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Abstract

This report explores the existence in the targeted market of European Local Authorities of products, services and initiatives which may compete with the eParticipate platform. Our research shows that to date there are a range of potential services which rather than direct competitors could be classed as “eParticipation services” and hence be included within the eParticipate platform.

Based on our research and having looked at both webcasting and eConsultation services it is clear that webcasting has the best selling potential in terms of its appeal, its ability to achieve demonstratable and quantifiable eDemocratic results with the public and its fit within the market conditions.

This report describes and analyses the features of a number of potential competitors to the eParticipate services in terms of webcasting and eConsultation. From this comprehensive review of the market, the consortium has been able to adequately define its positioning and draw some important conclusions regarding its market deployment priorities.

Our conclusion is that while a number of streaming competitors exist in the market their core products fall short of the Public-i offering. The many consultation tools reviewed on the other hand are often in-house projects and initiatives using the Councils own resources or National and European fundings but are not straight forward commercial offerings, so strong questions remain around Councils willingness to pay for such eConsultation services.

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1. Executive Summary

This report explores the existence in the targeted market of European Local Authorities, of products, services and initiatives which may compete with the eParticipate platform.

The eParticipate platform consists of best of breed components offering under one brand a range of eDemocratic services. The main strands of the platform are the webcasting and eConsultation services.

Our research shows that there are a range of potential services which could be classed as “eParticipation services” and hence be included within the eParticipate platform. Having reviewed a number of webcasting and consultation services it appears that webcasting has the best sales potential in terms of its appeal, its ability to achieve quantifiable eDemocratic results with the public and its fit within the market conditions. The current platform is unique by its best of breed approach and its offering of multiple eDemocratic tools but there is no doubt that the Public webcasting tool and added services are the main feature of the platform.

This document itemizes and analyses the features of a number of potential competitors to the eParticipate services in terms of Webcasting and eConsultation. This list has been compiled through desk research and inside knowledge held within the consortium of the market. In a number of cases and where the consortium deemed that a particular offering should be further investigated either because of the threat it represented or the potential best of breed it could bring to the eParticipate platform, direct contact was made and a more detailed picture was drawn. The list of the potential business partners is also included in section 4.

From this comprehensive review of the market, the consortium has been able to adequately define its positioning and draw some important conclusions regarding its market deployment priorities.

Our conclusion is that while a number of streaming competitors exist in the market their core products fall short of the Public-i offering. On the other hand, the consultation tools reviewed are often in-house projects and initiatives using the Councils own resources or National and European fundings, but are not straight forward commercial offerings. So strong questions remain around councils willingness to pay for such eConsultation services.

As well as competitors in Europe a number of companies outside of Europe have been reviewed in Appendix A.

2. Introduction

The aim of this report is to identify and assess current European products, services and initiatives which could prove to be competitors to the eParticipate platform. A number of eParticipation offerings are emerging on the European scene. Some of the offerings described here while investigated as “competitors” to the offering are proving in fact to be potential best of breed products and offering which could complement the other elements of the eParticipate platform. The offerings we have researched can be grouped in 2 categories: (a) webcasting products and services and (b) eConsultation tools and services.

Our research shows to date that the eParticipate platform is unique by its offering of a complete best of breed service. It is also clear from the research that from eParticipate’s 2 offerings, webcasting has the best market deployment potential both in terms of its appeal and of the market conditions we have found.

It seems that while a number of streaming competitors exist in the market their core products fall short of the Public-i offering. The consultation tools reviewed on the other hands are often inhouse projects and initiatives using the Councils own resources or National and European fundings but are not straight forward commercial offerings. So strong questions marks remain around Councils’ willingness to pay for such eConsultation services.

The 2 Tables in the following pages give a summary of the competing offerings reviewed in greater detail in later sections for both Webcasting and eConsultation services.

Webcasting competitors' Summary table.				
Country	Type of service	Name of competitors	Nature of the offering	Position Market relative to eParticipate
France	Streaming providers	France Telecom	The offer covers a complete service: from filming to distribution (including encoding and hosting). The base offer runs from €500 per month including software licences, hosting, administration and support.	This is a different offering than the eParticipate platform in the limited number of facilities it provides. It is aimed at smaller councils which are happy to live with the limitation of the offering for the lower cost.
France	Streaming providers	France Streaming	France-streaming specializes in streaming video hosting services: video content on demand and live webcast hosting.	Their main activities remain Web Hosting. However, the company is already in the French market
Belgium	Streaming providers	Cube New Media	Cube New Media is a production company for streaming media and video. It offers live and on demand audio broadcasting via the Internet and was one of the firsts to use broadband video in Belgium.	Streaming services offers only unqualified video broadcasting. Also, from the website it is not clear if it deals with any other markets outside Flanders.
UK	Streaming providers	Speedera	Speedera Networks is a global provider of distributed content and application delivery services. The company provides outsourced services that allow customers to shift their bandwidth, processing and storage requirements to Speedera's network, on demand	Speedera is the network used by Ukcouncil in the UK and the company seems to concentrate its activities in the area of bandwidth provision.
UK	Streaming providers	StreamUK	Stream UK are specialists in streaming media and also offer innovative web site design and production solutions	The company does not provide for such services as camera control/value added services.
UK	Streaming providers	Westminster Digital	Westminster Digital has worked on government webcasting initiatives.	Westminster Digital is targeting the eGovernment sector but has neither the added value services of eParticipate nor the local authorities focus and methodology
European Headquarters UK	Streaming providers	Virtue	Virtue supplies turnkey webcasting solutions that permit companies to communicate directly with employees, customers, partners and investors.	The company targets corporate market and doesn't show any knowledge of local authorities processes.
Finland	Streaming providers	Finnish WebTelevision	Their offering seems to offer basic video stream in realone window. No other functionality seems to be added to the offering.	The company works with the Finnish government and have done some work with the EC. The real player they use to webcast was not available for free to download.
Finland	Software providers	GoodMood Software	GoodMood is an online communications software suite that combines webcasting, IP based video conferencing and WebTV.	GoodMood's offering is not yet targeted at local governments and doesn't provide the hardware capability that eParticipate offers.

USA	Software providers	Granicus	Granicus, Inc. is a provider of Internet broadcasting solutions for live and archived streaming of your public meetings to the Web and was developed exclusively for local government agencies.	Granicus does target the local governments market but for now just in the United States which may indicate they do not possess the understanding of the European Market.
EU	Software providers	ManagEnergy Streaming Tool (MST)	MST consists of a mixture of guidance, recommendations and examples of successful streaming and tendering procedures, as well as the ManagEnergy Streaming Software. The MST is already used within the ManagEnergy Initiative.	The tool has not yet been tested in commercial settings or for other purpose than the project it was developed for.
Canada	Webcasting solution providers	Xstream Webcasting	Premiere webcasting services, webcast hosting, equipment manufacturing, server manufacturing, Real Networks distributor, encoding, hosting, network design, intranet, internet webcasting. Xstream Webcastings has provided services for most of the Canadian Government.	The company website doesn't indicate that they conduct any business outside Canada.
EU	Council IT departments	Potential competitor: No example available	MORI, the UK Social Research Institute conducted a survey on behalf of the Local e-Democracy National Project looking at local authorities experiences of democracy on and offline. The survey shows that resources for e-Democracy are limited and that back up and support for investment in e-Democracy is mixed.	We know of at least 3 councils in the UK which tried DIY streaming solutions but which ended up giving up the experiment. One of them is now working with UKC.

Consultation tools competitors Summary table				
Country	Type of service	Name of competitors	Nature of the offering	Position Market relative to eParticipate
UK	online consultation tool	Community People	eConsult is an online consultation publishing, management and analysis system for creating, and managing the actual online consultation process.	This is very closed to the intended service for eParticipate and a direct competitor.
UK	online consultation tool	Dialogue by Design	The e-consultation tool enables people to collect and collate responses from participants, and display the results in an easily accessible format.	This is a very good tool but which may be heavy for the needs of some councils.
UK	Community forum	Group server	GroupServer is a new open source online group tool that combines e-mail lists and web forums.	This is not a direct competitor as since it is a community forum type of offering, but it could prove a nice added service for the eParticipate best of breed platform.
UK	online consultation tool	The West of England partnership	Bristol is hosting this consultation on behalf of the authorities represented in the sub region. The council's aim is therefore extended to cover the diverse range of communities and stakeholders across the sub region.	This uses the eConsult tool developed by Communitypeople
UK	online consultation tool	Kettering Borough Council	Within this application citizen can view past and present consultations. They also have the option to comment on any current consultations.	This is a very simple and efficient tool embedded in the website. There is no indication as to any third party involvement.
UK	Citizen Centric portal best practice	Liverpool City council portal	This portal has won awards in 2004 for its knowledge management and is held in Europe as a best practice example.	The portal is very good in providing citizen-centric information and facilitating transaction with the different services but is not particularly strong around eDemocracy and consultation.
France	online consultation /polling tool	Entrouvert	The offering is presented as a consultation tool but is in fact more of an eVoting / ePolling tool than a consultative tool as is intended by the eParticipate consortium.	This is not a direct competitor for eParticipate but such functionalities as polling could be added to the platform.
Belgium	online consultation tool	Flanders Authority project	The aim of the 'Kleurrijk Vlaanderen' project is to stimulate the debate on the future of Flanders and to involve as many people as possible in this debate.	This is a regional project championed and tailored to its need by a particular region. This seems to be widespread as other examples below show.
Ireland	online consultation tool	Donegal county council	The project is involved in the development and delivery of an online forum for information sharing and consultation between the community and voluntary sector and various agencies involved in local development issues in Donegal.	It is expected that under the auspices of best practices, the tool developed by Donegal may be transferred to other councils in Ireland.

