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SMART VILLAGE LABS

D1.2 Drivers and factors of social exclusion in rural areas: macro-, meso-, and micro-level

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1. Executive Summary

Scope and objectives

This deliverable D1.2 is a key analytical output of the INSPIRE project, designed to investigate the structural, institutional, and local-level drivers of social exclusion across rural regions in Europe. The primary objective is to provide a multi-scale evidence base that informs policy interventions targeted at fostering social inclusion. It directly contributes to Task 1.5 by supporting the development of a territorial typology of social wellbeing, resilience, and exclusion. D1.2 aims to bridge gaps in rural policy design by integrating findings from macro (global trends), meso (national regimes), and micro (local realities) levels across seven pilot regions in Europe

Methodological overview

The methodology integrates qualitative and quantitative techniques to ensure a holistic understanding of rural social exclusion. Three levels of analysis were conducted:

- At the macro level, a Delphi foresight survey with EU-level experts was conducted to identify mega-trends affecting rural inclusion.
- At the meso level, semi-structured interviews and national-level online surveys captured the perspectives of stakeholders and institutional actors.
- At the micro level, observational fieldworks and paper-based and CATI surveys were carried out in seven pilot regions (Slovakia, Ireland, Poland, France, Greece, and Romania). This included direct engagement with vulnerable groups and community stakeholders.

This triangulated method enables a grounded, context-sensitive analysis of exclusionary dynamics and inclusion drivers at multiple scales.

Key findings

The analysis reveals that rural exclusion is shaped by interconnected structural, institutional, and local conditions. Key findings include:

- Global megatrends such as climate change, technological automation, and population ageing intensify rural vulnerabilities.
- National-level barriers include short-term policy planning, bureaucratic fragmentation, and underfunded social services.
- Local challenges are marked by limited access to healthcare, education, digital infrastructure, and social capital.

Among the inclusion drivers, one of the most consistent ones observed across pilot regions is the presence of strong community networks and social capital, often anchored by civil society organisations such as NGOs, faith-based institutions, and volunteer groups. These actors serve as critical intermediaries between vulnerable individuals and formal service systems, offering not only direct support but also advocacy and cultural mediation. Participatory governance emerged as another fundamental inclusion driver, where local authorities engaged residents in co-designing services and development plans, outcomes were more contextually relevant and better aligned with local needs. Additionally, flexible and decentralised service delivery models, such as mobile health units, community centers with multipurpose functions, and social enterprises, were shown to be effective in overcoming infrastructural deficits and geographic isolation. Digital inclusion efforts, though still uneven, also played a transformative role when combined with digital literacy training and community-based access points. Importantly, intersectional approaches (those that took into account gender, age, ethnicity, and disability) were more successful in ensuring that inclusion strategies reached the most marginalised. These findings underscore that rural inclusion is not only a matter of expanding service provision but also of empowering local actors, adapting delivery to diverse contexts, and embedding equity into governance frameworks.

Keywords: Social exclusion; social inclusion; rural areas; European Union; Horizon Europe; INSPIRE project; multidimensional framework.

Table of Contents

- 1. EXECUTIVE SUMMARY 3**
- 2. INTRODUCTION: CONTEXT, OBJECTIVES AND RELEVANCE OF THE STUDY..... 12**
 - 2.1 CONTEXT AND BACKGROUND 12
 - 2.2 OBJECTIVES..... 13
 - 2.3 RELEVANCE 14
 - 2.4 STRUCTURE OF THE DELIVERABLE 14
- 3. MACRO-LEVEL ANALYSIS..... 15**
 - 3.1 SECTION INTRODUCTION 16
 - 3.2 DELPHI METHODOLOGY 17
 - 3.2.1 *Overview* 17
 - 3.2.2 *Theoretical Background* 18
 - 3.2.3 *Preparations for the INSPIRE Delphi Survey*..... 21
 - 3.2.4 *First Round of the Survey*..... 24
 - 3.2.5 *Second Round of the Survey*..... 26
 - 3.3 MACRO-LEVEL ANALYSIS OF SOCIAL EXCLUSION DRIVERS IN RURAL AREAS..... 27
 - 3.3.1 *Global Mega-Trends Influencing Rural Areas*..... 27
 - 3.3.2 *Structural Drivers of Social Exclusion*..... 39
 - 3.3.3 *Impacts of Global Drivers on Rural Areas*..... 42
 - 3.4 FORECASTS ON FUTURE TRAJECTORIES - RESULTS OF THE DELPHI EXERCISE 44
 - 3.4.1 *Social Inclusion Needs of Rural Areas* 45
 - 3.4.2 *Needs of Vulnerable Groups* 48
 - 3.4.3 *Access in Social Services Delivery*..... 51
 - 3.4.4 *Social Entrepreneurship* 53
 - 3.4.5 *Governance and Mitigation Measures* 55
 - 3.5 CRITICAL SYNTHESIS, FUTURE SCENARIOS AND CONCLUSIONS FOR EUROPEAN RURAL AREAS..... 58
 - 3.5.1 *Future scenarios for European rural areas to 2035* 58
 - 3.5.2 *European rural areas stand at a critical crossroads*..... 59
- 4. MESO-LEVEL ANALYSIS 60**
 - 4.1 INTRODUCTION 60
 - 4.1.1 *Overview of Task 1.3* 60
 - 4.1.2 *Linkages to other tasks* 60
 - 4.2 PART I: SEMI-STRUCTURED INTERVIEWS WITH STAKEHOLDER..... 61
 - 4.2.1 *Research Objective: understanding the main themes, challenges, and narratives regarding social exclusion for the pilot regions*..... 61
 - 4.2.2 *Rationale for using interviews*..... 61
 - 4.2.3 *Methodology* 61
 - 4.2.4 *Analytical framework* 63
 - 4.2.5 *Interview results* 67

- 4.2.6 *Regional similarities and differences regarding main themes, challenges, and narratives* 71
- 4.2.7 *Contextualising results in literature on social inclusion* 72
- 4.2.8 *Discussion interviews* 74
- 4.3 PART II: NATIONAL SURVEY ON SOCIAL INCLUSION IN PILOT COUNTRIES 76
 - 4.3.1 *Introduction* 76
 - 4.3.2 *Dimensions and axes of social inclusion* 78
 - 4.3.3 *Sample and Instrumentation* 82
 - 4.3.4 *Analytic Strategy* 88
 - 4.3.5 *Results* 89
 - 4.3.6 *Summary and discussion of survey outcomes* 112
- 4.4 SYNTHESIS OF INTERVIEWS AND SURVEYS 115
- 5. MICRO-LEVEL ANALYSIS 117**
 - 5.1 METHODOLOGY 117
 - 5.1.1 *Pilot Area Selection* 118
 - 5.1.2 *Survey Design and Adaptation for CATI and Paper-Based Surveys* 123
 - 5.1.3 *Observational Fieldwork* 123
 - 5.2 FINDINGS FROM SURVEYS (CATI AND PAPER-BASED) 127
 - 5.2.1 *Introduction* 127
 - 5.2.2 *The CATI Survey Analysis* 129
 - 5.2.3 *The Paper-Based Survey Analysis* 130
 - 5.2.4 *SWOT analysis of Rural-Peripheral Regions* 131
 - 5.3 FINDINGS FROM OBSERVATIONAL FIELDWORK 132
 - 5.3.1 *Main findings from the observational fieldwork in each pilot* 133
 - 5.3.2 *Compendium of findings per themes* 143
 - 5.3.3 *Comparative Analysis* 146
 - 5.4 CONCLUSIONS: CRITICAL SYNTHESIS AND POLICY RECOMMENDATIONS FOR EUROPEAN RURAL AREAS 148
- 6. CONCLUSION, DELIVERABLE CONTRIBUTIONS AND LIMITATIONS 151**
 - 6.1 CONCLUSIONS AND CONTRIBUTION TO T1.5 151
 - 6.2 IMPLICATIONS AND POLICY INSIGHTS 152
 - 6.3 CHALLENGES AND LIMITATIONS 153
 - 6.3.1 *Data collection challenges* 153
 - 6.3.2 *Mitigation strategies* 154
- 7. REFERENCES 155**
- 8. APPENDICES 165**
 - 8.1 APPENDIX 1 – DELPHI SURVEY QUESTIONNAIRE (1ST ROUND) 165
 - 8.2 APPENDIX 2 - DELPHI SURVEY (SECOND ROUND) 169
 - 8.3 APPENDIX 3 – INFORMED CONSENT 173
 - 8.4 APPENDIX 4 – DELPHI SURVEY OUTCOMES IN FIGURES 174
 - A. *Future Social Inclusion Needs in Rural Areas of Different Geographical Characteristics* ... 174
 - B. *Specific Needs of Vulnerable Groups* 176

C. *Impact on Access to Social Service Delivery* 177

D. *Social Entrepreneurship* 179

E. *Enhanced Governance and Mitigation Measures* 181

8.5 APPENDIX 5. NATIONAL INTERVIEWS GUIDE 183

8.6 APPENDIX 6. MESO AND MICRO (CATI AND PAPER-BASED) QUESTIONNAIRE..... 187

8.7 APPENDIX 7. EUROSTAT DEMOGRAPHIC REFERENCE TABLES (RELATION TO MESO-LEVEL NATIONAL SURVEY)..... 197

8.8 APPENDIX 8. CONSOLIDATED CATI SURVEY ANALYSIS 198

 8.8.1 *Introduction: Methodology and Objectives of the CATI Survey Analysis*..... 198

