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D1.9 Exploitation Plan

Revision: Final

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Organisation name of lead contractor for this deliverable: FDCGO

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Revision History

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Statement of originality

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

Authors

Renzo Andrich, Sabrina Vincenti (FDCGO)
Executive Summary

The overall goal of the ETNA thematic network was to establish a **European Web Portal** able to provide a unified access to information on European ICT assistive products, on related organizations, services, and to allow access to repositories of freeware, open source software products and tools useful for e-accessibility.

The initial vision was that of a single Portal evolving from the already-existing EASTIN system (European Assistive Technology Information Network) and including two major components: the ETNA information system – a search engine that aggregates information from various providers and repositories all over Europe and beyond, under responsibility of the ETNA network – and a virtual community connecting all stakeholders, under responsibility of ATIS4all, another Thematic Network belonging to the same cluster.

In the course of the projects the two components gradually took shape, thanks to the contributions of all partners within each network and the collaboration between the two networks. Eventually, technical and sustainability reasons suggested to rethink the initial vision and establish two distinct but coexisting Portals, instead of a single one. Both Portals will continue after the end of the ETNA and ATIS4all projects; they will be independent of each other in terms of resources and sustainability strategy; however, they will collaborate and communicate with each other at various levels.

The ETNA information system will be inherited by the EASTIN Association: the new Portal (EASTIN 2.0) will replace the current EASTIN system and will maintain the same brand and address (http://www.eastin.eu).

The ATIS4All community will be operated by Technosite (the ATIS4all leader) through the new ATIS4all collaborative portal (http://collaborativeportal.atis4all.eu).

The deliverable presents the final exploitation plan of the EASTIN 2.0 Portal. It is part of ETNA Work Package 1 “Network coordination, implementation and dissemination”.

The **first Chapter** (The project’s outcome) provides an overview of the EASTIN 2.0 Portal: an on-line information system, especially focused on ICT assistive products and e-accessibility solutions, although prepared to encompass all domains of assistive technology. This chapter also highlights the new features of EASTIN 2.0 in comparison with the previous EASTIN, as well as a short presentation of the new search engines and interfaces.

The **second Chapter** (Sustainability strategy) describes the new structure decided within the EASTIN Association to ensure the sustainability of the information system. The new scenario is based on a three-level membership (Full Partners, Associate Partners and External Partners); participation procedures, roles and responsibilities are described, along with a clarification of the tasks of the partners acting as National Contacts or Data Providers.

The **third Chapter** (threats and opportunities) highlights the added value brought about by the revised ETNA project and outlines the main opportunities and threats to the EASTIN 2.0 Web Portal.

The **fourth Chapter** (Financial forecasting) provides an overview of how the operation of the EASTIN 2.0 Web Portal will be managed in the medium term. The financial basis will be ensured by the Full Partners of the EASTIN Association by means of an annual membership fee.
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The project’s outcome

The ETNA Information system

Over a period of three years, the ETNA Thematic Network has developed an on-line information system providing information on assistive products based on e-accessibility solutions which are available in Europe, and on related organizations and services.

It has been designed to meet the information needs of five categories of stakeholders: end-users (persons with disabilities, their families, primary caregivers), professionals (in health care, assistance, education), manufacturers and suppliers, researchers and developers, policy makers.

It hasn’t been developed from scratch: it has evolved from an already-existing Web Portal – the European Assistive Technology Information Network (EASTIN) – and has maintained (and further exploited) some unique characteristics of this Portal, such as the multilingual user interface and the ability to address all domains of assistive technology.

Since the beginning, ETNA has worked in close collaboration with the parallel network ATIS4all (European Thematic Network on Assistive Technologies and Inclusive Solutions) belonging to the same cluster. Indeed, the initial vision was that of a single joint Web Portal including both the information system (which is responsibility of the ETNA project) and the community (which is responsibility of the ATIS4all project).

In the course of both projects, as tangible results gradually took shape, technical considerations and thoughts related to future sustainability led to the decision of having two distinct but coexisting Portals, communicating with each other:

- the ETNA information system – a search engine that aggregates information from various providers and repositories all over Europe and beyond – to be inherited by EASTIN;
- the ATIS4All collaborative portal – connecting all stakeholders through a live virtual community – to be taken up by Technosite, the ATIS4all coordinator.

Details and conditions regarding this decision are described in detail in a Strategy Agreement (Annex 1) signed by both parties. Communication between the two portals will take place at three levels:

- reciprocal links in the headers of the Portals’ webpages;
- feeds from the ETNA Information system to the ATIS4all collaborative portal;
- a facility allowing members of the ATIS4all community to rate and comment assistive products retrieved from the ETNA Information System.

After the end of the ETNA Project the ETNA information system – which is currently accessible in test phase from the ETNA website www.etna-project.eu – will disappear as such: it will be taken up by the EASTIN system and will maintain its brand and address www.eastin.eu. It will be presented to the public as an evolution of the current EASTIN. As the current release of the EASTIN Web Portal is 1.1, and major developments have been introduced by the ETNA project including new functionalities and interactive tools, the new release will be marked 2.0

In comparison with the EASTIN 1.1, EASTIN 2.0 will have a even higher potential, thanks to the introduction of new advanced features:

- Improved architecture, able to aggregate an unlimited number of information providers communicating automatically through web services (called providers type “A”);
- Additional ways to collect information by means of a data upload tool, allowing information providers who don’t communicate via web services to upload data
manually onto a new central database (called *providers type “B”*);

- Improved *contents*, especially in relation to ICT assistive products and e-accessibility solutions, thanks to an improved domain model based on new taxonomies;
- A *taxonomy management tool*, for maintenance and future developments of the taxonomy;
- Improved *search engines*, especially in relation to ICT assistive products and e-accessibility solutions, thanks to advanced search facilities;
- Increased ability to deal with *other resources* rather than just product information; (organizations, such as companies, projects and service providers; associated info such as literature, regulations etc.);
- Increased *multilingual abilities* (mainly through controlled vocabularies and taxonomies) so as to accommodate for all languages/cultures of the European Union.

