Measuring the Impact of eInclusion Intermediary Actors

Characterisation and Mapping of eInclusion Intermediary Actors in the EU27

Cristina Torrecillas, Clara Centeno, Gianluca Misuraca

2014
Acknowledgements

The authors are very grateful for the contribution made by many of their colleagues and stakeholders who have been involved in the activities of the MIREIA Project.

In particular, we wish to thank Maria Garrido, Araba Sey, Tabitha Hartand and Luis Santana from the Technology & Social Change Group at the University of Washington Information School, authors of the 'Exploratory study on explanations and theories of how Telecentres and other community-based eInclusion actors operate and have an impact on digital and social inclusion policy goals'.

Moreover we would like to highlight the work done by the three researchers, Mara Jakobsone, John Clayton and Ismael Pena-Lopez, who carried out the Locality Mapping exercise in the areas of Zemgale (Latvia), Sunderland (United Kingdom) and El Raval-Barcelona (Spain) respectively.

In addition we would like to thank Gabriel Rissola from Telecentre-Europe and Maria Garrido from the University of Washington for conducting the survey on eInclusion intermediary actors in the EU27 (with the field support of Telecentre-Europe members) and analysing the data, which has been instrumental to the production of this report.

We would also like to acknowledge the contribution of the participants to the first and second Experts’ and Stakeholders’ Workshops on Measuring the impact of eInclusion actors held in Seville, respectively on 3rd and 4th May 2012 and on 6 September 2012, and thank them for their active participation and for their reviews and feedback to different intermediate pieces of the work.

Finally, we would like to express our appreciation to our colleagues from DG CONNECT and JRC-IPTS, who have contributed in different stages of MIREIA for their valuable inputs and suggestions and without whom this project would have not been possible.

Note:

This document has been prepared by Cristina Torrecillas, Clara Centeno and Gianluca Misuraca of the Institute for Prospective Technological Studies of the European Commission’s Joint Research Centre.

This document is based on the analysis conducted as part of Work Package 1 of the MIREIA project – ‘Measuring the Impact of eInclusion actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe’, co-funded by the European Commission DG Communications Networks, Content and Technology (DG CONNECT, former DG INFSO) and the Joint Research Centre’s Institute for Prospective Technological Studies (JRC-IPTS) under the Administrative Arrangement with Reference INFSO/H3/2011/2 - SMART 2011/007 – Nr. JRC 32611-2011-12.


For more information about MIREIA see: http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html
# Table of Contents

**Executive Summary**

1. **Introduction**
   1.1 Policy and research background  
   1.2 Research questions and structure of the report  
   1.3 Methodology

2. **What the Literature says about eInclusion Intermediary Actors**

3. **Structuring the Diversity of eInclusion Intermediary Actors**
   3.1 Findings from the exhaustive locality mappings  
   3.2 Typology of eInclusion intermediary actors

4. **Characterisation of eInclusion Intermediary Actors in EU27**
   4.1 Individual organisations vs. networks  
   4.2 Distribution across sectors  
   4.3 Organisational capacities  
   4.4 Target groups served  
   4.5 Services provided  
   4.6 ICT-enabled innovation carried out by eInclusion intermediary actors

5. **Estimate of the Size of the eInclusion Intermediary Sector in EU27**

6. **Conclusions**
   6.1 Key findings  
   6.2 Further research  
   6.3 Policy implications

**Annex I** – Network organisations identified in the EU27

**Annex II** – Survey Methodology and Questionnaire

**Annex III** – Bibliography
List of Tables

Table 1: Summary of the findings from the Locality mapping in Spain, Latvia and the UK.............................................13
Table 2: Typology of eInclusion intermediary actors........................................................................................................15
Table 3 (Annex II): Population, minimum foreseen organisations and survey respondents distribution by country...........47
Table 4 (Annex II): Distribution of individual and network of organisations by network affiliation................................48
Table 5 (Annex II): Estimate of the total number of organisations which are members of networks..........................49

List of Figures

Figure 1: Role and impacts of eInclusion intermediary actors ........................................................................................................10
Figure 2: Sample distribution by individual organisations and networks aggregated (Q1, Total N= 2,352) ..............16
Figure 3: Size of network organisations (Q1 & Q11, N=518) ..................................................................................17
Figure 4: Network membership by country (Q9, N=2351).................................................................................................18
Figure 5: Distribution of organisations by sector aggregated (Q5, N=2,752) ..........................................................19
Figure 6: Distribution of organisations by sector per country (Q5, N=2,752) ..........................................................19
Figure 7: Distribution by organisational categories in the public sector aggregated (Q6, N=1,605) .........................20
Figure 8: Distribution by organisational categories in the public sector by country (Q6, N=1,605) .....................21
Figure 9: Distribution by organisational categories in the third sector aggregated (Q7, N=984) ............................21
Figure 10: Distribution by organisational categories in the private sector aggregated (Q8, N=168) ....................22
Figure 11: Percentage of organisations aggregated by number of years in operation (Q5, N=2,352) .............23
Figure 12: Percentage of organisations within sector by number of years in operation (Q2 & Q5, N=2,352) .........23
Figure 13: Distribution by staff size aggregated (Q12, N=2,289) ........................................................................24
Figure 14: Organisations’ staff size by sector (Q12, N=2,289) ........................................................................24
Figure 15: Annual budget levels aggregated (Q15, N= 2,220) ..................................................................................25
Figure 16: Three main sources* of funding aggregated (Q16, N= 2,272) ..........................................................26
Figure 17: Main 3 sources* of funding by type of sector (Q16, N= 2,272) ..........................................................26
Figure 18: Target groups served aggregated (Q17, N=2,300) ...........................................................................27
Figure 19: Percentage of eInclusion actors that offer different ICT-related services (Q18, N= 2,255) ............28
Figure 20: Other social services provided by organisations aggregated (Q19, N=2,255) .................................29
Executive Summary

Background

The eInclusion policy was launched as part of the Lisbon 2010 strategy and revised under the Digital Agenda Flagship initiative in the Europe 2020 strategy. It aims to “reduce gaps in Information and Communication Technologies (ICT) usage and promote the use of ICT to overcome exclusion, and improve economic performance, employment opportunities, quality of life, social participation and cohesion.”

As part of its research strategy, JRC-IPTS and DG CONNECT are conducting a study, ‘Measuring the Impact of eInclusion actors on Digital Literacy, Skills and Inclusion goals of the Digital Agenda for Europe’ (hereinafter MIREIA). This policy-oriented research project aims to map and characterize the diverse set of actors involved in implementing the eInclusion policies and create adequate measurement instruments to provide evidence on how they contribute to the achievement of the Europe 2020 goals.

In this context, eInclusion intermediary actors can be defined as: “public, private and third sector organisations which intentionally address social inclusion goals through ICT or promote the use of ICT to enhance the socio-economic inclusion of marginalised and disadvantaged groups and of people at risk of exclusion”.

This report presents the research results of the first component of the MIREIA project and provides new insights into: who eInclusion actors are, what services they provide, to which targets groups, how they operate and innovate, and how many exist across the EU27. The research combined literature review, desk research, an exhaustive locality mapping and an online survey across EU27, which collected 2,752 responses from organisations and networks of organisations, representing at least 85,000 eInclusion intermediary actors across Europe.

Key Findings

The research identified the importance of networks among these organisations and the high diversity of eInclusion intermediary actors across sectors, as illustrated by the typology below.

<table>
<thead>
<tr>
<th>Public Sector</th>
<th>Third Sector</th>
<th>Private Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government-run Telecentre</td>
<td>Association</td>
<td>Training Organisation</td>
</tr>
<tr>
<td>Local Government</td>
<td>Charitable organisation</td>
<td>Formal Educational Institution</td>
</tr>
<tr>
<td>National Agency</td>
<td>Foundation</td>
<td>Cybercafé</td>
</tr>
<tr>
<td>Regional Agency</td>
<td>Non-governmental organisation</td>
<td>[Other]</td>
</tr>
<tr>
<td>State Agency</td>
<td>(NGO)</td>
<td></td>
</tr>
<tr>
<td>Public Library</td>
<td>Community organisation</td>
<td></td>
</tr>
<tr>
<td>Formal Educational Institution</td>
<td>Cooperative</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Federation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Informal network</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trade Union</td>
<td></td>
</tr>
<tr>
<td></td>
<td>[Other]</td>
<td></td>
</tr>
</tbody>
</table>

The analysis of types of actors that responded to the online survey shows that:

- Individual organisations make up close to 80% of the sample of 2,752 and the remaining 20% of the respondents is made up of networks of organisations, which represent at least 85,000 organisations across EU27.
- 60% of the organisations have been active for more than 10 years and 46% for more than 15 years.
- The analysis of the estimated 85,000 organisations belonging to the networks captured in the survey shows that two thirds of the eInclusion actors belong to the public sector, a third belong to the third sector and only a very small percentage (1.5%) to the private sector.
The analysis of the organisations' capacities shows that:

- Over 50% of eInclusion intermediary actors in the map are small organisations with 1 – 10 members of staff and have operating budgets of less than €100,000.
- Local governments play a very important role as a funding source for eInclusion actors with almost 67% of organisations reporting this source as one of their main three. National governments, the EU and usage/service fees follow per order of importance. For networked organisations, Local governments and EU funding are respectively the first and second most important financial source.

The analysis of the services provided by the eInclusion intermediary actors indicates that:

- Most eInclusion intermediary actors serve broad target groups, around half focus on specific groups such as senior citizens, young adults and unemployed people, and a third of the organisations serve children, women, low-skilled people, and low income people.
- 90% of the surveyed organisations offer access to computers and the Internet and basic ICT digital literacy training. Half of the organisations offer employment-related training (online job seeking, application, CV development, and training on social media and other collaborative software), social inclusion services (ICT supported access to government and social services) and education/skilling support (online courses).
- Moreover, more than half of the organisations surveyed also provide other (non ICT-related) social inclusion-related services in relation to employability, entrepreneurship, skilling, social and government services.
- Furthermore, by making use of ICT, these actors find innovative means to address social needs such as: improving access to ICT and ICT training and promoting citizen participation; providing digital skills for parents and women; increasing capacity building of the eInclusion sector, enhancing employment and entrepreneurship services; improving access to resources in remote and rural areas; enhancing access to education resources and certification and; increasing local partnership building.

The research estimates that there are around 250,000 eInclusion intermediary organisations in the EU27 (a third part – 85,000 - of which are represented by the networks to which they belong to in the survey sample) or an average of one eInclusion organisation for every 2,000 inhabitants.

Policy relevance

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 most vulnerable groups in society. These organisations are playing a relevant role in achieving the goals of the Digital Agenda for Europe, particularly 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 organisations mapped in this study provide access to ICT and to basic digital literacy training for their communities. Furthermore, the majority of organisations offer ICT-based, employment-related and social services.

In times where there is great policy expectation (e.g. Grand Coalition for Digital Jobs initiative) on the palliative role that digital jobs can play to mitigate the high unemployment rates (one of the major societal challenges in Europe today), eInclusion intermediary organisations are called to support those who are farer from those opportunities to be prepared for them, helping them to ameliorate their employability prospects by becoming digitally competent. Indeed there is a need for policy 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. When considering these policy options, the important role that networks play among these actors needs to be acknowledged, mainly because of the high number of small organisations that characterize the sector.
1. Introduction

1.1 Policy and research background

Information and Communication Technologies (ICTs) play an essential role in supporting daily life in today’s digital society. The eInclusion policy, launched under the Lisbon 2010 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.”¹

Furthermore, the more recent Europe 2020 strategy establishes ICTs as a core element in five of the EU’s seven flagship initiatives: the Digital Agenda for Europe, the European Platform against Poverty and Social Exclusion, An Agenda for New Skills and Jobs, Youth on The Move, and the Innovation Union.