Ireland	online consultation tool	Dublin City	Apart from discussion forums, the site allows users to contact local, national and EU politicians, who in turn can lead on-line dialogue with the electorate.	This is a project coordinated and custom designed by Dublin City Council and the Department of the Environment for a specific need but not as a commercial offering.
Czech Republic	online consultation tool	Czech Parliament	This pilot was a contribution to development of an open dialog between citizens and government with the main objective to provide both, citizens and state administration, with modern and user-friendly Internet based tools for the development of e-democracy	Developped in collaboration with a private company this is also a project and not a strick commercial offering.
Spain	online consultation tool	Madrid Participa	Madrid Participa was an initiative created by the City of Madrid in 2004 with the objective of involving citizens of the central district in evaluating the effectiveness of electronic mechanisms used for public participation.	The Website: www.madridparticipa.es is not active so there is very little information as to how far the initiative has progressed
Denmark	online consultation tool	County of North Jutland	The objective of the nordpol.dk project is to render visible the decisions made on a regional political level, and to involve the citizens in relation to the process of democracy. The project is mainly designed for consultation – a media for dialogue - where the County defines and manages the larger debates.	Once again this is a project based developmetnt. The web site was designed in close cooperation between the project group of the County of North Jutland, and the KMD, a large Danish IT enterprise.
Denmark	online consultation tool	Hals Municipality	Digital democracy in Hals municipality project. The debate module at the web-site www.hals.dk allows citizens to bring up political problems of their concern. It can be topics related to on-going political discussions or completely new topics.	Developped in collaboration with a private company this is also a project and not a strick commercial offering.
Sweden	online consultation tool	Kalix town hall	The Consultation uses a mix of Internet technologies, adapted and integrated by Votia Empowerment Inc. (Votia.com). The investment is considerable but made over several projects. All e-processes of a consultation are run by Votia. On the organizational side, the consultation is integrated in the normal operations of Town Hall. The cost for one Kalix-size consultation is estimated to \$100 000, including both technology and work	This is an extremely expensive solution and probably too specialised for most European councils needs

Sweden	online consultation tool	Norrholm District of Stockholm	a self-developed tool for helping citizens keeping in touch with the local political life. The tool, named Insight (Swedish: Insyn) can be described as a software agent monitoring documents produced by the district administration and notifying the citizen on documents and events of interest based on keywords and topics chosen by the citizen.	Another self developed tool.
EU	online consultation tool	European Commission	Your Voice in Europe' has been set up in the context of the Interactive Policy Making initiative. As part of the Commission's Minimum Standards on Consultation, it aims at improving European governance and introducing Better Regulation. 'Your Voice in Europe' is the European Commission's 'single access point' to a wide variety of consultations, discussions and other tools which enable EU citizen to play an active role in the European policy-making process:	EC tool developed as part of EC own initiative
EU	online consultation tool	other initiatives identified	Italy – Comune di Cesena PEG online The Netherlands – e-consultation on the future of food Italy – Comune di Bologna: DEMOS Project UK – Online Parliamentary enquiry into domestic violence UK – national eDemocracy initiative (umbrella of initiatives) UK - e-petitioning the Scottish Parliament	All those initiatives are partly funded by regional, national initiatives and not straight commercial purchase.

3. Competition to eParticipate Services

This section describes and analyses the features of a number of potential competitors to the eParticipate services in terms of webcasting and eConsultation. This list has been compiled through research and inside knowledge held within the consortium of the market. In a number of cases and where the consortium deemed that a particular offering should be further investigated, either because of the threat it represented or the potential best of breed it could bring to the eParticipate platform, direct contact was made and a more detailed picture was drawn.

It should be noted that through our research it became evident that most competitors websites do not clearly lay out the offerings and while the sites give some general information about what webcasting is, we found it difficult under the headings “products and services” to gain any precise specification of the products offered nor the capacity in terms of hosting and finally no indication regarding prices.

3.1 Webcasting products and services

The Public-i suite enables the creation and transmission of rich multimedia content either live or on demand over the internet. The directness and transparency of video is preserved; the platform doesn't require any post-production or editing and webcasts are automatically archived. The platform also provides an easily manageable content management system to ensure relevant contextual information and interactive facilities are provided to the viewer. The platform also provides a comprehensive service of content capture and control facilities, hosting, bandwidth, monitoring and support services. The following section examines offerings which contains some of the functionalities of the Public-i suites.

3.1.1 Streaming providers

Streaming providers are organisations who just provide video streaming but do not provide for such services as camera control/value added services or in most cases direct monitoring live support during a webcast. They can be seen as competitors because they do supply the bandwidth services and a lot has changed over the past two years. The bandwidth glut is here, the supply of fiber laid has exceeded demand, and numerous telcos like MCI WorldCom and Global Crossing have floundered. Because of the glut, surviving telcos have had time to improve the reliability of their networks. Peering points, where private and public networks converge, have improved such that packet loss has been drastically reduced. The price of hardware such as servers and network storage devices has plummeted. The ample supply of bandwidth have forced carriers to lower their Megabit per second (Mbps) prices charged to customers, sometimes as much as 75%, such that collocation centers can offer bandwidth and rack space at much reduced rates. All of these factors translate to lower operating costs for streaming companies, and therefore making it a real option for customers with webcasting needs.

The main streaming companies identified in Europe are identified in the next section of this document.

3.1.1.1 Case study: TeleNetCity

http://www.francetelecom.com/fr/entreprises/grandes_entreprises/solutions/solcom/hma/offres/

Reasons for closer examination:

This offering is only being commercialised since July 2005 but its stated target is “local councils of more than 10,000 habitants” which is the precise population targeted by the eParticipate platform. The solution is backed by France Telecom which is one of the most important telecom operators in Europe and therefore will be beneficiated from the support of the corporation marketing and sales channels. France also represents one of the bigger European markets and also one of the countries more able to afford the eParticipate platform.

Background:

The solution has been designed by Sofrecom and developed for 3 years in collaboration with the Innovation, Research & Development and Corporate Solution Marketing of France Telecom, TéléNetCité. Sofrecom previously had delivered products including Territoires Numériques (production assistance for “utilitarian” movies), Direct à la Demande (live transmission of local authorities events), Virtuhalls (deployment of highspeed citizen portals), Imagine and Cities (set up of digitized local platforms), etc.

The offering was originally trialled in the city of Vandoeuvre and allowed the realtime online transmission of public meetings and major municipal events. The solution allows a for an audio transmission of the municipal council meetings, cultural and sports events using a web radio. Thereafter the video contents are put online using the rich media streaming. The solution is completed by a third party partnership which allows translating debates in real time using sign languages.

Sales pitch:

TeleNetCity is presented as a way – “to dynamise actors in the commune, - to prompt voters to take part in the life of the locality”, it puts forwards as possible content: live webcasts, street surveys, council meetings, cultural events.

Economic attractiveness, Modernity and transparency, and enhanced communication are also depicted as being enhanced by the use of rich media tools such as synchronised video, powerpoint, text, powerpoints, transparent slides (with a capability to synchronise the different contents types).

Nature of the offering :

Functionalities include:

- archiving
- editing

- sending email to speakers,
- indexing (themes editor, content administration)
- powerpoint upload
- way to synchronise image with powerpoint and audio (Also in Vandoeuvre they synchronise it with sign language video)

The offer covers a complete service: from filming to distribution (including encoding and hosting). Clients can benefit from flexible communication tools at FT (France Telecom) tariffs. The base offer runs from €500 per month including software licences, hosting, administration and support. To cover specific events it is also possible to use specific services at an additional cost. The system is technically available within 15 days of ordering.

The offering provides 3 different packs:

	Pack 1	Pack 2	Pack 3
Licence Epres®	10 licences to install on 10 different PCs, ie 10 users within the same municipality	20 licences to install on 20 different PC, ie 20 users within the same municipality	50 v 50 different PCs, ie 50 users within the same municipality
Espace disque	1 Go ie 8 hours of content archived and encoded at 300 kbps	2 Go ie 16 hours of content archived and encoded at 300 kbps	5 Go ie 40 hours of content archived and encoded at 300 kbps
Traffic	10 Go per month, ie 1 500 à 3 000 connexions depending on time spent by internet users viewing content	20 Go per month, ie 3 000 à 6 000 connexions depending on time spent by internet users viewing content	50 Go per month, ie 7 000 à connexions depending on time spent by internet users viewing content

Requirements

Need to install e Epres® software on PC (requirement: Windows 2000 and PowerPoint 2000, audio card, Webcam and/or DV camera and Windows Media Encoder and Windows Media Player 9 (Free), Internet Explorer version 5.0 minimum and Direct X.

An ADSL 512 kbps connection is recommended to send files to the platform. The installation doesn't require network settings of any kind.