All the above developments - initially intended only for ICT ATs - will be applicable to the whole assistive technology domain.

At the time of production of this deliverable, technical details concerning the new features of the EASTIN 2.0 System are provided in *Deliverables D1.5 “Search engine and interface specifications”, D1.6 “TN Portal: search engine and interface first release”, and D6.1 “Partners’ webservices first release”*. 

As the project proceeds to its conclusion, detail updates will be provided by D1.8 *“TN Portal: search engine and interface second release”*, D1.1 *“TN Portal: search engine and interface final release”*, D6.2 *“Partners’ webservices: second release”* and D7.4 *“Partners’ webservices: final release”*.

### The search engine

This section provides a brief overview of the new facilities introduced by the search engine developed within the ETNA project. Some screenshots are presented to compare the EASTIN 1.1 with the current test version of the ETNA Information system, which is a preview of the future EASTIN 2.0. 

![Picture 1a: the Eastin 1.1 home page](image1.png)
![Picture 1b: the ETNA (test stage) home page](image2.png)

From the home page, three different kinds of searches can be carried out (*Picture 1a/b*):

- Searching Assistive Products
- Searching Organizations
- Searching Associated Information

**Assistive Products** can be retrieved by means of six search criteria:

- Guided Search by product classification codes (based on the ISO 9999:2011 standard)
- Keyword Search
• Search by product name
• Search by manufacturer’s name
• Search by insertion date
• Advanced search

Basically, the first five criteria are the same as in the previous EASTIN version, while the **advanced search** is being completely redesigned on the basis of the new detailed taxonomy of ICT assistive products (**Picture 2 a/b**).

New contents and search criteria have been introduced in the search once addressed only to “companies”: this search now is addressed to a broader range of entities falling within the concept of “organizations”: companies, projects, and service providers (**Picture 3 a/b/c**). Organizations can be searched by means of four criteria:

• Guided Search by ISO product classification codes
• Search by ICF classification codes
• Keyword search
• Search by name

Associated information includes new items, compared to the old version (Picture 4 a/b):

• Articles
• Case descriptions
• Ideas
• Faqs (Frequently Asked Questions)
• Forums
• News
• Regulations

These can be found by means of six search criteria:

• Guided search by ISO product classification codes
• Search by ICF classification codes
• Keyword Search
• Search by title
• Search by author
• Search on all documents

The data upload tool and the taxonomy management tool

As said above ETNA has introduced two additional facilities: an online data upload tool, allowing authorized information provider to manually enter information on products, organizations or associated info, and a taxonomy management tool, allowing the system administrators to carry out updates, modifications or extensions – subject to agreed rules – to the taxonomy that drives the product descriptions.

Picture 5a/b shows sample screenshot of the data upload tool. Conversely, at the time of production of this deliverable the taxonomy management tool hasn’t been completed yet, being it scheduled in November 2013.
Picture 5a: ETNA (test stage) data upload tool: editing the basic dataset of a product

Picture 5b: ETNA (test stage) data upload tool: editing the detailed dataset of a product
Sustainability strategy

The new EASTIN membership structure

Besides the technical and contents developments described above, the ETNA project opened new perspectives for the EASTIN Association, in terms of extending the number and the profile of information providers. These perspectives required detailed consultations within the EASTIN partners in view of future sustainability.

The discussion was facilitated by the fact that most EASTIN partners participate in the ETNA project; however, before approaching the final stage of the ETNA project, the issue also needed formal decisions by the EASTIN Association, which were taken in the EASTIN AGM held in London on June 11-12, 2013.

The most relevant decisions in relation to the ETNA exploitation are reported in the following.

First, it was decided to reshape the structure of the EASTIN organization to better accommodate the changes and developments brought by ETNA. In order to ensure long-term sustainability, a network of stable active partners must be established. It is important to rely on organisations who look at the participation in the network not as just a voluntary activity, but as a commitment linked to their institutional mission.

Accordingly, the EASTIN Assembly deliberated that the structure of the Association will be based on a three-levels membership that includes full, associate and external partners.

**Full Partners:**
- pay the annual membership fee established by the Assembly, thus providing the financial basis for the operation of the EASTIN system;
- participate in the EASTIN meetings as established by the Articles of Association, and have decision power;
- are the National Contact Organisation for their Country / culture;
- run a national AT database and serve as National Provider for that country-culture, by means of method “A” (webservices).

**Associate Partners:**
- don’t pay any annual membership fee;
- can participate in the EASTIN meeting but don’t have decisional power;
- are the National Contact Organisation for their country / culture;
- are eligible to serve as National Providers for their country-culture, by means of method “A” (webservices) or “B” (data upload tool) depending on their choice.

**External Partners:**
- don’t pay any annual membership fee;
- can participate in the EASTIN meeting but don’t have decisional power;
- are Thematic Providers of interest for the EASTIN system, by means of method “A” (webservices).