In this respect, digital inclusion goals remain a key objective of the Digital Agenda for Europe (DAE) which aims at “Every European Digital” and recognizes that for its implementation, “a sustained level of commitment at both EU and Member States level” will be required, and that “it cannot succeed without a major contribution by other stakeholders”. In this context, digital inclusion and social inclusion actors such as Public Internet Access Points, public libraries, third sector organisations and also social workers, called here eInclusion intermediaries, play a crucial role by providing ICT access and digital literacy training to excluded groups and also by using ICT to increase social inclusion and employability of groups at risk of exclusion. However, these actors have received limited policy attention so far, even though there is a growing awareness of their crucial contribution to achieving the goals set out in the DAE.

At the same time, not enough is known about the actual contribution of these actors to improving the socio-economic inclusion of the communities and groups they serve. In 2012, therefore, the Institute for Prospective Technological Studies (JRC-IPTS) of the European Commission’s Joint Research Centre together with the Directorate General Information Society (now Communication Networks, Content and Technology DG CNECT) launched a research project on ‘Measuring the impact of eInclusion actors on Digital Literacy, Skills and Inclusion goals of the DAE’ (MIREIA²). This project aims to: 1) better characterise eInclusion intermediary actors, and 2) create adequate instruments to facilitate the measurement of their impact in social and economic terms.

1.2 Research questions and structure of the report

This report summarizes the research findings for the first aim of project MIREIA, which was to answer the following research questions:

What are eInclusion intermediary actors? What services do they provide, to which targets groups? How do they operate and innovate? How they can be classified? What is a plausible estimate of the size and distribution of the actors?

The report is structured as follows: Chapter 1 introduces the background of the MIREIA research project, the research questions and structure of the document and briefly presents the methodology followed to conduct the study. Chapter 2 presents the main findings of the literature review conducted on eInclusion intermediary actors. Chapter 3 outlines the main outcomes of the Exhaustive Locality Mappings, highlighting the resulting typology of eInclusion intermediary actors. Chapter 4

---

² http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html
discusses the main findings from the mapping exercise in the EU27 as regards the research questions.

Finally, Chapter 5 draws conclusions on the characterisation and mapping of exclusion intermediary actors that emerged from the analysis, summarizing the key findings and outlining future research needs and implications for policy.

1.3 Methodology

To address the above mentioned objectives and respond to the research questions underpinning this study, a triangulation of research methods has been used:

a. Literature review and desk research

A literature review\(^3\) was conducted to provide a comprehensive and multidisciplinary landscape on theories and analytical frameworks to understand how Telecentres and other community-based e-Inclusion actors operate and have an impact on digital and social inclusion policy goals. This review was complemented by desk research in order to inform the development of a typology of eInclusion intermediary actors.

b. Exhaustive locality mapping

Based on the findings of the literature review, an ‘Exhaustive Locality Mapping’ in three selected areas was conducted in order to capture the diversity of stakeholders and contexts, and to define a common categorization of eInclusion intermediary actors for the EU27 mapping survey. This exercise consisted of providing a detailed picture of the local landscape of eInclusion actors in three selected areas: the urban neighbourhood of El Raval in Barcelona (Spain), the rural region of Zemgale (Latvia) and the city of Sunderland (United Kingdom). These localities were chosen to maximise the diversity of actors and contexts captured.

c. Survey of eInclusion intermediary Actors in EU27

The results of the locality mapping contributed to the design of the online survey which aimed to provide a map of eInclusion intermediary actors operating in the 27 EU Member States. It was carried out in collaboration with Telecentre Europe and ran online between 2 January and 28 February 2013 in 15 languages. A more detailed report on the survey data collected (2,752 responses from organisations and networks of organisations, finding at least 85,000 eInclusion intermediary actors across Europe) can be found in the report Survey on eInclusion Actors in the EU27.\(^5,6\)

d. Experts and stakeholders’ consultation

A consultation of experts and stakeholders for feedback and validation of the intermediate findings of the research was carried out at two dedicated workshops.\(^7\)

In addition, the MIREIA Community\(^8\) was consulted through an online collaborative platform to share and discuss relevant findings throughout the implementation of the MIREIA project.

---


\(^4\) See the website of the survey: http://www.telecentre-europe.org/?page_id=5644


\(^6\) Please refer to Annex II for more details about the survey methodology including the questionnaire, the sampling method, the dissemination strategy, the challenges in collecting the foreseen sample and the issues of overrepresentation and biases introduced by the above elements.

\(^7\) For a detailed list of events see the MieIA webpage at: http://is.jrc.ec.europa.eu/pages/EAP/eInclusion/MIREIA.html

\(^8\) http://MieIA-project.eu/consultation
2. What the Literature says about eInclusion

Intermediary Actors

This chapter presents the main findings of the literature review conducted on eInclusion intermediary actors.

The eInclusion concept has been defined from the policy perspective as "both inclusive ICT and the use of ICT to achieve wider inclusion objectives". It focuses on the participation of all individuals and communities in all aspects of the Information Society. The eInclusion policy, therefore, aims to close the 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.

The literature review carried out by Garrido et al (2012) in the context of this research, shows not only the wide diversity of actors categorised as intermediaries but also the different ways these eInclusion intermediaries are named: telecentres (Heeks, 2002; Gomez & Baron Porras, 2011); cyber/Internet cafes (Bentivegna & Guerrieri, 2010; European Commission, 2007; Wakeford, 2003); libraries (Gomez, 2012; Sey & Fellows, 2009; World Bank, 2005); Public Internet Access Points – PIAPs, and community technology/multimedia centres (i2010 eInclusion Subgroup, 2009; Groeneveld et al, 2008; Stoll, 2003); kiosks (Kumar and Best, 2006), telehouses (Gáspár, 2011) Telecottages (Huh, 2008; Murray, 2001) and others.

For the purpose of this research, a working definition of eInclusion intermediary actors has been proposed as "Public, private and third sector organisations which intentionally address social inclusion goals through ICT or promote the use of ICT to enhance the socio-economic inclusion of marginalised and disadvantaged groups and of people at risk of exclusion".

The inclusion or exclusion of individuals and groups within society is shaped by their relative capability to function and achieve desirable outcomes such as finding a job (Sen, 1999). These relative capabilities, which depend on individuals’ possession of resources and on their social relations, shape and are shaped by the digital means they possess. If an individual’s relative capabilities to function and achieve desirable outcomes are poor, this will reduce his/her digital means, which in turn will result in missed opportunities compared to others.

Though the literature review did not identify the ‘best theory’ to apply, it did identify some theoretical frameworks that are suitable to capture the various dimensions underpinning the concept of eInclusion and the role of intermediary actors.

The findings from the literature review to analyse the role and impact of eInclusion intermediary actors is presented in Figure 1 below and discussed in detail in Garrido et al (JRC-IPTS 2012). It outlines some analytical elements to understand how eInclusion intermediary actors work and the different kinds of impacts that their work can be linked to, given the appropriate environmental conditions exist. It has taken into consideration that the eInclusion arena includes several different types of actors with varying goals, facilities and services; a range of target populations with different

---

behind, needs, and motivations; numerous contextual influences; and a multitude of potential impacts.

**Figure 1: Role and impacts of eInclusion intermediary actors**

<table>
<thead>
<tr>
<th>HOW EINCLUSION ACTORS WORK</th>
<th>TYPES OF IMPACT</th>
<th>FACTORS UNDER WHICH IMPACT MAY OCCUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTITUTIONAL CAPACITY</td>
<td>DIGITAL INCLUSION</td>
<td>LIFE LONG LEARNING</td>
</tr>
<tr>
<td>PROGRAMS SERVICES</td>
<td>INFO ACCESS</td>
<td>SOCIAL CONNECTIONS</td>
</tr>
<tr>
<td>TYPE OF ORGANISATION</td>
<td>DIGITAL LITERACY</td>
<td>WELL-BEING</td>
</tr>
<tr>
<td>OWNERSHIP MODEL</td>
<td></td>
<td>CIVIC ENGAGEMENT</td>
</tr>
<tr>
<td>BUSINESS MODEL</td>
<td></td>
<td>ORGANIZATIONAL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PERSONAL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SOCIAL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ECONOMIC</td>
</tr>
</tbody>
</table>

Source: Garrido et al, JRC-IPTS, 2012

These findings structure the different concepts relevant to understanding the role and impact of these actors as follows:

Understanding how eInclusion intermediary actors work, through their mission, programmes and services provided, types of organisation, ownership and business models. Three of these aspects (ownership model, business model and type of organisation) are strongly embedded in the institutional capacity of the eInclusion intermediary actor: that is, they affect the ability of an institution to exist and to carry out planned activities (and subsequently to have impacts). The last two categories (mission and programme and services provided) are more directly related to the impacts on the target populations in the sense that they shape those impacts. All of

---

11 The type of eInclusion actor narrows the focus to identifiable institutions, in particular those that are perceived as especially well-placed to contribute to eInclusion goals. Social organisations, government agencies, public libraries and schools tend to top the list, although other institutions could be included. In summary, based on available evidence, the critical issue for achieving digital and social inclusion goals through eInclusion actors is less about the specific identity of the actor, or a particular model of service provision, and more about what types of services are provided, appropriate targeting of services to populations, and the ability of actors to garner the human, financial and social resources important for providing value to the target community. While some organizational structures maybe have strengths in one area or the other, so far it seems that no organizational model has a monopoly on being able to achieve any particular outcomes. Extracted from Garrido, M., Sey, A., Hart, T., Santana, L. (2012). Literature review of how Telecentres operate and have an impact on eInclusion. Stewart, J., Rissola, G., Misuraca, G., Torrecillas, C. (Eds.) European Commission, JRC-IPTS Technical Report; Available at: http://ipts.jrc.ec.europa.eu/publications/pub.cfm?id=5479
them, however, represent the way in which eInclusion intermediary actors organize their activities by making choices in each of those aspects.

eInclusion intermediary actors generate diverse types of impact: on their own institutional capacity and on digital inclusion, social inclusion, and employability of the target groups they address. The first, on institutional capacity, refers mainly to the organisation’s sustainability in particular, financial and social sustainability, since this indirectly affects user impacts. The digital inclusion impacts include technology access; digital literacy (basic ICT skills, ICT practitioner skills, and e-Business skills); and information appropriation. The most common impacts on social inclusion reported by the literature include: lifelong learning; social connections; civic engagement; and wellbeing.

With regard to employability, which refers to the combination of factors and processes that enable people to progress towards or find employment, to remain employed, and/or to advance in the workplace. Most common employability impacts reported include: people acquiring new job-related skills, increased access to jobs and training opportunities, and contact with employers, better income, and opportunities for lifelong learning.

Finally, the literature reports a set of external factors that can shape whether or not desired impacts are achieved. These can be summarized as: factors at the organisation level (relevance of training design and training strategy for users, organisational partnerships, available resources, community buy-in, state of technological infrastructure), at the individual level (perceived ease of use and usefulness of ICT, motivation, social influence), at the social level (demographic characteristics, social connections, availability of affordable health care and housing), and at the economic level (labour market dynamics, labour demand for skills, discrimination practices, quality of jobs available).