 8.8.2 *Case Study: France – Yonne (FRC14)*..... 198

 8.8.3 *Case Study: Greece – Peiraias, Nisoi (EL307)*..... 208

 8.8.4 *Case Study: Greece – Ioannina (EL543)*..... 218

 8.8.5 *Case Study: Ireland – Midland (IE063)*..... 228

 8.8.6 *Case Study: Poland – Lubelski (PL814)*..... 238

 8.8.7 *Case Study: Romania – Suceava (RO215) & Maramureş (RO114)*..... 249

 8.8.8 *Case Study: Slovakia – Košický kraj (SK042)*..... 259

 8.8.9 *Concluding Remarks*..... 271

8.9 APPENDIX 9. CONSOLIDATED PAPER-BASED SURVEY ANALYSIS..... 273

 8.9.1 *Introduction: Methodology and Objectives of the Face-to-Face Survey Analysis*..... 273

 8.9.2 *Case Study: France – Monéteau*..... 273

 8.9.3 *Case Study: Greece – Kythera*..... 284

 8.9.4 *Case Study: Greece – Konitsa* 295

 8.9.5 *Case Study: Ireland – Westmeath*..... 306

 8.9.6 *Case Study: Poland – Dębowa Kłoda*..... 316

 8.9.7 *Case Study: Romania – Poiana Stampei, Panaci, Botiza & Ocna Şugatag*..... 327

 8.9.8 *Case Study: Slovakia – Košice*..... 338

 8.9.9 *Concluding Remarks*..... 348

8.10 APPENDIX 10. OBSERVATIONAL FIELDWORK RESEARCH GUIDE 350

8.11 APPENDIX 11. SCRATCH NOTES TEMPLATE 361

8.12 APPENDIX 12. TEMPLATE FOR THE NARRATIVES TO BE SUBMITTED 362

8.13 APPENDIX 13. MASTER PROTOCOL 363

List of Figures

Figure 3.2.1.1 Overview of the process followed 18

Figure 3.2.3.1 Overview of the Delphi statements developed 22

Figure 3.2.3.2 Matrix Excel file for identifying experts 24

Figure 3.2.4.1 Response rate in rounds 1 & 2..... 25

Figure 3.2.4.2 Demographic characteristics of the INSPIRE Delphi Survey participants 25

Figure 3.3.1.1 Global risks over the long term (10 years), ranked by severity 28

Figure 3.3.1.2 Share (%) of respondents in OECD countries who are not at all, not very, somewhat, or very concerned about climate change, 2022..... 29

Figure 3.3.1.3 EU innovation performance versus global competitors in 2023 (left) & Change of global innovation performance from 2016-2023 (right)..... 33

Figure 3.3.1.4 Global map by regime type 35

Figure 3.3.1.5 Humanitarian funding (billion dollars), 2022-2024 37

Figure 3.3.3.1 The consensus achieved among participants 45

Figure 4.2.4.1 Coding tree for the theme of social exclusion. 64

Figure 4.2.4.2 Coding tree for the theme of social inclusion. 64

Figure 4.2.4.3 Coding tree for the theme of vulnerable groups..... 65

Figure 4.2.4.4 Coding tree for the theme of consequences and impact of social exclusion. 65

Figure 4.2.4.5 Coding tree for the theme of barriers to social inclusion. 66

Figure 4.2.4.6 Coding tree for the theme of drivers of social inclusion. 67

Figure 4.3.2.1 The four dimensions and axes of social inclusion from D1.1 81

Figure 4.3.5.1 Correlations between economic indicators; b) Employment and poverty risk; c) Employment and income satisfaction; d) Change in income and poverty risk; e) Change in income and income satisfaction; f) Employment and experiences of social inclusion; g) Change in income and experiences of social inclusion . 96

Figure 4.3.5.2 Correlations between indicators of social participation 97

Figure 4.3.5.3 Correlations between indicators of health and well-being..... 98

Figure 4.3.5.4 a) Correlations between indicators of living conditions; b) Self-assessed accessibility and vehicle ownership; c) Housing expenditures for mortgage and rent by housing situation; d) Experiences of social inclusion by housing situation 99

Figure 5.1.1.1 Spatial Allocation of the Pilot Areas 119

Figure 8.8.2.1 Yonne (FR). Demographic Characteristics 199

Figure 8.8.2.2 Yonne (FR). Labour Market and Environment 201

Figure 8.8.2.3 Yonne (FR). Living Conditions & Accessibility 202

Figure 8.8.2.4 Yonne (FR). Health Self-perception 203

Figure 8.8.2.5 Yonne (FR). Social Participation & Engagement 204

Figure 8.8.2.6 Yonne (FR). Digital Access 205

Figure 8.8.2.7 Yonne (FR). Risk of Poverty & Social Exclusion 207

Figure 8.8.3.1 Peiraias, Nisoi (EL). Demographic Characteristics 210

Figure 8.8.3.2 Peiraias, Nisoi (EL). Labour Market and Environment 211

Figure 8.8.3.3 Peiraias, Nisoi (EL). Living Conditions & Accessibility 213

Figure 8.8.3.4 Peiraias, Nisoi (EL). Health Self-perception 214

Figure 8.8.3.5 Peiraias, Nisoi (EL). Social Participation & Engagement 215

Figure 8.8.3.6 Peiraias, Nisoi (EL). Digital Access 216

Figure 8.8.3.7 Peiraias, Nisoi (EL). Risk of Poverty & Social Exclusion 217

Figure 8.8.4.1 Ioannina (EL). Demographic Characteristics 219

Figure 8.8.4.2 Ioannina (EL). Labour Market and Environment 221

Figure 8.8.4.3 Ioannina (EL). Living Conditions & Accessibility 222

Figure 8.8.4.4 Ioannina (EL). Health Self-perception 223

Figure 8.8.4.5 Ioannina (EL). Social Participation & Engagement 224

Figure 8.8.4.6 Ioannina (EL). Digital Access 225

Figure 8.8.4.7 Ioannina (EL). Risk of Poverty & Social Exclusion 227

Figure 8.8.5.1 Midland (IE). Demographic Characteristics..... 229

Figure 8.8.5.2 Midland (IE). Labour Market and Environment 231

Figure 8.8.5.3 Midland (IE). Living Conditions & Accessibility 232

Figure 8.8.5.4 Midland (IE). Health Self-perception 233

Figure 8.8.5.5 Midland (IE). Social Participation & Engagement 234

Figure 8.8.5.6 Midland (IE). Digital Access 236

Figure 8.8.5.7 Midland (IE). Risk of Poverty & Social Exclusion 237

Figure 8.8.6.1 Lubelski (PL). Demographic Characteristics 239

Figure 8.8.6.2 Lubelski (PL). Labour Market and Environment..... 241

Figure 8.8.6.3 Lubelski (PL). Living Conditions & Accessibility 242

Figure 8.8.6.4 Lubelski (PL). Health Self-perception..... 243

Figure 8.8.6.5 Lubelski (PL). Social Participation & Engagement..... 246

Figure 8.8.6.6 Lubelski (PL). Digital Access	247
Figure 8.8.6.7 Lubelski (PL). Risk of Poverty & Social Exclusion	248
Figure 8.8.7.1 Suceava & Maramureş (RO). Demographic Characteristics	250
Figure 8.8.7.2 Suceava & Maramureş (RO). Labour Market and Environment	252
Figure 8.8.7.3 Suceava & Maramureş (RO). Living Conditions & Accessibility	254
Figure 8.8.7.4 Suceava & Maramureş (RO). Health Self-perception	255
Figure 8.8.7.5 Suceava & Maramureş (RO). Social Participation & Engagement	256
Figure 8.8.7.6 Suceava & Maramureş (RO). Digital Access	257
Figure 8.8.7.7 Suceava & Maramureş (RO). Risk of Poverty & Social Exclusion	258
Figure 8.8.8.1 Košický kraj (SK). Demographic Characteristics	261
Figure 8.8.8.2 Košický kraj (SK). Labour Market and Environment	263
Figure 8.8.8.3 Košický kraj (SK). Living Conditions & Accessibility	264
Figure 8.8.8.4 Košický kraj (SK). Health Self-perception	266
Figure 8.8.8.5 Košický kraj (SK). Social Participation & Engagement	267
Figure 8.8.8.6 Košický kraj (SK). Digital Access	268
Figure 8.8.8.7 Košický kraj (SK). Risk of Poverty & Social Exclusion	270
Figure 8.9.2.1 Monéteau (FR). Demographic Characteristics	276
Figure 8.9.2.2 Monéteau (FR). Labour Market and Environment	277
Figure 8.9.2.3 Monéteau (FR). Living Conditions & Accessibility	279
Figure 8.9.2.4 Monéteau (FR). Health Self-perception	280
Figure 8.9.2.5 Monéteau (FR). Social Participation & Engagement	281
Figure 8.9.2.6 Monéteau (FR). Digital Access	282
Figure 8.9.2.7 Monéteau (FR). Risk of Poverty & Social Exclusion	283
Figure 8.9.3.1 Kythera (EL). Demographic Characteristics	285
Figure 8.9.3.2 Kythera (EL). Labour Market and Environment	287
Figure 8.9.3.3 Kythera (EL). Living Conditions & Accessibility	288
Figure 8.9.3.4 Kythera (EL). Health Self-perception	289
Figure 8.9.3.5 Kythera (EL). Social Participation & Engagement	291
Figure 8.9.3.6 Kythera (EL). Digital Access	292
Figure 8.9.3.7 Kythera (EL). Risk of Poverty & Social Exclusion	294
Figure 8.9.4.1 Konitsa (EL). Demographic Characteristics	297
Figure 8.9.4.2 Konitsa (EL). Labour Market and Environment	298
Figure 8.9.4.3 Konitsa (EL). Living Conditions & Accessibility	300
Figure 8.9.4.4 Konitsa (EL). Health Self-perception	301
Figure 8.9.4.5 Konitsa (EL). Social Participation & Engagement	303
Figure 8.9.4.6 Konitsa (EL). Digital Access	304
Figure 8.9.4.7 Konitsa (EL). Risk of Poverty & Social Exclusion	305
Figure 8.9.5.1 Moate (IE). Demographic Characteristics	307
Figure 8.9.5.2 Moate (IE). Labour Market and Environment	308
Figure 8.9.5.3 Moate (IE). Living Conditions & Accessibility	310
Figure 8.9.5.4 Moate (IE). Health Self-perception	311
Figure 8.9.5.5 Moate (IE). Social Participation & Engagement	312
Figure 8.9.5.6 Moate (IE). Digital Access	314
Figure 8.9.5.7 Moate (IE). Risk of Poverty & Social Exclusion	315
Figure 8.9.6.1 Parczew (PL). Demographic Characteristics	318
Figure 8.9.6.2 Parczew (PL). Labour Market and Environment	319
Figure 8.9.6.3 Parczew (PL). Living Conditions & Accessibility	322
Figure 8.9.6.4 Parczew (PL). Health Self-perception	323
Figure 8.9.6.5 Parczew (PL). Social Participation & Engagement	324
Figure 8.9.6.6 Parczew (PL). Digital Access	325
Figure 8.9.6.7 Parczew (PL). Risk of Poverty & Social Exclusion	326