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1 Usually there is just one culture per country, however there are cases of multiple cultures such as Belgium-French and Belgium-Dutch; from the EASTIN viewpoint it is like having two different Countries, because users need a national contact for each language (unless the same organisation can do it for both languages).
This structure involves that the key requirement for participating in the network is the capability to serve as information provider, whether national or thematic (as explained in the next chapter), or to serve as National Contact Organisation for a certain Country / culture. It also involves that it is possible to have only one partner – whether full or associate – for each Country / culture, and an unlimited number of external partners.

If this network exists and efforts are spent to keep it strong, it is expected that many other organisations or even individuals (e.g. software developers) will be easily aggregated by establish links with any EASTIN partners, whether full, associate or external.

How to join the network

As anticipated above, participation as partner in the EASTIN Association is open to Organizations able to serve:

- as National Contact for their country-culture;
- as National Information Provider to the EASTIN search engine;
- as Thematic Information Provider to the EASTIN search engine.

Serving as National Contact means being responsible for:

- maintaining the EASTIN language layer related to a given country-culture;
- answering questions posted by citizens of that language-culture through the EASTIN website;
- answering questions posted by manufacturers willing to make known their product in a given country-culture.

Serving as information provider – whether national or thematic – means being responsible for providing data to the EASTIN system – either through method “A” (automatic feed through purposely-written webservises) or method “B” (manual feed through the EASTIN data upload tool) – according to agreed information quality standard. Information providers may be national, in case the data provided encompass the whole spectrum of assistive technology products, cover the whole national market and are localised in a given culture of that Country; or thematic, in case they are specialized on a specific subset of assistive technology – for instance open source e-accessibility solutions – with international perspective.

Whatever the case, the actual engagement of an information provider takes place when an agreement is signed between the information provider and the EASTIN Association. Indeed a formal agreement is needed to state each party’s responsibilities in relation to information quality, IPR and legal issues. The overall principle is each information provider bears all responsibilities for the data provided to the EASTIN system, is credited for these data, and can make public use of the EASTIN brand and logo under certain conditions. To this end, international legal consultancy has been sought and two templates have been decided for this agreement: one for providers “type A” (Annex 2) and one for providers “type B” (Annex 3).

To a certain extent, some automatic procedures may help data quality controls on the EASTIN web-server client side: for instance, a filter that accepts only product information whose latest update is after a certain date. However this does not substitute for the need to agree data quality rules among all partners.

A National Contact may wish to also serve as national information provider, whether “type A” (in which case it may also apply to become full partner) or “type B” (in which case it will stay associate partner). No other organisation for that Country / culture is eligible to sign a license agreement as national information provider. This organisation may decide do it alone or take agreements with other organizations at national level that can help in data collection; whatever the case, all data will be under its responsibility as National Provider. This approach avoids the
user being confused about who is responsible for the data related to a given country-culture - thematic area.

Any organisation willing to participate in the EASTIN network as partner – whether full, associate or external - should follow an approval procedure that includes:

- sending an application to the EASTIN Association;
- being invited to introduce themselves in an EASTIN plenary meeting;
- in case of organisations willing to participate as data providers, getting “green light” by the EASTIN AGM to proceed with the technical set-up;
- check that everything works well;
- final approval.

Implementing the new structure of the EASTIN Association

The transition to the new structure will proceed as follows:

- The current Full Partners stay as Full Partners;
- The current National Contact become Associate Partner; in case they want to also take the opportunity of being National Provider, they are given the credentials for the data upload tool (or develop their own webservices), and sign the appropriate license agreement;
- The organizations operating the thematic databases being experimentally plugged in the ETNA system (OATSoft, OAEG), if the experiment is successful, may apply as External Partners;
- The organization operating the other database being experimentally plugged in the ETNA system (SD2 from ITD/CNR, Italy, which cannot be considered a international “thematic provider” but a second Italian source extending the coverage of the already existing national provider SIVA), if the experiment is successful, will not become Partner but may take agreement with SIVA for providing their data under SIVA responsibility;
- Any other Organisation around the globe may also apply to join the EASTIN network in its preferred way. For instance, the US Abledata system, which will experimentally plug in the ETNA system in November, 2013 if the experiment is successful, may wish to apply as External or an Associate Partner. They may also consider to apply as Full Partner: however, the decision to admit a non EU-based Organisation as Full Partner would require a change in the Articles of the EASTIN Association.

Partners’ motivations to ensure sustainability

The scenario described so far is based on a voluntary commitment by all partners to fulfill their role in the network – as information provider or national contact organization – plus the commitment of the full partners to provide the financial basis for the operation of the EASTIN system through an annual membership fee. Substantially, it is the same model that has successfully driven the EASTIN Association since its foundation (2006) until now; the difference will be that an outer circle of partners (associate and external) will add to the inner circle of full partners, thus extending contents and geographical coverage, and bringing new dynamics to the Association.

The motivation for each partner’s commitment is not related to generating business in

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2 In case of providers “A”, developing the web services according to the EASTIN specifications, in case of providers “type B”, upload a certain amount of data allowing for a first quality assessment;
traditional sense, but rather to acknowledging the added value of being partner in this international network against acting alone and locally.

The motivation to be a national contact is connected to the international acknowledgement of a key role already played at national level in disability policies and especially on AT-related issues. That’s why, wherever possible, the preferred National Contacts are governmental Bodies with national responsibilities on AT-related issues (as it already happens today in the EASTIN network for most Countries); only in case this is not possible, other entities (such as user organizations, academic institutions, major rehabilitation centres, etc.) can be accepted, provided they have a well-acknowledged key role in that Country and have the technical / organizational ability to serve as National Contacts.