The publication interface looks after the archiving, transfer of files and their differed diffusion on the internet. An active x search for file is produced on the pc, a validation click transfers the file and update the online site giving a link to view the file.

Case study implementation- Ville de Vandoeuvre- <http://www.vandoeuvre.fr/mairie/>:

The municipality of Vandoeuvre has been trialling the system in partnership with FT since May 2005 and is considering signing an official partnership deal with the France Telecom in September. The following information were gathered in a phone interview with Mr Sylvain Parmenand – Manager of the “services modernisation” department.

Background:

The municipality and the mayor of Vandoeuvre have had a proactive approach in the area of ICT and eDemocracy. They invested in Public Internet Access Point in the city and decided to develop their website to make it more interactive with their citizen and accessible to all the

possible excluded groups. They developed a programme “Vandoeuvre j’accède” to coordinate actions which can lead to the population seen as excluded (people who can not attend meetings because they are working, people with disabilities or learning difficulties). It must be said too that Vandoeuvre has an all encompassing policy towards eDemocracy and has in the past 4 years introduced initiatives in all areas of eDemocracy from eConsultation to eVoting so it is not surprising that they are now turning their attention to webcasting.

Existing Democracy experiences:

- E-Voting

The municipality has experimented with eVoting for the past four to five years. Initially, they experimented with the idea of internet voting but problems with legislative bodies and the provider meant that they eventually had to scale down and then abandon the idea. However, they have since successfully implemented the use of electronic voting using voting machines which have received approval from the state. The last European elections and the vote on the European Constitution have both been carried out paperlessly and with no major opposition from the public and the municipality doesn’t foresee any going back to paper. The machines were hired for the purpose of the election but investment in the technology will not be considered until further legislative and technological progress have been made and the return on investment can be guaranteed.

- eConsultation

Vandoeuvre has partnered with a company called Entrouvert which specialised in free software to deploy a consultation platform compatible to that normally established by the Liberty Alliance consortium. The software offers citizen the possibility to make comments on an issue but also to change their mind and amend their views/decision once they have viewed debates about the issue.

The software has been used to decide on anti-smoking slogans chosen by schools. Each pupil had a personal login and a vote. Both simple and argumentated voting was used to test the shift of opinions after debates took place.

The tool has also been used for an urban project and views were gathered before and after the public meeting took place.

- Municipal Newsletter in mp3 format

The Municipal newsletter is now also provided in mp3 format in order to allow people who are visually impaired to listen to the newsletter.

Webcasting experience:

The platform centres more around web-radio than webcasting (i.e. video). The web-radio allows the council to broadcast the audio of live council meetings, events and concerts. Simultaneously to the live radio broadcasting of the event, a sign language translation of the content is encoded using the webcast equipment. Within a day or 2 the webcast is uploaded giving the radio and the sign language webcast of the event. The solution is quite simple and more basic than the eParticipate platform. The council uses a single web-camera, laptop loaded with the FT ePresentation software and the operator uses an encoding function to start the recording. The internet users are given an email where they can send their comments as they hear the broadcast but this doesn’t seem to be linked to the solution.

The system does not provide any details of who is speaking or any direct link to any documents relevant to that which is being transmitted.

The municipality only pays for the broadband width package they choose. There are limitations to the monthly package and the council must be mindful of the number of hours they broadcast but this means they have to manage the archiving of older broadcast to make space for new ones.

A solution like the eParticipate would of course be ideal and much more flexible but with a Council of 32,000 habitants feels it can not justify the cost of such solution. They are aware that Marseilles broadcasts live council meetings but the cost associated is very high running at €1,000 for one meeting and such spending would not be acceptable in the municipality. Other municipalities which are using production companies for one off events are phoning Vandoeuvre to ask them about their solution.

Joinville les Ponts also uses the system but not to consult with citizen and more to record social and tourism short clips about the town and its inhabitants.

Municipality's eDemocracy experiment conclusions:

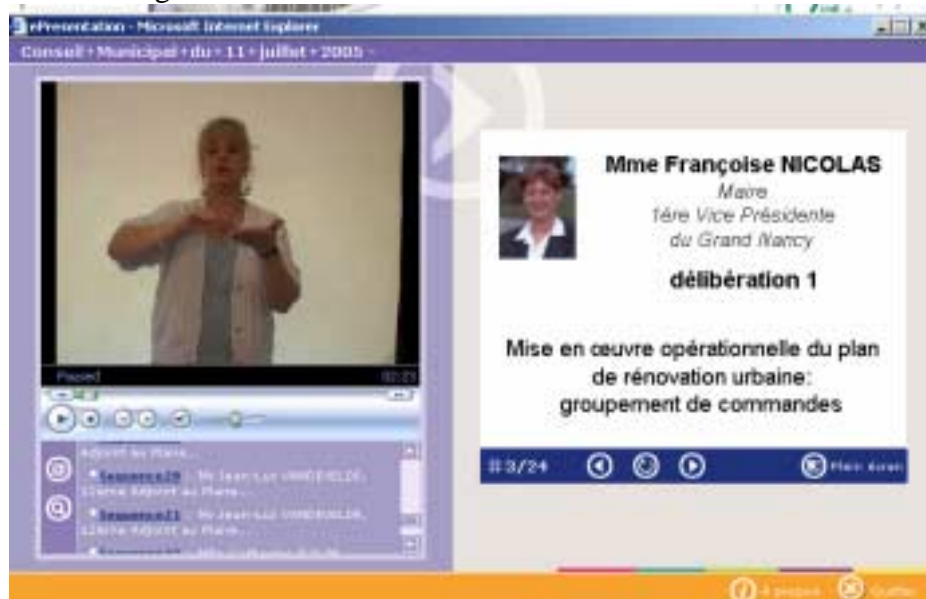
- eDemocracy tools are complementary to the normal process, they cannot become the sole consultation or democracy means of reaching citizens. When receiving feedback on these tools and feedback in general the council must be careful to remember that the view they get through the different ICT tools is the one of internet users and as such they have a number of specific attributes that differentiate them from other populations ie: more likely to have access to ICT, more prone to be positive about ICT spending and worthiness of such projects.
- The council has now broadcasted 4 council meetings. The first meeting was followed by 300 internet users and the fourth one by 100. It should be said that this compared with council meetings which are usually attended by no one
- The tool is seen as tool of transparency and as such as been very well received both internally and by the public.
- The webcasting has only started since May and the evaluation and conclusions about how the introduction of the webcasting needs to be reflected by a change in internal processes is still ongoing. For example:
 - The emails feedback during the session can cause problem as there need to be transparent means that all queries must be addressed, yet the identification or classification by author and topics can not be guaranteed in realtime with the risks of say a lobby group hijacking the council meetings by sending a large number of emails.
 - Some changes of attitudes and behaviours have (or need to) taken place. Because of the proceedings are radio broadcasting it is important that people do not interrupt each other. The councillors seem to debate more and be more vocal. There is no way anymore can now claim "I didn't say that". Councillors were at first a bit surprised but are now well used to it
 - The work that it is generated at the backend and additional work responding to the feedback still needs to be evaluated.
 - Internally the output of conferences and events is much more visible as the webcasts remain accessible to people after the event.

- The tool is simple to use and whilst apparently not very expensive provides a limited range of functionality. However the service has specifically been designed by France Telecom with accessibility in mind.

Competition analysis:

- This is a different offering than the eParticipate platform in the limited number of facilities it provides. Irrespective of the marketing it would appear to be aimed at smaller councils which are happy to live with the limitation of the offering for the lower cost.
- Vandoeuvre is mainly marketing this as the web-radio and not really as the live webcast.
- The webcast part is not live but is available after manual upload which is not as transparent as a live webcast.
- The feedback functionality is done outside the system using email so it is not as much of integrated solution.
- There is no obvious link to meeting documents
- The Streaming speed used is 298kbps which may be distorted when viewing using a modem or lower speed broadband. It also could casue viewing problems in a location of multiple viewers (i.e. library).
- The ASP solution starts from €500 per month which is quite cheap
- Other councils are enquiring about the solution so the cheaper offering can definitely present an important competition for eParticipate in the 10000 to 500000 inhabitants section of the market.
- Our experience of looking at the Vandoeuvre's site is that sound is poor and what is shown is the sign language translator. This provides a less friendly experience than live webcast showing who is speaking and therefore which may put off some viewers.

Below is a screen grab from the vandoeuvre webcast.



In comparison the eParticipate Public-i service can provide having a sign languager image superimposed onto the principal image ie not constituting the only image as is the case in the

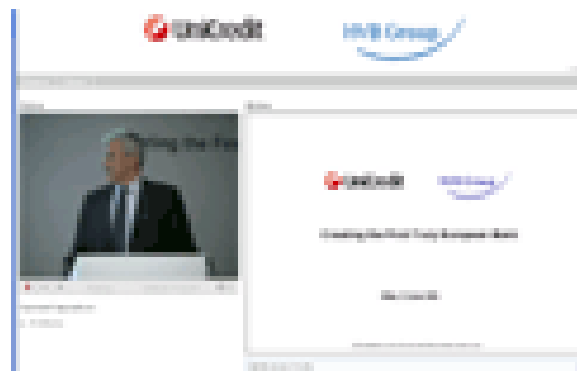
Vandoeuvre service. This flexibility adds a lot to the attractiveness of the webcast for the different populations targeted.