These findings from the literature were crucial to understanding and shaping the research scope of the Exhaustive Locality Mapping, which at the same time, has been instrumental for the survey of eInclusion actors within the EU27.
3. Structuring the Diversity of eInclusion Intermediary Actors

This section outlines the relevant research results with regards to understanding the diversity of eInclusion intermediary actors, their categorisation and the construction of a typology of those actors.

3.1 Findings from the exhaustive locality mappings

In this section, the results deriving from the cross-analysis of the three selected exhaustive locality mappings of eInclusion intermediaries are briefly presented, while details of the analysis can be found in the working papers prepared by the local researchers.\(^\text{12}\) As explained in Chapter 1, the aim of this research was to capture the diversity of stakeholders and contexts, in order to define a common categorisation of eInclusion Intermediary actors, to help design the EU27 mapping survey. The analysis was carried out in three types of area, each of which showcases a particular landscape of eInclusion intermediary actors: a neighbourhood in a large city (El Raval in Barcelona, Spain), an industrial medium-sized city (Sunderland, UK), and a rural region (Zemgale, Latvia).

Among the most relevant findings is, first of all, the important differences in the localities in the resulting typology of eInclusion Intermediaries as illustrated in Table 1.

Table 1: Summary of the findings from the Locality mapping in Spain, Latvia and the UK

<table>
<thead>
<tr>
<th>Country (Mapping Type)/Population</th>
<th>Spain El Raval, Barcelona (Neighbourhood)/Population: 48,485</th>
<th>Latvia Zemgale (Region)/Population: 100,686</th>
<th>UK Sunderland (City)/Population: 283,500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total No. of Organisations in location</td>
<td>79</td>
<td>160</td>
<td>248</td>
</tr>
<tr>
<td>Organisations in sample (interviewed)</td>
<td>11</td>
<td>54</td>
<td>39</td>
</tr>
<tr>
<td>Type of Organisation</td>
<td>Cybercafé = 30</td>
<td>Libraries = 68</td>
<td>City Council Facilities = 26</td>
</tr>
<tr>
<td></td>
<td>Municipal Wi-Fi = 20</td>
<td>School libraries = 25</td>
<td>Community Youth Centers = 43</td>
</tr>
<tr>
<td></td>
<td>High School = 4</td>
<td>Municipal Adult Education Centres = 3</td>
<td>Formal Educational Institution = 93</td>
</tr>
<tr>
<td></td>
<td>Technical School = 4</td>
<td>Primary &amp; Secondary = 53</td>
<td>Education, Training and Employment Organisations =32</td>
</tr>
<tr>
<td></td>
<td>Telecentre = 3</td>
<td>State Agency Social = 2</td>
<td>Black and Minority Ethnic Groups =8</td>
</tr>
<tr>
<td></td>
<td>Civic Centre = 2</td>
<td>State Agency Jobs = 2</td>
<td>Social Housing Suits/ suites:</td>
</tr>
<tr>
<td></td>
<td>University = 2</td>
<td>Private Institutions = 4</td>
<td>Gentoo Electronic Village Halls = 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NGOs = 3</td>
<td>Health and Social Care Organisations =</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Categorization of eInclusion intermediary actors according to the local context</th>
<th>Based on structure and activities</th>
<th>Based on role in communities</th>
<th>Based on mission and activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. ICT core activity</td>
<td>1. Public Internet access points</td>
<td>1. Education and Training providers</td>
</tr>
<tr>
<td></td>
<td>Not core activity</td>
<td>2. Training Centers</td>
<td>2. Neighbourhood based open ICT access &amp; ICT courses communities</td>
</tr>
<tr>
<td></td>
<td>Inclusion core activity</td>
<td>3. Social Advisers/Consultants</td>
<td>3. Neighbourhood based open ICT access and ICT courses provided by councils</td>
</tr>
<tr>
<td></td>
<td>Not for profit</td>
<td>4. Awareness raisers and informers about benefits of digital society, e-services, and e-Skills.</td>
<td>4. Socially-targeted access providers</td>
</tr>
<tr>
<td></td>
<td>For Profit</td>
<td></td>
<td>5. Business/Community and Voluntary Support and Facilitation providers</td>
</tr>
<tr>
<td></td>
<td>Public</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Private</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Networked</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not networked</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Distribution based on common definition of Organisational type</th>
<th>Public Sector = 48%</th>
<th>Public Sector = 84%</th>
<th>Public Sector = 49%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Third Sector= 6%</td>
<td>Third Sector = 11%</td>
<td>Third Sector= 34%</td>
</tr>
<tr>
<td></td>
<td>Private sector = 46%</td>
<td>Private Sector = 5%</td>
<td>Private sector = 17%</td>
</tr>
</tbody>
</table>

Comparing the distribution of actors among the sector categories in the three areas, the public sector is the most relevant in all of them. This is in part due to the fact that educational institutions (including school libraries) play a relevant role as eInclusion Intermediaries. In Zemgale, the most relevant actors are libraries from the public sector. In contrast in El Raval, the private and the public sectors have almost the same number of organisations, showing the prominent role played by cybercafés in the area. In Sunderland, public investment in eInclusion has largely been done in partnership with local/neighbourhood associations; making the third sector in this locality more important than it is in the other localities.

Despite the differences between the various localities in terms of eInclusion intermediary actors, it is interesting to see the elements they have in common, as these are of particular relevance for the construction of a common typology.

First of all, we observe that the context shapes the mission, the design, the organisation, the range of services and infrastructures and, in general, the landscape of eInclusion intermediaries.

Secondly, the way the different layers of governments (municipality, province, region and state) have provided resources and developed infrastructures, policy and regulatory frameworks has also shaped the landscape of eInclusion intermediary actors in different areas.

Thirdly, we observe that networks (belonging to the different administration levels, networks of telecentres and libraries, and private sector networks made up for example by cybercafés, IT shops and telecommunication services) play an important role in all
the areas analysed. In particular, networks of telecentres or networks of libraries have demonstrated that they provide an efficient way to share resources and disseminate the knowledge gathered in the physical venues. Also, networks made up of different actors (telecentres, libraries, NGOs and sometimes schools) have shown that coordination can reinforce the identification of the community’s needs and can also help to fulfil these needs.

Finally, characterising eInclusion intermediaries entails understanding that there has been an evolution in the concept of digital inclusion, from access and ICT basic skills towards empowerment through digital means. This evolution has translated into the provision of a wider set of services, which extend to the skilling and social and economic inclusion domains.

3.2. Typology of eInclusion intermediary actors

Building on the definition of eInclusion intermediary actors above (see Chapter 2) and on the results of the locality mapping exercises, a typology of eInclusion intermediary actors has been developed, see Table 2 below.

<table>
<thead>
<tr>
<th>SECTOR</th>
<th>Type of organisation</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBLIC</td>
<td>Government-run Telecentre</td>
<td>Rural/urban telecentres, telecottage, Public Internet Access Points (PIAPs)</td>
</tr>
<tr>
<td></td>
<td>Local Government</td>
<td>Living Labs, Adult Education Centres, Electronic Village Halls, Training Rooms, etc.</td>
</tr>
<tr>
<td></td>
<td>National, Regional, and State Agency</td>
<td>Social, Employment, Health Agencies</td>
</tr>
<tr>
<td></td>
<td>Public Library</td>
<td>Public Libraries providing WI-Fi, ICT courses, etc.</td>
</tr>
<tr>
<td></td>
<td>Formal Educational Institution</td>
<td>Primary, Secondary, High School, technical school, University</td>
</tr>
<tr>
<td>THIRD</td>
<td>Association, Charitable organisation or foundation</td>
<td>ICT-related but also: neighbourhood associations, migrants organisations, etc.</td>
</tr>
<tr>
<td>Sector</td>
<td>Non-governmental organisation</td>
<td>NGOs ICT-related but also related to social inclusion, migrants, elderly people, etc.</td>
</tr>
<tr>
<td></td>
<td>Community organisation</td>
<td>Community Electronic Village Halls’, Centres for elderly, unemployed, etc.</td>
</tr>
<tr>
<td></td>
<td>Cooperative</td>
<td>Rural, social, research cooperatives</td>
</tr>
<tr>
<td></td>
<td>Federation</td>
<td>Federations of senior people, retired people, companies etc.</td>
</tr>
<tr>
<td></td>
<td>Informal Network</td>
<td>Carers, volunteers, elderly, cultural informal networks, etc.</td>
</tr>
<tr>
<td></td>
<td>Trade Union</td>
<td>Trade Unions providing ICT courses</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>Specific Projects, Research Centres/Institutions, etc.</td>
</tr>
<tr>
<td>PRIVATE</td>
<td>Training Organisation</td>
<td>ICT courses providers, social media courses providers, training providers for third sector organisations, etc.</td>
</tr>
<tr>
<td>Sector</td>
<td>Formal Educational Institution</td>
<td>Primary, Secondary, High School, technical school, University</td>
</tr>
<tr>
<td></td>
<td>Cybercafé</td>
<td>Internet café, etc.</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>Private nursing homes, privately-run social housing, , clubs, chambers of commerce, etc.</td>
</tr>
</tbody>
</table>

Using this typology in the survey has shown that the categorisation seems to be representative of most types of organisations at both country and sector levels. However, 45% of the private sector actors chose the category "Other" when asked which they belonged to. Therefore, we suggest that future research should look into...
extending the categories for the private sector, and increasing the involvement of private sector actors in the research process.

4. Characterisation of eInclusion Intermediary Actors in EU27

In this chapter, the main findings from the mapping exercise at EU27 level are presented and discussed. The mapping exercise was based on an online survey of eInclusion actors, complemented by desk research and in-depth analysis of 14 European countries (Bulgaria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, Poland, Romania, Spain, Sweden, and the United Kingdom) which represent 83% of the total EU27 population and 81% of the respondents to the survey.

The analysis of eInclusion intermediary actors is conducted from several perspectives: the sectors and type of organisation they belong to; how long they have been operating; organisational capacity such as staff size, operating budget, funding sources, and affiliation to networks; the services they provide and the target groups they address. It highlights similarities and differences across sectors and types of organisations within sectors, and points to relevant disparities among the EU27 countries.

4.1. Individual organisations vs. networks

The data sample obtained is composed of responses from individual organisations which represent 78% of the sample. The remaining 23% of the responses come from networks of organisations and organisations, which identify themselves as both (See Figure 2). This proportion remains similar at country level in most of the cases, except in Spain and Italy where the networks of organisations represent over 30% of the survey responses. For Bulgaria, Finland, Hungary, Poland, Portugal, and Latvia the proportion of individual organisations is higher – i.e. 90% of the survey responses.

Figure 2: Sample distribution by individual organisations and networks aggregated (Q1, Total N= 2,352)

The analysis of the size of the networks that responded to the survey (organisations that responded to Q1 that they were a “network” or “both”), shows, as illustrated in figure 3, that the biggest networks with over 500 members represent 27% of the total

13 Due to round off numbers (77.9% of Individual organisations, 18.5% of Network of organisations and 3.6% of Both) to no decimal places, the total is over 100%.
sample, followed by small networks with 10-50 members (23%) and medium-sized networks with 51-200 members (21%).

**Figure 3: Size of network organisations (Q1 & Q11, N=518)**

<table>
<thead>
<tr>
<th>Network Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10</td>
<td>8%</td>
</tr>
<tr>
<td>10-50</td>
<td>23%</td>
</tr>
<tr>
<td>51-200</td>
<td>21%</td>
</tr>
<tr>
<td>201-500</td>
<td>7%</td>
</tr>
<tr>
<td>500+</td>
<td>27%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Network membership** can provide e-Inclusion intermediary 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 resources – financial, human, and otherwise – available for member organisations. Out of the individual organisations that responded to the survey, 60% belong to one or multiple networks. The private sector had the lowest network membership – only 35% of the organisations belonging to a network.