For a National Contact, being member of the EASTIN gives the opportunity:

- to participate in an international network of expertise, discuss common issues, share experiences and good practices;
- to strengthen its position at national level, and be better known at international level;
- through the website’s “Submit a product” and “Info request” tools, to open up an additional communication channel with users and other stakeholders in the field, and
- to take advantage of the data upload tool for creating a national AT database for free.

The motivation to be an information provider can be envisaged in the fact that joining one’s data to all other data flowing in network, and furthermore automatically available in all languages, expands outreach and ensures better response to all stakeholders’ needs and requests. In case of providers “type A”, it also attracts more visitors to one’s own information system, whether national or thematic.

On the users’ side, thanks to the aggregation of all data within a single network, all interested people will be able to access the whole amount of AT information available in Europe, in their language and according to a user-friendly common format. Thanks to the advancements brought by the ETNA project, the EASTIN contents will achieve a much wider coverage especially on ICT assistive products, e-accessibility solutions and related resources.

On the partners’ side, participation in the EASTIN network will facilitate optimization of the use of their resources by exchanging information, sharing expertise, and identifying more efficient methods for their information systems. This will also have improved relationships with other organizations doing similar work throughout Europe, which may also plug into the Portal.

Last but not least, a better service for the audience will mean a stronger position of each information provider in front of their national funding sources or sponsors.
Opportunities and threats

The most important opportunities offered by the EASTIN Network can be clustered round four headlines:

- social opportunities;
- economical opportunities;
- prestige opportunities;
- outreach opportunities.

Social opportunities

Empowerment of people with disabilities falls within the core mission of all partners. Making accessible all information available in Europe to people with disabilities and stakeholders in the field is instrumental to empowerment. The EASTIN 2.0 will offer a powerful opportunity by:

- providing a single multilingual access point from more information systems;
- improving the citizens’ awareness of what assistive products and e-accessibility solutions are available on the European market;
- stimulating Companies – and also researchers and developers – to expand their AT products’ offer in terms of both products quality and people’s needs coverage;
- provide information on AT products in such a way to allow for comparisons;
- stimulate communication and exchange of knowledge between end-users, industry and professionals;

The guiding idea of the EASTIN Network is that any citizen with disabilities should be able to access the appropriate level of knowledge on AT (s)he wishes or needs, and access it in an accessible, user-friendly and affordable way. In such a way it will contribute to the EU social objective of equal opportunities in the Information Society.

Economical opportunities

Collaboration, co-ordination, harmonization, and exchange of expertise within the EASTIN 2.0 Portal offer opportunities to increase cost effectiveness in the daily work of all partners. This is because harmonization of data formats, common classification methods, common approaches towards product-identification, common discussion about data collection and quality control procedures, and better coordination in the data collection process, make it possible to limit duplication of efforts and take advantage of each other data and experience.

Within the ETNA project, discussion has started in relation to a number of harmonization issues, and will continue within the EASTIN Association in working groups. Some examples are described in the following.

- The taxonomy developed within ETNA will contribute to the development of a common 4th level to the ISO-classification, that eventually can be brought to the relevant committees of the International Standardisation Organisation to become an ISO standard. Since it is very resource demanding task needing specific expertise, co-ordination and sharing of this work between the partners would be cost-effective.
- The EASTIN 2.0 Portal will further strengthen the possibilities to exchange and use data from each other. Coordinating the implementation of a common approach towards product-identification will extend the possibilities to exchange data; developing common data-archives such as a common supplier and/or manufacturer database could
be coordinated by the EASTIN Network; common data-collection tools on the EASTIN website could be further developed, thus making data-collection more efficient.

- The EASTIN 2.0 Portal will be able to co-ordinate the development of terminology databases, helping to improve the automatic translation tools and/or ease the national translation work.
- Thanks to the new taxonomy, the EASTIN 2.0 Portal will enhance harmonization and mapping of key-words. Developing keyword systems mapped to the ISO-classification is resource-demanding task needing specific expertise. Sharing this work among the partners would increase its cost effectiveness.

**Prestige opportunities**

As anticipated in the previous section about the partners’ motivation, the main prestige opportunities offered by participating in the network are:

- achieving a stronger position regarding funding sources, both nationally and internationally (for instance, in relation to EU projects);
- standing in a leading position in Europe in the field of disability and assistive technologies;
- increasing business opportunities with added-value services that can be generated around an AT information system (educational / training initiatives, publication / selling educational material etc.)
- strengthening relationship with the manufacturers and suppliers of AT products, due to the fact that through the EASTIN network their new products can be made quickly known all over Europe and the World.

**Outreach opportunities**

The EASTIN network is close to covering all European Countries, so that every European citizen can access accurate information on AT, in their own native language.

Furthermore the EASTIN 2.0, although rooted in Europe, has been designed in such a way that it can be also global: indeed, basically any country of the world could make a request to join the Portal, as a partner. Of course acceptance is depending on the case-by-case decisions of the EASTIN Association; however there are no technical barriers to global extension.

**Threats**

No major threat is seen today that may undermine the significance and the sustainability of the EASTIN network. The existence of an international, effective and comprehensive Web Portal specifically dealing with assistive technology meets the information needs of a specific and well-defined target population. Due to the EASTIN’s unique position as EU-wide network, no other possible competitors can be seen that are willing to serve the same purpose.

An overall threat – which is however common to any information system – is related to the overwhelming advancement of general-purpose search engines that may cause the EASTIN 2.0 to quickly become obsolete. This calls for a continuous effort of the EASTIN association to keep the system on the leading edge of technology and take advantage of these advancements rather than attempt competition with them. The growing pervasiveness of new internet devices also calls for continuous improvements of the user interfaces, especially in relation to mobile devices.