3.1.1.2 Virtue/World-Television - <http://www.world-television.com/>

Virtue supplies turnkey webcasting solutions that permit companies to communicate directly with employees, customers, partners and investors.

Nature of the offering:

Their core skill is the transmission of interactive presentations, combined with slides, text and other elements, into the Internet or Company Intranet - live and on demand.



Target Market:

The company website indicates that they target the corporate and entertainment market only. Their European subsidiary could be a competitor.

Barcelona City council uses the system to webcast its monthly plenary sessions. The solution allows Barcelona City Council to create their own webcasts without the need for a third party production team. It uses two standard videoconference systems, the council's in-house technical team is able to create the webcasts which are then encoded and delivered across the Internet.

Madrid Autonomous Regional Government is also using Virtue to broadcast all press conferences that the Madrid Autonomous Regional Government holds. Virtue broadcasts one webcast per week plus any other important council announcements as they arise.

Competition analysis:

Virtue communication represents a competitor to the eParticipate offering. While their streaming doesn't offer the flexibility or the full functionalities offered by the eParticipate platform its presence in the Spanish market represents a danger for the eParticipate consortium and the Spanish trials need to ensure that maximum dissemination exposure is gained and that a business partner is secured rapidly in order to penetrate the market in the briefest delay to curtail the risk of the Virtue communication solution taking a strong hold in

the public sector market. Alternatively consideration could be given to working with Virtue as the local business partner.

3.1.1.3 Westminster Digital - <http://www.westminster-digital.co.uk/whoweare.html>

Westminster Digital's roots lie in TV production. They provide video production service for their clients, including single and multi-camera Outdoor Broadcasts (OBs) as well as studio shoots.

Nature of the offering:

Westminster Digital offers webcasting services including: production, encoding, hosting.



Target Market:

Westminster Digital has worked on government webcasting initiatives, with clients that include The Office of the e-Envoy, Number 10 Downing Street, DEFRA, SEAC, DTI, COI, The Treasury Office and others. Corporate and media clients include The Economist, NASDAQ, GSK, Pfizer, Granada Media, The FT, and the BBC.

www.parliamentlive.tv carries live audio-visual coverage of the Chambers of both the House of Commons and House of Lords and Sittings in Westminster Hall. There is captioning to aid the identification of speakers as well as direct links to Order papers and other background material which is available on the Parliamentary website www.parliament.uk. An on-demand archive and captioning to identify speakers in major Parliamentary debates are features of the new, improved internet service and the launch of further channels now also allows simultaneous audio-visual coverage of up to four Select or Standing committees - making seven 'televised' channels in all.

Competition analysis:

Westminster Digital is targeting the eGovernment sector and as such is a closer competitor to eParticipate but it appears has neither the added value services of eParticipate nor the local authorities focus and methodology.

3.1.1.4 Speedera - <http://www.speedera.com/>

Speedera Networks is a global provider of distributed content and application delivery services. The company provides outsourced services that allow customers to shift their bandwidth, processing and storage requirements to Speedera's network, on demand. Akamai Technologies, Inc. completed in June 2005 its acquisition of Speedera Networks, Inc.

Nature of the offering:

Before streaming even begins, EdgeSuite Streaming downloads a stream from storage and transfers it reliably to the optimal Akamai streaming servers at the edges of the Internet. From there, the streaming servers deliver the original-quality streaming media file to the end users.

To avoid the jerkiness caused by packet loss, EdgeSuite Streaming sends multiple copies of the same stream over different routes from an Akamai Entry Point to the optimal streaming servers at the edges of the Internet. These copies are then combined to form one complete, original-quality stream, which is sent from the streaming servers to the end users.

Target Market:

With the recent take over of the company information about Speedera strategic focus are not available however Akamai has no previous experience of dealing with public bodies in Europe.

Competition analysis:

Speedera is an important network but given the administrative changes the company is undergoing it is unlikely to present itself as competitor in the short term. In addition the Public-i service currently operates through the Speedera network and hence can be seen more as a partner rather than a competitor.

3.1.1.5 StreamUK - <http://www.streamuk.com/>

Formed in 1999, Stream UK began by recording and hosting material from Scottish Parliamentary Cross-party Groups and educational sites such as Gresham College. The expansion of streaming capability across the Internet has led to an increase in scope and capacity.

Nature of the offering:

Stream UK are specialists in streaming media and also offer innovative web site design and production solutions, their website seems to indicate that a lot of their work is with hosting.

Target Market:

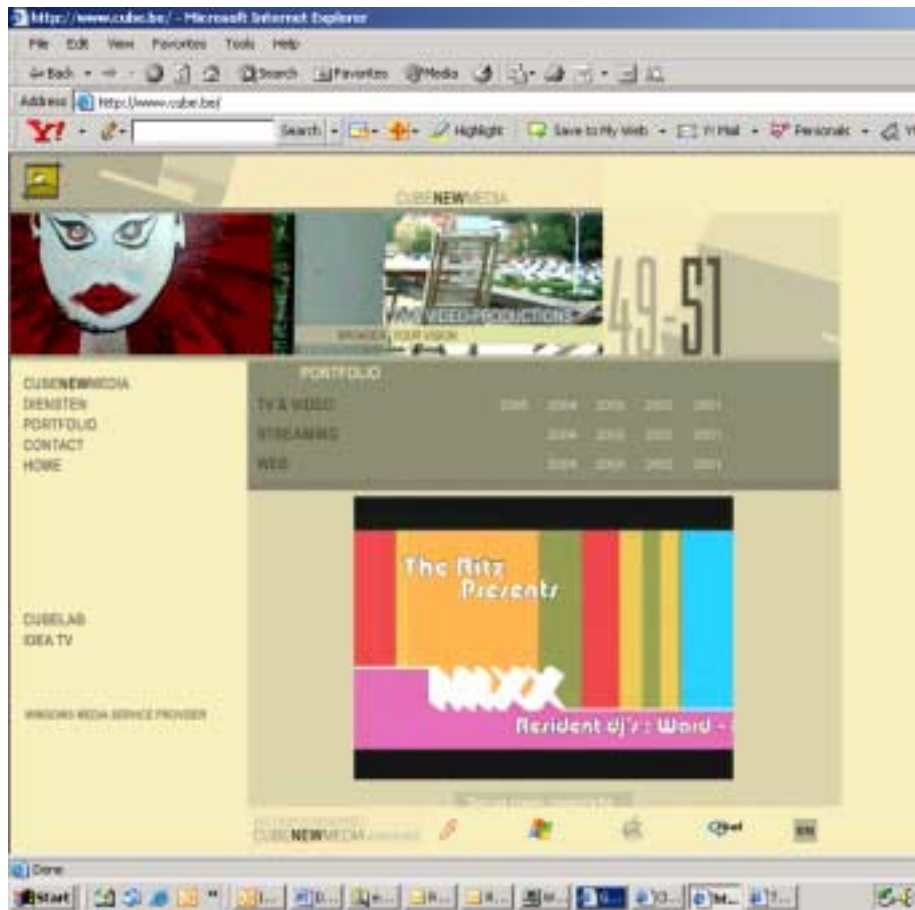
The website indicates that they are mainly targeting private businesses. However, Stream UK worked with Lewisham Council to provide them with a one off webcasting system under the UK's National e-Democracy Project. The company delivered an end to end solution encompassing hosting, delivery, bespoke hardware, training and on-going support. The system 'packaged as webcasting in a suitcase' was specifically developed for offsite community meetings rather than meetings in a council building.

Competition analysis:

Stream UK is a potential competitor in the UK to the eParticipate platform. However, like all other streaming solutions it lacks the added value services of eParticipate.

3.1.1.6 Cube New Media - <http://www.cube.be/>

Cube New Media is a production company for streaming media and video. At the end of 1997, the team was one of the first in the field of live and on demand audio broadcasting via the Internet and was one of the first to use broadband video in Belgium. <http://www.cube.be>



Nature of the offering:

- The encoding of audiovisual material for the Internet in Windows Media, Realvideo, Quicktime or Flash format.
- Webcasting of events, seminars... (live or on demand)

Target Market:

Cube New Media makes audiovisual productions in the broadest sense of the word but does not focus on streaming and the list of customers only include commercial organisation

Competition analysis:

From the website however it is not clear if it deals with any other markets outside Flanders and hence is not seen as a competitor.

3.1.1.7 France Streaming - <http://www.france-streaming.com>

France-streaming specializes in streaming video hosting services: video content on demand and live webcast hosting.

Nature of the offering:

Their main activities remain Web Hosting (php4, mysql, asp, access, odbc, sql server, cgi...) but France-Streaming can also broadcast any events, using QuickTime or WindowsMedia, live or pre-recorded, video chat, live streaming broadcasts, up to 20 000 streams at the same time, works without any plug-in.

Target Market:

France's streaming portfolio contains both private and public customers. Among its public customers are some chambers of commerce and some regional councils and some political parties

Competition analysis:

Their main activities remain Web Hosting. However, France-Streaming is already in the French market and may have a headstart with its knowledge of the market

3.1.1.8 Finnish WebTelevision - <http://www.nettitelevisio.com/english/>

Finnish WebTelevision is broadcasting programme on current affairs. They offer online and recorded webcasts

Nature of the offering:

Their offering seems to offer basic video stream in realone window. No other functionality seems to be added to the offering.