There are some differences in network membership at country level. These range from over 70% of organisations 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%. Luxembourg and Poland reported the lowest network membership of the entire sample with less than 25% of organisations belonging to a network (See Figure 4: Network membership by country).
4.2. Distribution across sectors

This survey maps the distribution of organisations in the public, third, and private sector providing eInclusion services for a wide variety of users across the European Union.

At an aggregate level, as illustrated in Figure 5, 58% of the organisations represented in the survey belong to the public sector, 36% are third sector organisations and a small percentage (6%) are private sector organisations.
At country level, the figure below shows that the distribution of sectors varies from one country to another. In Belgium, Finland, Lithuania, Poland, Romania, and Spain over 70% of the organisations belong to the public sector and less than 50% in Bulgaria, Denmark, Germany, Hungary, Italy, and the United Kingdom. A higher representation of organisations in the public sector may derive, in part, by the active participation of libraries in the study in general and by a high proportion of organisations belonging to Guadalinfo, a network of local government organisations in Spain.

A complementary analysis using the total estimated number of organisations represented by the survey network responses, where networks of organisations have been weighted by their number of members (representing a total of more 85,000 organisations), shows that a higher percentage of organisations belong to the public sector (70% of the sample), followed by those belonging to the third sector (30%) and only 1.5% of organisations belong to the private sector.

An analysis per sector, shows, as illustrated in Figure 7, that for the entire sample, public libraries and municipal/local government organisations represent the vast majority of organisations in the public sector (51% and 21% respectively). Government-run telecentres follow (10% of the survey responses). National, Regional

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

Approximately 2/3 of the eInclusion actors belong to the public sector, 1/3 belong to the third sector and only a very small percentage (1.5%) to the private sector across Europe.
and State Agencies and Formal Educational Institutions have comparatively few responses (7% each).

**Figure 7: Distribution by organisational categories in the public sector aggregated (Q6, N=1,605)**

![Diagram showing distribution by organisational categories]

Note: Includes 136 data entries from the German Library Association (Deutscher Bibliotheksverband - dbv) gathered by Stiftung Digitale Chancen for this study.

This distribution, however, does not necessarily represent the actual landscape of eInclusion actors in the European Union. The heavier representation of some types 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 for the survey. Indeed, the complementary analysis based on the estimate of the total number of organisations represented by the surveyed networks shows a different breakdown of organisational categories in the public sector. In this analysis, public libraries represent only 8% of the organisations within this sector, while Government-run telecentres (31%) followed by Municipal/City Government (25%) are the most important categories represented.

**At country level**, in spite of the bias introduced by the dissemination strategy, which favours the presence of libraries in some countries, we think it is worth including the table below which shows the distribution of organisations within the public sector by country.
Figure 8: Distribution by organisational categories in the public sector by country (Q6, N=1,605)

![Bar chart showing distribution by organisational categories in the public sector by country](image1)

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, see Figure 9, associations, charitable organisations or foundations and NGOs combined represent 77% of the survey responses. The rest is mainly represented by community organisations (13%).

Figure 9: Distribution by organisational categories in the third sector aggregated (Q7, N=984)

![Bar chart showing distribution by organisational categories in the third sector aggregated](image2)

Note: Includes 196 NGO entries from the Stiftung Digitale Chancen Internet Points database shared by this organisation for the study.
At **country level** in the third sector, distribution follows a very similar pattern to that of the aggregate level, except in the Czech Republic and Ireland where there are more **community organisations** than any other category (66% and 58% respectively). In the United Kingdom, community organisations represent the second largest category after associations, charitable organisations or foundations (35%). In Bulgaria, Germany, Greece, Hungary, Latvia, Lithuania and Romania, **NGOs** represent the highest percentage of organisations in the third sector (weighting over 68%).

Half the **private sector** organisations are private training organisations and 20% are cybercafés, see Figure 10. Private formal educational institutions contribute only 3% of the survey responses.

**Figure 10: Distribution by organisational categories in the private sector aggregated (Q8, N=168)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Training Organization</td>
<td>52%</td>
</tr>
<tr>
<td>Cybercafe</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>25%</td>
</tr>
<tr>
<td>Private Formal Educational Institution</td>
<td>3%</td>
</tr>
</tbody>
</table>

At **country level**, Germany, the Czech Republic, and the Netherlands have the highest number of organisations belonging to the private sector. With the exception of Germany, where most of the organisations are cybercafés, the total number of responses at country level renders the analysis per organisational category statistically insignificant.

It is worth mentioning that the low level of representation of the public and private **formal education institutions** in our sample (7% and 3% of the organisations of each sector) may be a consequence of the bias introduced by the dissemination strategy, self-perception (schools and universities offering eInclusion services normally consider these activities part of their socio-educational mission so they don’t recognise themselves as eI2 – self-excluding themselves from the sample) or of a lack of active participation by these actors in eInclusion-related activities. Further research would be needed to clarify this issue.

### 4.3. Organisational capacities

#### 4.3.1. Years of operation

Most of the organisations mapped have a long tradition of serving their communities. 60% of them were founded more than 10 years ago and almost half have been operating for more than 15 years (see Figure 11).
Figure 11: Percentage of organisations aggregated by number of years in operation (Q5, N=2,352)

At sectorial level, see Figure 12, around 60% of the organisations in the public, third and private sectors have been providing various services to their target groups for at least 10 years.

Figure 12: Percentage of organisations within sector by number of years in operation (Q2 & Q5, N=2,352)

4.3.2. Organisation’s staff size
As Figure 13 shows, the majority of the sample is represented by small organisations with 1-10 employees. The rest of the organisations are almost equally divided between medium-sized organisations with 11-50 employees and larger organisations employing more than 50 people.
The analysis of the individual organisations that do not belong to any network (N=673) shows that a higher percentage of them (65%) are small organisations (1-10 employees) and a smaller percentage (13%) are bigger organisations (51+ employees).

The analysis by sector, see Figure 14, shows that the third sector has the highest proportion of small organisations (62% have 1-10 employees); whereas the public sector has the highest proportion of larger organisations (24% have more than fifty employees).

A more detailed analysis by sector shows that, within public sector organisations, formal educational institutions and national, regional and state agencies have the most employees (62% and 50% respectively employ more than 50 people).

In the third sector, over 60% of organisations across all categories are small organisations employing 1-10 people, reaching over 70% for NGOs. 11% of the associations, organisations and foundations are larger organisations employing more than 50 people whereas only 6% of NGOs and community organisations reach this size.

In the private sector, considering the small total sample size, we have only analysed private training organisations and find that 67% of the organisations employ fewer than 10 people.

At country level, Belgium, Cyprus, Estonia France, Hungary, and Slovakia have over 65% of the organisations which employ fewer than ten people. For Hungary, the...
percentage is over 90%. Medium sized organisations employing 11 to 50 people make up 30% of the sample in countries such as Denmark, Lithuania, and Portugal and over 40% in the Netherlands, Malta and Slovenia. Lithuania has the highest proportion of organisations employing more than 50 people (41%) followed by Austria and Denmark (36%), Finland (33%), and Italy (31%).

4.3.3. Organisation’s annual budget

In line with the findings on staff size, 46% of the organisations have annual budgets of less than €100,000 and only just over 18% have budgets of €100,000 to €1 million, see Figure 15. A small percentage of the organisations have higher budgets (12%).

![Figure 15: Annual budget levels aggregated (Q15, N= 2,220)](image)

The analysis of annual budget levels of individual organisations that do not belong to any network shows a higher percentage (55%) with annual budgets of less than €100,000 euros. Similarly, the third sector has a higher proportion (56%) of organisations with those smaller budgets, compared to the public and private sectors.

A wide range of financial actors are funding the activities of eInclusion intermediary actors, see Figure 16 for the percentage of organisations reporting particular financial actors as one of their three main sources.

At an aggregate level, local governments appear to be playing a very important role as a funding source for eInclusion intermediary actors with almost 67% of organisations reporting this source as one of their main three sources of funding.

Local government is followed by national government (29%), European Union (25%) and usage/service fees (22%) as the most important sources of funding.
An analysis per sector is illustrated in Figure 17. It shows that public funding from local government is the first source of financing for eInclusion organisations from the public and third sector, while the most important source for the private sector organisations is the private sector itself. National government funding is the second source mentioned by public sector organisations and the third by organisations from the third sector.

It is worth noting that the second source of funding for both third and private sector organisations is "usage/service fees". European Union funds come next in importance, as the third source for public and private sector actors. For networked organisations, EU funding is the second most important financial source.

Note: The table should be read as the proportion of organisation in that sector that chose each funding source as one of their main three.
4.4. Target groups served

Inclusion intermediary organisations serve a wide variety of groups depending on how many people they employ, their mission, and the social composition and the needs of the communities in which they are embedded. Figure 18 shows that while half the organisations report serving broad groups such as the general public (54%), and adults (51%), a high proportion also addresses the specific needs of other groups such as senior citizens (49%), young adults (46%), and unemployed people (42%). In addition, children, women, low-skilled people, low earners and disabled people are targeted by a smaller number (a third) of the organisations in the sample. Finally, the specific needs of a broad set of other groups (migrants, ethnic minorities, mentally disabled people, small entrepreneurs, informal carers, etc.) are also served by a smaller but still relevant number of organisations.

Figure 18: Target groups served aggregated (Q17, N=2,300)

As a general finding, the type of sector (public, third or private) plays an important role in the target groups served. 68% of public sector organisations, compared with 33% of third sector organisations and 30% of private organisations, said they target all groups. In addition to that, similar proportions of public sector organisations, as those from the other two sectors, report serving also specific groups.

4.5. Services provided

4.5.1. Inclusion or ICT-enabled services provided

Not surprisingly, see Figure 19, the vast majority of organisations (over 80%) provide ICT access to both computers and the Internet and also basic ICT digital literacy training services to their users.

An analysis of the top 6 inclusion services provided shows that approximately half of the total number of organisations, in addition to providing ICT access and basic and advanced ICT training, also provide services that support employability (50% provide training on online job seeking, and 48% on social media for communication,
collaboration and participation), social inclusion (45% offer ICT-supported access to government and social services – health, welfare, independent living, e-government) and education/skilling (45% offer access to online courses offered by formal or non-formal education institutions). This means that the role of these organisations goes well beyond simply supporting digital inclusion and ICT skills, to employability, social inclusion and education/skilling.

At the low extreme, certification training on ECDL and ICDL and ICT training targeting small and medium entrepreneurs or the self-employed have the lowest percentage of service provision in the sample – 17% and 24% respectively.

Figure 19: Percentage of eInclusion actors that offer different ICT-related services (Q18, N= 2,255)

There are some differences among sectors in relation to the eInclusion or ICT-enabled services provided. The private sector plays a more relevant role in providing advanced ICT skills development (46% of the organisations surveyed), and certification training such as ECDL. Naturally, public sector organisations are more likely to offer e-Accessibility training and ICT-supported access to government and social services than organisations in the other two sectors.

A separate analysis of the services provided by networks of organisations and individual organisations shows that the former are more likely to offer all categories of services than the latter.
The case of Denmark

In Denmark, a different survey "The Library barometer" shows that 91% of the libraries provide courses on e-government for citizens, 81% provide courses on the general use of ICT, 45% provide courses on social media, and 49% provide courses on using tablets and smartphones.