A specific threat is related to the dependency on the ATIS4all collaborative portal in relation to
the User Rating and Comment functionality. A possible default of the ATIS4all collaborative portal must be taken into account in this exploitation plan, as it would cause the loss of all ratings stored until that time and make this functionality unavailable for users. However, in case of this unfortunate event, it will be possible for the EASTIN association to re-build within the EASTIN Web Portal the components of the functionality that were previously in the ATIS4all Portal. This will require some investment – in the range of about one man-month of a software engineer’s work.
Financial sustainability

As anticipated in chapter “Sustainability strategy”, the financial sustainability of the EASTIN 2.0 Portal is ensured by full partners through the payment of an annual membership fee. Each full partner will be a national information provider, running an established public national AT database in their country. Participation in the EASTIN network is considered as falling within the operation of a national database. The EASTIN membership fee is a minimal part of their annual budget allocated for the operation of the national system, and all other activities that are not directly related to the maintenance of the Web Portal (such as meetings etc.) are borne within the same budget.

As shown in the table below, the financial forecast from 2014 until 2016 is based on the assumption that the network will maintain the current seven full partners for the next 3 years, the annual membership fee is 2,500 €, and the EASTIN results from previous years are used. Of course, in case of new full partners joining the network or additional funding from new projects, the income is going to increase; however this is unknown today thus a cautious estimate has been preferred. The main expenses foreseen within this budget are related to hosting (which is provided for just a token fee 5,000 € / year by Don Gnocchi Foundation), software developments (some investment will be needed to reengineer and consolidate the ETNA inheritance within the EASTIN 2.0), dissemination and outreach activities, and coordination / management.

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**INCOMES**
- Membership fees: € 17,500 (€ 17,500 (€ 17,500)
- Other incomes: - - -

**Total**: € 17,500 (€ 17,500 (€ 17,500)

**EXPENSES**
- Hosting / maintenance of the EASTIN Website: € 5,000 (€ 5,000 (€ 5,000)
- Editorial work: € 5,000 (€ 5,000 (€ 5,000)
- Administrative support and Auditing: € 700 (€ 700 (€ 700)
- Activities related to dissemination/extension to all EU Countries: € 5,000 (€ 3,000 (€ 1,000)
- Software developments, technical assistance to partners: € 20,000 (€ 5,000 (€ 3,000)
- President's budget for unforeseen expenses: € 800 (€ 800 (€ 800)
- Other expenses: € 500 (€ 500 (€ 500)

**Total**: € 37,000 (€ 20,000 (€ 16,000)

**Result of the year**: -€ 19,500 (€ 2,500 (€ 1500)

**Availability Bank at end**

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Table 1 – EASTIN financial forecast 2014-2016
Annex 1 - ETNA/ATIS4all Strategy Agreement

The “European Thematic Network on Assistive Information Technologies” EC, CIP-ICT-PSP-2010-4 Project 270746, hereinafter ETNA and the “Assistive Technologies and Inclusive Solutions for All” EC, CIP-ICT-PSP-2010-4 Project 270988, hereinafter ATIS4all,

- Having regard of the agreement reached by ETNA and ATIS4all for their clustered activities included in both Grant Agreements,

- Having regard of the reviewers’ request that both thematic networks arrive at quick consensus concerning a final strategy for either integration of co-existence of the web portals,

Whereas

(1) Appendix 1 (“Clustering between ETNA and ATIS4all”) of Annex I (“Description of Work”) of both ETNA and ATIS4all Grant Agreements envisioned a joint Web Portal as final result of the work of the two thematic networks.

(2) It also established the “distinction of tasks and related responsibilities” with respect to the various components of the joint Portal, for better exploiting the respective expertise and “...avoiding any possible conflict between the two networks”. In particular, it identified two major components: the “search engine” - which was agreed to be responsibility of ETNA, and the “community” - which was agreed to be responsibility of ATIS4all.

(3) It also established that both networks - in order “to be perceived by the public as part of the same cluster” - would share the same visual identity in their publicly available results. It was agreed that an ad-hoc design would be created by the design department of Technosite (ATIS4all coordinator).

(4) All the activities mentioned above have been carried out. The ETNA and the ATIS4all Institutional websites have been created sharing the same visual identity, and have been continuously maintained. Joint dissemination material has been produced and joint dissemination events have been held.

(5) Technosite’s design department (ATIS4all coordinator) created an ad hoc design to increase the appealing of the prospective joint portal. The draft design of some key webpages was presented to the ETNA coordinator in a clustering meeting held in May 31st, 2012. The ETNA coordinator provided feedback on them.

(6) The ETNA search engine with the related search interfaces (now called ETNA Information System http://test.etna-project.eu) and the ATIS4all community (now called ATIS4all Collaborative Portal http://collaborativeportal.atis4all.eu) have been published in their first releases at the beginning of 2013. Further releases are expected in 2013.

(7) In developing the ETNA Information system, the project coordinator Fondazione Don Gnocchi didn’t start from scratch: it upgraded the already-existing EASTIN Web Portal
by integrating the new components (taxonomy, domain model, search functionalities, data entry tools etc..) that had been gradually developed within the ETNA Consortium; the complexity of the system and the tight time schedule forced to keep graphical design considerations as a second priority; thus the original EASTIN graphical layout was used, although with minor modifications. Conversely, in developing the ATIS4all Collaborative Portal, the project coordinator Technosite started from scratch and thus adopted the above-mentioned ad-hoc design (see point 5).