Figure 8.9.7.1 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Demographic Characteristics 329

Figure 8.9.7.2 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Labour Market and Environment..... 330

Figure 8.9.7.3 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Living Conditions & Accessibility..... 332

Figure 8.9.7.4 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Health Self-perception 333

Figure 8.9.7.5 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Social Participation & Engagement. 335

Figure 8.9.7.6 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Digital Access..... 336

Figure 8.9.7.7 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Risk of Poverty & Social Exclusion . 337

Figure 8.9.8.1 Košice (SK). Demographic Characteristics 339

Figure 8.9.8.2 Košice (SK). Labour Market and Environment..... 340

Figure 8.9.8.3 Košice (SK). Living Conditions & Accessibility 342

Figure 8.9.8.4 Košice (SK). Health Self-perception..... 343

Figure 8.9.8.5 Košice (SK). Social Participation & Engagement..... 344

Figure 8.9.8.6 Košice (SK). Digital Access..... 345

Figure 8.9.8.7 Košice (SK). Risk of Poverty & Social Exclusion 347

Figure 8.10.1.1: The location observation "mantra" 353

List of Tables

Table 4.3.1 Overview of sampling organisation and returned sample size per country. 82

Table 4.3.2 Progressive regression analyses and stratifications. 88

Table 4.3.3 Summary statistics for experienced social inclusion and rurality. 89

Table 4.3.4 Summary statistics for gender and marital status. 90

Table 4.3.5 Fluency in the local language and ethnicity..... 91

Table 4.3.6 Self-reported status of physical and mental health. 91

Table 4.3.7 Descriptive statistics for level of education and employment status. 92

Table 4.3.8 Internal consistency of compound variables. 94

Table 4.3.9 Progressive regression analyses showing the associations between the four dimensions of social inclusion and experienced social inclusion, separately. 100

Table 4.3.10 Associations between the axes of social inclusion and experienced social inclusion. 101

Table 4.3.11 Fully specified regression models with 3.1) all dimensions and 3.2) all dimensions and axes.. 102

Table 4.3.12 Country stratifications of the fully specified model (model 3.2). 108

Table 4.3.13 Regression stratified by degree rurality..... 111

Table 5.2.1 SWOT Analysis of Rural-Peripheral Regions. 132

Table 5.3.1 Delphi Survey Questionnaire (1st round). 147

Table 8.7.1 Population by type of region. 197

Table 8.7.2 Population by sex. 197

Table 8.7.3 Population by level of education..... 197

Table 8.10.1 Observation modes along the “non-participant – participant” continuum..... 351

Table 8.10.2 What to observe in general..... 354

List of Terms and Definitions

Abbreviation	Definition
AI	Artificial intelligence
AROPE	At Risk of Poverty or Social Exclusion
CATI	Computer-Assisted Telephone Interviewing
CLLD	Community-led local development
DE	Determinants Identified
EU	European Union
EU-SILC	EU Statistics on Income and Living Conditions
GDPR	General Data Protection Regulation
ICT	Information and Communication Technology
INSPIRE	“Supporting the inclusion, wellbeing, and growth of rural areas through multi-actor Smart Villages labs for enhanced governance frameworks” (Horizon Europe project)
IPCC	The Intergovernmental Panel on Climate Change
Laeken Indicators	Indicators to monitor poverty and social exclusion, developed by the European Council
LNOB	Leaving no one behind
NEETs	Not in Education, Employment, or Training (youth indicator)
NGOs	Non-profit organizations
NUTS	Nomenclature of Territorial Units for Statistics
R&D	Research and development
SDGs	Sustainable Development Goals
SE	Social Economy
SES	Socioeconomic status
SMEs	Small and Medium-sized Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
TWIN transition	Digital and green transitions
OECD	Organisation for Economic Co-operation and Development

2. Introduction: Context, Objectives and Relevance of the study

2.1 Context and background

Deliverable D1.2 is a central analytical output within Work Package 1 of the INSPIRE project, which investigates the structural, institutional, and place-based dynamics underpinning social exclusion in rural areas across Europe. Building upon the theoretical and methodological groundwork established in Deliverable D1.1—which provided an integrated definition of social exclusion and a corresponding set of indicators—this deliverable shifts the focus from conceptual development to empirical exploration. Specifically, D1.2 seeks to identify and critically assess the multi-level drivers and barriers that shape patterns of exclusion and vulnerability in rural territories.

The overall objective of INSPIRE is to support the inclusive and sustainable development of European rural areas by facilitating access to quality services and enhancing the wellbeing of rural populations, particularly vulnerable groups. In this context, D1.2 contributes to the broader mission by collecting and interpreting data at multiple scales to enable evidence-informed policymaking. The findings presented herein will inform the development of the rural territorial typology (D1.3) and the Rural Social Inclusion Policy Dashboard (D5.2), providing strategic guidance for addressing exclusionary dynamics across diverse rural settings.

The analytical approach adopted in this deliverable is grounded in the multidimensional framework advanced by Lazarte, which classifies the conditions of rural vulnerability into three broad categories: (i) structural (global) weaknesses, (ii) fragile environments (e.g., national regimes), and (iii) dynamic pressures (e.g., local institutions)¹. In alignment with this framework and the project's Grant Agreement, the analysis is organised across three interrelated levels:

- (i) **Macro-level:** This dimension examines global and transnational phenomena—referred to in the project's design as "mega-trends"—such as the Twin Transition (digital and green), climate change, ageing populations, and technological automation. These forces constitute structural pressures that shape the socio-economic trajectories of rural regions, often beyond the immediate control of national or local actors.
- (ii) **Meso-level:** At this scale, the focus is on national governance architectures, political systems, welfare regimes, and institutional performance. As the nation-state continues to be the primary provider of public services and regulatory frameworks, meso-level conditions play a pivotal role in enabling or constraining rural inclusion.
- (iii) **Micro-level:** This level captures the context-specific realities of rural life and exclusion at the scale of individuals and communities. It addresses localised challenges, including limited access to services, social capital disparities, demographic decline, and cultural or spatial marginalisation. Given the inherently contextual nature of social exclusion, the micro-level analysis is conducted through direct engagement with communities and vulnerable groups across the project's pilot areas.

¹ ILO (2017). "Understanding the drivers of rural vulnerability". EMPLOYMENT Working Paper No. 214

2.2 Objectives

Our research was conducted in the seven INSPIRE pilot regions—Košice (Slovakia), Eastern and Midland Regions (Ireland), Lubelskie (Poland), Bourgogne (France), Kythera (Greece), Konitsa (Greece) and Maramureş–Suceava (Romania). Together, these sites represent a spectrum of rural typologies—traditional, island/coastal, peri-urban and mountainous—and encompass diverse geosocioeconomic landscapes. By serving both as living laboratories for tailored data collection and as illustrative case studies, they ensure that our insights can be meaningfully replicated across rural Europe.

