff and their cost, the physical characteristics of the telecentres and provision of spaces, the technical resources available and the activities and services offered.

The Telecentre Networks are made up of public Internet access centers with broadband Internet connection and computer equipment from later than 2009. They are networks that offer free services and in which the staff are mainly employed by a local council institution. The staff of these networks is responsible for opening and closing the centre, its management (use, users, activity record, etc.) and carrying out educational, informative and promotional activities, as well as advising the people who use the centre. These staff members have a full or part time contract. The Telecentre Networks offer Internet access (free surfing) and personalized advice services, aimed chiefly at citizens and, to a lesser extent, at companies and agents in the region. Their centers offer face-to-face training, through courses, talks and seminars in which most of the materials used are produced in-house or are those available on the Internet. Their activity is specifically aimed at the groups of people aged over 50, women, minors and people at risk of exclusion. At the Network centers promotional services are offered for e-Administration and employment access via the Internet and participation in social networks."

The study concludes that Telecentres:

- Bring the population closer to infrastructures that enable the use of computers and free Internet access and train them for this (citizens and business fabric).
- Represent a strategic tool for providing free Internet access, as a basic component in the reduction of regional differences.
- Favor the e-inclusion of the population who is furthest from the Information Society (rural areas, the elderly, people with disabilities, etc.).
- Provide resources that ensure the participation of citizens and companies in the IS.
- Promote the use of ICTs as a resource for professional and business development.
- Train the people in the region and revitalize it technologically. The telecentres are a local technological reference point.
- Contribute to increasing users' confidence and security in relation to the use of and participation in digital environments.
- Promote participation and training in the use of ICTs: improved employability, digital relations (e-administration, e-banking, e-commerce…)

Other notable studies worth to mention are:

- KZ Gunea 2011 Report, retrievable from http://www.kzgunea.net/docs/memorias/memoria_2011_cast.pdf
- Socio-economic impact of Guadalinfo network – research study commissioned by Junta de Andalucia (regional government of Andalusia) to Red2Red and Alcalá de Henares University (not available online).

Most relevant network organizations in the country: in Spain the e-Inclusion landscape is dominated by regional telecentre networks created by the governments of Autonomous Communities.

1. **Spanish Community of Telecentre Networks** (Asociación Comunidad Redes de Telecentros), an association that represents most of the telecentre networks in the country and through them around 8.000 telecentres. Find out more: http://www.comunidaddetelecentros.net
2. **Guadalinfo**, a network of more than 700 telecentres located in small towns and rural villages spread out all over Andalusia region. Find out more: http://www.guadalinfo.es
3. **Dot ICT Network** (Xarxa Punt TIC), a network of more than 700 associated telecentres distributed across the territory of Catalonia region. Find out more: http://punttic.cat/
4. **KZ Gunea**, a network of more than 100 ICT access, training and certification centers covering practically all the municipalities of Basque Country region. Find out more: http://www.kzgunea.net
5. **New Knowledge Centres** (Nuevos Centros de Conocimiento), a historical network of more than 100 centers born in the late '90s in the meridional region of Extremadura http://www.nccextremadura.org

6. **Plug In Network** (Red Conecta), a network of more than 70 public internet access and training points hosted by local social organizations partnering with Fundación Esplai, owner of the network. It is the only one with national scope, spread over more than a half of the Spanish autonomous communities. Find out more: http://www.redconecta.net
7. **Local Technology Dynamization Centres** (Centros de Dinamización Tecnológica Local), a small but dynamic network in Asturias, http://actuacionescdtl.wordpress.com
8. **Centres for Modernisation and Technological Inclusion** (CeMIT, Centros para a Modernización e Inclusión Tecnolóxica), a small but dynamic network in Galicia, http://www.cmg.xunta.es

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	1. „... *cooperative and collaborative way for the development of an open, free and neutral public telecommunications network, as http://guifi.net [in a rural area] by this initiative is the physical or legal persons [who] can improve their access to telecommunications networks and services they are offered or offer them, what guarantees and power the real digital inclusion and promote that these people have the best access regardless of their place of residence or their level of income.* 2. *Guadalinfo centers have a major social impact in the towns where they are located, since they are centers of social innovation aimed at all ages and areas of society*	12%
2. Innovation in the provision of general services	1. *Create an itinerary for digital inclusion with training activities, measures such as counseling, measures of conciliation as the nursery, working with volunteers ICT support for activities with elders …* 2. *IT Txartela training in e-Administration virtual communities. program that allows free e-mail to all users account to associations and groups without nonprofit, the creation and maintenance of a website, with a simple application, dissemination and use of free software* 3. *We offer the possibility that users of our network start-up their ideas and turn them into real projects. We facilitate the creation of social innovation projects that generate improvements in the quality of our municipalities.* 4. *Training in the creation of video games for children and youth. Innovation in accessible video game interfaces. New forms of production of interactive innovation. Pedagogical innovation through the use of critical pedagogies in projects related to art work technology and video games for children and youth. Creation of a hybrid publishing under free licenses that promotes the*	41%

		collaborative work and process visualization. Public online documentation of all its activities.	
		5. Saregune is a space for the approach of people to the world of new technologies. A space for training and free use of computer tools (always with free Software) enabling access to information and knowledge, contributing to the breakdown of the "digital divide", mainly from people who are quite far away from the new possibilities that represent. An alternative employment for 20 persons which facilitates a work experience in the development of tasks related to the new technologies (profiles in the dynamization of technology training centers and training profiles of web design). An initiative of revitalizing, different activity that seeks a different impact and positive for one of the areas of greater social decline, business and residential attraction of the historic centre of Vitoria-Gasteiz.	
		6. The possibility of working together on social networks, allowing collaborative work tools as titanpad, networking site 2.0 internal networking intercultural, open meeting.	
		7. The network of library of the Instituto Cervantes offers access to electronic information resources and loan or download eBooks to all users with a pass for our libraries. In addition, all libraries of the network, which are 61 and are spread all over the world, are present in social networks, and have a profile on Facebook, Twitter, Delicious, Flickr, and others. In addition, many maintain specialized blogs. Currently they are starting to develop interfaces adapted for mobile devices applications used, starting with the OPAC. Also online training programs are being developed for users (video tutorials and courses for learning resources of information and documentation that have the...)	
3.	Innovation in the provision of targeted social and civic services		
4.	Innovation in skills provision and certification	*Training on new devices (tablets, eBooks, GPS,…) tests for the certification of competence basic in the information technologies*	6%
5.	Innovation in targeted employment and entrepreneurship services	*1. This initiative provides that persons have access to opportunities for work, maintenance of their jobs or stimulation of entrepreneurship.* *2. ICT-based social Innovation model that stimulates telecentres' users and eFacilitators to become digital entrepreneurs with a community sense, offering them a space and a methodology to start-up their ideas and turn them into real projects*	12%
6.	Innovation on capacity building for the eInclusion sector	*Elaboration of educational programmes for the introduction of videogames in classrooms aimed at education professionals*	6%
7.	Innovation in local partnerships for eInclusion	*1. Development of the 'Big Idea' brought to the EU for the Digital Agenda 2020, 'Bottom-Up Broadband' consisting of the development of telecommunications infrastructure with investment from stakeholders, whether individuals, companies, administrations* *2. … and the collaboration of the private sector with the label "partner company" to create financing measures and advantages in the purchase of computers.* *3. Collaboration with institutions, social groups and professional organizations, by providing the network of telecentres for different*	24%

	activities (courses,...) related to new technologies. *4. We work in network and coordination with various organizations at local and national levels, allowing to share space, resources and methodology.*	

13. SWEDEN

We learnt from the survey that in Sweden public sector organizations double third sector ones, and are highly represented by libraries (over 70%). National, Regional, or State Agencies represent 17%, which is over the sample average (less than 10%).

Medium size organizations with staff size of less than fifty people make up over 40% of the sample in Sweden. In terms of network size Sweden shows one of the highest proportion of organizations belonging to smaller networks with less than 10 members.

The local government represents the first more important source of funding for over 80% of the organizations.

If we move to secondary sources of information, *Swedes and the Internet 2013* authored by Olle Findahl (retrievable from http://www.worldinternetproject.net/_files/_Published/_oldis/120_engsoi2012_web_121214.pdf) informs us that "The Internet in Sweden is currently in the mobile phase, following the broadband phase (2005-2010) and the initial proliferation phase (1995-2005). This does not mean everyone has a smartphone or that everyone even uses the Internet. But there are certainly enough people who use their mobile phone to connect to the Internet about half of the Swedish population to be exact."

This could make the need of e-Inclusion facilitation redundant, but the same report assures later that:

> "The feeling of being excluded from the information society remains among many. This is also related to the fact that the elderly lack a feeling of inclusion with the emerging "information society." This has remained unchanged in the past seven years… While inclusion is lowest among the elderly, even one-fourth of those aged 16-45, among whom the feeling of inclusion is the greatest, feel only slightly or not at all included. Among those aged 56 and up, the group that feels excluded comprises the majority. There has been no change in recent years and the feeling of exclusion will probably sustain."