(8) Now the ETNA and the ATIS4all Thematic Networks are entering their final stage, with planned conclusion December 31, 2013. They have made significant progress in compliance with their work plans and are expected to achieve their objectives within the planned deadlines.

(9) As the work proceeded within each network, technical issues and exploitation prospects gradually became clearer. Several key issues were clarified thanks to the collaborative effort of all partners and also to the mutual collaboration between the two project coordinators. Now, the situation of both networks is clear enough to discuss the best strategy for the future exploitation of the results.

(10) The information system developed within the ETNA project is going to be inherited by the EASTIN Association after the conclusion of the project. Thus ETNA will disappear as such: it will be embedded within the EASTIN system, as an evolution of it. The new EASTIN system's profile can be described as follows:

a. an on-line information system covering all domains of assistive technology;

b. designed to satisfy the information needs of five categories of stakeholders: end-users (persons with disabilities, their families, primary caregivers), professionals (in health care, assistance, education), manufacturers and suppliers, researchers and developers, policy makers;

c. especially powerful in relation to ICT assistive technology and e-accessibility products and related resources, thanks to the improvements generated by the ETNA project;

d. mainly working on data made available through web services by national or thematic information providers (referred to as “Type A providers”);

e. also equipped with a data upload tool that makes it possible also for participants of communities to enter and share additional data (referred to as “Type B providers”);

f. fully multilingual (mainly through controlled vocabularies and taxonomies) so as to accommodate for all languages/cultures of the European Union.

- Its long-term sustainability is ensured by the inherent financing system of the EASTIN Association, based on membership fees, on voluntary contributors an on a network of National Contact Organisations covering all EU Countries.

(11) The collaborative portal developed within the ATIS4all is managed by Technosite. The future of ATIS4all thematic network will be decided in the second half of 2013: it may continue as an informal or formal association of experts. The ATIS4all collaborative portal can be described as follows:
a. an online collaborative portal focussed on ICT assistive technologies and services
b. especially powerful in exploiting the potential of the Web 2.0 tools to facilitate the online collaboration of the key actors not only as visitors, but also as content providers
c. mainly working through Content Management Systems (CMSs) and Forums open to the portal registered users, and RSS services to provide automatically updated content
d. containing three main areas (Marketplace, R&D community, Key Actors) while product searches are redirected to the EASTIN information system
e. its sections and subsections are specifically designed to satisfy the information and interaction needs of all the key actors in the ICT AT field, including: end-users, carers, lobbyists, user organisations, R&D organisations (rehabilitation & technology oriented), universities, standardisation organisations, testing organisations, manufacturers, dealers, wholesalers, advisors, service delivery institutions, institutional organisations (rehabilitation centres, hospitals, schools, universities, etc.) and government at various administrative levels.
f. fully multilingual, not only the navigation menus, but also all the static and dynamic content provided by the portal members and automatic systems, through automatic translation tools.

- Its sustainability relies on a set of sponsors for the maintenance of the system.

(12) On the one hand, looking at the results achieved so far and at the current progress of both networks, ETNA opines that:

a. The notion of fully integrate the two portals into one “joint portal” now it is unrealistic expectation, because of 1) the quite different scope and profile of each portal and 2) the technical complexity and the investment involved (far beyond the available resources) if the ETNA information system had to be re-designed according to the ad-hoc created design (see point 5).

b. Therefore ETNA wishes EASTIN 2.0 to inherit essentially the same interface as EASTIN 1.0, which it will replace maintaining the same brand.

c. At this stage ETNA also considers that adopting the same design of the ATIS4all collaborative portal may be even counterproductive, causing confusion to the users. The reason is that on the one side EASTIN 2.0 will be an informative portal addressing ATs “horizontally”, and on the other side ATIS4all will be a collaborative portal addressing ICT ATs “vertically”:

(13) On the other hand, looking at the results achieved so far and at the current progress of both networks, ATIS4all opines that:

a. A common design would the optimal solution to optimize the impact and sustainability of both sections. Users would feel it as a single portal, the traffic
among the sections would increase, the dissemination activities would benefit both of them, and the sponsors would be more eager to contribute.

b. The end users may feel confused with the change in the “look & feel” when going from ETNAs section to ATIS4all one, or vice versa.

c. The lack of a common “look & feel” will affect negatively to ATIS4all collaborative portal impact and sustainability. The engagement of key actors as portal members, and the persuasion of the potential sponsors will be affected by it. They would feel more attracted by a joint portal.

d. Despite the aforementioned setbacks, ATIS4all agrees on producing two connected portals (instead of a joint one) in order to facilitate the agreement of a common approach.

Agree

1. The two portals will maintain their different visual identity as it is now. However, they will co-exist and communicate at two levels detailed below.

2. At the highest level (presentation tier) interaction is via http Get/Post messaging: this includes the links from ETNA pages to ATIS4all pages and vice versa.

3. At the lower level (data tier) interaction is via SOAP webservice and proxies; this includes:
   
a. the EASTIN “product review” functionality (Picture 2, where the product ratings are assigned and recorded in the ATIS4All system, and visualised in the EASTIN system); information on the language of the browser of the user providing rates
and comments will be also saved in the ATIS4all database to be available by ETNA when showing the users rates and comments.

b. the ATIS4all functionality presenting the top rated products (Picture 3, where products are ranked in ATIS4all database, and the detailed information is provided by EASTIN web service and displayed in ATIS4all collaborative portal).

c. the ATIS4all functionality presenting the open source software products or other categories of product of specific interest for the ATIS4all community (provided by EASTIN web service and displayed in the ATIS4all collaborative portal section “Tools for ICT AT’s development”).