Lack of data granularity obscures policy understanding of social inclusion challenges in rural areas. Vulnerable groups at risk of exclusion are usually underrepresented in survey samples. This can be attributed to structural reasons: (i) remoteness of the population in wide rural areas; (ii) vulnerable groups form a small percentage of survey samples; (iii) accessibility issues (e.g., lack of permanent residence from homeless people); and (iv) language barriers (e.g., dialects).² Beyond these, social constraints—such as mistrust towards researchers rooted in cultural and religious beliefs or limited education—make these groups in rural Europe particularly hard to reach. **The objective of this deliverable is to provide insight into the specific challenges and barriers that hinder social inclusion in rural areas across European regions.** To identify and understand these obstacles in rural areas, this deliverable aims to improve data collection strategies and better inform inclusive policy design. To that end, **a combination of traditional and advanced data collection methods was employed.** We leverage the expertise and networks of pilot and partner organisations to engage with community-based actors, including charities, churches, local influencers, and networks. This approach facilitates trust-building with community members. Local institutions were involved to help reach those without permanent residence, while tailored communication and outreach methods (e.g., paper-based surveys, telephone interviews) were used to connect with widely dispersed rural populations.

Regarding data collection, in order to cover all three levels, we relied on the generation of a set of different sources of data to capture the complex and nuanced experiences of rural dwellers, as briefly presented next.

Macro-level:

- **Delphi method:** It is a semi-quantitative method designed to obtain expert consensus on topic of uncertainty, that was applied with EU-level experts.

Meso-level:

- **Semi-structured interviews with QH stakeholders at national level:** This method allows for rapport-building and enables participants to share experiences.
- **Online surveys:** which allows participants to maintain their anonymity while still sharing their views.

² UN (2022). “Approaches to Measuring Social Exclusion”. UNECE Task Force.

Micro-level:

- **Paper-based surveys:** Traditional and reliable data collection method, where a printed survey is used directly by the researcher while making the observational fieldwork.
- **CATI surveys:** They are conducted over the phone, which is a more accessible and efficient mode of interviewing.
- **Observational fieldwork:** The researcher participates as direct observer and immerses themselves in the examined social context (rural dwellers and vulnerable groups).

As observed, the micro-level data imply participatory methods and engage directly local communities and vulnerable groups to gather accurate and reliable data on “hard-to-reach” populations, draw safe conclusions for social inclusion and develop interventions that meet the needs of these groups. In all pilot cases where primary research takes place, a clear protocol was designed by pilot partners with the assistance of consortium experts, in order to present criteria and guidelines on the participation of such persons in research activities.

We integrate the data coming from all these levels with the final objective of further strengthening the understanding of policy makers to detect and counter challenges to rural social inclusion by deploying actual, concrete roadmaps and pilot activities that will help us discover hidden challenges that mainstream research cannot spot.

2.3 Relevance

The data and conclusions obtained within this D1.2 helps us **develop a territorial typology of rural areas on social inclusion** under Task 1.5 of INSPIRE project, and proved in deliverable D1.3. In addition, our robust evaluation of pilot actions will **integrate vulnerable groups in the project’s 7 Smart Village Labs** and connect them to policy makers, who will be able to liaise with these groups to understand their every-day challenges, problems, and optimal remedies. The pilot-driven evidence that was generated by our representative sample of pilot areas will result in policy briefs with strong policy replication and uptake potential for all rural, coastal, peri-urban and mountainous areas of Europe. Our piloting of new governance frameworks, based on labs, and the application of SE solutions, will offer to policy makers real-life evidence of what works and what does not, as well as corrective measures for future interventions.

2.4 Structure of the deliverable

After this introduction (section 1), this deliverable has three core sections devoted to the macro (section 2), meso (section 3) and micro-levels (section 4). The fifth section concludes the main findings of the deliverable, a set of implications and policy recommendations, and its main contributions and limitations. We also provide the full list of references employed to develop this document. In addition, the Appendix includes the complete set of materials used (surveys, interview guides, protocols, etc.) as well as extensive in-depth results.

3. Macro-Level Analysis

This section of the D1.2 report presents the findings from a two-round Delphi foresight survey conducted as part of the macro-level analysis (i.e., transnational mega-trends that impact social exclusion trends and associated outcomes in rural Europe) within the INSPIRE project. The objective was to explore perspectives on the possible trajectories and social inclusion needs of European rural areas over the next ten years, with a focus on identifying emerging challenges, potential responses, and strategic implications for policy and practice.

The Delphi process engaged 65 European experts from academia, civil society, public administration, and the private sector, selected for their expertise in rural development, groups in vulnerable situations, social services, social entrepreneurship, and rural governance. The survey focused on five thematic areas: (i) social inclusion needs in rural regions of different geographical types, (ii) needs of groups in vulnerable situations, (iii) access to social service delivery, (iv) the role of social entrepreneurship, and (v) governance and mitigation measures. Experts evaluated 49 future-oriented statements based on evidence from prior literature and policy analysis. The iterative nature of the Delphi method enabled participants to reflect on peer feedback between rounds. By the end of the process, strong or majority agreement was reached on most projections, while a small number showed divided opinion, reflecting the complexity and regional variation of rural dynamics.

Key insights include the recognition that demographic ageing, digitalisation, and regional inequalities will intensify pressures on rural social cohesion. Groups in vulnerable situations will require targeted support, particularly in accessing education, healthcare, and employment. New service delivery models, such as mobile, online, and integrated approaches, were seen as essential to overcoming spatial barriers. Social entrepreneurship was widely viewed as a promising but underutilised vehicle for inclusion, especially if supported through funding, training, and network-building. The importance of inclusive governance, participatory planning, and locally grounded strategies emerged as a recurrent theme across all thematic areas.

The Delphi outcomes contributed directly to the construction of future scenarios for rural areas by 2035, illustrating both the risks of inaction and the potential for inclusive revitalisation. These findings will feed into the development of the INSPIRE territorial typology of rural regions on social wellbeing, inform the structure of the Rural Social Inclusion Policy Dashboard, and shape targeted capacity-building activities for rural stakeholders. This foresight exercise offers a forward-looking evidence base to anticipate challenges, guide strategic planning, and support policy innovation for rural social inclusion across Europe.

3.1 Section Introduction

The current section presents the research results of **Task 1.2 “Macro-level: mega-trends and global drivers of social exclusion in rural areas”**. It has been elaborated to design, guide the implementation, and report the results of a two-round Delphi survey, a forecasting technique that solicits experts’ views. The objective of this study has been to gather forecasts on future trajectories with a **10-year horizon**³ regarding:

- (i) social inclusion needs of rural areas of different geographical characteristics
- (ii) specific needs of vulnerable groups (integrating the intersectional dimension)
- (iii) impact on access in service delivery
- (iv) impact on social entrepreneurship and
- (v) potential mitigation measures through enhanced governance.

Concerning the process followed, literature research was initially performed to identify the anticipated global mega-trends influencing rural areas, the structural drivers of social exclusion and the impacts of global drivers in rural areas in the next ten years. The outcomes of the literature review were then translated into statements for the Delphi participants to discuss their potentiality and impacts.

To that end, **65 experts in the fields of social inclusion and rural development** participated in the survey, above the relevant target of 50 prescribed originally. Their responses were collected, analysed, and interpreted, and eventually made available to all INSPIRE partners, in order to feed the next steps of the project. More accurately, insights from this Section of Deliverable 1.2 will inform the territorial typology on social wellbeing (T1.5 Typology on social wellbeing, resilience and exclusion of European rural areas), the capacity building (T4.1 Capacity building in business, technical, digital, and soft skills), and policy recommendations (T5.2 Creation of the Rural Social Inclusion Policy Dashboard).

The current section is structured as follows:

- **Sub-section 3.2** describes the design of the study, including the steps for the desk research, as well as the methods for selecting participants for the Delphi survey and analysing data, among others.
- **Sub-section 3.3** reviews the most critical drivers of social exclusion in rural areas, as they are cited in the literature.
- **Sub-section 3.4** presents the results of the two-round Delphi survey, including forecasts on future trajectories with respect to social inclusion needs in rural areas, needs of groups in vulnerable situations, access in social services delivery, social entrepreneurship and governance mitigation measures.
- **Sub-section 3.5** provides the main conclusions of this exercise.

³ A 10-year horizon was selected as it offers a balance between strategic foresight and practical relevance. It is long enough to capture the influence of slow-moving structural trends, such as demographic shifts or governance reforms, while still being close enough to allow experts to make informed and meaningful projections. A longer timeframe could risk reduced accuracy, particularly given the pace of technological disruption.

The **Appendices** of this section include (i) the set of statements employed in the frame of the Delphi survey, (ii) screenshots of the 2nd round of the Delphi survey, (iii) the informed consent and (iv) figures with the final results.

The methodology of INSPIRE for the Delphi exercise builds on know-how and tools and templates that were developed internally by Q-PLAN as well as on good practices from literature. As in previous EU-funded projects, tailored modifications to the methodology were implemented for INSPIRE as well, in order to comply with the conditions of the Grant Agreement (GA) and the particularities of the project. Along these lines, this deliverable presents the adjusted methodology as it was further developed and applied in INSPIRE, as well as presents the results from its application during the project.