Despite this evidence along the years, no study about the e-Inclusion intermediary organization could be identified in Sweden. Therefore, the estimations made previously don't vary.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
Sweden	3,060	139	435	887	215	103	128	244	497	175	25	18	16	5	43	13	78	7	34

Most relevant network organizations in the country: in Sweden, the following are the most representative networks operating in the e-Inclusion sector:

1. **Workers' educational activities** (Arbetarnas Bildningsverksamhet) (51-200 members, national scope). Find out more: http://www.abf.se/

2. **.SE, the Internet infrastructure Foundation** (Stiftelsen för Internetinfrastruktur) (less than 10 members, national scope). Find out more: https://www.iis.se/

3. **Digidel 2013** (201-500 members, national scope). Find out more: http://www.digidel.se/eng/

4. **National Library of Sweden** (Kungliga Biblioteket) (less than 10 members, national scope). Find out more: http://www.kb.se/english/

5. **Education Association** (Folkbildningsförbundet) (10-50 members, national scope). Find out more: http://www.studieforbunden.se/in-english/

6. **Education Council** (Folkbildningsrådet) (less than 10 members, national scope). Find out more: http://www.folkbildning.se/Folkbildning/Oversattningar/English-translations/

7. **PRO** (more than 500 members, national scope). Find out more: http://www.pro.se/

8. **Seniornet Sweden** (more than 500 members, national scope). Find out more: www.seniornet.se/

9. **Center for Adult School** (Studieförbundet Vuxenskolan) (51-200 members, national scope). Find out more: www.sv.se/en/

10. **Sweden's County librarians** (Sveriges länsbibliotekarier) (10-50 members, regional scope). Find out more: www.lansbiblioteken.se

Relevant examples of ICT-driven Social Innovation as informed by respondents:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas		
2. Innovation in the provision of general services	*1. Book a librarian for ICT consulting is very popular and a new service since 2011* *2. Mobile money, e-commerce, broadband connectivity, e-government, identity management, secure cross border transactions.* *3. Remote access to databases like Library Press Display, Global Grant, databases with newspaper articles, e-books, e-music, self-service online - like renew loans of the library books, make reservations of library books online. Offers to loan and/or play games like XBOX360, Playstation 3, Nintendo Wii U* *4. International Skype-sessions!* *5. Access to Internet for those who can´t afford it, and personal guidance how to find the information one needs, or personal help when applying for a job, renting an apartments, buying travel tickets and other personal affairs. And for the immigrants and those with other languages than Swedish, the possibility to read newspapers on-line, from their home countries and watch TV on -line from their own culture.* *6. On-line media: E-books (incl. reference) E-papers E-music* *7. People need to train, and train, and train...They also need help to clean and update the products at home. And make it fun to use new programs and products alone and together. If you can see the meaning, point and practice with something it´s more fun and you want to learn more and put money on in.*	64%
3. Innovation in the provision of targeted social and civic services	*1. Our goal is to prevent the major part of being lonely and increase the social networks through teaching ICT and use Facebook and Skype.* *2. The project Personal Download which is general practice on how to borrow digital talking books. MTM collaborate with libraries all over Sweden to meet the needs of people with reading disabilities to access literature in accessible formats. Today we have 26,000 individual users and approximately 2,000 libraries using the service.*	18%
4. Innovation in skills provision and certification		
5. Innovation in targeted employment and entrepreneurship services		
6. Innovation on capacity building for the eInclusion sector		
7. Innovation in local partnerships for eInclusion	*1. Working strategically to reach politicians, senior civil servants at the regional level. Building strong networks with authorities, companies, NGO:s, schools, libraries.... in order to help all citizens to develop their knowledge of the digital world and to show the possibilities of internet resources.* *2. We are currently working in collaboration with our local bank, where we and the bank sponsor the courses for senior citizen so that we can offer free 15-hour courses.*	18%

14.   UNITED KINGDOM

We learnt from the survey that in the United Kingdom where less than 50% of the organizations belong to the public sector. Third sector predominates, especially for the types identified as Association, Charitable organization or Foundation (37%) and Community organization (25%).

The United Kingdom is one of the countries with the largest proportion of organizations with staff capacity of less than ten people (over 65% of the organizations).

A very interesting finding is the role that usage and service fees play as a source of funding in this countries (cited by over 20% of the respondents).

If we move to secondary sources of information, UK Online Centres conducts extensive research in order to monitor the network, find out more about its current users and target audiences and gain insight into wider issues around online take-up. It collaborates with Ofcom, the Office for National Statistics and other key partners. A couple of relatively recent reports (released early January 2012) depict the digital inclusion and its economic benefits, but provide little information that could help characterizing the intermediary actors that facilitate that process.

Digital inclusion, social impact (2012). This research looks at 20 UK online centre-led projects which sought to reach socially disadvantaged people and engage them in ICT activities. It maps the relationship between digital inclusion and the social impacts on participant's lives. Available at http://www.ukonlinecentres.com/media-centre/research-reports/item/download/108_e6e6bd1566292c665fad3857a415dc1f.html

Economic benefits of digital inclusion (2012). This research summary begins to break down the specific benefits and associated savings digital inclusion could provide for five core groups – individual people, private sector organizations, the government, society and the wider economy. Available at http://www.ukonlinecentres.com/media-centre/research-reports/item/download/109_ae6e2ba994bcdb296f88b30a529ce395.html

Additionally, UK Online Centres maintains a directory of centers that allows users find centers close to a certain location (see http://www.ukonlinecentres.com/centresearch/). Unfortunately this research team hadn't access to the directory database as to run frequencies that would have helped to improve our previous estimations. The only information we got is a rounded number of centers that form the UK online centers network: around 3,800 community partners who provide free or low-cost access to computers and the internet. This number is well aligned with our estimated number of eInclusion organizations from Third Sector, so we keep our original estimations for UK without any amendment.

Country	Estimated number of eInclusion organizations *	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cyber café	Private Training Organization	Private Formal Educational Institution	Other
United Kingdom	13,113	598	1,865	3,803	921	441	547	1,044	2.128	748	106	78	67	22	184	56	335	28	145

Most relevant network organizations in the country: in UK the e-Inclusion landscape seems to be dominated by public government initiatives and community and volunteering network organizations.

1. **Age UK's Digital Inclusion Network** has over 200 members and was developed to support and work in partnership with local community initiatives to alleviate the digital exclusion that exists today; and to prevent a digital divide in later life. Find out more: http://www.ageuk.org.uk
2. **British Assistive Technology Association (BATA)** Aims to raise the awareness of assistive technology, educate and inform widely on the benefits of Assistive Technology and provide expert and impartial support and advice to government departments and agencies. Find out more: http://www.bataonline.org
3. **Communities and Local Governments Department of the Government of UK,** https://www.gov.uk/government/topics/community-and-society
4. **Digital Activist Inclusion Network (DAIN)** aims to promote digital inclusion by encouraging people to use technology with the help of volunteers (Digital Activists) across the East Midlands. Find out more: http://www.dainproject.org
5. **Making IT Personal: Joining the DOTs** is an ambitious new scheme designed to tackle digital exclusion by harnessing the knowledge and experience of people who enjoy using technology and like helping friends and family. A DOT is a Digital Outreach Trainer, an informal mentor for those grappling with technology for the first time—not an expert, simply someone who is able to pass useful knowledge on and volunteers to do so. Find out more: http://www.makingitpersonal.eu
6. **National Association of Voluntary & Community Organisations (NAVCA)** is a national membership organisation with a membership network of over 350 local support and development charities across the whole of England. Find out more: http://www.navca.org.uk NIACE Find out more: http://www.navca.org.uk
7. **The National Institute of Adult Continuing Education (NIACE)** aims to encourage all adults to engage in learning of all kinds. Find out more: http://www.niace.org.uk/current-work/area/digital-inclusion

8. **UK Online Centres** support communities to tackle social and digital exclusion. UK online centres coordinates a network of 3,800 community partners, who provide free or low-cost access to computers and the internet. The organisation also provide training and support to hundreds of volunteers, centre staff and community leaders, helping them to work within their own communities. Find out more: www.ukonlinecentres.com

9. **Welsh Government Digital Inclusion Unit** is an expression of the prioritization of Digital inclusion in the social inclusion agenda. The Welsh Government is committed to tackling digital exclusion, as reflected by its Communities 2.0 initiative and Digital Inclusion Framework. This unit works with institutions to achieve understanding of and openness towards digital inclusion approaches with a view to changing organisations' policies and practice. Find out more: http://wales.gov.uk/topics/housingandcommunity/regeneration/digincl/?lang=en

Relevant examples of ICT-driven Social Innovation as informed by respondents:

The Community and Voluntary Service (CVS) sector is well structured and known as social service provider sector in UK, and therefore innovation examples comes from the use they make of ICT, including the reinforcement of the capacities of the organisations themselves:

Type of Innovation	Examples of Innovations (respondent's quotations)	Weight in country sample
1. Innovation in rural areas	*Our main focus is on getting connections to people who can't get connected through any other means. We are deeply rural community. To do this we use all the skills latent within the community, we provide training and help people get qualifications or the skills to do work and provide employment or a career for them in the future. They start off as volunteers, then work for shares, then get paid a wage. From tiny acorns grow mighty oaks, and the whole community is working together to help themselves and others. It is creating economic value by its existence, meeting social needs and building cohesion, and it promotes social relations between classes, between geographical areas of our network build out and is collaborating with many other companies to achieve its aims.*	7%
2. Innovation in the provision of general services	*1. Our UK-wide welfare rights advice support service - rightsnet www.rightsnet.org.uk which receives more than 20,000 unique visitors every month. The service was commended in the Cabinet Office report, 'Excellence and fairness: achieving world class public services', and won the British Library sponsored 'Opening the World of Knowledge' category in the Nominet Internet Awards in 2011;* *2. UK online start something campaign is the most recent ICT-supported program, promoting new social relation.* *3. We have internet access and people are encouraged to do UK on line courses and we assist people who have no knowledge about computers and internet* *4. We have found that the UKONLINE 'online basic' course is the most sort after followed by CSCS practice (construction health and safety) and Food Hygiene certificates.* *5. Nearly 3 years ago at Lancaster Library we started PC sessions where people with little to no experience of working with computers could learn the very basics. This tapped into a lot of elderly people that hitherto had no prior*	33%

		knowledge of computing. If we got 3 completions a month we would get a small sum that would go towards the library service. We no longer have this funding, but we do still rub the course every Thursday. It helps people who might have felt isolated in society, stay in touch with friends, look for property, shop online and so on.	
3.	Innovation in the provision of targeted social and civic services	*1. Our free technical support for disabled people helps them to access the internet, technology and assistive technology. We offer an advice line with a Freephone number and locally based communities of IT volunteers around the UK who can help people in their own homes. We also offer free factsheets about computing and disability available on our website or by post, free online self-assessments and free webinars for cost effective dissemination of information to disabled people and workers in this field.* *2. Our Get Connected project provided technology support to providers of adult social care in England and was delivered in partnership with the Social Care Institute of Excellence and Charity Technology Trust. This won the 'Working Together' category in the 2012 Technology4Good Awards.* *3. That people with a history of mental illness are given the opportunity to learn computer skills from scratch in a useful and meaningful manner.* *4. JJHT have implemented a Digital Inclusion project to help bring our retirement tenants online. The project received funding from Digital Unite in the early stages and since then JJHT have invested heavily in expanding it throughout our retirement schemes. To date we have 42 schemes online and have reached approximately 450 tenants with basic digital skills training. The next step is to look at how we can expand the project to our tenants in General Let properties especially in light of the impending Welfare Reforms in the UK.*	27%
4.	Innovation in skills provision and certification		
5.	Innovation in targeted employment and entrepreneurship services	*1. We were partners in the delivery of the Key Competencies for All (KC4All) project www.keycompetences.eu a project supported through the EU programme Lifelong Learning. The project provided an Employment Toolkit to improve employability through an ICT-based learning approach. It was designed as a pathway leading the jobseeker from the choice of a profession to a job application. KC4All also provided Online Centre facilitators and teachers with a set of structured online tools and workshops.* *2. Almost all learners are unemployed therefore not able to pay for training. Most training with us is Free and the other is low cost.*	13%
6.	Innovation on capacity building for the eInclusion sector	*1. Lasa provides both social welfare law advice services and technology advice and support, which makes us uniquely placed to identify advice need and deliver new solutions to support the delivery of advice through the use of technology. We have a track record for developing highly successful, innovative and award-winning resources that combine adviser support with online delivery. [...] Lasa has been working in third sector ICT for 28 years and has developed a number of key online resources – such as rightsnet, the ICT Knowledgebase (www.ictknowledgebase.org.uk), and the Suppliers Directory (www.suppliersdirectory.org.uk/). Lasa has been at the forefront of VCS initiatives to improve support for the strategic development of ICT within the sector. We have run several successful circuit rider projects, and we work*	13%

		with other organisations around the UK and internationally as lead organisation for the UK circuit rider movement.	
		2. We are member based services. It is our members who provide access to e inclusion . we provide information concerning what is available and help them to make links. Many of our members provide services in Care Homes and in Housing with care. Much work has been with staff and clients who use services to access computers for learning and staying in touch with family and connecting with communities	
7.	Innovation in local partnerships for eInclusion	*Our HMRC-funded revenuebenefits website provides support to frontline advisers in relation to the range of HMRC products, including tax credits, child benefit and guardian's allowance. Delivered in partnership with the Low Incomes Tax Reform Group, the service won the 'Technological Innovation' prize at the LexisNexis Taxation Awards 2012.*	7%

6.3 Plausible (consolidated) estimation of e-Inclusion organizations in EU27

The updated estimation after its adjustment in countries with available counts on eInclusion typologies is presented below:

Country	Estimated number of eInclusion organizations	Public Sector						Third Sector								Private Sector			
		National, Regional, and State Agency	Municipal/City Government	Public Libraries	Government-run Telecentre	Formal Educational Institution	Other	Non-governmental organization	Association, Charitable organization or Foundation	Community organization	Cooperative	Federation	Informal Network	Trade Union	Other	Cybercafé	Private Training Organization	Private Formal Educational Institution	Other
%	*100.0%*	*4.6%*	*14.2%*	*29.0%*	*7.0%*	*3.4%*	*4.2%*	*8.0%*	*16.2%*	*5.7%*	*0.8%*	*0.6%*	*0.5%*	*0.2%*	*1.4%*	*0.4%*	*2.6%*	*0.2%*	*1.1%*
Austria	2,842	129	404	824	200	96	119	226	461	162	23	17	15	5	40	12	73	6	31
Belgium	4,215	192	599	1,222	296	142	176	336	684	240	34	25	22	7	59	18	108	9	47
Bulgaria	3,244	148	461	940	228	109	135	258	526	185	26	19	17	6	46	14	83	7	36
Cyprus	272	12	39	79	19	9	11	22	44	16	2	2	1	0	4	1	7	1	3
Czech Rep.	16,790	765	2,387	4,867	1,179	565	701	1,337	2,723	958	136	100	86	29	236	71	429	36	186
Denmark	1,496	68	213	434	105	50	62	119	243	85	12	9	8	3	21	6	38	3	17
Estonia	1,448	66	206	420	102	49	60	115	235	83	12	9	7	2	20	6	37	3	16
Finland	2,715	124	386	787	191	91	113	216	440	155	22	16	14	5	38	12	69	6	30
France	19,681	839	6,376	5,648	297	84	1,175	0	4,601	74	0	84	0	0	168	84	168	0	84
Germany	8,409	103	321	2,865	159	76	94	4,120	366	129	18	13	12	4	32	10	58	5	25
Greece	1,355	62	193	393	95	46	57	108	220	77	11	8	7	2	19	6	35	3	15
Hungary	3,631	80	708	1,053	467	67	0	662	375	50	40	80	40	0	7	0	0	0	2
Ireland	1,008	46	143	292	71	34	42	80	163	57	8	6	5	2	14	4	26	2	11

Italy	27,729	1,275	4,189	6,875	2,070	991	1,229	2,345	4,779	1,681	238	176	151	50	414	125	753	63	326
Latvia	3,015	137	429	874	212	101	126	240	489	172	24	18	15	5	42	13	77	6	33
Lithuania	4,226	192	601	1,225	297	142	176	336	685	241	34	25	22	7	59	18	108	9	47
Luxembourg	173	8	25	50	12	6	7	14	28	10	1	1	1	0	2	1	4	0	2
Malta	141	6	20	41	10	5	6	11	23	8	1	1	1	0	2	1	4	0	2
Netherlands	3,667	167	521	1,063	258	123	153	292	595	209	30	22	19	6	52	16	94	8	41
Poland	10,843	1,125	489	7,379	242	116	144	404	480	196	28	21	18	6	48	15	88	7	38
Portugal	1,636	75	233	474	115	55	68	130	265	93	13	10	8	3	23	7	42	3	18
Romania	5,002	305	214	1,941	570	1,000	142	310	111	40	40	40	40	40	40	40	49	40	40
Slovakia	5,125	233	729	1,486	360	172	214	408	831	292	41	31	26	9	72	22	131	11	57
Slovenia	693	32	99	201	49	23	29	55	112	40	6	4	4	1	10	3	18	1	8
Spain	12,718	1,011	771	3,626	1,558	428	531	1,013	2,064	726	103	76	65	22	179	54	325	27	141
Sweden	3,061	139	435	887	215	103	128	244	497	175	25	18	16	5	43	13	78	7	34
United Kingdom	13,118	598	1,865	3,803	921	441	547	1,044	2,128	748	106	78	67	22	184	56	335	28	145
Total Sample	**158,255**	7,938	23,057	**49,749**	10,296	5,124	6,245	14,446	24,169	6,903	1,035	908	683	241	1,874	627	3,234	291	1,433
		102,408							**50,261**						**5,586**				

As said in the introduction of this chapter, this estimation should probably be increased to better reflect the proportion of micro-sized organisations (from 58,2% in the sample to 92,2%, the weight of micro-sized enterprises in the total enterprises universe in Europe), growing up to **250,706 eInclusion organisations** in Europe, which represents **one eInclusion organization per every 2,004 inhabitants**. See the following table for a sectorial breakdown of these figures.