Target Market:

The webcasts advertised on their websites are either national authorities or conferences.

Competition analysis:

The company works with the Finnish government and have done some work with the EC. The real player they use to webcast was not available for free to download for any other countries than the USA, using the link advertised on their website.

3.1.1.9 Streaming competition analysis

Streaming providing companies can be seen as direct competitors of the e-Participate webcasting services. However, according to *Todd Loewenstein CEO of [ArcoStream](#)*¹ “the way that many streaming providers structure their networks will never allow them to become profitable. Distributed network providers face numerous hurdles to profitability and quality of service, including commitments for unused rack space and bandwidth, power, switch/router ports, reporting and reliability issues, increased storage costs due to unnecessary content replication, high labor costs, and poor customer service. Thus many CDNs are saddled with higher costs, and yet are forced to lower their prices in order to compete with more nimble, smaller service providers.”

In times Mr Loewenstein predicts that a “a new breed of streaming companies will eventually take the place of the giants of the streaming industry. These service companies, which will focus on sales, customer support, and lower costs, will be able to offer the same services as bigger companies, at lower prices, with better reliability, and yet will still be able to maintain and grow a profitable business”.

One of the primary criteria that public authorities look for in suppliers is reliability and longevity, IT managers whether it is in public authority offices or hospitals are very reluctant to invest public money applications or equipments from companies that may be susceptible to disappear. This is also a warning to the eParticipate consortium that any new company established for the purpose of the commercialisation of the platform should anchor itself within the existing commercial and reputable companies in the consortium if the company is to convince local public authorities of its viability. To this extent, the pre-existing catalogue of UK councils using the UKCouncil webcasting systems will be of huge advantage to a new company. It is also interesting to note that the Public-i system is the only offering which does not base its charging on viewership or bandwidth usage ie the local authority is not penalised for successful broadcasts.

So streaming as a solution for highly reliable and cost efficient public bodies may not yet be the answer.

3.1.2 Software providers

Software providers provide webcasting applications with a number of functionalities but may outsource hardware and streaming.

¹ The Economics Of The Streaming Service Provider Business, <http://www.streamingmedia.com/article.asp?id=8284&c=1>

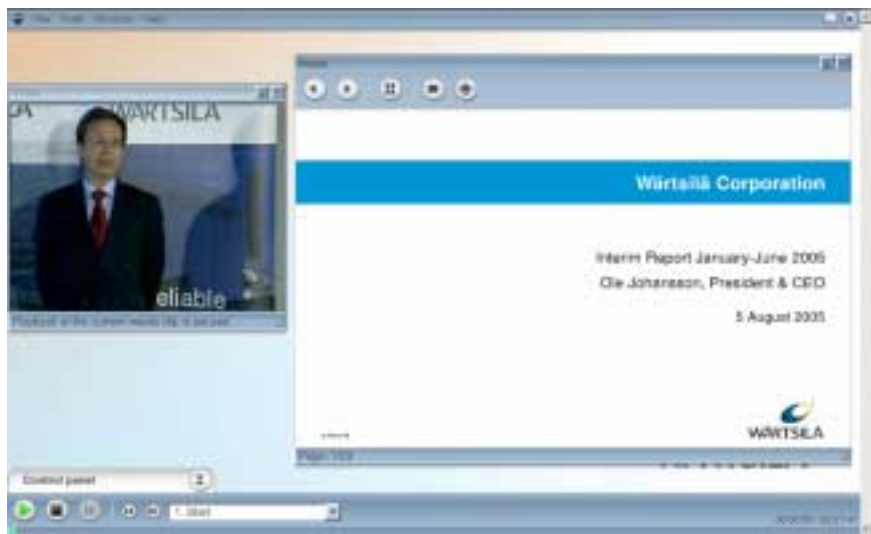
3.1.2.1 GoodMood Software - <http://www.goodmood.fi/>

GoodMood WIP is an online communications software suite that combines webcasting, IP based video conferencing and WebTV in a single application.

Nature of the offering:

The range of tools available to GoodMood WIP users include:

- *Streaming video* – Supporting both Microsoft Windows Media Player and Real Player.
- *Feedback tool* – Sending messages to an administration page from both live and recorded presentations.
- *Polling of participants* – Any number of questions can be placed in the presentation or generated ‘on-the-fly’. Results are displayed graphically in real-time.
- *Discussion* – A real-time area for all participants, or just selected users.
- *Agendas* – Supporting both text formatting and links.
- *Attachments* – For users to download files in any format or recorded presentations.
- *Biography* – Biographies of all presenters and participants can be included with both a picture and formatted text.
- *Message bar* – An animated text bar that can be placed on the screen for providing information, help, or warning messages.
- *Annotation tool* – To be used within the media window. All tools include content and property options, such as resizing, renaming, and repositioning.



Target Market:

The company targets the private sector and puts forward as benefits:

- Improved Company Wide Communication
- Efficient Communication with Customers, Business Partners, and Shareholders
- Cost Savings
- Enterprise Class Security, Scalability, and Reliability

Competition analysis:

For now GoodMood’s offering is not yet targeted at local governments

3.1.2.2 ManagEnergy Streaming Tool (MST) - <http://www.managenergy.tv>

Nature of the offering:

MST consists of a mixture of guidance, recommendations and examples of successful streaming and tendering procedures, as well as the ManagEnergy Streaming Software. The MST is already used within the [ManagEnergy Initiative](#).



Target Market:

The objective is to release the MST for free use for the Commission and its clients in the near future. The objective of the projects indicate that online video-recording make European events live longer and help alleviate barriers to information. Multimedia and streaming technologies are also seen as having the potential to save energy, effort and environment.

Competition analysis:

The tool if offered free of charges to all members of the European commission could prove a competitor but the tool has not yet been tested in commercial settings or for other purpose than the project it was developed for.

3.2 Council IT departments – In-house development

MORI, the UK Social Research Institute conducted a survey on behalf of the UK's Local e-Democracy National Project looking at local authorities experiences of democracy on and offline. The survey shows that resources for e-Democracy are limited and that back up and support for investment in e-Democracy is mixed. Given that the main gains are difficult to judge since they are in the main subjective factors such as "increased public engagement" or "improved public perception/satisfactions" Councils IT departments maybe reluctant to fund such projects. As a result the temptation to develop in house streaming solution at a lower cost that meet if only partially the corporate ideal of e-democracy maybe high and the eParticipate service sales pitch will need to address those budgetary constraints and potential competition strand.

We know of at least 3 councils in the UK which tried DIY streaming solutions but which ended up giving up the experiment. One of them is now working with UKC.

From direct contact with the council it appears that East Riding trialled the use of a webcam from their registry office in order to broadcast weddings and other occasions. A webcams is distinctly different from webcasting as it transmits a single static shot which is refreshed at a regular interval. Though technically sound the solution failed to satisfy a number of requirements:

- The static shot was not engaging for the viewer
- The lack of audio made the viewing a lot less compelling
- The lack of an archive meant that few people could benefit from the content

Given these issues East Riding have decided to abandon the webcams experiment and after a detailed investigation process have decided to implement multimedia content via webcasting instead of webcams and will be working with Public-i to do this.

3.2.1 eParticipate vs competitors - Webcasting SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> ▪ eParticipate when compared to best of competitors remains one of the more flexible ▪ It is one of the most visually appealing solution. ▪ The administration side of the eParticipate platform seem to be much more mature than the competitors ▪ UKC has a number of reference sites up and running in the UK ▪ UKC and MAC have proven to be reliable partners to public sectors and have long standing experience ▪ The eParticipate European trials will give the eParticipate platform a competitive edge as no other competitors has launched services abroad. ▪ The Public-i service appears to provide the only comprehensive service covering content capture, management and bandwidth ▪ There is an ability to share best practise amongst users thus ensuring efficiency in implementing a new service 	<p>Weaknesses</p> <ul style="list-style-type: none"> ▪ The competition websites provide very few specifications so it is hard for potential customers to compare offerings ▪ Lack of research in eDemocracy as highlighted in D.2.1 ▪ Despite primary contacts in D.2.1 very few information on local council IT spending on eDemocracy so eParticipate platform pricing will be crucial issue
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ The streaming competitors are not offering any mobile units. There should be an opportunity to partner with some of the strongest one in this area ▪ eParticipate in the coming year will have a European exposure and should pursue actively the more mature markets. 	<p>Threats</p> <ul style="list-style-type: none"> ▪ A number of streaming companies are active in the area and targeting the public sector market ▪ Streaming and software solution may be seen as more cost efficient ▪ The lack of hardware required means that there is less risk of hardware failure and obsolescence ▪ Council DIY and OSS policy may incite them to try to develop solution in house

3.3 eConsultation tools and services

eConsultation is the use of online media to engage citizen in the governance process. In the case of the eParticipate platform eConsultation is taken as means to run structured consultation processes and offering in-depth and rich interaction with Citizen.

The eParticipate Consultation Tool is a web based system and is based on the requirement that the Consultation Tool be readily used by all citizens and organisations in responding to relevant issues and strategies being developed by Regional and Local Authorities.