3.2 Delphi Methodology

3.2.1 Overview

The purpose of this Section is to forecast the constituting elements of future developments in the domains of (i) social inclusion needs of rural areas; (ii) needs of groups in vulnerable situations; (iii) access in social service delivery; (iv) social entrepreneurship; and (v) governance mitigation measures, as well as the impacts they may produce thereafter. Among the various available forecasting techniques, **the Delphi method was selected as a suitable approach for the topic under investigation** (see subsection 3.2.2). The overall process followed consists of five main steps (see Figure 3.2.1.1):

Step 1	As typical for the Delphi method, literature research was initially performed to identify the anticipated global mega-trends influencing rural areas, structural drivers of social exclusion and extract initial assumptions on the impacts of global drivers in rural areas in the next ten years (see sections 3.3.1, 3.3.2 & 3.3.3).
Step 2	The outcomes of the literature review were translated into statements about future developments, and then, the online survey set of statements was prepared (see Appendices, section 8.1).
Step 3	A set of expert selection criteria and an engagement strategy were established. During the first Delphi round, 65 experts were recruited with the support of the consortium, bringing expertise in (i) social inclusion and exclusion with a focus on rural areas, (ii) groups in vulnerable situations, (iii) social services, (iv) social entrepreneurship, and (v) governance. Their feedback, grounded in their expertise, experiences, and insights, formed the basis for the analysis (see subsection 3.2.4).
Step 4	This feedback was anonymously collected, consolidated, and returned to the participants individually during the second round of the Delphi. At that time, participants had the opportunity to revise their responses in which bipolarity or divergence of opinions prevailed in the first round, in the light of other participants' views (see subsection 3.2.5).
Step 5	Finally, the results were aggregated, analysed and outlined to come up with meaningful conclusions (see subsections 3.4 & 3.5).



Figure 3.2.1.1 Overview of the process followed

3.2.2 Theoretical Background

3.2.2.1. Forecasting

Forecasting and planning are regarded to be the basis for rational decision-making.⁴ Yet, the future is uncertain and most often unpredictable and hence, many people, businesses, and **institutions strive to predict future developments and their economic and policy implications.** Forecasting

⁴ Kurzak, L. (2012). Importance of forecasting in enterprise management. *Advanced Logistic systems*, 6(1), 173-182. Retrieved from https://als.uni-miskolc.hu/old_als/cikkek/2012/ALS6_p173_182_Kurzak_L.pdf

studies are complicated and, certainly, not always accurate at depicting the future.^{5,6} They should not be perceived as predictors of the future, but rather as “*tools to broadly describe the space within which actual futures are likely to develop*”,⁷ helping all concerned parties to manage the uncertainty.⁸

Since the early 1960s, **several technology-forecasting methods have been developed.**⁹ With regards to their nature, they are commonly classified into three categories: (i) qualitative methods, such as brainstorming, citizen panels, expert panels, essays, futures workshops, gaming, interviews, literature review, relevance trees, scenarios, and SWOT analysis; (ii) quantitative methods, such as bibliometrics, modelling/simulation, and trend extrapolation; and (iii) semi-quantitative methods, such as cross-impact/structural analysis, Delphi, multi-criteria analysis, stakeholder mapping and (technology) road-mapping.¹⁰

3.2.2.2. The Delphi Method

The methods that fit into the third category apply mathematical principles to quantify subjectivity, judgements and opinions of experts and other stakeholders (e.g., by weighting opinions and distributing probabilities).¹¹ The Delphi method, in particular, is a multi-round expert survey in which, “*in the second and later rounds of the survey the results of the previous round are given as feedback*”.¹² To be more specific, **the Delphi method initiates as an ordinary opinion survey to solicit participants’ opinions on a subject.** What differentiates Delphi is that, afterwards, the facilitator collects, consolidates, and returns these opinions to the participants individually. Therefore, during the second (and any later) round, the experts can revise their viewpoints under the influence of their colleagues’ opinions. The rationale is that the respondents can learn from the anonymised views of others, without being unduly influenced either by traditional group communication processes, such as groupthink (i.e., “*the psychological drive for consensus at any cost that suppresses dissent and appraisal of alternatives*”) or by a few individuals who may talk loudest at meetings, or who have most prestige.^{13,14}

⁵ Branson, W., Laffont, J. J., Solow, R., Ulph, D., von Weizsäcker, C., & Kyriakou, D. (2002). Economic dimensions of prospective technological studies at the Joint Research Centre of the European Commission. *Technological Forecasting and Social Change*, 69(9), 851-859. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162502003001>

⁶ Saritas, O., & Oner, M. A. (2004). Systemic analysis of UK foresight results: joint application of integrated management model and roadmapping. *Technological Forecasting and Social Change*, 71(1-2), 27-65. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162503000672>

⁷ Eyre, N., & Baruah, P. (2015). Uncertainties in future energy demand in UK residential heating. *Energy Policy*, 87, 641-653. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0301421514007058>

⁸ Branson, W., Laffont, J. J., Solow, R., Ulph, D., von Weizsäcker, C., & Kyriakou, D. (2002). Economic dimensions of prospective technological studies at the Joint Research Centre of the European Commission. *Technological Forecasting and Social Change*, 69(9), 851-859. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162502003001>

⁹ Cho, Y., & Daim, T. (2013). Technology forecasting methods. In *Research and Technology Management in the Electricity Industry* (pp. 67-112). Springer, London. Retrieved from https://link.springer.com/chapter/10.1007/978-1-4471-5097-8_4

¹⁰ Butter, M., Brandes, F., Keenan, M., & Popper, R. (2008). How are foresight methods selected?. *Foresight*. Retrieved from [http://projects.mcrit.com/esponfutures/documents/Foresight%20methodology/Popper%20R.%20\(2008\)%20How%20are%20foresight%20methods%20selected.pdf](http://projects.mcrit.com/esponfutures/documents/Foresight%20methodology/Popper%20R.%20(2008)%20How%20are%20foresight%20methods%20selected.pdf)

¹¹ Butter, M., Brandes, F., Keenan, M., & Popper, R. (2008). How are foresight methods selected?. *Foresight*. Retrieved from [http://projects.mcrit.com/esponfutures/documents/Foresight%20methodology/Popper%20R.%20\(2008\)%20How%20are%20foresight%20methods%20selected.pdf](http://projects.mcrit.com/esponfutures/documents/Foresight%20methodology/Popper%20R.%20(2008)%20How%20are%20foresight%20methods%20selected.pdf)

¹² Cuhls, K. (1998). *Foresight with Delphi Surveys in Japan*, Heidelberg: Physica (Technik, Wirtschaft und Politik 29). https://www.researchgate.net/publication/260210556_Foresight_with_Delphi_Surveys_in_Japan

¹³ von Briel, F. (2018). The future of omnichannel retail: A four-stage Delphi study. *Technological Forecasting and Social Change*, 132, 217-229. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162518302026>

¹⁴ Futures4Europe (2025) <https://www.futures4europe.eu/>

The original purpose of the Delphi method was to reach consensus among a group of experts about specific statements (e.g., opinions and forecasts).¹⁵ Later, **the obligatory need for consensus was dissolved**. Researchers have argued that recording and presenting the diverse experts and stakeholders' views on a contested topic is valuable per se, since it provides "*a broader understanding of the evidence and of the range of issues at stake*".¹⁶ In this respect, the main benefit of this research technique is that it facilitates the development of reliable group opinions by providing diverse experts a place to discuss within a structured setting.¹⁷

Since Delphi does not seek to establish consensus, **the iterative process theoretically ends once views have been stabilised**, meaning that participants' responses no longer alter significantly between successive rounds of feedback.¹⁸ However, in practice, it is often challenging to convince experts to answer a questionnaire twice or more. Usually, after the second or third round, the dropout rate increases. To avoid this, most current studies are limited to two rounds.¹⁹

3.2.2.3. Delphi Survey Design

Overall, the Delphi method is perceived to be difficult to perform well. Two **critical success factors for its implementation are the quality of the questionnaire** and the appropriateness of the group of experts. The questionnaire includes several projections (i.e., statements about the possible future) that the experts are asked to evaluate (in terms of probability, or of the severity of impact, etc). These statements need to meet certain quality criteria, such as (i) to be short and concise to avoid complexity and potentially resulting confusion; (ii) to focus on a single issue to avoid ambiguity; and (iii) to exclude positive or negative item wordings to avoid any influence on respondents.^{20,21}

Besides, **the outcome of a Delphi survey is largely dependent on the group of participants involved**.²² A narrow set of criteria for selecting experts may lead to unrepresentative views or miss out important sources of knowledge.²³ Thus, the selected experts need to at least: (i) be aware of the current state of development in the domain of focus,²⁴ and (ii) to have heterogeneous backgrounds

¹⁵ Dalkey, N. C. (1969). The Delphi method: An experimental study of group opinion (No. RM-5888-PR). RAND CORP SANTA MONICA CALIF. Cited in: Jiang, R., Kleer, R., & Piller, F. T. (2017). Predicting the future of additive manufacturing: A Delphi study on economic and societal implications of 3D printing for 2030. *Technological Forecasting and Social Change*, 117, 84-97. Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162517300276>

¹⁶ Kattirtzi, M., & Winskel, M. (2020). When experts disagree: Using the Policy Delphi method to analyse divergent expert expectations and preferences on UK energy futures. *Technological Forecasting and Social Change*, 153, 119924. Retrieved from: <https://www.sciencedirect.com/science/article/abs/pii/S0040162519310170>

¹⁷ Jiang, R., Kleer, R., & Piller, F. T. (2017). Predicting the future of additive manufacturing: A Delphi study on economic and societal implications of 3D printing for 2030. *Technological Forecasting and Social Change*, 117, 84-97. Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162517300276>