4. In order to avoid the user confusion due the change of the look & feel when moving between the ETNA and the ATIS4all environment, and to give the deserved recognition to their developers:

   a. In the user rating and comment facility, both look & feels will be kept as shown in Picture 2;

   b. An acknowledgement will be included in the ETNA webpage under the “Review this product” button (e.g. “The commenting and rating facilities are provided by the ATIS4all collaborative portal”);

   c. Multilingual features to the forms for the rating and commenting of the AT products will be provided through language-localised forms;

   d. Being registered in the ATIS4all collaborative portal is a necessary and sufficient condition to be allowed to provide rates and comments. No further rights (e.g. supporters’ rights) are required.
e. In the sections of the ATIS4all collaborative portal where information is queried from the ETNA system, this should be acknowledged by the sentence “powered by EASTIN”.

The ETNA Project Coordinator

Renzo Andrich
Fondazione Don Carlo Gnocchi Onlus

Milano, May 22, 2013

The ATIS4all Project coordinator

Roberto Torena
Fundosa Technosite S.A.

Madrid, May 29, 2013
Annex 2 - Licence Agreement for information providers type "A"

(Partner Operating with Webservice Server Software)

[Date], (hereinafter, “Effective Date”)

By and between

EASTIN ASSOCIATION, whose registered office is at Piazzale Morandi 6, 20121 Milano, Fiscal Code and VAT Number 0556280963, represented by its legal representative Mr Renzo Andrich, born in Belluno, Italy, on May 25, 1955, duly empowered hereto (hereinafter, “Eastin”) and

[..........................], with registered office in [............], fiscal code [..........................], hereby represented by [..............], duly empowered hereto (hereinafter, the “Partner”)

(hereinafter jointly referred to as “Parties”)

WHEREAS

a) Eastin is the owner, or the legitimate user, of the web site www.eastin.eu, which provides information on assistive products, (hereinafter, “Eastin Website”), including any related or connected data, information, patents, designs, trade marks and trade names (whether registered or unregistered), copyright and related rights, database rights, know-how, confidential information, software, and any other intellectual and industrial property;

b) the Partner owns and manage its own web site [●] .............. providing information on assistive products (hereinafter, “Partner’s Website”) and is the owner, or the legitimate user, among the others, of data, information, database, including any other connected intellectual property rights, related to the above assistive products, employed, included or connected to the Partner’s Website (collectively, hereinafter, “Partner’s IP”);

c) the Parties are interested: i) to grant to the Eastin Association the right to use the Partner’s IP with the purpose to include such Partner’s IP between the data, information, content and material to publish through the Eastin Website; and ii) to grant to the Partner the licence to use the Eastin Trademark under following point 4 on the Partner’s Website, according to the terms and conditions of the present agreement (hereinafter, “Agreement”).

IT IS CONVENED AS FOLLOWS

1. The Partner grants to Eastin the non-exclusive licence to use, copy, publish, transmit, distribute and communicate to the public the Partner’s IP through the Eastin Website and to modify it to the extent it is technically necessary to use the Partner’s IP in the Eastin Website.

2. Eastin shall directly access the Partner’s IP on the Partner’s Web Site through a webservice client software. To this end, the Partner shall acquire, at its own care and expenses, a licence on a webservice server software interacting with the aforesaid Eastin software.

3. Upon request by Eastin, the Partner shall make available to Eastin the source code of the webservice server software of the Partner’s Website in order help fix possible technical problems related with the interaction with the Eastin webservice clients software.

4. Eastin shall grant to Partner a non-exclusive licence to use the Eastin Association trademark (hereinafter, “Eastin Trademark”) attached to the present Agreement under Exhibit A for the sole purpose to use it in the Partner’s Website. Any other possible use of the Eastin Trademark, for instance in any informative material, letters or public communication, shall be previously approved in writing by the Eastin Association. Upon written request of Eastin, the Partner shall change any representation of the Eastin Trademark on the Partner’s Website or in any other approved material, in line with the Eastin Association instructions. Eastin shall have the right to terminate at
any time the present license on the Eastin Trademark without cause, upon written notice to the Partner.

5. The Parties agree that, also in consideration of the personal interest of the Partner to extend the knowledge and diffusion of the assistive products provided on the Partner’s Website and in light of the social, humanitarian and not-for-profit scope of the activities performed both on the Eastin Website and on the Partner’s Website, no amount, consideration or reimbursement shall be due, at any title, between the Parties for the rights and obligation provided under the present Agreement.

6. The present Agreement shall commence on the Effective Date and shall remain in force unless terminated by any of the Parties upon 90 (ninety) days written notice sent via registered letter with advice of receipt.

7. Eastin Association guarantee to be the exclusive owner of the Eastin Trademark and that the license under above point 4 does not and will not violate the terms of any other contract, covenant or agreement with any third party now existing or hereinafter entered into.

8. The Partner guarantees to be fully entitled to grant the license on the Partner’s IP under above point 1 and that the use by Eastin of the Partner’s IP under above point 1 will not violate or infringe any third right’s parties, including without limitation, any third party intellectual property rights.

9. The Partner shall make their best effort to guarantee the accuracy, the value, the integrity, the completeness and the authenticity of the data and information included in the Partner’s IP and made available by Eastin to the users of the Eastin Website. The Partner shall be fully and exclusively responsible for any defect, mistake, omission or inaccuracy of the above said data and information.