	Public Sector	Third Sector	Private Sector	Total
Total estimation	**102,408**	**50,261**	**5,586**	**158,255**
Inhabitants per organization	*4,907*	*9,999*	*89,967*	*3,176*
Total estimation w/micro-organisations weighting factor	**162,234**	**79,623**	**8,849**	**250,706**
Inhabitants per organization	*3,098*	*6,312*	*56,791*	*2,004*

The following tables help characterizing this scenario in terms of average number of users served on an annual basis by organizations, and main resources invested (i.e. number of permanent staff working in the organisations and budget/income level).

TABLE 36: AVERAGE NUMBER OF USERS SERVED ON AN ANNUAL BASIS

Users	Public Sector	Third Sector	Private Sector	TOTAL
Average No. of users	**120,270**	**29,220**	**4,534**	**85,323**
Number of respondents (N)	*1012*	*544*	*60*	*1616*
% of respondents	*63%*	*34%*	*4%*	*100%*

TABLE 37: USERS SERVED ON AN ANNUAL BASIS

Staff size		Public Sector	Third Sector	Private Sector	Total
1 to 10	Count	724	477	58	1259
	%	54%	66%	63%	58%
11 to 50	Count	282	173	21	476
	%	21%	24%	23%	22%
51+	Count	342	72	13	427
	%	25%	10%	14%	20%
TOTAL	Count	1348	722	92	2162
	%	100%	100%	100%	100%

Annual budget/income		Public Sector	Third Sector	Private Sector	TOTAL
Less than €10,000	Count	273	189	18	480
	%	29%	28%	23%	28%
€10,000 to €100,000	Count	294	230	26	550
	%	31%	34%	33%	33%
€100,000 to €1 million	Count	224	161	18	403
	%	24%	24%	23%	24%
€1 million to €10 million	Count	104	74	14	192
	%	11%	11%	18%	11%
More than €10 million	Count	48	14	4	66
	%	5%	2%	5%	4%
TOTAL	Count	943	668	80	1691
	%	100%	100%	100%	100%

6.4 Most relevant network organizations in the remaining countries

The most relevant network organizations in each country have been identified by a combined procedure of extraction of network organizations from the survey sample (either those which answered the survey or those mentioned by respondents as the networks that their organizations are members of) and a process of validation and completion performed by each national partner based on their direct knowledge of the local eInclusion panorama and desk research.

In a few countries the research team lacked the capacity to identify those organizations: *Austria, Cyprus, Luxembourg* and *Slovenia*.

1. **BELGIUM**

The most relevant networks dealing with the digital gap in Belgium are (per region):

Brussels region:

1. **CABAN** (Collectif des Acteurs Bruxellois de l'Accessibilité Numérique), with more than 50 members. Find out more: www.caban.be

2. **CIRB** (Centre d'Informatique de la Région Bruxelloise), through its technical support service to Brussels region's networks, www.cirb.be

Flanders region:

3. **Flemish interface Centre for New literacy** (**VSNG**, Vlaams Steunpunt Nieuwe Geletterdheid), with more than 80 members. Find out more: http://www.vsng.be

4. **Do-IT**, a platform of Belgian organizations working around the digital divide in disadvantaged groups and founded by Microsoft Unlimited Potential, http://www.vsng.be

5. **The Digital Week** (De Digitale Week) initiative, http://www.digitaleweek.be

6. **LINC vzw** (Lezen, Informatie, en Communicatie), www.linc-vzw.be

7. **Link in de Kabel**, http://www.linkindekabel.be

Walloon region:

8. **Digital Public Spaces resources centre** (Centre de ressources des EPN de Wallonie, run by Technofutur TIC asbl) serving more than 120 EPNs. Find out more: http://www.epn-ressources.be, www.technofuturtic.be

9. **Wallon Telecommunications Agency** (**PMTIC**, Agence Wallonne de Télecommunication) through its technical support service to Walloon's networks, www.awt.be (Wallonie)

2. **CZECH REPUBLIC**

Despite the lack of government focus on eInclusion policies, the following selection starts by a public body which is the most influential (at policy level) in terms of eInclusion. The list is completed with associations active nation-wide or important inclusion actors playing a significant role in local/regional context:

1. **Government Council for Competitiveness and Information Society,** main body responsible for advising the government in the field of Information Society (incl. eInclusion), has 29 members including: the Prime Minister, Minister of Interior, Minister of Finance, Minister of Industry and Trade, Minister of Education, Youth and Sports, Minister of Justice and the Chairperson of the Government Legislative Council and the „Digital Champion" (other members of the Council are representatives of the most important institutions of the state administration and local governments who are involved in the area of the information society and implementation of eGovernment). Find out more: http://www.vlada.cz/cz/ppov/rvis/rada-vlady-pro-konkurenceschopnost-a-informacni-spolecnost-73372/

2. **National council for people with disability** (Národní rada osob zdravotně postižených) brings together organisations working in this area. In eInclusion the council is active in education in ICTs both to people with disabilities as well as those working with them, education in eSkills etc. Find out more: http://www.nrzp.cz/

3. **Association of family centres** (Asociace center pro rodiny), member of international federations – FICPM and FAFCE. Works with families and senior citizens. List for its eInclusion activities, which focus on projects dealing with ICT education of women during and after maternity leave. Find out more: http://acer.uvadi.cz/

4. **Association of institutions in adult education** (Asociace institucí vzdělávání dospělých - http://www.aivd.cz/) and

5. **Association of Universities for third age** (Asociace univerzit třetího věku – https://au3v.vutbr.cz/) both bring together actors that provide (ICT) education to the elderly.

6. **Association of centres for citizen guidance** (Asociace občanských poraden) is a network of organizations which provide support to all groups of citizens and many of their projects aim at education various disadvantaged groups in ICTs. Find out more: http://www.obcanskeporadny.cz/

7. **Helpnet.cz portal** is an information portal for people with specific needs, which brings together stakeholders and organizations dealing with related issues, and helps those interested in sharing (organisations and networks) or finding (individual stakeholders or organisations) information. The portal also organizes an annual national conference on ICTs for people with special needs. Find out more: www.helpnet.cz

8. **Association of librarians and information professionals** (Sdružení knihovníků a informačních pracovníků) is a voluntary, special and professional organization of librarians

and information professionals which has a character of a civic association. The mission of SKIP is an effort to constantly improve the standards of library and information services and in that manner to increase the professional prestige. It also works toward the goal of better conditions for the development and activities of libraries and information centres. Find out more: http://www.skipcr.cz

9. The **European Projects and Management Agency – EPMA**, a member of Telecentre Europe, is a prominent example of associations and networks as well as individual third sector, private or public organisations, which undertake ad-hoc projects related to eInclusion. It has created eLearning modules for the un- or under-employed teaching them relevant issues related to eGovernment procedures. There is also a number of individual **homes for the elderly**, **youth centres, community centres** or **organisations for minorities and migrants**, which provide ICT lessons and classes starting with the basic up to advanced levels. Although very significant on the local level, these organisations have not listed membership in any larger networks or associations. Find out more: www.epma.cz

3. ESTONIA

The most relevant e-Inclusion actors in the country are:

1. **The Estonian Folk High Schools Union** (Eesti Rahvaülikoolide Liit), with less than 10 members, National scope. Find out more: http://rahvaulikoolideliit.ee

2. **The Estonian Chamber of Disabled People** (Eesti Puuetega Inimeste Koda), with 51-200 members, European scope. Find out more: www.epikoda.ee

4. GREECE

In Greece, the e-Inclusion initiative is led by the public sector.