¹⁸ Heiko, A. (2012). Consensus measurement in Delphi studies: review and implications for future quality assurance. *Technological forecasting and social change*, 79(8), 1525-1536. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162512001023>

¹⁹ Futures4Europe (2025) <https://www.futures4europe.eu/>

²⁰ Turoff, M., & Linstone, H. A. (2002). The Delphi method-techniques and applications. Cited in: Jiang, R., Kleer, R., & Piller, F. T. (2017). Predicting the future of additive manufacturing: A Delphi study on economic and societal implications of 3D printing for 2030. *Technological Forecasting and Social Change*, 117, 84-97. Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162517300276>

²¹ Hyman, M. and Sierra, J. (2016). Guidelines for writing good survey questions. NM State University. Business Outlook. Volume 14, Issue 2. Retrieved from https://www.researchgate.net/publication/282250020_Guidelines_for_writing_good_survey_questions

²² von Briel, F. (2018). The future of omnichannel retail: A four-stage Delphi study. *Technological Forecasting and Social Change*, 132, 217-229. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162518302026>

²³ Futures4Europe (2025) <https://www.futures4europe.eu/>

²⁴ Georghiou, L. (1996). The UK technology foresight programme. *Futures*, 28(4), 359-377. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/0016328796000134>

(in terms of the type of stakeholder, nationality, etc), as “*more diverse viewpoints reduce certain polarisation of preferences and responses*”.²⁵

Concerning **the number of participants in a Delphi survey**, there is no optimum choice. It depends on the scope of the study, the desired panel diversity, and the availability of experts in the area under investigation.²⁶ There are Delphi studies featuring 18-40 participants^{27,28,29,30}, others with 73-76,^{31,32} but also others with 127 participants.³³

Finally, researchers are arguing that the Delphi method can provide additional insights into the investigation topic if **the experts can also submit qualitative comments to validate the propositions**. In other words, participants can be invited to share arguments for or against a statement, resolving the problem of lack of justification.³⁴

3.2.3 Preparations for the INSPIRE Delphi Survey

3.2.3.1. Formulation of the Delphi Statements

In the frame of INSPIRE, the Delphi survey statements were developed through desk-based research (between M4 and M7 of the project, building also on the results of Task 1.1, which ended on M5). Initially, the key global mega-trends influencing rural areas were identified. This kind of information allows a better understanding of the broader framework within which the structural drivers of social exclusion influence areas and can lead to conclusions regarding the impacts of global drivers in rural areas.

As a next step, the critical insights gained from the literature research were used to develop a total of **49 survey statements**. In essence, these statements constitute a set of projections about the potential drivers, trends, and impacts identified. With a keen awareness of the diversity of the survey sample across different disciplines and professions, **the overall quality and comprehensibility of the formulated statements were seriously considered**. Following the guidelines of Hyman and

²⁵ Yaniv, I. (2011). Group diversity and decision quality: Amplification and attenuation of the framing effect. *International Journal of Forecasting*, 27(1), 41-49. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0169207010000944>

²⁶ Loo, R. (2002). The Delphi method: a powerful tool for strategic management. *Policing: An International Journal of Police Strategies & Management*. Retrieved from <https://www.emerald.com/insight/content/doi/10.1108/13639510210450677/full/html?fullSc=1&mbSc=1>

²⁷ von Briel, F. (2018). The future of omnichannel retail: A four-stage Delphi study. *Technological Forecasting and Social Change*, 132, 217-229. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162518302026>

²⁸ Mushonga, M., Arun, T. G., & Marwa, N. W. (2018). Drivers, inhibitors and the future of co-operative financial institutions: A Delphi study on South African perspective. *Technological Forecasting and Social Change*, 133, 254-268. Retrieved from <http://www.treasury.gov.za/coopbank/publications/Drivers%20inhibitors%20and%20the%20future%20of%20co-operative%20financial%20institutions%20in%20South%20Africa.pdf>

²⁹ Kluge, U., Ringbeck, J., & Spinler, S. (2020). Door-to-door travel in 2035—A Delphi study. *Technological Forecasting and Social Change*, 157, 120096. Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162520309227>

³⁰ Melander, L., Dubois, A., Hedvall, K., & Lind, F. (2019). Future goods transport in Sweden 2050: Using a Delphi-based scenario analysis. *Technological Forecasting and Social Change*, 138, 178-189. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162517303621>

³¹ Roßmann, B., Canzaniello, A., von der Gracht, H., & Hartmann, E. (2018). The future and social impact of Big Data Analytics in Supply Chain Management: Results from a Delphi study. *Technological Forecasting and Social Change*, 130, 135-149. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S004016251731329X>

³² Culot, G., Orzes, G., Sartor, M., & Nassimbeni, G. (2020). The future of manufacturing: A Delphi-based scenario analysis on Industry 4.0. *Technological forecasting and social change*, 157, 120092. Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162520309185>

³³ Kattirtzi, M., & Winskel, M. (2020). When experts disagree: Using the Policy Delphi method to analyse divergent expert expectations and preferences on UK energy futures. *Technological Forecasting and Social Change*, 153, 119924. Retrieved from: <https://www.sciencedirect.com/science/article/abs/pii/S0040162519310170>

³⁴ Saritas, O., & Oner, M. A. (2004). Systemic analysis of UK foresight results: joint application of integrated management model and roadmapping. *Technological Forecasting and Social Change*, 71(1-2), 27-65. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162503000672>

Sierra³⁵, the topic statements were as far as possible concise, precise, unambiguous, and devoid of epistemic terminology, as well as inclusive and unbiased. Another consideration was to limit the number of statements to minimise participant attrition during the Delphi rounds and to allow sufficient time for providing meaningful insights in the comments, while still adequately covering the full scope of the exercise topics.

Finally, **the statements were embedded in a survey** titled “Delphi Survey: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon)”. The survey was structured in a way that allows participants to indicate their degree of agreement with each statement. An ordinal 5-point Likert-type response scale, ranging from “Fully disagree” to “Fully agree”, was used. Besides, the questionnaire provided participants with the option of explaining the reasoning behind their answers.

Out of the 49 statements developed, 10 statements are related to **future social inclusion needs in rural areas of different geographical characteristics**, 10 statements are related to the **specific needs of various categories of groups in vulnerable situations in rural areas**, 10 statements are related to the **impact on access to social service delivery**, 9 statements are related to **social entrepreneurship** and 10 statements are related to **enhanced governance and mitigation measures** (see Figure 3.2.3.1). The full list of statements is available in the Appendices (see section 8.1).

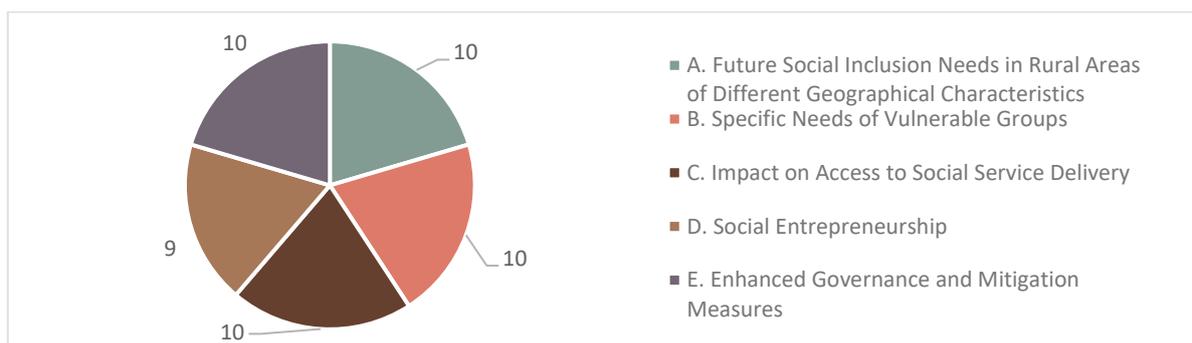


Figure 3.2.3.1 Overview of the Delphi statements developed

³⁵ Hyman M. & Sierra J. (2016). Guidelines for writing good survey questions. NMSU Business Outlook. 14. https://www.researchgate.net/publication/282250020_Guidelines_for_writing_good_survey_questions

3.2.3.2. Recruitment of Panel Participants

In this stage of the survey, **87 experts were originally identified as potential participants**. This initial pool of experts was compiled using a networking approach, leveraging the networks and expertise of the INSPIRE partners. The partners were briefed about the steps to be followed for the implementation of the Delphi Survey, and it was made clear that its successful implementation depends on two key factors, i.e. the quality of the questionnaire and the relevance and diversity of the expert group.

To ensure a meaningful and efficient exercise, we developed the following selection criteria for the experts:

❖ Generic Criteria (required for all experts)

1. **Responsiveness:** Experts should be reachable by email within a maximum of two workdays or by phone.
2. **Relevance:** Experts should have relevant expertise to provide constructive feedback.
3. **Availability:** Experts must be able to dedicate around 45 minutes to complete both rounds of the DELPHI exercise.

❖ Expertise Criteria (at least one high level required)

Experts should possess significant knowledge and/or experience in at least one of the following areas:

1. Social Inclusion/Exclusion in rural contexts
2. Groups in Vulnerable Situations (e.g., Disabled, Elderly, Migrants/Refugees, Minorities, Women, Youth)
3. Social Services and Wellbeing
4. Enhanced Governance frameworks for Social Inclusion (including disruptive technologies)
5. Social Entrepreneurship

❖ Diversity Criteria

1. **Stakeholder Group:** Aim for a balanced representation across the Quadruple Helix model (academia, industry, government, and civil society).
2. **Region:** Ensure balanced participation from Urban, Intermediate, and Rural areas.
3. **Sex:** A minimum of 40% representation of each sex.
4. **Nationality:** Balanced representation from all EU countries.
5. **Age:** Balanced representation from people of all ages.