10. The Parties acknowledges that this agreement shall be governed by the Italian Laws. Any dispute arising out of this agreement shall be referred exclusively to the Court of Milan, with the express exclusion of the competence of any other Court in Italy or abroad.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by the following by authorised signatories

EASTIN ASSOCIATION

By: ____________________________________________  [●]

[●]Legal Representative

By: ____________________________________________

[●]Legal Representative

The parties acknowledge and agree to specifically approve the following clauses of the present Agreement by means of Section 1341 c.c. of the Italian Civil Code:

Point: 4 (Right of Termination), 11 (Choice of the Competent Court)

EASTIN ASSOCIATION

By: ____________________________________________

[●] Legal Representative

By: ____________________________________________

[●] Legal Representative

EXHIBIT A: EASTIN ASSOCIATION TRADEMARK

![Eastin Trademark](image)
Annex 3 - Licence Agreement for information providers type “B”

(Partner Not Operating with Webservice Server Software, 
i.e. uploading information through the Eastin Data Upload Tool)  
[Date], (hereinafter, “Effective Date”)  

By and between  

EASTIN ASSOCIATION, whose registered office is at Piazzale Morandi 6, 20121 Milano, Fiscal Code and VAT Number 0556280963, represented by its legal representative Mr Renzo Andrich, born in Belluno, Italy, on May 25, 1955, duly empowered hereto (hereinafter, “Eastin”)  

And  

[.........................], with registered office in [..........], fiscal code [.....................], hereby represented by [............], duly empowered hereto (hereinafter, the “Partner”)  

(hereinafter jointly referred to as “Parties”)  

WHEREAS  

a) Eastin is the owner, or the legitimate user, of the web site www.eastin.eu, which provides information on assistive products, (hereinafter, “Eastin Website”), including any related or connected data, information, patents, designs, trade marks and trade names (whether registered or unregistered), copyright and related rights, database rights, know-how, confidential information, software, and any other intellectual and industrial property;  

b) the Partner, an organization focussed on assistive products, is the owner, or the legitimate user, among the others, of data, information, and database, including any other connected intellectual property rights, concerning such products (collectively, hereinafter, “Partner’s IP”);  

c) the Partner is interested to grant to Eastin the right to use the Partner’s IP with the purpose to include such Partner’s IP between the data, information, content and material published through the Eastin Website, and to be granted with a licence on Eastin Trademark under point 3 below, according to the terms and conditions of the present agreement (hereinafter, “Agreement”).  

IT IS CONVENED AS FOLLOWS  

1. The Partner grants to Eastin the non-exclusive licence to use, copy, publish, transmit, distribute and communicate to the public the Partner’s IP through the Eastin Website and to modify it to the extent it is technically necessary to use the Partner’s IP in the Eastin Website.  

2. Any data, information and documentation of the Partners' IP shall be materially transferred by the Partner to Eastin according to technical modalities agreed between the Parties.  

3. Eastin shall grant to Partner a non-exclusive licence to use the Eastin Association trademark (hereinafter, “Eastin Trademark”) attached to the present Agreement under Exhibit A for the sole purpose to use it in its official website (if any), as communicated by the Partner to Eastin. Any other possible use of the Eastin Trademark, for instance in any informative material, letters or public communication, shall be previously approved in writing by Eastin. Upon written request of Eastin, the Partner shall change any representation of the Eastin Trademark on the Partner’s Website or in any other approved material, in line with Eastin instructions. Eastin shall have the right to terminate at any time the present license on the Eastin Trademark without cause, upon written notice to the Partner.  

4. The Parties agree that, also in consideration of the personal interest of the Partner to extend the knowledge and diffusion of the assistive products under point b) of the above premises, and in light of the social and humanitarian scope of the activities performed on the Partner’s Website, no amount, consideration or
reimbursement shall be due, at any title, between the Parties for the rights and obligation provided under the present Agreement.

5. The present Agreement shall commence on the Effective Date and shall remain in force unless terminated by any of the Parties upon 90 (ninety) days written notice sent via registered letter with advice of receipt.

6. Eastin guarantees to be the exclusive owner of the Eastin Trademark and that the license under above point 3 does not and will not violate the terms of any other contract, covenant or agreement with any third party now existing or hereinafter entered into.

7. The Partner guarantees to be fully entitled to grant the license on the Partner’s IP under above point 1 and guarantees that the use by Eastin of the Partner’s IP under above point 1 will not violate or infringe any third right’s parties, including, without limitation, any third party intellectual property rights.

8. The Partner shall make their best effort to guarantee the accuracy, the value, the integrity, the completeness and the authenticity of the data and information included in the Partner’s IP and made available by Eastin to the users of the Eastin Website. The Partner shall be fully and exclusively responsible for any defect, mistake, omission or inaccuracy of the above said data and information.

9. The Parties acknowledges that this agreement shall be governed by the Italian Laws. Any dispute arising out of this agreement shall be referred exclusively to the Court of Milan, with the express exclusion of the competence of any other Court in Italy or abroad.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by the following by authorised signatories

EASTIN ASSOCIATION

By: ________________________________
[●] Legal Representative

By: ________________________________
[●] Legal Representative

The parties acknowledge and agree to specifically approve the following clauses of the present Agreement by means of Section 1341 c.c. of the Italian Civil Code:

Points: 3 (Right of Termination), 11 (Choice of the Competent Court)

EASTIN ASSOCIATION

By: ________________________________
[●] Legal Representative

By: ________________________________
[●] Legal Representative

EXHIBIT A: EASTIN ASSOCIATION TRADEMARK