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. The objective is that 80% of written communications between citizens/companies and the public sector should take place online by 2015. This transformation will mean that, in the coming years, most public services will be ‘digital by default’. Thus all Danish citizens will use the Internet from registering a birth to obtaining any other service, up to obtaining funeral assistance. In this context, citizens’ support services to access online public services will be provided at citizen service centres, the libraries or in data rooms located around the country, all eInclusion intermediary actors as per this study’s definition.

4.5.2. Other social services provided

When asking organisations about other (than eInclusion or ICT-enabled) social services they provide, 55% said they provided employment related services and 26% entrepreneurship-related services, and other social services, see Figure 20.

These figures illustrate that the provision of eInclusion-related services seems to be, at least for half of the respondents, embedded in organisations that provide employment and social inclusion-related services such as employability, entrepreneurship, skilling or social/government services.

Figure 20: Other social services provided by organisations aggregated (Q19, N=2,255)

A more specific analysis within this perspective, shows that a higher proportion of organisations that belong to networks (obtained by weighting each network by its size) provide employment (71%) and entrepreneurship-related services (57%) in comparison to organisations not belonging to any network (only 49% and 18% of them provide these services respectively).
The percentage of organisations answering “Other” to this question is particularly high (44%), which points to the need to better understand the other services provided and thus have a more accurate view of the mission of the organisations surveyed, by expanding the list of possible answers in future exercises of a similar nature.

The analysis per sector shows that third sector organisations are more likely to offer social and government services (30% of them do) and that a higher proportion (42%) of private sector organisations offer vocational training.

4.6. ICT-enabled innovation carried out by eInclusion intermediary actors

The study aimed to understand how the use of ICT could be an enabler for eInclusion intermediary actors to innovate in the provision of their services, so as to better serve their communities by providing new solutions to their specific problems. While the previous survey results provided information about what services are provided, in this section, we look at how these services address social needs, by making innovative uses of ICT.

For this purpose, the survey thus asked organisations about the most innovative aspects of the ICT-supported programmes and services available at organisations (e.g. new programmes, products, or services created to meet social needs while creating economic value and promoting new social relations or forms of economic collaboration).

The methodology for analysing the responses to this question is explained in in Annex II. The analysis allowed us to cluster the responses provided by the survey respondents into seven categories:

A. Improving access to ICT and ICT training and promoting citizen participation

Practices in this category aim to provide ICT access and training to more segments of the population and promote participation. They include: the use of free Wi-Fi access to online courses and training materials in public libraries; the use of social media tools to promote peer-to-peer learning, online participation and development of user-generated content; and 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.

B. Providing digital skills for parents and women

The practices in this category include services that aim to bridge the digital divide between parents and their children, through multilingual classes on media education and specific training courses for women, together with child care in order to lower the obstacles faced by many women to participating in learning activities.

C. Increasing capacity building of the eInclusion sector

A key challenge for organisations working in the eInclusion sector is the need to constantly update their services and programmes and to build the required competences in their own or partners’ organisations. Most of the examples within this category point to the development of eLearning training modules for e-facilitators.

---

15 "eFacilitator term encompasses a range of professional profiles providing assistance, training and support services to users of Telecentres and other kind of Public Internet Access Points (libraries, etc.). eFacilitators are enablers of both Digital Literacy and ICT-enhanced Social Inclusion processes". Extracted from:
and volunteers working in these organisations, development of collaborative networks of inclusion actors and social workers for peer learning, and implementation of new ways of using ICT technologies within the organisations, especially in the third sector.

D. Enhancing employment and entrepreneurship services
Practices in this category refer to the provision of enhanced employment and entrepreneurship services designed especially for women, young people, the unemployed, people in precarious labour situations, and small entrepreneurs. These practices include skills training in social media applications (from cloud computing, to tablets and smartphones) to improve employability. They also include the development of digital services by employment offices, complementing face-to-face consultations and information search.

E. Improving access to resources in remote and rural areas:
The most numerous practices in this category refer to improving access to telecommunications infrastructure, services and educational opportunities in remote rural areas, by making use of various technologies (videoconferencing, touch-screen terminals, etc.), and by making the physical provision of services mobile by using mobile telecentres, in order to reach a higher number of communities in rural areas.

F. Enhancing access to education resources and certification
The practices included in this category include activities such as 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, organisations offer different official skill certifications such as the European Computer Driving Licence (EDCL)\textsuperscript{16} and other national certificates to improve people's position in the labour market.

G. Increasing local partnership building
Practices in this category consist of forming ad hoc or stable partnerships with a range of education, social and economic agents operating in the same territory, enabled by the capacity of inclusion intermediary organisations to network and collaborate with other organisations through the use of ICT.

---

\textsuperscript{16} ECDL (European Computer Driving Licence) is known as ICDL (International Computer Driving Licence) outside of Europe. See more at: \url{http://www.ecdl.org/}
5. **Estimate of the Size of the eInclusion Intermediary Sector in EU27**

This chapter provides an estimate of the number of eInclusion organisations across the EU27. The full calculations for this estimate can be found in Rissola and Garrido (2013). Here, we present a brief outline of how the calculation has been done:

a) An initial calculation was based on relatively complete and recent available national statistics and estimates of public libraries and other types of eInclusion organisations in most of the 27 EU countries, together with the results of the survey conducted, in particular the relative percentages of each category of actors in each country.

Concretely, the data on libraries was used to calculate the number of municipalities as a category of eInclusion intermediaries offering eInclusion services. The calculation of the rest of eInclusion categories was based on the relative percentages for each category of actors provided by the survey for each country.

b) Second, the initial results obtained by country have been then validated or adjusted, on a country by country basis, with available local secondary sources in 14 countries. This adjustment provides an estimate of around 158,255 eInclusion organisations in the EU27.

c) Third, the percentage of micro-organisations (1-10 employees) in the survey sample (55%) was compared with the figures provided by Eurostat, which estimates that micro enterprises (<10 employees) represent 92.2% of the total enterprises in Europe. It was assumed, therefore, that these organisations are under-represented in the survey sample, and also in the calculations done in a) and b). By adjusting the results obtained in (b) for a more adequate representation of micro-organisations, the estimated number of eInclusion intermediary actors increases to 250,706 organisations. This means an average of one eInclusion intermediary organisation for every 2,004 inhabitants.

However, further research is needed to refine these estimates through extensive fieldwork at local level. For example, additional locality mapping exercises could be carried out to cover a larger set of countries/regions, and a wider diversity of local settings, with a special focus on mapping the smallest organisations which are the hardest to reach.

---


6. Conclusions

6.1. Key findings

This component of the MIREIA research project aimed to map and characterise eInclusion intermediary actors. It collected evidence based on a literature review and desk research, 3 locality mapping exercises and a survey of eInclusion intermediary actors across the EU27.

For the purpose of this research, a working definition of eInclusion Intermediary actors was used as "Public, private and third sector organisations which intentionally address social inclusion goals through ICT or promote the use of ICT to enhance the socio-economic inclusion of marginalised and disadvantaged groups and of people at risk of exclusion". Both eInclusion intermediary actors and their networks constituted the units of analysis.

The resulting map of eInclusion intermediary actors in EU27, the first of its kind at EU level, includes 2,752 organisations and networks (78% vs. 22%), representing more than 85,000 organisations operating within the borders of the EU 27.

The evidence collected shows a huge diversity of organisations from the public, third and private sectors, currently providing eInclusion services across the EU. Furthermore, almost half of these organisations across the three sectors have been active for more than for at least 15 years, and close to two thirds for at least 10 years.

Municipal and city offices and government-run telecentres represent over half the eInclusion actors in the public sector, with some variations across the EU27 countries.

The exhaustive locality mapping exercises, conducted in a large city, a medium-sized industrial city, and a rural region (three areas which showcase the landscape of eInclusion intermediary actors) show that the local context matters. It shapes the mission, the design, the organisation, the range of services and infrastructures and, in general, the picture of eInclusion Intermediaries in different parts of Europe. Furthermore, networks play a crucial role, to the point that the eInclusion intermediaries’ landscape could be described as a set of networks from the three sectors that interact with each other.

eInclusion intermediary actors provide a broad range of eInclusion services that go well beyond ICT access and basic ICT skills training (provided by more than 80% of the organisations). At least half of them also offer services that support employability (training on online job seeking and social media), social inclusion (ICT supported access to government and social services) and education/skilling (access to online courses offered by formal or non-formal education institutions). Furthermore, for at least half of the respondents, the provision of these eInclusion services is embedded in organisations that provide other social inclusion-related services (employability, entrepreneurship, skilling and social/government services).

The wide range of services is not only provided to the general public. They also address the needs of specific disadvantaged groups such as the elderly, young adults, unemployed people, children, women, low skilled and low income people, people with physical disabilities and other vulnerable groups through the EU.

Across the three sectors, the majority (55%) of the intermediary actors employ ten people or fewer to provide their services, so they tend to be micro
organisations with operating budgets of less than €100,000. This trend holds true across all countries except Finland, Denmark, Lithuania, and Cyprus where organisations tend to have, on average, higher operating budgets.

The eInclusion sector is largely funded from public budgets. Indeed, the eInclusion map shows the important role of local governments, which provide funding resources for 67% of the organisations. Local governments are followed by national governments (29%), the European Union (25%) and user service fees (22%) as the most important funding sources for eInclusion intermediary actors. It is worth to note that user service fees are the second most frequently mentioned funding source for organisations in the third and private sectors.

Moreover, though the findings from the survey cannot be considered conclusive, there is sufficient evidence to suggest that eInclusion intermediary actors are social innovators in their local communities. Innovation here refers to ‘new solutions for actual problems in a clearly defined context’. The evidence collected illustrates a diverse set of innovative solutions enabled by ICT, to address specific social needs such as: improving access to ICT and ICT training and promoting citizen participation; providing digital skills for parents and women; increasing competences in the eInclusion sector, enhancing employment and entrepreneurship services; improving access to resources in remote and rural areas; enhancing access to education resources and certification and increasing local partnership building.

As a conclusion, even though the map cannot be claimed to be representative of the eInclusion landscape in each country, it represents an important step towards characterising the eInclusion sector. It helps to quantify and qualify more accurately this sector’s social and economic role and impact in the achievement of the goals of the EU Digital Agenda and the social and employment goals of the Europe 2020 strategy. The map also helps us to understand the resources needed to further support the engagement of eInclusion actors with the communities they serve, and the different policies that could help them succeed in the provision of these key services.

6.2. Further research

This characterisation and mapping exercise was the first of its kind at EU27 level. The study aimed, first of all, to explore a new area of inquiry, and to define the scope and magnitude of the phenomenon of eInclusion intermediation. It attempted to generate a common understanding of this phenomenon; observing it carefully in order to document it in detail.

Thus, limitations exist, and it could not be otherwise. First of all, the unit of analysis for the research was unknown at the outset: it was constructed in various steps while the research was being carried out. The resulting definition of a typology of eInclusion intermediaries has proved to be applicable to most organisations at the country and sector level. It has however some limitations, especially with regard to the fact that a quarter of the private sector respondents identified themselves as “Other” in the set of categories proposed in the survey.

Bearing in mind that this characterisation and mapping exercise was the first of its kind, it has nonetheless provided a rich initial picture of the phenomenon, which serves as a baseline for future research. However, the dissemination strategy could be improved in the future to ensure better coverage across categories of actors (with regards to the private sector, micro-organisations, and formal education institutions). In addition, more data should be collected to better understand the challenges and opportunities faced by eInclusion intermediaries in Europe and their behaviour.