1. The Ministry of Administrative Reform and eGovernment is responsible inter alia for the Operational Programme "Information Society" in terms of studies, projects and actions related to eGovernment and providing quality value-added services to their citizens. Find out more: http://www.ydmed.gov.gr

2. The **Observatory for the Greek Information Society** is a non-profit organization placed under the supervision of the Ministry of Economy & Finance. The vision of the Observatory for the Greek IS is to become the key point of reference for accurate and up-to-date information on Information Society indicators, as well as one of the main institutions that contribute to the ICT policy formulation processes. The mission of the Observatory for the Greek IS is to measure and evaluate the national progress made towards the Information Society and to contribute to the accomplishment of the IS strategic goals on a national level. Find out more: http://www.observatory.gr/

3. The **Information Society S.A.** supports government departments and agencies at all stages of ICT project design, implementation and follow-up. Find out more: http://www.ktpae.gr/

5. IRELAND

In Ireland, the size of the networks is smaller than in larger countries. The selected ones show a balance between national and regional focus:

1. **FIT Ltd,** an organisation with links to about 350 organisations and European coverage through various eInclusion projects

2. **INDIE** (Irish Network for Digital Inclusion and Engagement) with nearly 200 member organisations and national coverage

3. **The Kerry Flyer**, with network links in the range of 10-50 organisations and regional coverage in the South West of Ireland

4. **Meath VEC** with network links in the range of 10-50 organisations and regional coverage in the North East/ Mid Leinster area

6. MALTA

In Malta the following are the most relevant organizations operating in the e-Inclusion sector:

1. **Malta Communications Authority**, a government entity which its aim is to achieve widespread eLiteracy, digital inclusion and the use of ICTs as a tool to improve quality of life for all citizens, in particular, disadvantaged groups. Encouraging the use of e-Business models by local enterprises as a means to improve competitiveness. https://www.mca.org.mt/

2. **Inspire Foundation**, a leading NGO working in the disability sector in Malta. Its services and programmes address the educational, therapeutic, social and recreational needs of the people attending the Centre, with a focus on ability and potential. In order to ensure maximum inclusion, the Centre focuses on ICT training to ensure that members can fully participate in the Networked Society. This Centre is used by the residents of the Foundation and the general public. http://www.inspire.org.mt/home?l=1

7. NETHERLANDS

In The Netherlands, there is a diversified landscape of e-Inclusion organizations, being the most representative ones:

1. **Dutch Library network,** formed by **SIOB** (national coordinator / sector institute for all Dutch libraries), **PSO** (service organisations at province level, servicing regional library networks with innovation and development of services and products - approximately 6 PSOs at this moment) and **libraries** (providers of local services and products for end users). Find out more: http://www.siob.nl/about-us/item11

2. **Seniorweb**, a local services and products for 55+ end users, national network. Find out more: www.seniorweb.nl

3. **Computerwijk**, a local training for end users, in 15 cities and 67 locations, 250 volunteer professional trainers. Find out more: www.computerwijk.nl

4. **HCC**, a national computer club and internet association for end users starting from one level above basic digital skills. 'Members help/train members' concept . Approx. 100.000 members. Find out more: www.hcc.nl

8. PORTUGAL

In Portugal, the following are the most representative networks operating in the e-Inclusion sector:

1. **Schools Programme** (Programa Escolhas) is devoted to promote the socio-economic inclusion of kids and youth in vulnerable situation (national scope). Find out more: www.programaescolhas.pt

2. **National Network of Public Libraries** (Rede Nacional de Bibliotecas Públicas) (national scope). Find out more: http://rcbp.dglb.pt/pt/Bibliotecas/Paginas/default.aspx

3. **Network of Internet Spaces** (Rede de Espaços Internet) runs around 1.000 PIAPs in a diversity of public spaces across the country (national scope). Find out more: http://www.umic.pt/index.php?option=com_content&task=view&id=18&Itemid=37

4. **Network of Universities for Seniors** (Rede de Universidades da Terceira Idade) is an association born to give support to the Universities for Seniors in the country (national scope). Find out more: http://www.rutis.org

9. SLOVAKIA

In Slovakia the eInclusion landscape is dominated by sectorial associations with national coverage:

1. **Association of Institutions educating adults in Slovakia** (Asociácia Inštitúcií vzdelávania dospelých), linked to Cisco Networking Academy Program, national scope. Find out more: http://www.aivd.sk/

2. **Association of the Deaf of Slovakia**, member of World Federation of the Deaf, national scope. Find out more: http://www.aneps.wbl.sk/

3. **National council of citizens with disability in Slovakia** (Národná rada občanov so zdravotným postihnutím v SR), member of the **European Blind Union – EBU**, national scope. Find out more: http://www.nrozp.sk/index.php/uvodna-stranka-nrozp

4. **Slovak Association of Libraries** (Slovenská asociácia knižníc – SAK), national scope. Find out more: http://www.sakba.sk/

Conclusions

The evidence gathered in this study shows a wide spectrum of eInclusion organizations currently providing ICT-enabled and other social services across the EU 27 countries. It indicates the many types of eInclusion actors that are contributing to the goals of the Europe 2020 Digital Agenda for Europe and also to related social and economic goals in these times of economic hardship. By providing ICT-enabled services and activities to thousands of people at risk of exclusion (young or unemployed people, the elderly, women, the disabled and other groups) across the region, these diverse sets of actors are fulfilling important social roles in their local communities, for the benefit of the whole European society.

This eInclusion map, the first of its kind at European Union level, includes almost 3,000 organizations mainly from the public and third sectors, with a few from the private sector, operating within the EU 27. Even though the map is by no means representative of the eInclusion landscape in each individual country, it represents an important step towards quantifying and qualifying more accurately the social and economic impact of these actors, the resources they need to further support their engagement with the communities they serve, and the different policies that could help them succeed in the provision of these critical services.

Based on the evidence from this mapping exercise, public libraries, municipal and city offices, and government-run telecentres represent the bulk of eInclusion actors within the public sector with some variations across the EU27 countries. These public sector actors seem to play a more active role in the eInclusion landscape of France, Belgium, Bulgaria, Finland, Latvia, Lithuania, Poland, Portugal, Spain, and Sweden than in the rest of the countries. On the other hand, non-governmental organizations, associations or foundations and community organizations in the third sector are more prevalent in the eInclusion landscape in Austria, Cyprus, Estonia, Germany, Greece, Hungary, Ireland, Italy, Malta, the Netherlands, Slovakia, and the United Kingdom.

Most of the actors in all three sectors that provide eInclusion and other social services tend to be micro organizations employing 10 people or fewer with operating budgets of less than €100,000. This is true for all countries except Finland, Denmark, Lithuania, and Cyprus where these organizations have on average higher operating budgets. Staff capacity and operating budget are clearly the two variables that determine, depending on the context and the target group, the scale of reach of these eInclusion organizations. The evidence from the survey points to a relationship between budget level and the annual average number of users that these organizations can reach. The higher the budget and staff capacity of the organization the more people they can help. Although this finding is not surprising, it adds to the mounting evidence that more resources would enable these organizations to provide more and better services to more people in their target groups and count on the means necessary to collect data and measure their social impact. This has important implications at the policy level especially because the eInclusion sector is largely funded from public budgets, either directly (public sector organizations) or indirectly (third sector organizations benefiting from public grants and funding programmes). The eInclusion map shows the important role of local governments as they provide funding resources for 70% of the organizations across sectors. National governments are also an important funding source especially in Finland, Ireland, and Slovenia. Funding from the European Union and from user service fees are the third and fourth top funding sources for eInclusion actors. It is important to note that user service fees are more significant as a funding source for organizations in the third sector, pointing perhaps to the willingness of users to pay a fee, however nominal, because they value the services these organizations provide.

Looking at the basket of ICT-enabled services eInclusion actors provide across the three sectors, it is evident that these organizations are helping advance the policy goals of the Digital Agenda for Europe, in particular in two of its action areas: enhancing digital literacy, skills and inclusion and ICT-

enabled benefits for EU society. As pointed out in the Digital Agenda Scoreboard 2013 report[26], 30% of Europe's population has never used the Internet, partly because basic ICT skills and affordable access are lacking. Over 80% of the organizations mapped in this study provide access to computers and Internet and also to basic digital literacy training for their communities. Furthermore, the majority of organizations go a step further and offer employment-related training, training on the use of social media and other collaborative software to promote peer-to-peer learning and content generation, thus transforming many of their users from consumers to producers of information. All these activities are at the heart of the Digital Agenda policy goals.

Evidence from the eInclusion map also highlights the efforts by organizations in the sector to collect user data in order to improve their services and activities, measure the impact of these services on their users, and fulfil funding requirements. Contrary to the commonly-held assumption that there is very limited impact assessment activity from these organizations, over 60% of the actors mapped collect user data. Although the most common user data collected revolves more around outputs (number of users, demographic information, etc.) than social and economic impact, these data constitute an important foundation for the development of evidence-based policy.

This report provides a sound estimate of the size of the eInclusion sector, which amounts to 158,255 eInclusion organizations operating in EU 27, and its distribution across countries and typologies. A comparison with business sector statistics suggest that a more granular counting could increase the number and weight of micro organizations, making the total figure still higher, reaching a possible total of **250,706** organizations. This would be equivalent to one eInclusion organization per every **2,004** European inhabitants. These figures are important since they constitute the first sound pan-European inference of the size of the sector, which will be useful for further policy making, social investment (e.g. through CSR initiatives) and more focused research to verify assumptions and refine the numbers that make up these key figures.