For the purpose of the comparison we therefore looked at tools which may have offered some of the following features or which may have been sold to Councils as an eConsultation product.

eConsultation features:

- Allowing Local Authorities create a new public consultation process.
- Publishing a web based form or document which gathers feedback from public users, integrating with the published document by means of the documents categories (sections).
- Allowing users to view previous submissions of a particular consultation process and add a new submission.
- Allowing Local authority users to view/edit public submissions and add summaries and recommendation to these.
- Allowing Local authorities to generate reports on the results of a particular consultation process for final review and discussion.

3.3.1 Commercial offerings

The research is showing that there are many more initiatives and pilots than there are commercial offerings. The following sections highlights the best offering found in the market.

3.3.1.1 Case Study Community - People <http://www.communitypeople.net>

Reasons for closer examination:

eConsult is the tool used by the Scottish Parliament and by the best practice eConsultation site <http://www.askbristol.com/>. This citizens ePanel has been developed as part of the eDemocracy National project. The eParticipate consortium was also contacted directly by the communitypeople company to see if some common activities could be found.

Background:

Askbristol is a new website where citizen can have their say about all sorts of issues that may affect life in Bristol. Upon registration citizen are asked to give some personal details and let choose what topics or areas they are interested in. Once registered citizen can make their views known. The site contains a range of consultations that could include surveys, discussion groups as well as live question and answer sessions. Some of them will also provide background information or links to further details to help someone reach a decision. Once a consultation takes place about one of the topics selected upon registration, an email is sent inviting the person to join in.

Sales pitch:

The sales pitch is about citizen engagement – and about the need for authorities to render their process accountable. It also pitches at the lack of bottom up consultation and the challenges facing authorities when trying to engage in consultation

Success according to them can come from 5 key aspects of the eConsult online consultation system:

1. Bite-sized consultation topics.
2. Meaningful navigation within the consultation itself.
3. Providing clarity of purpose, process and outcome
4. Meaningful reporting and analysis
5. Reporting is realtime.

Nature of the offering:

eConsult is an online consultation publishing, management and analysis system for creating, and managing the actual online consultation process. The tool

- Publish consultations
- Manage and report on the process
 - maximise participation and quality of response
 - stakeholder dialogue and community discussion tools built in
 - No technical knowledge needed.

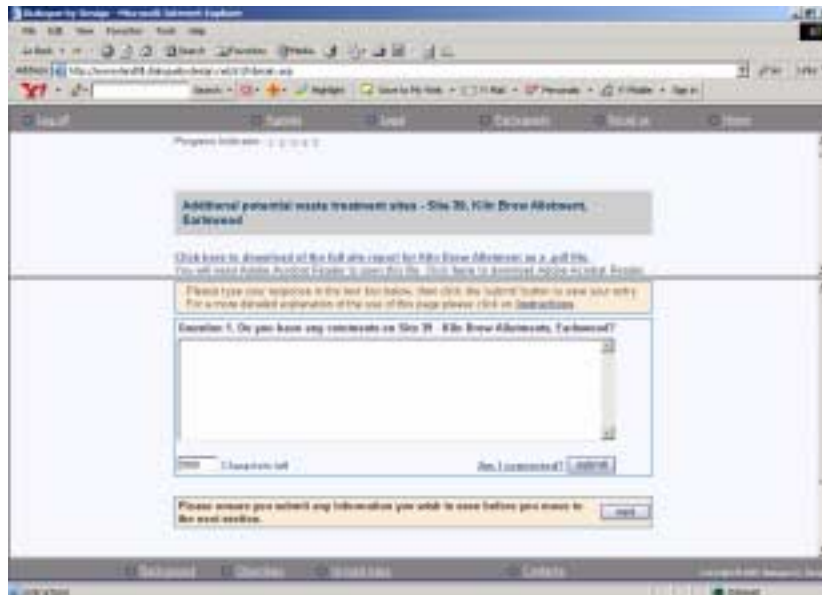
Competition analysis:

Communitypeople is a well rounded offering and has a number of other components that can be added to it. The offering offers the same functionalities to the eParticipate consultation services but we were unable to gain figures regarding pricing. The Communitypeople tool will have receive some publicity through its involvement with the eDemocracy project so it is important that the eParticipate tool is presented as complementary to the webcasting tool and not as the main offering.

3.3.1.2 Dialogue by Design- <http://www.dialoguebydesign.net>

Nature of the offering:

The e-consultation tool enables people to collect and collate responses from participants, and display the results in an easily accessible format. The system is not based on e-forums or chat rooms, but on a series of user-friendly templates integrated with a sophisticated data management system. The system can organise very large volumes of information rapidly, and tailor any consultation or information gathering exercise to meet specific needs and objectives.



Target Market:

This is a consultation tool and it is marketed at public and regulatory bodies.

Competition analysis:

This is a very good tool. Inside knowledge and previous contact with the company make it a potential best of breed partner for the eParticipate solution, however, the solution maybe a bit expensive for certain councils especially since a lot of the products described in section 3.2.2 tend to be in house custom products.

3.3.1.3 Entrouvert - <http://www.entrouvert.com/en>

Entr'ouvert is a free software company whose commercial activity was built around eGovernment and eVoting solutions

Entr'ouvert is a consulting and development company. Its principal activities are:

- e-Gouvernance consulting;
- Democracy and Transparency consulting;
- Online voting;
- Installation of collaborative information systems.

Nature of the offering:

The offering is presented as a consultation tool but is in fact more of an eVoting / ePolling tool than a consultative tool as is intended by the eParticipate consortium.

Target Market:

The tool is used in Vandoeuvre and the offering is mainly the French market although the site is also available in English.

Competition analysis:

This is not a direct competitor for eParticipate but such functionalities as polling could be added to the platform. Entrouvert offers platform based on libre software and as such may be attractive to government and local authorities which are increasing looking at opensource solutions. This could be a useful added service for the eParticipate platform.

3.3.2 Free Open Source Software

Group server - <http://e-democracy.org>

GroupServer is a new open source online group tool that combines e- mail lists and web forums.

Nature of the offering:

Citizens choose their preferred method of participation - e-mail or web - and are part of the same inclusive discussion.

Features include:

- E-mail discussion tool - Database-driven with full text and subject line "topic digest" options
- Web forum view and posting - Converts e-mails with same subject in the popular linear format with posts sorted by time
- File sharing - Upload documents, images, and files
- RSS feeds - RSS is built in, allowing participation via news readers as well as the display of forum headlines across multiple web sites
- Member Directory - Flexible directory with the ability to tailor what information is presented. Posts distributed via e-mail automatically insert a link to posters member page.
- Web Administration - This allows Forum Managers to easily accomplish many tasks while also providing technical access to site administrators.

Target Market:

GroupServer is for online communities and anchors its “sales pitch” around ease of use for the “average citizen”. The tool is used in the UK Issues Forums and its release is supported by the UK Local E-democracy National Project.

Competition analysis:

This is not a direct competitor as since it is a community forum type of offering, but it is interested to the consortium for two reasons:

- It shows the enhanced capacities of free open source solutions
- It could prove a nice added service for the eParticipate best of breed platform.

3.3.3 European & Nationally funded initiatives

The eParticipate consortium has identified a number of initiatives across Europe which has been publicly funded. As such none of those offering represent a direct competition for eParticipate since they are developed on a once off basis for a targeted audience. However, what they highlight is:

1. The recognition for the need of eDemocracy application
2. A willingness to investigate the requirements using pilots
3. The possibility that Local authorities may feel they can do it themselves and not need outside contractors on the issue of consultation.

3.3.3.1 Your Voice in Europe – European Commission - <http://europa.eu.int/yourvoice>

'Your Voice in Europe' has been set up in the context of the Interactive Policy Making initiative. As part of the Commission's Minimum Standards on Consultation, it aims at improving European governance and introducing Better Regulation.

Nature of the offering:

'Your Voice in Europe' is the European Commission's 'single access point' to a wide variety of consultations, discussions and other tools which enable EU citizen to play an active role in the European policy-making process: EC tool developed as part of EC own initiative

Target Market & competition analysis:

This is not a commercial offering.

3.3.3.2 Flanders Authority project –Belgium - www.kleurrijkvlaanderen.be

The aim of the 'Kleurrijk Vlaanderen' project is to stimulate the debate on the future of Flanders and involve as many people as possible in this debate. In order to achieve this, the project team makes use of an extensive website (www.kleurrijkvlaanderen.be) on which the online part of the debate takes place on web forums.

Competition analysis:

This is a regional project championed and tailored to its need by a particular region. This seems to be widespread as other examples below show.

3.3.3.3 Donegal County Council –Ireland - http://www.donegal.ie/dcc/dcc_home.htm

This project is involved in the development and delivery of an online forum for information sharing and consultation between the community and voluntary sector and various agencies involved in local development issues in Donegal. The project has developed a template for the practical involvement of the community and voluntary sector in eGovernment by means of

interaction with local stakeholders and through the provision of an information portal for the sector.

Competition analysis:

This is an internally commissioned project. It is expected that under the auspices of best practices, the tool developed by Donegal may be transferred to other councils in Ireland.

3.3.3.4 Democracy in The City – Ireland - www.dublin.ie/democracy

Called "Democracy in the City", the project has been described by its creators as a "democracy marketplace," where opinions, proposals and ideas can be expressed in full view of the public and politicians. Apart from discussion forums, the site allows users to contact local, national and EU politicians, who in turn can lead on-line dialogue with the electorate. The project's creators -- the Department of the Environment and Local Government and Dublin City Council -- also said that users can become virtual members of the Dublin Civic Forum, allowing them to organise virtual petitions and making judgments on political issues through a so-called "citizens jury."