Future efforts to continue mapping and identifying eInclusion intermediary actors could consider consulting stakeholders in order to add new categories to the existing list. A
grounded theory approach, i.e. applying a bottom up approach, where theory is generated from analysis of data, would probably enrich and refine the typology of exclusion intermediary actors.

This would mean extending the survey, perhaps making it periodical or available permanently online. For this purpose, a review of the design of the survey itself, particularly the questionnaire, would be recommended. For example, an analysis of the above mentioned 25% of organisations from the private sector which classified themselves in the category ‘Other’ could shed some light in this regard. It could also be useful to ask the 44% of institutions which answered that they provided ‘other services’, and to find out what these services are.

In addition, the current analysis does not tell us about the opportunities for building cooperation and synergies among different actors (from public, third and private sectors as, for example through multi-stakeholder partnerships or networks of networks). This could enhance their effectiveness when addressing social, employability and education/skilling services for the same groups of individuals. It would enable them, for example, to share competence development and the coordination and specialisation of particular services. For this purpose, a more in-depth analysis would be required, for example through the collection of practices and analysis of case studies in different policy areas and regions.

6.3. Policy implications

This report provides a sound estimate of the size of the eInclusion sector, which amounts to a total of 250,000 organisations, or the equivalent of one eInclusion intermediary organisation for every 2,000 European inhabitants. These figures are important since they constitute the first pan-European inference of the size of the sector. They will be useful for further policy making, social investment (e.g. through Corporate Social Responsibility) and for 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 the wide range of organisations operating in the eInclusion sector across the public, private and third sectors. The results of the current mapping therefore represent an important starting point for building a ‘directory’ of actors that could be engaged in future policy actions.

Although almost half of these eInclusion intermediary organisations have been providing ICT-enabled social inclusion services (ICT access and basic/advanced ICT training, employability, social inclusion and education/skilling services) for more than 15 years, so far they have received limited attention from policy makers. However, the lack of basic ICT skills in certain population groups and the need for affordable access in specific geographical areas are in part responsible for the digital exclusion of as many as 30% of Europeans. At the same time, ICT skills are becoming crucial for employability: 90% of jobs in 2020 will require some sort of ICT skills according to CEDEFOP. There is also a shortage of ICT-skilled labour in Europe, which will lead to 900,000 unfilled job vacancies by 201519.

Looking at the basket of services eInclusion actors provide across the EU27, it is evident that these inclusion intermediary actors can significantly contribute to the achievement of the Europe 2020 social inclusion and employment goals, and those of the Digital Agenda for Europe. In particular, they can contribute to

---

the creation of multi-stakeholder partnerships and the provision of ICT training and certification outside formal education systems.

Indeed, 80% of the organisations mapped provide public access to computers and Internet and digital literacy training for their communities, in particular to disadvantaged groups such as the unemployed and women.

Half the organisations studied offer employment-related training in, for example, online job seeking, applications, and CV development. They also provide training on the use of social media and other collaborative software to promote peer-to-peer learning and content generation skills that increase peoples’ employability, opening up new employment paths in the growing media, creative and cultural sectors. This is particularly relevant for young people.

Furthermore, half the surveyed organisations offer services which support social inclusion, such as ICT-supported access to government and social services, and learning/skilling support services, such as access to online courses offered by formal or non-formal education institutions.

The private sector was weakly represented in the sample of organisations surveyed, possibly due to the methodological constraints of this first exercise. It would therefore be advisable to further explore the current and potential eInclusion role of this sector (including, but not limited to, corporate social responsibility initiatives and social entrepreneurship) and how it could interact with public and third sector activities in this area. In the sample of organisations collected, we observed that the private sector plays a more significant role in the provision of advanced ICT training, of particular relevance for the Grand Coalition for Digital Jobs20 policy initiative. It also plays an important role, by providing financial resources to 22% of the third sector organisations.

These findings give rise to a set of policy options that support the contribution eInclusion actors make to achieve the social and economic goals of the European Union. The following suggestions deserve further reflection and (public) debate:

- **Raising the awareness** of policy makers about the potential role of eInclusion intermediaries, and how these actors could be actively involved in the above mentioned Grand Coalition on Digital Jobs or other policy initiatives such as the Social Investment Package, Social innovation and Social Business initiatives as well as dedicated actions implemented at EU and Member State level.

- Better understanding the current role of the private sector and the conditions which would encourage its greater involvement and strengthen its role. This could be of critical importance in helping to address the challenges of digital exclusion, employability and the shortage of ICT-skilled workers. Clear opportunities linked to the Grand Coalition on Digital Jobs emerge in this respect.

- **Strengthening the capacities of eInclusion intermediary actors** to further develop their entrepreneurial skills and to support the development and transformation of the organisations through the establishment of sustainable business models increasingly based on usage/service fees. Indeed, the survey findings point to users’ potential willingness to pay a fee, however nominal, for the valued services these organisations provide. Usage/service fees are the second source of funding most-mentioned by private and third sector actors, and the third by public sector actors. In doing that, providing adequate (to the

---

size) instruments to support this transformation emerges as an opportunity for EU policy.

- In terms of services provided, exploring how to **reinforce the role of eInclusion intermediary actors in promoting social entrepreneurship**. At the moment only 24% of the organisations surveyed provide ICT-supported assistance for small and medium enterprises and the self-employed. These services could however have an important multiplier effect if they were further developed and promoted.

- Understanding and reinforcing the ecosystem needed for **eInclusion intermediaries to create local innovation**, especially ICT-enabled, and promoting the transfer of local knowledge among actors and across regions in Europe.

A key challenge to implementing most of the above policy options is how to support, in practical terms and with the available EU and national instruments, the role, impact, network effects, social innovation processes created and the services provided by such a high number of organisations (half of which have below 10 employees and annual budgets of less than 100,000€). In this context, the important role of networks among these actors might be a key facilitator.
Annex I – Network organisations identified in the EU27

The most relevant network organisations in each country have been identified by a combined procedure of extraction of network organisations from the survey sample (either those which answered the survey or those mentioned by respondents as the networks that their organisations 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 organisations: Austria, Cyprus, Luxembourg and Slovenia.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>NETWORK ORGANISATIONS</th>
<th>WEBSITE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BELGIUM</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Brussels region:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. CABAN (Collectif des Acteurs Bruxellois de l’Accessibilité Numérique)</td>
<td><a href="http://www.caban.be">http://www.caban.be</a></td>
</tr>
<tr>
<td></td>
<td>2. CIRB (Centre d’Informatique de la Région Bruxelloise)</td>
<td><a href="http://www.cirb.be">http://www.cirb.be</a></td>
</tr>
<tr>
<td></td>
<td>Flanders region:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Flemish interface Centre for New literacy (VSNG, Vlaams Steunpunt Nieuwe Geletterdheid)</td>
<td><a href="http://www.vsng.be">http://www.vsng.be</a></td>
</tr>
<tr>
<td></td>
<td>4. Do-IT</td>
<td><a href="http://www.vsng.be">http://www.vsng.be</a></td>
</tr>
<tr>
<td></td>
<td>5. The Digital Week (De Digitale Week) initiative</td>
<td><a href="http://www.digitaleweek.be">http://www.digitaleweek.be</a></td>
</tr>
<tr>
<td></td>
<td>6. LINC vzw (Lezen, Informatie, en Communicatie)</td>
<td><a href="http://www.linc-vzw.be">http://www.linc-vzw.be</a></td>
</tr>
<tr>
<td></td>
<td>7. Link in de Kabel</td>
<td><a href="http://www.linkindekabel.be">http://www.linkindekabel.be</a></td>
</tr>
<tr>
<td></td>
<td>Walloon region:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Digital Public Spaces resources centre (Centre de ressources des EPN de Wallonie, run by Technofutur TIC asbl)</td>
<td><a href="http://www.epn-ressources.be">http://www.epn-ressources.be</a></td>
</tr>
<tr>
<td><strong>BULGARIA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>There is no fully independent organisation on country level which is major actor dealing with e-inclusion. Here is a list of few organisations/projects which have been working last years towards e-inclusion on national level.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Bulgarian Library and Information Association (BLIA)</td>
<td><a href="http://www.lib.bg">http://www.lib.bg</a></td>
</tr>
<tr>
<td></td>
<td>2. Global Libraries project</td>
<td><a href="http://www.glbulgaria.bg">http://www.glbulgaria.bg</a></td>
</tr>
</tbody>
</table>
### 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:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Association of Universities for third age (Asociace univerzit třetího věku)</td>
</tr>
<tr>
<td>8.</td>
<td>Association of librarians and information professionals (Sdružení knihovníků a informačních pracovníků)</td>
</tr>
</tbody>
</table>

### DENMARK

The Learn more about ICT network (now under the Ministry of Finance, Agency for Digitisation) also includes the networks listed as numbers 2-6:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Learn more about ICT network (Lær mere om it)</td>
</tr>
<tr>
<td>2.</td>
<td>The Association of Danish Senior Citizens (Aeldremobiliseringen)</td>
</tr>
<tr>
<td>3.</td>
<td>DaneAgeAssociation (Ældre Sagen)</td>
</tr>
<tr>
<td>4.</td>
<td>The Danish Agency for Culture (Kulturstyrelsen)</td>
</tr>
<tr>
<td>5.</td>
<td>The Danish Library Association (Danmarks Biblioteksforening)</td>
</tr>
<tr>
<td>6.</td>
<td>Danish Adult Education Association (Dansk Folkeoplysningssamråd)</td>
</tr>
</tbody>
</table>

### ESTONIA

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The Estonian Folk High Schools Union (Eesti Rahvaülikoolide Liit)</td>
</tr>
<tr>
<td>2.</td>
<td>The Estonian Chamber of Disabled People (Eesti Puuetega Inimeste Koda)</td>
</tr>
</tbody>
</table>

### FINLAND

Probably due to the country’s long tradition on Adult Education, a number of relevant e-Inclusion actors identified come from the lifelong learning and non-formal education sector:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lifelong learning and non-formal education sector:</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>The Finnish Association of Adult Education Centres (Kansalaisopistojen liitto KoLi)</td>
</tr>
<tr>
<td>2.</td>
<td>The Association of Summer Universities in Finland (Suomen kesäyliopistot ry)</td>
</tr>
<tr>
<td>3.</td>
<td>The Training Alliance (Bildningsalliansen)</td>
</tr>
</tbody>
</table>

Other organisations:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The International Federation of Library Associations and Institutions (IFLA)</td>
</tr>
</tbody>
</table>
### FRANCE
A combination of respondent networks and desk research led the research team to organise these networks in two groups according to their geographical scope:

<table>
<thead>
<tr>
<th>National:</th>
<th>Regional:</th>
</tr>
</thead>
</table>
| 1. Créatif | 6. Cybercommune Région Bretagne  
http://www.bretagne.fr/ |
| 2. Réseau des cyberbase | 7. CORAIA (Coordination Rhône-Alpes de l'Internet Accompagné et les réseaux membres de cette coordination)  
http://www.coraia.org |
| 3. Netpublic - not a network as such, it is the name of the national online resources centre.  
| 4. Union nationale des PIMMS  
| 5. Villes Internet  
http://www.villes-internet.net/ | 10. Réseau des ERIC (Region Provence Alpes Côte d'Azur)  
http://emergences-numeriques.regionpaca.fr/ |