Diversity criteria were applied following the expertise criteria to ensure a well-rounded and representative experts' pool.

A dedicated matrix (Excel file) was created and shared with partners, who used it to suggest potential experts and assess their level of expertise related to the survey across three categories: high, medium, and low. (Figure 3.2.3.2).

No	Surname	Name	email	phone	position/ profession	Organisation name	Country of residence	Expertise on social Inclusion / Exclusion with a focus in rural areas	Expertise on Vulnerable groups	Expertise on Social Services	Expertise on Governance	Expertise on Social Entrepreneurship
1												
2												
3												
4												
5												
6												

Relevance	Reachable	Available	Partner Contact	Stakeholder Group	Region	Sex	Nationality	Age	Round 1	Round 2	consent form	Networking	Dissemination

Figure 3.2.3.2 Matrix Excel file for identifying experts

The selection of experts was carefully curated to ensure **high engagement, timely completion, and credible outcomes**. The generic criteria and the selection process were designed to overcome the risk of low response rate often faced by research activities, such as surveys and interviews.

3.2.4 First Round of the Survey

3.2.4.1. Panel Participants

In the first round of the INSPIRE Delphi survey, **87 experts were contacted**. Of these, **65 provided valid responses**, significantly surpassing the target of 50 participants set by the Grant Agreement. Twenty-one experts did not access the survey, and one submitted an incomplete questionnaire, which was excluded from the analysis. The final count of 65 valid responses corresponds to a **response rate of 75%** (Figure 3.2.4.1).

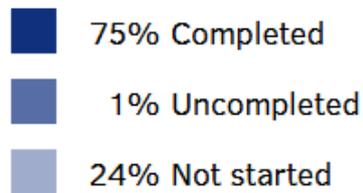
Among the 65 valid respondents, **almost half of them (34 people) held a “High” level of expertise in social Inclusion / Exclusion with a focus in rural areas**. Similarly, 42 people held “High” level of expertise in groups in vulnerable situations, 31 people in social services, 28 people in governance and 24 people in social entrepreneurship (see Figure 3.2.4.2c). Besides, all participants' countries of residence were in Europe. Indicatively, 36.9% of them were living in Greece³⁶, 12.3% in Romania, 9.2% in Spain and 7.7% in Türkiye, while several other European countries are also represented (see Figure 3.2.4.2a). Regarding the type of stakeholder, 37% of the 65 respondents are members of NGOs, CSOs, Vulnerable groups, Volunteers, Citizens etc., 32% of them are members of Academia

³⁶ Although experts from Greece made up 30% of the original pool of 87 invitees, not all originally selected experts were able to participate. Moreover, almost all Greek nominees did respond. As a result, due to the strong participation from Greece, their share among actual participants increased to 35.4%. This is also understandable, as 2 out of the 7 pilots as well as 4 out of 18 consortium partners, are based in Greece and primarily suggested experts from their local networks. While this may introduce a slight geographic bias in the results, especially in context-specific insights, the overall composition of the expert group still reflects a broad and diverse range of perspectives across Europe.

/ Research bodies, 20% of come from Business and Industry and 9% from Governmental Bodies and Public Authorities (see Figure 3.2.4.2b).

RESPONSE RATE

Round 1



Round 2

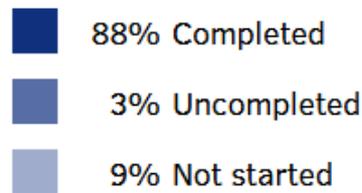
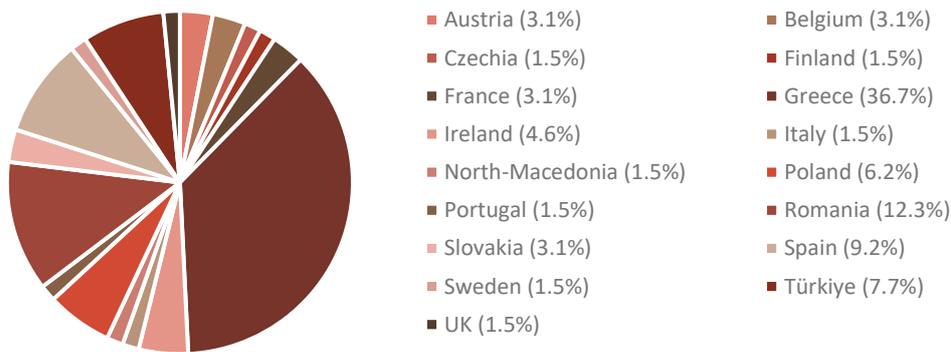
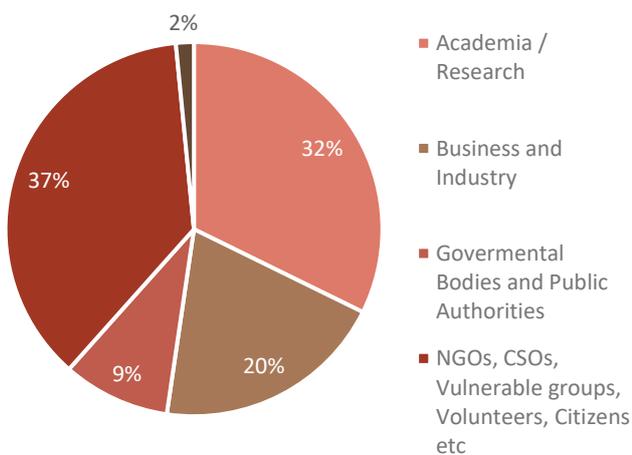


Figure 3.2.4.1 Response rate in rounds 1 & 2

(a) country of residence



(b) type of stakeholder



(c) high expertise per field

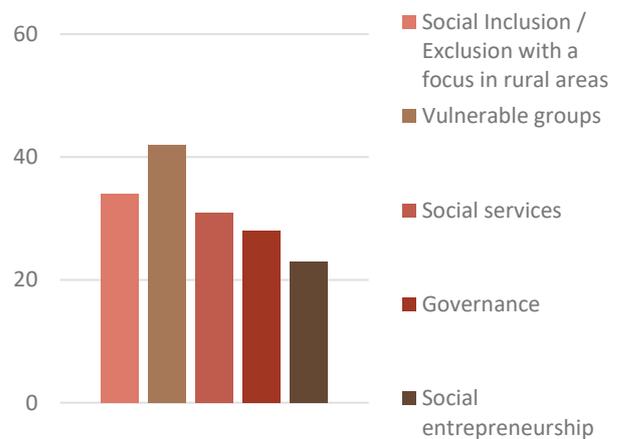


Figure 3.2.4.2 Demographic characteristics of the INSPIRE Delphi Survey participants

3.2.4.2. Execution of Delphi Survey

The first round of the INSPIRE Delphi survey was conducted between the 22nd of May and the 2nd of June 2025. **The questionnaire was administered using the Welphi decision support system.** Welphi is a survey platform specifically designed to conduct Delphi surveys. It was selected because it permits the confrontation of ideas in an asynchronous, online, participatory, and interactive way, while guaranteeing anonymity. Moreover, it is equipped with technological tools that allow researchers to manage the implementation of the study (e.g., automatically inviting, and easy monitoring and managing participants).

Before participating in the survey, the invited experts were asked to consent to the privacy policy of the project. The privacy policy, as well as the consent form (Appendices, section 8.3) and the data subject request form, were all designed **according to the guidelines of the EU's General Data Protection Regulation (GDPR)** and the Data Management Plan of the project.

3.2.4.3. Interim Analysis

After completing the first round of the INSPIRE Delphi survey, the **results were analysed to check for consensus among participants**. As is the case with most Delphi studies, "*consensus is assumed to have been achieved when a certain percentage of the responses fall within a prescribed range for the value being estimated*".³⁷ More specifically, following the paradigm of Dajani et al. (1979)³⁷, the level of agreement between participants was categorised based on the below decision rule:

- **Consensus** occurred when unanimity was achieved, meaning that 100% of responses were spread across contiguous categories (i.e., Agree and Fully agree; or Disagree and Fully disagree).
- **Majority agreement** occurred when more than 75% of the respondents had rated either 4 and 5 (Agree and Fully agree, respectively), or 1 and 2 (Disagree and Fully disagree, respectively).
- **Bipolarity** occurred when respondents were equally divided over an issue (i.e., provided two conflicting forecasts). A convenient way to check for bipolarity, as proposed by Von Briel (2018)³⁸, is to analyse the histogram of each statement. If the histogram has more than one peak, then bipolarity is present.
- **Majority disagreement** occurred when responses showed a large spread across the 5-point response scale and could not be brought into consonance³⁷.

The data was analysed in Excel. Altogether, at the end of this round, consensus has not occurred in any of the 49 investigated statements. However, a **majority agreement occurred in 34 statements and bipolarity in 15 statements**.