Competition analysis:

This is a project coordinated and custom designed by Dublin City Council and the Department of the Environment for a specific need but not as a commercial offering.

3.3.3.5 Czech Parliament – Czech Republic – (no url found)

This pilot was a contribution to development of an open dialog between citizens and government with the main objective to provide both, citizens and state administration, (respective, voted political representatives), with modern and user-friendly Internet based tools for the development of e-democracy

Competition analysis:

Developped in collaboration with a private company this is also a project and not a strick commercial offering.

3.3.3.6 Madrid Participa – Spain - www.madridparticipa.es

The e-consultation initiative of the City Council of Madrid.

Madrid Participa was an initiative created by the City of Madrid in 2004 with the objective of involving citizens of the central district in evaluating the effectiveness of electronic mechanisms used for public participation. Citizens were introduced to local decision-making processes and the multi-faceted approach of the Internet, Java mobile phones, SMS messages and on site centres – 21 public access Internet centres deployed throughout the city in January 2004.

Approximately 50% of those surveyed were decisively favour the use of electronic systems in any kind of electoral process such as a Citizen Consultation similar to Madrid Participa or binding elections. Only 15% of those surveyed indicated their reluctance to their use in binding elections. Three other e-consultations will take place during 2005 and will gather citizens' opinion on key issues affecting three different districts in Madrid. Besides the e-consultations, a remodelled portal Madrid Participa will be launched shortly with new tools for the citizen associations and general participation tools such as online forums.

Competition analysis:

The Website: www.madridparticipa.es is not active so there is very little information as to how far the initiative has progressed

3.3.3.7 County of North Jutland –Denmark - www.nordpol.dk/project/project_eng.htm

The objective of the nordpol.dk project is to render visible the decisions made on a regional, political level, and to involve the citizens in relation to the process of democracy. The project is mainly designed for consultation – a media for dialogue - where the County defines and manages the larger debates.

Competition analysis:

Once again this is a project based development. The web site was designed in close cooperation between the project group of the County of North Jutland, and the KMD, a large Danish IT enterprise.

3.3.3.8 Hals Municipality – Denmark - www.hals.dk

This is a digital democracy project run in Hals municipality. The debate module at the website www.hals.dk allows citizens to bring up political problems of their concern. It can be topics related to on-going political discussions or completely new topics.

Competition analysis:

This was developed in collaboration with a private company this is also a project and not a strict commercial offering.

3.3.3.9 Kalix town hall – Sweden - www.kalix.se

The Consultation uses a mix of Internet technologies, adapted and integrated by Votia Empowerment Inc. (Votia.com). The investment is considerable but made over several projects. All e-processes of a consultation are run by Votia. On the organizational side, the consultation is integrated in the normal operations of Town Hall.

Competition analysis:

The cost for one Kalix-size consultation is estimated to \$100 000, including both technology and work. To date and based on what our councils have reported to date, this solution's

pricing is totally inadequate for most councils which needs could easily be fulfilled by a much cheaper solution. This is an extremely expensive solution and probably too specialised for most European councils needs.

3.3.3.10 Norrmalm District of Stockholm – Sweden -
<http://norrholm.yourvoice.se/insyn.asp>

This is a self-developed tool for helping citizens keeping in touch with the local political life. The tool, named Insight (Swedish: Insyn) can be described as a software agent monitoring documents produced by the district administration and notifying the citizen on documents and events of interest based on keywords and topics chosen by the citizen.

Competition analysis:

This is also an inhouse developed tool.

3.3.3.11 The West of England partnership – UK - www.askbristol.com

Bristol is hosting this consultation on behalf of the authorities represented in the sub region. The council's aim is therefore extended to cover the diverse range of communities and stakeholders across the sub region. The aim of Bristol City Council's Consultation Strategy is to ensure that the views of Bristol's diverse communities are used to inform decision-making. In relation to this consultation, the council's aim is therefore extended to cover the diverse range of communities and stakeholders across the sub region.

This uses the eConsult tool developed by Communitypeople see section 3.2.1.1

3.3.3.12 Kettering Borough Council – UK -
http://www.kettering.gov.uk/site/scripts/consultation_open.php

Kettering Borough Council wishes to strengthen their confidence, capacities and connections through engaging with the local community. According to them “It is essential that as a Council, we listen to the views and opinions of residents and use these to inform our policy making. A key tool to achieving this is effective community consultation and, through this, genuine engagement.”

Within this application citizen can view past and present consultations. They also have the option to comment on any current consultations.



Competition analysis:

This is a very simple and efficient tool embedded in the website. There is no indication as to any third party involvement. The tool appears to be a php plug in.

3.3.3.13 Liverpool City council portal - <http://www.liverpool.gov.uk/index.asp>

The Liverpool website has received a lot of praises and recognition as a best practice council portal in Europe. The Liverpool City Council portal strategy is at the forefront of the delivery of e-business for the City Council, its' employees, citizens and the business sector. The portal also facilitates joined up services.

Information is disseminated via the portal in a structured, but customisable screen format offering personalised web browsing for the various user groups and individuals. It enables a delivery framework that allows City Council services to be supplied more effectively on demand and provides more efficient access to services. The Liverpool approach and development of Citizens portal is centred around the provision of capability for a:

- Personalised service through the provision of
- Online information,
- Relevant to the individual customer, which is
- Targeted to the citizen or any other defined community, through creation of
- Accessible information on Local Authority services geared to the
- Life events of the web visitor

Competition analysis:

This portal has won awards in 2004 for its knowledge management and is held in Europe as a best practice example. The portal is very good in providing citizen-centric information and facilitating transaction with the different services but is not particularly strong around eDemocracy and consultation.

3.3.3.14 Other initiatives identified

All those initiatives are partly funded by regional, national initiatives and not straight commercial purchase but no further information was found.

Italy – Comune di Cesena PEG online

The Netherlands – e-consultation on the future of food

Italy – Comune di Bologna: DEMOS Project

UK – Online Parliamentary enquiry into domestic violence

UK – national eDemocracy initiative (umbrella of initiatives)

UK - e-petitioning the Scottish Parliament

3.3.4 eParticipate vs competitors - eConsultation SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> ▪ The platform offers best of breed solutions which can be selected based on pricing and needs of a particular council ▪ The number of initiatives undertaken across Europe show there is strong need for consultation in Europe 	<p>Weaknesses</p> <p>The fact that most councils go down the inhouse road may mean that:</p> <ul style="list-style-type: none"> ▪ Councils have the skills in house to oversee such needs ▪ The pricing of the offer would have to remain quite low to compete with the inhouses options
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ The research carried out for D.2.1 and D.2.2 have revealed a number of potential business partners for national roll out. ▪ There are very few commercial offering competing with the consultation tool 	<p>Threats</p> <ul style="list-style-type: none"> ▪ The number of commercial offering vs inhouse product is very low

4. Identification of potential business partners.

The consortium has identified early on in the project the need to identify potential business partners for the deployment of the platform in across Europe. Through the work carried out in workpackage 2 (market analysis and competitors analysis) a number of potential business partners have been identified. The Table given the next page outline the current potential partners list for Europe.

Identified list of potential business partners for eParticipate.		
	eParticipate Potential Business Partners	National Contacts likely to know of potential business partners
Austria	None identified to date	Austrian Computer Society: The OCG has set up in 2001 a Forum e-Government, which brings together representatives of public administration, industry and academia, and provides an independent platform for the discussion and exchange of experience in e-Government and e-Democracy. The OCG also issues to its members signature cards suitable for use as Citizen Cards.
Belgium	None identified to date	None identified to date
Cyprus	None identified to date	Cyprus Planning Bureau: The Planning Bureau is the responsible authority for the development of the Information Society in Cyprus
Czech Republic	None identified to date	None identified to date
Denmark	<p>WebHouse Aps is a private company deeply involved in the development of specific software solutions backing the digital democratic process.</p> <p>Sven Allan Jensen A/S (a private company advising local authorities on city, country and traffic planning)</p> <p>KMD - Kommunedata: The company formed in 1972 through the merger of a number of municipal IT departments. It is owned by Danish local and regional authorities, through Local Government Denmark and Danish Regions, and supplies them with IT expertise, systems and services.</p>	Joint Board of the e-Government Project The Joint Board of the e-Government Project is the central decision-making body for e-government in Denmark. It is made up of the permanent secretaries from five ministries, the managing directors of the associations of County Councils and of Municipalities, and of a representative from the two largest municipalities (Copenhagen and Frederiksberg). Chaired by the Ministry of Finance, it assumes joint responsibility for the country's e-government strategy/policy.
Estonia	None identified to date	E-Governance Academy The E-governance Academy is a regional learning centre set up by the Republic of Estonia, the United Nations Development Program (UNDP) and the Information Program of the Open Society Institute (OSI). The centre aims to promote the use of ICT in the work of governments and in democratic practices. The centre provides training in e-governance and e-democracy, serves as a platform of exchange of experience and conducts related research. The primary target audience includes civil servants, policy makers and representatives of civil society of the countries of Central Europe, the Caucasus, Central Asia, and the Balkans.