### GERMANY
The e-Inclusion sector is diversified:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1. Federal Association of Adult Education organisations (Deutscher Vokshochschulverband)  
http://www.dvv-vhs.de | 1. The Operational Programme "Information Society" (The Ministry of Administrative Reform and eGovernment)  
http://www.ydmed.gov.gr |
| 2. Digital Opportunities Foundation (Stiftung Digitale Chancen)  
http://www.digitale-chancen.de | 2. The Observatory for the Greek Information Society  
http://www.observatory.gr/ |
| 3. Federal Library Association (Deutscher Bibliotheksverband)  
http://www.bibliotheksverband.de | 3. The Information Society S.A.  
http://www.ktpae.gr/ |
| 4. Regional network of Digital Literacy Activities in Northrhine-Westphalia (Medienkompetenznetzwerk NRW)  
http://www.mekonet.de/ | |

### GREECE
The e-Inclusion initiative is led by the public sector.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu | 1. The Operational Programme "Information Society" (The Ministry of Administrative Reform and eGovernment)  
http://www.ydmed.gov.gr |
| 2. eHungary Points (eMagyarország Pontok)  
http://www.emagyarorszag.hu | 2. The Observatory for the Greek Information Society  
http://www.observatory.gr/ |
| 3. Forum for Hungarian Information Society (Informatikai Érdekegyeztető Fórum)  
http://www.inforum.org.hu/ | 3. The Information Society S.A.  
http://www.ktpae.gr/ |
| 4. Alliance of Libraries and Information Institutes (Informatikai és Könyvtári Szövetség)  
www.ikszt.shp.hu | 4. Regional network of Digital Literacy Activities in Northrhine-Westphalia (Medienkompetenznetzwerk NRW)  
http://www.mekonet.de/ |
| 5. DemNet Foundation | 5. Villes Internet  
http://www.villes-internet.net/ |

### HUNGARY

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu | 1. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu |
| 2. eHungary Points (eMagyarország Pontok)  
http://www.emagyarorszag.hu | 2. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu |
| 3. Forum for Hungarian Information Society (Informatikai Érdekegyeztető Fórum)  
http://www.inforum.org.hu/ | 3. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu |
| 4. Alliance of Libraries and Information Institutes (Informatikai és Könyvtári Szövetség)  
www.ikszt.shp.hu | 4. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu |
| 5. DemNet Foundation | 5. Hungarian Telecottage Association (Magyar Teleház Szövetség) and its seven regional branches:  
http://www.telehaz.hu |

42
IRELAND
The size of the networks is smaller than in larger countries. The selected ones show a balance between national and regional focus:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> FIT Ltd</td>
<td><a href="http://www.fit.ie/">http://www.fit.ie/</a></td>
</tr>
<tr>
<td><strong>2.</strong> INDIE (Irish Network for Digital Inclusion and Engagement)</td>
<td><a href="http://digitalinclusion.ie/">http://digitalinclusion.ie/</a></td>
</tr>
<tr>
<td><strong>3.</strong> The Kerry Flyer</td>
<td><a href="http://www.kerryflyer.ie/">http://www.kerryflyer.ie/</a></td>
</tr>
</tbody>
</table>

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:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Auser</td>
<td><a href="http://www.auser.it">http://www.auser.it</a></td>
</tr>
<tr>
<td><strong>2.</strong> ANCI (Associazione Nazionale Comuni Italiani)</td>
<td><a href="http://www.anci.it">http://www.anci.it</a></td>
</tr>
<tr>
<td><strong>3.</strong> Federsolidarietà</td>
<td><a href="http://www.federsolidarieta.confcooperative.it">http://www.federsolidarieta.confcooperative.it</a></td>
</tr>
<tr>
<td><strong>4.</strong> Eurodesk</td>
<td><a href="http://www.eurodesk.it">http://www.eurodesk.it</a></td>
</tr>
<tr>
<td><strong>5.</strong> UPI (Unione Province Italiane)</td>
<td><a href="http://www.upinet.it">http://www.upinet.it</a></td>
</tr>
<tr>
<td><strong>6.</strong> ARCI</td>
<td><a href="http://www.arci.it/">http://www.arci.it/</a></td>
</tr>
<tr>
<td><strong>7.</strong> TRIO, a public e-Learning network (The Regional Government of Toscana)</td>
<td><a href="http://www.progettotrio.it/trio/">http://www.progettotrio.it/trio/</a></td>
</tr>
<tr>
<td><strong>8.</strong> PANE E INTERNET (The Regional Government of Emilia Romagna)</td>
<td><a href="http://www.paneinternet.it/">http://www.paneinternet.it/</a></td>
</tr>
<tr>
<td><strong>9.</strong> Stati Generali Innovazione</td>
<td><a href="http://www.statigeneralinnoevazione.it/">http://www.statigeneralinnoevazione.it/</a></td>
</tr>
<tr>
<td><strong>10.</strong> Fondazione Mondo Digitale</td>
<td><a href="http://www.mondodigitale.org">http://www.mondodigitale.org</a></td>
</tr>
</tbody>
</table>

LATVIA
The e-Inclusion networks with real, national scope impact in Latvia are:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Latvian Information and communication association (LIKTA)</td>
<td><a href="http://www.likta.lv">http://www.likta.lv</a></td>
</tr>
<tr>
<td><strong>2.</strong> Latvia @World network</td>
<td><a href="http://www.eprasmes.lv">http://www.eprasmes.lv</a></td>
</tr>
<tr>
<td><strong>3.</strong> State Agency “Culture information systems”</td>
<td><a href="http://www.3rd.lv/">http://www.3rd.lv/</a></td>
</tr>
</tbody>
</table>

LITHUANIA
Libraries are the predominant e-Inclusion actor, as the list shows:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> County Public Libraries Association (Apskričių Viešųjų Bibliotekų Asociacija)</td>
<td><a href="http://bibliotekos.utena-on.lt/">http://bibliotekos.utena-on.lt/</a></td>
</tr>
<tr>
<td><strong>2.</strong> Municipality public libraries association of Lithuania (Savivaldybių viešųjų bibliotekų asociacija)</td>
<td><a href="http://www.fbd.lt/">http://www.fbd.lt/</a></td>
</tr>
<tr>
<td><strong>3.</strong> Lithuanian Librarians’ Association (Lietuvos bibliotekininkų draugija)</td>
<td><a href="http://www.lbd.lt/">http://www.lbd.lt/</a></td>
</tr>
<tr>
<td><strong>4.</strong> Rural internet access points association (Asociacija “Viešuji interneto prieglos taškai”)</td>
<td><a href="http://www.vipt.lt/">http://www.vipt.lt/</a></td>
</tr>
<tr>
<td><strong>5.</strong> Martynas Mazvydas national library of Lithuania (Lietuvos nacionalinė Martyno Mažvydo)</td>
<td><a href="https://www.lnh.lt">https://www.lnh.lt</a></td>
</tr>
<tr>
<td><strong>6.</strong> Association “Langas į ateitį” (Asociacija Langas į ateitį)</td>
<td><a href="http://www.langasiateiti.lt">http://www.langasiateiti.lt</a></td>
</tr>
<tr>
<td><strong>MALTA</strong></td>
<td>1. Malta Communications Authority</td>
</tr>
<tr>
<td><strong>NETHERLANDS</strong></td>
<td>1. Dutch Library network</td>
</tr>
<tr>
<td></td>
<td>2. Seniorweb</td>
</tr>
<tr>
<td></td>
<td>3. Computerwijk</td>
</tr>
<tr>
<td></td>
<td>4. HCC</td>
</tr>
<tr>
<td><strong>POLAND</strong></td>
<td>National scope</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Local scope</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PORTUGAL</strong></td>
<td>1. Schools Programme (Programa Escolhas)</td>
</tr>
<tr>
<td></td>
<td>3. Network of Internet Spaces (Rede de Espaços Internet)</td>
</tr>
</tbody>
</table>
### ROMANIA

| 1. | ANBPR, the National Association of Public Libraries and Librarians in Romania | http://www.anbpr.org.ro |
| 2. | e-Centre network in Romania (developed by EOS Romania through Unlimited Potential Programme) | http://www.eos.ro |
| 3. | Junior Achievement Romania (a chapter of the international organisation) | http://www.jaromania.org |
| 4. | Economic network of local communities (Ministry of Communications and Information Technology) | http://www.economitate.ro, |
| 5. | Digital Alliance for Romania (Alianta Digitala pentru Romania) | http://www.aliantadigitala.ro |
| 10. | Info region, a non-formal education network | |

### SLOVAKIA

The e-Inclusion landscape is dominated by sectoral associations with national coverage.

| 4. | Slovak Association of Libraries (Slovenská asociácia knižníc – SAK) | http://www.sakba.sk/ |

### 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) | http://www.comunidadtelecentros.net |
| 2. | Guadalinfo | http://www.guadalinfo.es |
| 3. | Dot ICT Network (Xarxa Punt TIC) | http://puntic.cat/ |
| 4. | KZ Gunea | http://www.kzgunea.net |
| 5. | New Knowledge Centres (Nuevos Centros de Conocimiento) | http://www.nccextremadura.org |
| 6. | Plug In Network (Red Conecta) | http://www.redconecta.net |
| 7. | Local Technology Dinamization Centres (Centros de Dinamización Tecnológica Local) | http://actuacionescilt.wordpress.com |
| 8. | Centres for Modernisation and Technological Inclusion (CeMIT, Centros para a Modernización e Inclusión Tecnológica) | http://www.cemg.xunta.es |
| SWEDEN | 1. Workers’ educational activities (Arbetarnas Bildningsverksamhet) | http://www.abf.se/ |
|        | 2. SE, the Internet infrastructure Foundation (Stiftelsen för Internetinfrastruktur) | https://www.iis.se/ |
|        | 5. Education Association (Folkbildningsförbundet) | http://www.studieforbunden.se/english/ |
|        | 6. Education Council (Folkbildningsrådet) | http://www.folkbildning.se/ |
|        | 7. PRO | http://www.pro.se/ |
|        | 8. Seniornet Sweden | http://www.seniornet.se/ |
|        | 9. Center for Adult School (Studieförbundet Vuxenskolan) | http://www.sv.se/en/ |
|        | 10. Sweden's County librarians (Sveriges länsbibliotekarier) | http://www.lansbiblioteken.se |

| UNITED KINGDOM | 1. Age UK's Digital Inclusion Network | http://www.ageuk.org.uk |
|                | 2. British Assistive Technology Association (BATA) | http://www.bataonline.org |
|                | 3. Communities and Local Governments Department of the Government of UK | https://www.gov.uk/ |
|                | 4. Digital Activist Inclusion Network (DAIN) | http://www.dainproject.org |
|                | 5. Making IT Personal: Joining the DOTs | http://www.makingitpersonal.eu |
|                | 7. The National Institute of Adult Continuing Education (NIACE) | http://www.niace.org.uk/ |
|                | 8. UK Online Centres volunteers | http://www.ukonlinecentres.com |

The e-Inclusion landscape seems to be dominated by public government initiatives and community and volunteering network organisations.
Annex II – Survey Methodology and Questionnaire

Since the universe of intermediary actors is unknown, the sampling method used for this survey has been a non-probability sampling.\(^{21}\) Based on the results of the Exhaustive Locality Mapping research, it was estimated that the map sample would need to cover at least 5 organisations for every million people in the EU27. Additionally, it was required that the sample should include the different types of organisations within the defined typology in each country.