In fact, this has been the first coordinated effort at pan-European level to survey organizations operating in the eInclusion sector, covering the full range of eInclusion organization typologies. It has benefited from the engagement and active contribution of a network of organizations (national partners) who are practitioners more than researchers. Despite the scarce resources available to run fieldwork, they were the key to the successful achievement of the goals of this study, thanks to their local networks and their knowledge of the field at national level. Further research efforts should be devoted to systematically zooming into local settings in order to explore the sector composition more exhaustively.

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[26] https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/DAE%20SCOREBOARD%202013%20-%20SWD%202013%20217%20FINAL.pdf

Annexes

Annex 1: English version of the online questionnaire[27]

> **Mapping eInclusion actors in the European Union [MIREIA]
**
>
> **About this survey**
>
> Across the European Union, different organizations provide access and training to information and communication technologies (ICTs), along with other services for groups at risk of social exclusion, such as workers in declining industries, women, the elderly, people with disabilities, and immigrants – to name a few. From basic computer training, to online learning, to employment support, to accessing online government services, these organizations contribute to creating safer and more inclusive communities.
>
> If your organization is part of this vital ecosystem, it's very important that your work be acknowledged. By participating in this survey, you'll help create a map that shows the range of organizations engaged in advancing digital and social inclusion, the types of programs and services offered, and the groups that are being reached by these initiatives.
>
> This study is part of a larger research project coordinated and funded by the European Commission's Joint Research Centre, Institute for Prospective Technological Studies (JRC-IPTS) in collaboration with DG-CONNECT on Measuring the Impact of eInclusion actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe (MIREIA). The objective of MIREIA is to understand the role of eInclusion actors in advancing European inclusion policy goals and to create adequate instruments to demonstrate their outcomes.
>
> It takes 10-15 minutes to fill in the survey, so please take a moment to be counted. The data gathered through this survey is confidential and will only be used for the purposes of the study.
>
> The survey is being implemented by Telecentre-Europe with the collaboration of the Technology & Social Change Group, University of Washington. If you have questions or comments about the survey or the study please contact:
>
> for the UK: Peter Farrell at peter.farrell@ukonlinecentres.com
> for Ireland: Helen Johnston at HelenJohnston@fit.ie - phone: 01 8825570
> for Latvia: Mara Jakobsone at mara.j@dtmedia.lv
> for Lithuania: Karolina Jasvinaite at karolina.jasvinaite@langasiateiti.lt
> for Sweden: kansliet@digidel.se
> for Malta: Mark Schembri at mark.c.schembri@mca.org.mt
>
> **1. Is your organization a?**
>
> ☐ Individual organization operating in certain territory (NGO, telecenter, library, community association, etc.)
>
> ☐ Network of organizations (Association, Federation, formal or informal network)
>
> **About your organization**

Mapping eInclusion actors in the European Union [MIREIA]

2. Information of your organization

Name

Year your organization started

Address

City

3. Please select your country

☐ Austria	☐ Germany	☐ Netherlands
☐ Belgium	☐ Greece	☐ Poland
☐ Bulgaria	☐ Hungary	☐ Portugal
☐ Cyprus	☐ Ireland	☐ Romania
☐ Czech Republic	☐ Italy	☐ Slovakia
☐ Denmark	☐ Latvia	☐ Slovenia
☐ Estonia	☐ Lithuania	☐ Spain
☐ Finland	☐ Luxembourg	☐ Sweden
☐ France	☐ Malta	☐ United Kingdom

4. Contact information

Phone number

Email address

Website

5. To what sector does your organization belong? [Select ONE]

○ Public Sector

○ Third Sector (Non-governmental, Community, Voluntary, Non-Profit)

○ Private Sector

About your organization

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6. Type of organization in the Public Sector [Select ONE]

○ National, Regional, and State Agency [Social, Employment, Health]

○ Municipal/City Government [Adult Education Centre, Electronic Village Hall, Training Room, etc.]

○ Public Library

○ Government-run Telecentre

○ Formal Educational Institution [Primary, Secondary, High School, technical school, University]

○ Other

About your organization

7. Type of organization in the Third Sector [Select ONE]

○ Non-governmental organization

○ Association, Charitable organization or Foundation

○ Community organisation

○ Cooperative

○ Federation

○ Informal Network

○ Trade Union

○ Other

About your organization

8. Type of organization in the Private Sector [Select ONE]

○ Cybercafe

○ Private Training Organization

○ Private Formal Educational Institution [Primary, Secondary, High School, Technical School, University]

○ Other [Private nursing home, privately-run social housing, etc.]"

About your organization

9. Is your organization part or a member of a network or association [Select ONE]

○ Yes   ○ No   ○ Don't know

About your organization

10. Name(s) of the networks/associations of which it is a member

Name:

Name:

Name:

Name:

11. Approximately, how many organizations are part of this network/association? [Select ONE]

◯ Less than 10

◯ 10-50

◯ 51-200

◯ 201-500

◯ 500+

◯ Don't know

About your organization

12. How many permanent staff (including you) work at the organization? [Select ONE]

◯ 1-10   ◯ 11-50   ◯ 51+   ◯ Don't know

13. Approximately, how many users does your organisation serve on an annual basis? [Write the number in the space below or leave it blank if you don't know]

14. Approximately, how many users does your organization serve on an annual basis in the following areas? [Write the number in the space below or leave it blank if you don't know]

Access to Internet

Digital Competences Training

Certification of ICT Competences

ICT-related consultation and guidance

Other ICT-supported services

15. Which is the annual overall budget level of your organization? [Select ONE]

◯ Less than €10,000

◯ €10,000 to €100,000

◯ €100,000 to €1 million

◯ €1 million to €10 million

◯ More than €10 million

◯ Don't know

16. What are the MAIN sources of funding for your organization? [Select UP TO THREE]

☐ Local government

☐ National government

☐ European Union

☐ Philanthropic organizations (e.g. Foundations)

☐ Private sector (e.g. commercial companies)

☐ Community contributions

☐ Usage/service fees

☐ Other

☐ Don't know

Target Groups

17. What are the main target groups your organization serves? [Select ALL that apply]

☐ General (all groups)

☐ Children

☐ Young adults (16-24 years old)

☐ Adults

☐ Senior citizens/elderly

☐ Migrants

☐ Ethnic Minorities

☐ Women

☐ Individuals with physical disabilities

☐ Individuals with mental disabilities

☐ Unemployed people

☐ Low-skilled people

☐ People in precarious work

☐ Offenders/ex-offenders

☐ People suffering from addictions

☐ Low-income people

☐ People living in social housing

☐ Public sector employees

☐ Informal Carers

☐ Small entrepreneurs

☐ NGO/Volunteer organizations & staff

☐ Other

Programs and activities your organization offers

Mapping eInclusion actors in the European Union [MIREIA]

18. From the following list, please select all the different ICT-related services/activities available at your organization [Select ALL that apply]

- [ ] ICT Access [both computers and Internet]
- [ ] Basic ICT Training/Digital Literacy [computer fundamentals, email, Internet browsing]
- [ ] Advanced ICT Skills Development [programming, web development and design]
- [ ] Certification Training [ECDL, ICDL, etc.]
- [ ] Access to online courses offer by formal or non-formal educational institutions
- [ ] Training on social media for communication, collaboration, and participation (social networking sites, content creation and sharing programs)
- [ ] Training in online job seeking, job application, and CV development
- [ ] e-Accessibility training and awareness
- [ ] ICT supported access to government and social services (health, welfare, independent living, e-government)
- [ ] Awareness and management of legal and ethical aspects of online privacy and security
- [ ] ICT supported assistance for small and medium entrepreneurs or people self-employed
- [ ] ICT supported community building (including assistance to social organisations, informal groups and volunteers)
- [ ] Other

19. What other additional services/activities does your organization offer? [Select ALL that apply]

- [ ] Social/Government services (i.e. housing, childcare, schools, health, etc.)
- [ ] Employment-related services (i.e. support for job search/finding work, help with CVs/resumes, practice job interviews, etc.)
- [ ] Entrepreneurship-related services (i.e. assistance with self-employment, starting a business, social enterprise, etc.)
- [ ] Language training
- [ ] Vocational training
- [ ] Legal assistance (i.e. residence permits, etc.)
- [ ] Other

Your opinion on innovation providing eInclusion services

20. From your point of view, what are the most innovative aspects of the ICT-supported programs and services available at your organization? For example, which new programs, products, or services were/are created that meet social needs while creating economic value and promoting new social relations or forms of economic collaboration. [Please write your answer in the space below]

User data collection at your organization

21. Does your organization collect user [beneficiary] data to understand the performance of the programs, areas of improvement, and contributions of these programs to the well being of your users?

○ Yes ○ No ○ Don't know

User data collection at your organization

22. Please select from the following list the data your organization collects [Select ALL that apply]

☐ Demographic (age, gender, employment status, etc.)

☐ Number of users accessing computers and Internet at the organization

☐ Number of users STARTING ICT courses

☐ Number of users COMPLETING ICT courses

☐ Progress of trainees ICT Skills level (before and after training)

☐ Follow up on users' employment status after ICT training (3 months, 6 months, annually)

☐ Number of users participating in other services/activities at the organization

☐ Number of users accessing e-government services

☐ Number of users obtaining certificates (ECDL, ICDL, etc.)