Finland	None identified to date	HAUS, The Finnish Institute of Public Management Ltd. Was established in 1971 as an in-service training centre for civil servants. It was transformed into a state-owned enterprise subordinate to the Ministry of Finance In 1995, and converted into a limited company at the beginning of September 2002. Its mission is to provide innovative training and consulting services and to promote latest knowledge in the field of administrative practices. The services are organised into the following business areas: Strategies and Leadership, Administration and EU Know-how, International Projects.
France	<p>France Telecom: France Telecom has invested in the Telenetcity products which is a low cost, no frills offering and may be interested in eParticipate for larger councils which need enhanced capacity.</p> <p>Entr'ouvert is a consulting and development company. Its principal activities are:</p> <ul style="list-style-type: none"> - e-gouvernance consulting; - democracy and Transparency consulting; - online voting; - installation of collaborative information systems. 	
Germany	None identified to date	Federal Coordination and Advisory Agency for IT in the Federal Administration (KBSt)
Greece	The Information Society S.A. operates under the supervision of the Ministry of the Interior, Public Administration and Decentralization (MIPAD) to provide back-up services – using outside consultants – to the implementing bodies while they are planning and carrying out the actions and later in the productive operation of the projects	
Hungary	None identified to date	
Ireland	N/A MAC project partner	
Italy	None identified to date	Regional Competence Centers for e-government - They were established following an agreement between the central government and the Presidents of all 19 Regional plus 2 Autonomous Provincial Authorities in March 2002. They form a network of expertise providing local public sector bodies in their areas with technical assistance, information and training activities. They support regional and local governments in their efforts to implement e-government, upgrade their IT systems and reorganise both their back-office processes and their service delivery channels.
Latvia	None identified to date	Infostruktūra: Infostruktūra is a State-owned company created in 1992, which provides IT infrastructure and services to central and local government. In particular, Infostruktūra has created and maintains the computer network of State institutions (VIKT)
Lithuania	None identified to date	
Luxembourg	None identified to date	
Malta	None identified to date	Malta Information Technology and Training Services Ltd (MITTS) MITTS is a Government-owned company supplying IT systems and services to Government departments.
Netherlands	None identified to date	
Poland	None identified to date	

Portugal	INESC Porto: INESC Porto is an institution created to act as an interface between the academic environment and the economic world of industry and services, as well as public administration, in the framework of Information, Telecommunications and Electronic Technologies. Its activities range from research and development, to technology transfer, consulting and advanced training.	
Slovakia	Identified through consortium partner	IVeS - Organisation for the Public Administration Informatics provides software solutions to cover specific needs of the public administration bodies.
Slovenia	None identified to date	
Spain	MSS: identified through consortium partner. However additional partners in differing regions could be considered	
Sweden	Votia Empowerment Inc. (Votia.com), they provide eConsultation tools and have run successful e-democracy projects in Kalix, Nyköping and Luleå.	
United Kingdom	N/A UKC project partner	

5. Conclusions & Recommendations

One of the main advantages of the eParticipate platform is that it offers a complete service and range of eParticipation tools for citizens under one brand name.

The eParticipate platform benefits from the advantages of being an innovation product and early penetration in the market, but it also suffers from some of the disadvantages such as the lack of information regarding the potential market and spending patterns.

We have established that competition exists for both strands of the platform: webcasting and consultation tools. While a number of competitors exist mainly in the area of streaming the nature of their offering seems to be of a lesser quality than the one provided by the Public-i component. The Public-i webcasting and added value services represent best practice and best of breed components in a market which is mainly dominated by streaming products with little flexibility and added value services.

On the other hand there are now many pilots and initiatives using custom-made, in-house consultation tools. From this research it appears that there are serious question marks about European municipalities' willingness to purchase a commercial off the shelf consultation tool when in house capability and freeware may be able to provide a simple and acceptable solution.

It is therefore concluded that the webcasting component is the core that will sell the eParticipate platform. While a number of competitors exist mainly in the area of streaming the nature of their offering seems to be of a lesser quality than the one provided by the Public-i component. On the other hand there are now a number of pilots and initiatives using custom-made, inhouse consultation tools.

It should be noted that while we were able to determine this based on our knowledge of the product and by comparing the quality of the webcasts, the lack of specification, standards and overall knowledge of clients in this domain will mean that customers may not necessarily be able to recognise and choose from the different offerings the quality ones. It is therefore important that eParticipate establish itself early on as the preferred platform of Local Councils. In the next year it will be critical that eParticipate makes itself visible to the National purchasing public bodies and create strategic alliances with well connected providers in each of its target markets.

The consultation component of the eParticipate platform is a very good value added component to bolt on to the main webcasting offering but closer examination of the market reveals that, while the need for eConsultation tool definitely exists throughout Europe as proved by the number of initiatives identified, the requirements for a tool may be simple enough to be addressed by in-house tools. The consultation process can be implemented by a relatively straightforward tool where users register, enter their comments and submit a form. As such, most website designers can add in small plug ins which will fulfil these basic requirements. The overall commonality of the consultation process and the lack of specificity means that most public bodies are happy with simpler and cheaper tools. Only if the consultation starts to integrate into the back end of the administration will the tools require more sophistication.

Appendix A: Competitors outside Europe.

Fednet- USA - <http://www.fednet.net/>

- Overview of the service:

Internet News channel – webcasting

- Target Market:

Federal government and some corporate

- Competition analysis:

Basic video stream. No added functionality. Company seem to work exclusively with federal government, similar to uk parliament broadcasting. Also run a news service of latest developments and round ups, although this is pay per view

Connect live- USA - <http://www.connectlive.com/>

- Overview of the service:

Webcasts

- Target Market:

Government and depts

- Competition analysis:

Full service webcasting, videoconferencing and satellite streaming. Displays in realone window, with basic video controls. Slides, and transcriptions available from webpage but not within transmission window. No polling or feedback functions available

E-studio live – USA - <http://www.e-studiolive.com>

- Overview of the service:

Webcasting

- Target Market:

Public and private sector

- Competition analysis:

Streaming media co. specialised in range of sectors including training. Appears in TP with synchronised slides and jump points. Good quality image although basic functionality and no sign of feedback, polling etc. They are working with local government channel in Cupertino. They also sell stand alone webcasting solutions i.e. hardware and software

Roadshow Media – USA - <http://roadshowmedia.com>

- Overview of the service:

Webcasting, web design

- Target Market:

public and private sector

- Competition analysis:

Webcast appears in TP with synchronised slides and video jump points. Good quality image although no feedback or polling functionality available

Ipolis – USA - <http://www.ipolis.net/>

- Overview of the service:

Streaming Media

- Target Market:

Public sector

- Competition analysis:

No examples of webcasts on homepage. Provide all aspects of webcasting primarily to government bodies. Work with cable TV stations to provide encoded version of what TV viewers see. Appears in media player, basic controls, and no added functionality

Channel 88 – USA - <http://www.channel88.com>

- Overview of the service:

All aspects of new media

- Target Market:

all

- Competition analysis:

US and Canadian company. No examples of their work found

eclipsnow.com – USA - <http://www.eclipsnow.com>

- Overview of the service:

Streaming Media

- Target Market:

All

- Competition analysis:

Webcasting and video production services across range of sectors including webcasting of church services. Webcast appears in media player, fair quality image. No added functionality

SonicFoundry – USA - <http://www.sonicfoundry.com/>

- Overview of the service:

Streaming Media

- Target Market:

All

- Competition analysis:

Webcasting offer, displayed within a TP, with polling etc also available. Also do licensing of their product.

Xstream Webcasting - Canada www.xstream-tv.ca

- Overview of the service:

Premiere webcasting services, webcast hosting, equipment manufacturing, server manufacturing, Real Networks distributor, encoding, hosting, network design, intranet, internet webcasting. Xstream Webcasting is a division of NtegratingSolutions a Canadian based solutions provider.

- Target Market:

Canadian government is their specialty, having provided services for most of the Canadian Government including Industry Canada DND Justice, Transport, Canadian Space Agency - International servers on 4GB backbone, partnered also with Real Broadcast Network (RBN)

- Competition analysis:

However, their website doesn't indicate that they conduct any business outside Canada.

www.econsultationsolutions.com – Canada

- Overview of the service:

The company promotes the development of e-government and electronic service delivery (ESD) and harness their power to provide more accessible and responsive services to the broader public sector. The eConsultation Solutions has been designed as a content management platform. Content management is a web development tool that allows individuals with little or no knowledge of Internet programming to develop fully functional web sites.

- Target Market:

IronPoint is a provider of content management software and services to the Canadian public.

- Competition analysis:

The website doesn't indicate that the company is targeting any other market than the Canadian on

Granicus - USA - www.granicus.com

- Overview of the service:

The Granicus MediaManager software provides tools for live streaming, scheduled archiving, indexing of video by agenda item, a web based keyword search, automatic file management and web publishing, integration with document records, internal and externally hosted video distribution, online training tools.

- Target Market:

[Granicus, Inc.](http://www.granicus.com) is a provider of Internet broadcasting solutions for live and archived streaming of public meetings to the Web and was developed exclusively for local government agencies.

- Competition analysis:

Granicus does target the local governments market but for now just in the United States which may indicate they do not possess the understanding of the European Market