The dissemination strategy combined various actions. Individual organisations were contacted directly by Telecentre-Europe and, at the same time, intermediary organisations (networks, associations, etc.) disseminated the survey through different channels (newsletters, email lists, telephone calls, websites and social media channels). Telecentre Europe (TE) and its members’ direct knowledge of most of the addressed organisations was complemented with desk research which included the revision of national reports and databases to identify additional channels to promote the survey at both national and European level and to identify the most relevant network organisations in each of the EU27 countries. This desk research also provided input to estimate the number of eInclusion intermediary actors in the European Union (see Section 3.5 of this report).

A total of 2,352 organisations participated in the survey. The data obtained was complemented with data from 400 respondents to a similar recent exercise in Germany.\(^{22}\) The total number of foreseen respondents was reached, however the distribution of organisations by countries was diverse (see Table 3 below). In some countries, the foreseen sample was not reached (in red), whereas in others (green) more responses were collected.

<table>
<thead>
<tr>
<th>Country</th>
<th>Population 2011</th>
<th>Minimum Foreseen Organisations</th>
<th>Survey respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>8,404,252</td>
<td>42</td>
<td>12</td>
</tr>
<tr>
<td>Belgium</td>
<td>10,951,266</td>
<td>55</td>
<td>72</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>7,504,868</td>
<td>38</td>
<td>99</td>
</tr>
<tr>
<td>Cyprus</td>
<td>804,435</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>10,532,770</td>
<td>53</td>
<td>103</td>
</tr>
<tr>
<td>Denmark</td>
<td>5,560,628</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Estonia</td>
<td>1,340,194</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Finland</td>
<td>5,375,276</td>
<td>27</td>
<td>53</td>
</tr>
<tr>
<td>France</td>
<td>65,048,412</td>
<td>323</td>
<td>218</td>
</tr>
<tr>
<td>Germany</td>
<td>81,751,602</td>
<td>409</td>
<td>411</td>
</tr>
<tr>
<td>Greece</td>
<td>11,309,885</td>
<td>57</td>
<td>27</td>
</tr>
<tr>
<td>Hungary</td>
<td>9,985,722</td>
<td>50</td>
<td>65</td>
</tr>
<tr>
<td>Ireland</td>
<td>4,480,858</td>
<td>22</td>
<td>28</td>
</tr>
<tr>
<td>Italy</td>
<td>60,626,442</td>
<td>303</td>
<td>102</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Population 2011</th>
<th>Minimum Foreseen Organisations</th>
<th>Survey respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latvia</td>
<td>2,229,641</td>
<td>11</td>
<td>26</td>
</tr>
<tr>
<td>Lithuania</td>
<td>3,244,601</td>
<td>16</td>
<td>68</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>511,840</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Malta</td>
<td>417,617</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>Netherlands</td>
<td>16,655,799</td>
<td>83</td>
<td>127</td>
</tr>
<tr>
<td>Poland</td>
<td>38,200,037</td>
<td>191</td>
<td>282</td>
</tr>
<tr>
<td>Portugal</td>
<td>10,636,979</td>
<td>53</td>
<td>100</td>
</tr>
<tr>
<td>Romania</td>
<td>21,413,815</td>
<td>107</td>
<td>211</td>
</tr>
<tr>
<td>Slovakia</td>
<td>5,435,273</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Slovenia</td>
<td>2,050,189</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Spain</td>
<td>46,152,926</td>
<td>230</td>
<td>432</td>
</tr>
<tr>
<td>Sweden</td>
<td>9,415,570</td>
<td>47</td>
<td>94</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>62,498,612</td>
<td>308</td>
<td>133</td>
</tr>
<tr>
<td>Total</td>
<td>2,352</td>
<td>2,352</td>
<td>2,752</td>
</tr>
</tbody>
</table>

Source: Eurostat 2011. Note:* Includes 400 data entries shared by the Stiftung Digitale Chancen for the study.


\(^{22}\) Stiftung Digitale Chancen (DE), conducted a mapping exercise similar to the MIREIA Survey to provide an overview on Public Internet Access Points in the country, which included the data from the annual statistical report collected by the German Library Association. In total, 400 records collected between December 2012 – February 2013 were shared for this study with a distribution as follows: 34% libraries, 49% NGOs and 17% commercial organisations, and representing all the regions in the country.
The sampling method and the dissemination strategy used, together with the difficulties experienced in achieving the minimum foreseen responses per country, have introduced a number of biases into the results obtained. Since the research is based on a non-probability sample strategy and the universe of eInclusion intermediary 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. The following merit particular attention:

1. The sampling method has its inherent limitations, as it is based on the findings of three areas which covered very specific contexts with certain characteristics that are not necessarily representative of other localities across Europe. Indeed, the landscape of eInclusion intermediary actors in each local context is determined by government programmes, EU funding, and a whole set of different factors that manifest themselves differently, depending on the location.

2. The sample method defines very small sample sizes for a number of countries, which gives the analysis at country level a very low level of representativeness.

3. The sample sizes obtained from each country are diverse with regards to the foreseen minimum sample. Some countries had a much larger number of respondents (i.e. Spain, Poland, Romania, the Netherlands, and the Czech Republic) whereas others had smaller numbers (i.e. Austria, France, Greece, UK and Slovenia). The resulting landscape of eInclusion intermediary actors at EU27 level, obtained through a simple aggregation of country samples, is thus influenced by the countries with larger sample sizes in relation to their population.

4. Consistent with the dissemination strategy, which focused on using intermediary (or seed) organisations in each country to widely distribute the survey, the analysis of the data shows that more than a third of survey participants heard about the survey through the seed organisation in their country. It is expected that the sector and type of the seed organisation will have brought biases to the selection of survey participants, particularly because the third sector, municipal agencies and libraries were over-represented among those seed organisations.

5. An important caveat of the dissemination strategy was its limited capacity to reach organisations from the private sector, leading to their underrepresentation in the collected sample. The formal education institutions also seem to be underrepresented in the sample as intermediary actors, given that their total number is known through official statistics.

Taking into account these considerations, the analysis has been conducted at both aggregated and country level to minimize, to the extent possible, any over- or under-representation of the range of eInclusion intermediary actors in a given country. In this report results are presented at aggregate EU27 level and marked differences among countries are highlighted.

With regards to the analysis carried out, it is important to understand that the sample is composed of responses provided by individual organisations, networks of organisations and organisations which claimed to be both (Question 1 in the survey questionnaire, hereinafter, Q1). Respondents were also asked if they were members of a network of organisations themselves in Q9. The resulting range of organisations responding to the survey is illustrated in Table 4.

**Table 4 (Annex II): Distribution of individual and network of organisations by network affiliation**

<table>
<thead>
<tr>
<th>Q1. Is your organisation an?</th>
<th>Q9. Is your organisation part or a member of a network or association?</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual organisation operating in certain territory</td>
<td>Yes</td>
<td>984</td>
</tr>
<tr>
<td>Network of organisations</td>
<td>349</td>
<td>57</td>
</tr>
<tr>
<td>Both</td>
<td>75</td>
<td>7</td>
</tr>
<tr>
<td>Missing value</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>1408</td>
<td>737</td>
</tr>
</tbody>
</table>
Most of the analysis was based on data from all the survey respondents (2,352) and the 400 entries from Germany. Additional analysis, however, was carried out separately on individual organisations not belonging to any network (~673~ those who responded “individual” to Q1 and “no” to Q9 in red in the table) as well as on networks of organisations. For the latter, in order to avoid double counting, only those that responded as networks (which responded “Network” – 434- and “both” -84- to Q1 in blue in the table) were considered.

In addition, an analysis of all the organisations belonging to networks which responded to the survey (518), was carried out by weighting each network according to the numbers of members it had, as outlined in Table 5 below. By using this conservative method (consisting of assigning the average number of member organisations to the networks that responded to the survey, except for the highest range–500+ –, where the minimum value –500- has been used), we estimate that the networks in the survey represent at least 85,580 member organisations.

**Table 5 (Annex II): Estimate of the total number of organisations which are members of networks**

<table>
<thead>
<tr>
<th>Missing values</th>
<th>Less than 10</th>
<th>10-50</th>
<th>51-200</th>
<th>201-500</th>
<th>500+</th>
<th>Don't know</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value assigned</td>
<td>0</td>
<td>5</td>
<td>30</td>
<td>125</td>
<td>350</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>Number of Network of organisations responding (Networks organisation + both in Q1)</td>
<td>75</td>
<td>37</td>
<td>104</td>
<td>93</td>
<td>29</td>
<td>121</td>
<td>60</td>
</tr>
<tr>
<td>Estimate of members represented</td>
<td>0</td>
<td>185</td>
<td>3120</td>
<td>11625</td>
<td>10150</td>
<td>60500</td>
<td>0</td>
</tr>
</tbody>
</table>

Regarding the analysis of the innovation role played by inclusion actors, a total of 1,200 respondents answered an open-ended question (question number 20 in the online questionnaire). In order to analyse the answers, national partners were requested to go through the country samples, to select the 10-15 most relevant and representative answers of the national context and translate them into English. The research team carried out a qualitative analysis across countries of the selected answers and classified the different examples along a set of categories of innovation as presented in Section 3.4 of this report.

See below the questionnaire (English version) used for the online survey.
Mapping exclusion 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 Exclusion 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 exclusion 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 Helen.Johnston@it.ie - phone: 01 8825570
for Latvia: Mara Jakobsone at mara.j@dtmedia.lv
for Lithuania: Karolina Jasvaitaite at karolina.jasvaitaite@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
### 2. Information of your organization

<table>
<thead>
<tr>
<th>Name</th>
<th>Year your organization started</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>City</th>
</tr>
</thead>
</table>

### 3. Please select your country

- [ ] Austria
- [ ] Belgium
- [ ] Bulgaria
- [ ] Cyprus
- [ ] Czech Republic
- [ ] Denmark
- [ ] Estonia
- [ ] Finland
- [ ] France
- [ ] Germany
- [ ] Greece
- [ ] Hungary
- [ ] Ireland
- [ ] Italy
- [ ] Latvia
- [ ] Lithuania
- [ ] Luxembourg
- [ ] Malta
- [ ] Netherlands
- [ ] Poland
- [ ] Portugal
- [ ] Romania
- [ ] Slovakia
- [ ] Slovenia
- [ ] Spain
- [ ] Sweden
- [ ] United Kingdom

### 4. Contact information

<table>
<thead>
<tr>
<th>Phone number</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Email address</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Website</th>
</tr>
</thead>
</table>

### 5. To what sector does your organization belong? [Select ONE]

- [ ] Public Sector
- [ ] Third Sector (Non-governemental, Community, Voluntary, Non-Profit)
- [ ] Private Sector

---

**About your organization**
### 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
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 offered 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 organizations, 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
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 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
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 fulfil 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
Annex III – Bibliography


Abstract

This report presents the main findings and policy recommendations of an analysis based on the results of an online survey of intermediary organisations working on eInclusion in 27 European countries. The survey, which is the first-ever assessment of the e-Inclusion intermediary sector, collects relevant data from almost 3,000 individual and network organisations that represent more than 85,000 members. In addition, it is estimated that there are a total of 250,000 organisations, or one e-Inclusion actor for every 2,000 inhabitants.

According to the findings, these organisations play an important role in achieving the goals of the Digital Agenda for Europe, particularly in two of its action areas: enhancing digital literacy, skills and inclusion and ICT-enabled benefits for EU society. Moreover, most of organisations offer ICT-based, employment-related and other social services.

In conclusion, there is a need for policy 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. When considering these policy options, the important role that networks play among these actors needs to be acknowledged, mainly because of the high number of small organisations that characterize the sector.
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.