☐ Number of users accessing online courses

☐ Number of small and medium entrepreneurs participating in ICT training

☐ Follow-up with entrepreneurs to learn impact of ICT use in business operations

☐ Economic impact for the citizen (e.g. employment status change after ICT/other training)

☐ Education impact for the citizen (e.g. # of users participating in additional training)

☐ Other

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23. How does your organisation collect this data? [Select ALL that apply]

☐ Electronically (online like surveys or reporting systems) direct from the beneficiary

☐ Electronically (offline, like spread sheet sent by email) direct from the beneficiary

☐ Manually (on paper) from the beneficiary

☐ Other

☐ Don't know

24. What method(s) does your organization use to measure the impact of its programs and activities on users? (Select ONE)

○ Qualitative methods [i.e. interviews, focus groups, direct observation, outcome mapping, etc.]

○ Quantitative methods [i.e. surveys for statistical analysis]

○ Combination of qualitative and quantitative methods

○ Other

○ Don't know

25. For what purposes does your organization collect user data? (Select ALL that apply)

☐ To measure the impact of services and activities on users

☐ To fulfill funders evaluation requirements

☐ Assess programme performance

☐ Improvement of products/programmes/activities

☐ Other

26. What are the THREE main barriers your organization faces to collect user information/data? [Select UP TO THREE]

☐ Don't have staffing capacity

☐ Don't have time capacity

☐ Don't have funding

☐ Don't have data collection method/system

☐ Never thought about it/ needed to

☐ Other

☐ Don't know

About you

27. Are you a?

○ Woman   ○ Man

**Mapping eInclusion actors in the European Union [MIREIA]
**

28. Your age

29. What is your position at the organization?

☐ Director/Manager/Head of Department/Organisation

☐ Programme/Project Manager/Coordinator

☐ e-Facilitator/Trainer

☐ Volunteer

☐ Other

30. How did you hear about the survey? [Select ALL that apply]

☐ I was contacted by an organization in my country

☐ I was contacted by Telecentre-Europe

☐ I learned about it in an event

☐ Mailing list/newsletter

☐ Social Media channels (Facebook, Twitter, Google+, etc.)

☐ Somebody pointed it to me

☐ Other

Thank you for your participation!

We are trying to reach as many organizations as possible and we would really appreciate if you help us disseminate the survey to other organizations in your area and country.

Share this link http://www.telecentre-europe.org/?page_id=5644

Annex 2: Information of eIMAP partners per country

Country	Organization	Sector	Organization Type
Belgium	Belgium - Interface3	Third Sector	Association, Charitable organization or foundation
Bulgaria	Bulgaria - ICT Development Bulgaria Association (ICTD BG)	Third Sector	Association, Charitable organization or foundation
Czech Republic	Czech Republic - European Projects & Management Agency (EPMA)	Private Sector	Other
Denmark	Denmark - Learn more about ICT network	Public Sector	Government-run Telecenters
Denmark	Denmark - The Association of Danish Senior Citizens	Third Sector	Association, Charitable organization or foundation
Estonia	Estonia - eGovernance Academy	Third Sector	Non-governmental organization
Estonia	Estonia - eGovernance Academy	Third Sector	Non-governmental organization
France	France - Association Creatif	Third Sector	Association, Charitable organization or foundation
Finland	Finland - Finnish Association of Adult Education Centres (KoL)	Third Sector	Association, Charitable organization or foundation
Finland	Finland - Finnish Association of Adult Education Centres (KoL)	Third Sector	Association, Charitable organization or foundation
Germany	Germany - Stiftung Digitale Chancen	Third Sector	Association, Charitable organization or foundation
Greece	Greece - Government To You (Gov2U)	Third Sector	Non-governmental organization
Greece	Greece - Government To You (Gov2U)	Third Sector	Non-governmental organization
Hungary	Hungary - Foundation for Development of Democratic Rights (DemNet)	Third Sector	Association, Charitable organization or foundation

Ireland	Ireland - Fast Track to Information Technology Ltd	Private Sector	Private Training Organizations [Support Government programs, NGOs, etc]
Italy	Italy - Fondazione Mondo Digitale	Third Sector	Association, Charitable organization or foundation
Italy	Italy - Fondazione Mondo Digitale	Third Sector	Association, Charitable organization or foundation
Latvia	Latvia - Latvian Information and Communication Technology Association (LIKTA)	Third Sector	Association, Charitable organization or foundation
Lithuania	Lithuania - Association Langas i Ateiti (Window to Future)	Third Sector	Government-run Telecenters
Malta	Malta - Community Empowerment Organization	Public Sector	Government-run Telecenters
Netherlands	Netherlands - ECP-EPN	Third Sector	Association, Charitable organization or foundation
Poland	Poland - Information Society Development Foundation	Third Sector	Association, Charitable organization or foundation
Portugal	Portugal - FCT	Public Sector	National, Regional, and State Agencies [Social, Employment, Health]
Romania	Romania - Educating for an Open Society Foundation (EOS)	Third Sector	Association, Charitable organization or foundation
Spain	Spain - Association of the Community of Telecentre Networks and Social Innovation Centres	Third Sector	Association, Charitable organization or foundation
Spain	Spain - Telecentre-Europe AISBL	Third Sector	Association, Charitable organization or foundation
Sweden	Sweden - Digidel 2013	Third Sector	Non-governmental organization
United Kingdom	United Kingdom - Peabody	Third Sector	Association, Charitable organization or foundation
United Kingdom	UK online centres	Third Sector	Association, Charitable organization or foundation

Annex 3: List of Third Party Dissemination Channels

NATIONAL eINCLUSION INTERMEDIARY ORGANIZATIONS THAT ACTED AS DISSEMINATION PARTNERS:

Belgium: Interface3 (INT3) http://www.interface3.be

Bulgaria: ICT Development Bulgaria Association (ICTD BG) http://www.ictdbg.eu

Cyprus: (cfr. Greece)

Czech Republic: European Projects & Management Agency (EPMA) http://www.epma.cz

Denmark: Learn More about ICT Network (LMI) http://www.lærmereomit.dk

Estonia: eGovernance Academy, http://www.ega.ee

France: Association Creatif (CREA) http://www.creatif-public.net

Finland: Finnish Association of Adult Education Centres (KoL) http://www.ktol.fi

Germany: Stiftung Digitale Chancen (SDC) http://www.digitale-chancen.de

Greece: Government To You (Gov2U) http://www.gov2u.org

Hungary: Foundation for Development of Democratic Rights (DEMNET) http://www.demnet.hu

Ireland: Fast Track into Information Technology Ltd (FTI) http://www.fit.ie

Italy: Fondazione Mondo Digitale (FMD) http://www.mondodigitale.org

Latvia: Latvian Information and Communication Technology Association (LIKTA) http://www.likta.lv

Lithuania: Association Langas i Ateiti (LIA) http://www.langasiateiti.lt

Luxembourg: (cfr. Belgium)

Malta: Community Empowerment Organization (CEO) http://www.mca.org.mt

Netherlands: ECP Foundation (ECP) http://www.ecp.nl

Poland: Information Society Development Foundation (FRSI) http://frsi.org.pl

Portugal: Foundation for Science and Technology (FCT)

Romania: Educating for an Open Society Foundation (EOS) http://www.eos.ro

Slovakia: (cfr. Czech Republic)

Spain: Community Association of Telecentre Networks and Social Innovation Centres (CATN) http://www.comunidaddetelecentros.net

Sweden: Internet Infrastructure Foundation https://www.iis.se

United Kingdom: UK Online Centres (UOL) http://www.ukonlinecentres.com

OTHER NATIONAL eINCLUSION INTERMEDIARY ORGANIZATIONS

AUSTRIA:

A1 Internet für Alle, http://www.a1.net

Austrian Institute of Technology (AIT), http://www.ait.ac.at

Österreichische Institut für angewandte Telekommunikation (ÖIAT), http://www.oiat.at

Telehaus Eschenau http://www.telehaus.at

ESTONIA:

ICT Demo Centre | e-Estonia, http://e-estonia.com/ict-demo-center

Smart Work Association (SWA), http://www.smartwork.ee

Estonian Association of Information Technology and Telecommunications, http://itl.ee

Look@World Foundation, http://www.vaatamaailma.ee

Tiger Leap Foundation (TLF), http://www.tiigrihype.ee/en

FRANCE:

Bibliothèque Publique d'Information (BPI), http://www.bpi.fr

FINLAND:

Finnish Library Association, http://www.suomenkirjastoseura.fi

GREECE:

Trainingnet T.E.N, http://www.trainingnet.gr

Hellenic Professionals Informatics Society (HePIS), http://www.hepis.gr

SLOVAKIA:

Aptech Computer Education, http://www.aptech-europe.com

SLOVENIA:

Ypsilon, http://ypsilon.si

Centre for eGovernance Development http://www.cegd.eu

NATIONAL CIVIL SOCIETY ORGANIZATIONS

AUSTRIA:

Zentrum für Interaktion, Medien & soziale Diversität (ZIMD) http://www.zimd.at

ESTONIA:

Estonian National Youth Council (ENL) http://www.enl.ee

NATIONAL RESEARCH INSTITUTIONS

AUSTRIA:

Österreichische Forschungsförderungsgesselschaft, http://www.ffg.at

Central European Institute of Technology (CEIT) http://www.ceit.at

Donau Universität Krems http://www.donau-uni.ac.at

Research Studios Austria http://www.researchstudio.at

GIVE Research Association, http://www.give.at

NATIONAL GOVERNMENT INSTITUTIONS

AUSTRIA:

Bundeskanzleramt für Recht, Organisation und Internationales, (Federal Chancelery where all lines converge to Projects for a Digital Austria)

Bundeskanzleramt, Abteilung I/11: E-Government – Recht, Organisation und Internationales

http://www.bka.gv.at

Bundesministerium für Unterricht, Kunst und Kultur (Ministry for Education and Culture)

http://www.bmukk.gv.at

campaign website: ***Digitale Agenda für Bildung, Kunst und Kultur*** http://www.efit21.at

Bundesministerium für Wirtschaft, Familie und Jugend (Ministry for Economy, Family and Youth), http://www.bmwfj.gv.at

Stadt Salzburg, (City of Salzburg), http://stadt-salzburg.at

SWITZERLAND:

Direction générale des systèmes d'information (DGSI),Département de la sécurité – REPUBLIQUE ET CANTON DE GENEVE(Project: Antennes Citoyennes), http://www.ge.ch/dgsi/

Laboratoires d'usages des Administrations à l'ère d'internet (OT Lab) Observatoire Technologique – Direction générale des systèmes d'information (DGSI)Département de la sécurité – REPUBLIQUE ET CANTON DE GENEVE, http://www.ot-lab.ch

Desk research: Third-Party Dissemination Channels

EUROPEAN ONLINE COMMUNITIES:

Digital Agenda for Europe Engagement Platform, http://daa.ec.europa.eu

ePractice Community, http://www.epractice.eu

My-europe, http://my-europa.eu

YouthNetworks, http://www.youthnetworks.eu

EUROPEAN ASSOCCIATIONS

Association of Voluntary Service Organisations (AVSO), http://avso.org

Age Platform Europe, http://www.age-platform.eu

Civic Agenda, http://www.civicagenda.co.uk

Council of European Professional Informatics Societies (CEPIS), http://www.cepis.org

Digital Europe, http://www.digitaleurope.org

European Bureau of Library, Information and Documentation Associations (EBLIDA), http://www.eblida.org

Euclid network, http://www.euclidnetwork.eu

Eurocities, http://www.eurocities.eu

European Academy for Education and Social Research, http://www.academy-europa.eu

European Civil Society Platform on Lifelong Learning (EUCIS-LLL), http://www.eucis-lll.eu

European Computer Driving License Foundation (ECDL), http://www.ecdl.com

European Disability Forum, http://www.edf-feph.org

European Dynamics. http://eurodyn.com

European Eskills Association, http://eskillsassociation.eu

European Projects Association (EPA), http://www.europeanprojects.org

European Schoolnet, http://www.eun.org

European Youth Foundation (EYF), http://www.eyf.coe.int/fej

European Youth Forum, http://www.youthforum.org

Junior Achievement Young Enterprise (JA-YE Europe), http://www.ja-ye.org

National Authorities on Public Libraries in Europe (NAPLE), http://napleblog.wordpress.com
http://sisterlibrariesnaple.wordpress.com

Platform of European Social NGOs, http://www.socialplatform.org

EUROPEAN PROJECT PARTNERSHIPS:

Bridge IT, http://www.bridge-it-net.eu

CARER Plus, http://www.carerplusproject.eu

CARE Net, http://www.carenetproject.eu

Speeding Every European Digital (SEED), http://www.seed-project.eu

This is IT, http://www.thisisit4u.eu

Pan European eParticipation Network (PEP-NET), http://pep-net.eu

EUROPEAN INSTITUTIONAL PLAYERS:

European Commission – DG Communications Networks, Content and Technology, http://ec.europa.eu/dgs/connect/index_en.htm

Digital Agenda for Europe, http://ec.europa.eu/digital-agenda

European Commission – DG Employment, Social Affairs & Inclusion, http://ec.europa.eu/social/home.jsp

European Platform against Poverty and Social Exclusion, http://ec.europa.eu/social/main.jsp?langId=en&catId=961

EUROPEAN MEDIA PLAYERS

Agence Europe, http://www.agenceurope.com

BBC online, http://www.bbc.co.uk

Deutsche Welle Online, http://www.dw.de

EU Observer, http://euobserver.com

Euractiv, http://www.euractiv.com

Euronews, http://www.euronews.com

European Broadcasting Union (EBU), http://www3.ebu.ch

European voice, http://www.europeanvoice.com/

Europolitics, http://www.europolitics.info

FT Online, http://www.ft.com

TheParliament.com, http://theparliament.com

GLOBAL ONLINE COMMUNITIES:

Digital Inclusion Network (DIN), http://forums.e-democracy.org/groups/inclusion

LinkedIn group "eInclusion", http://www.linkedin.com/groups/eINCLUSION-889757/about?trk=anet_ug_grppro

LinkedIn group "Digital Literacy and eSkills for all", http://www.linkedin.com/groups/Digital-Literacy-eSkills-all-4123637

GLOBAL ASSOCIATIONS

International Federation of Library Associations and Institutions (IFLA), http://www.ifla.org

Internet Society, https://www.internetsociety.org

Techsoup, http://www.techsoupglobal.org

Telecentre.org, http://www.telecentre.org

GLOBAL INSTITUTIONAL PLAYERS:

International Telecommunication Union (ITU), http://www.itu.int

United Nations Development Programme (UNDP), http://www.undp.org

United Nations Public Administration Network (UNPAN), http://www.unpan.org

INDUSTRIAL PLAYERS

Accenture, http://www.accenture.com

Certiport, http://www.certiport.com

Cisco Systems, http://www.cisco.com

Intel Europe, http://www.intel.eu

Liberty Global, http://www.lgi.com

Microsoft Europe, http://www.microsoft.com/europe/index.html

Motorola, http://www.motorola.com

Oracle, http://www.oracle.com

	Average # users per organization	Standard Deviation	Sample Size
Austria	92,814	245,499	8
Belgium	79,942	423,272	55
Bulgaria	11,712	46,325	79
Czech Republic	51,140	252,461	66
Cyprus	685,865	1,765,884	7
Denmark	125,112	149,875	4
Estonia	105,500	196,571	4
Finland	83,535	207,064	38
France	433,334	5,092,035	163
Germany	58,690	108,312	7
Greece	4,066	7,727	11
Hungary	34,322	168,284	55
Ireland	5,297	9,058	19
Italy	4,403	12,553	55
Latvia	5,171	9,231	18
Lithuania	73,515	126,532	50
Luxembourg	10,000	NA	2
Malta	410	528	4
Netherlands	140,505	434,396	85
Poland	21,116	81,288	202
Portugal	26,931	43,514	67
Romania	12,879	58,872	149
Slovakia	2,474	3,938	21
Slovenia	28,050	38,147	4
Spain	49,763	184,132	291
Sweden	50,501	115,355	47
United Kingdom	103,527	695,406	97

Abstract

This report presents the results of an online survey that collect relevant data from almost 3,000 organisations working on eInclusion in 27 European countries, which is the first attempt in Europe to collect primary data from those actors. This research constitutes a building block of a larger project 'Measuring the Impact of eInclusion Actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe' (MIREIA), a policy-oriented research project which aims to better understand the role of these actors across the European Union and to create adequate measurement instruments to provide evidence about how they contribute to the achievement of the Europe 2020 policy goals, from the eInclusion perspective.

The findings of the analysis provide policy relevant insights and help shed light on the size of the sector, the types of organisations providing eInclusion services and their capacity (staff, budgets, funding sources and network), the services they provide and the target groups they address. In conclusion, they illustrate the key relevance of these estimated 250,000 actors in EU27 in advancing social and economic inclusion goals of the Europe2020 strategy, and in particular the digital literacy and inclusion goals of the Digital Agenda for Europe.

As the Commission's in-house science service, the Joint Research Centre's mission is to provide EU policies with independent, evidence-based scientific and technical support throughout the whole policy cycle.

Working in close cooperation with policy Directorates-General, the JRC addresses key societal challenges while stimulating innovation through developing new standards, methods and tools, and sharing and transferring its know-how to the Member States and international community.

Key policy areas include: environment and climate change; energy and transport; agriculture and food security; health and consumer protection; information society and digital agenda; safety and security including nuclear; all supported through a cross-cutting and multi-disciplinary approach.

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