3.2.5 Second Round of the Survey

For the second round of the INSPIRE Delphi survey, the 34 statements on topics where majority agreement had already been reached from the first round were omitted. The resulting set of

³⁷ Dajani, J. S., Sincoff, M. Z., & Talley, W. K. (1979). Stability and agreement criteria for the termination of Delphi studies. *Technological forecasting and social change*, 13(1), 83-90. doi: [https://doi.org/10.1016/0040-1625\(79\)90007-6](https://doi.org/10.1016/0040-1625(79)90007-6).

³⁸ von Briel, F. (2018). The future of omnichannel retail: A four-stage Delphi study. *Technological Forecasting and Social Change*, 132, 217-229. Retrieved from <https://www.sciencedirect.com/science/article/abs/pii/S0040162518302026>

statements included only the remaining 15 statements. In parallel, the new survey included additional information on the average values of the experts' answers on each statement as they emerged from the first round. Then, **the experts were invited to reconsider their feedback** in light of the anonymised collective responses of other people and to provide an explanation for their statements.

Invitations to participate were sent only to those 65 experts who successfully submitted a valid answer in the first round. However, six of them did not access the survey at all, while two of them left the questionnaire incomplete (their answers were disregarded). In the end, **57 valid replies were received, which corresponds to an 88% response rate**. Moreover, a majority agreement occurred in 43 additional statements and bipolarity occurred in 6 statements.

3.3 Macro-Level Analysis of Social Exclusion Drivers in Rural Areas

3.3.1 Global Mega-Trends Influencing Rural Areas

Mega-trends are “*macro-level phenomena which include various (sometimes conflicting) sub-phenomena (e.g. globalisation, climate change)*”³⁹ and “*large, transformative global forces that define the future by having a far-reaching impact on business, economies, industries, societies and individuals*”⁴⁰. **Understanding megatrends helps the reader to identify the underlying processes** that will determine – to a certain extent – the course that trends will take. This section builds on relevant and recent research and policy reports, scientific journal articles, and other scientific publications, and offers an overview of the megatrends influencing social inclusion in rural areas.

3.3.1.1 Climate Change and Environmental Degradation

According to the World Economic Forum's Global Risks Perception Survey 2024–2025, respondents identified environmental risks as the most severe over the next decade. The top four risks (extreme weather events, biodiversity loss, critical changes to Earth systems, and natural resource shortages) all fall within this category, as illustrated in the figure below.

³⁹ Georghiou, L. (Ed.). (2008). The handbook of technology foresight: concepts and practice. Edward Elgar Publishing.

⁴⁰ EY (2015). Megatrends 2015: Making sense of a world in motion. Retrieved from <https://www.top-network.org/assets/Gatherings/2017/ey-megatrends-report-2015.pdf>



Figure 3.3.1.1 Global risks over the long term (10 years), ranked by severity

Source: World Economic Forum Global Risks- Perception Survey 2024-2025 & World Economic Forum. (2025). *The Global Risks Report 2025: 20th Edition, Insight Report* (ISBN: 978-2-940631-30-8). <https://www.weforum.org/publications/global-risks-report-2025/digest/>

Global temperatures are rising at an accelerating pace, with Europe warming faster than any other continent⁴¹. Despite some climate efforts, current policies suggest greenhouse gas emissions will continue growing past 2040. Climate change is part of a broader environmental crisis, alongside overuse of natural resources, biodiversity loss⁴², and pollution, known as the "triple planetary crisis"^{43,44}.

Biodiversity is declining rapidly⁴⁵, weakening ecosystems and their ability to cope with climate impacts. The Intergovernmental Panel on Climate Change (IPCC) warns that emissions must drop by 43% by 2030 and 69% by 2040 to stay within 1.5°C of warming⁴⁶, but current trends fall far short. While global agreements like the Kunming-Montreal Framework and the UN's High Seas Treaty offer hope, progress is slow⁴⁴.

In Europe, climate change is expected to cause more severe heat waves, water shortages, and wildfires⁴⁷. Adaptation is becoming urgent, with rising demand for climate insurance, greener cities, and stronger infrastructure. However, political resistance to environmental policies is also growing⁴⁸,

⁴¹ European Environment Agency, European Climate Risk Assessment (2024, March 11), <https://www.eea.europa.eu/en/analysis/publications/european-climate-risk-assessment>

⁴² United Nations Environment Programme (2024): Global Resources Outlook 2024: Bend the Trend – Pathways to a liveable planet as resource use spikes. International Resource Panel. Nairobi. <https://wedocs.unep.org/20.500.11822/44901>

⁴³ United Nations Framework Convention on Climate Change (13 April 2022), 'What is the triple planetary crisis?', <https://unfccc.int/news/what-is-the-triple-planetary-crisis>

⁴⁴ European Parliament; General Secretariat of the Council of the European Union; European Commission, Secretariat-General; European Commission, Joint Research Centre; European External Action Service; European Economic and Social Committee; European Committee of the Regions, European Court of Auditors, European Investment Bank, EU Institute for Security Studies, *Choosing Europe's future*, Barry, G. (editor), Publications Office of the European Union, Luxembourg, 2024, [https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA\(2024\)757825_JRC137474](https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA(2024)757825_JRC137474).

⁴⁵ IPBES - Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (2019), 'Global Assessment Report on Biodiversity and Ecosystem Services', <https://www.ipbes.net/global-assessment>

⁴⁶ IPCC - International Panel on Climate Change (2023), 'Climate Change 2023: AR6 Synthesis Report', <https://www.ipcc.ch/report/ar6/syr/>

⁴⁷ European Environment Agency (24 January 2023), 'What will the future bring when it comes to climate hazards?', <https://www.eea.europa.eu/publications/europes-changing-climate-hazards-1/what-will-the-future-bring>

⁴⁸ Madeline Judge et al.(2023), 'Environmental decision-making in times of polarization', Annual Review of Environment and Resources, vol. 48, <https://doi.org/10.1146/annurev-environ-112321-115339>

though public concern is increasing - 77% of EU citizens see climate change as a serious problem, and 58% want faster green transitions^{49,44}.

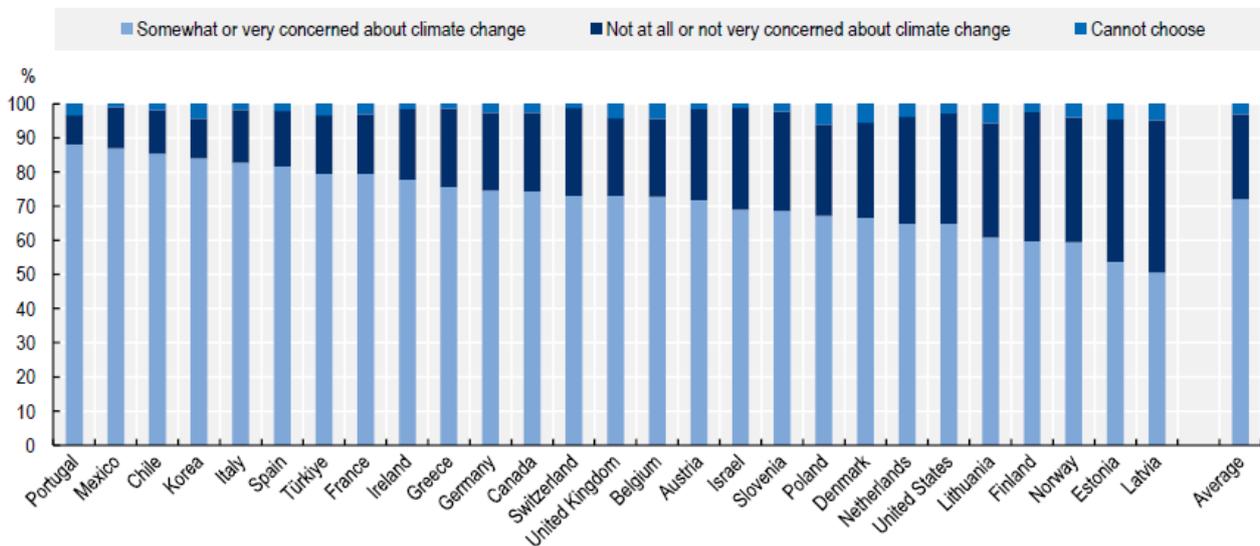


Figure 3.3.1.2 Share (%) of respondents in OECD countries who are not at all, not very, somewhat, or very concerned about climate change, 2022

*Note: Average refers to the unweighted average of the 27 OECD countries for which data are available. Respondents were asked: “How worried are you about climate change?” Respondents could choose “Not at all concerned,” “not very concerned,” “somewhat concerned,” “very concerned,” or “cannot choose”. “Somewhat or very concerned” responses are aggregated here, as are “not at all or not very concerned” responses. RTM data include respondents aged 18-64 with a representative sample n=1 000 per country. Source: OECD Risks that Matter Survey 2022, <https://www.oecd.org/en/topics/social-and-economic-risks.html>, OECD (2024), *Megatrends and the Future of Social Protection*, OECD Publishing, Paris, <https://doi.org/10.1787/6c9202e8-en>

Extreme weather conditions such as floods, wildfires, and heatwaves, might damage infrastructure, disrupt livelihoods, and reduce economic resilience⁵⁰. Some assets may become uninsurable, creating risks for businesses and the financial sector⁴⁴. To support adaptation, there may be a need to shift the focus from costs to the benefits, like better quality of life, increased resilience, and energy independence⁴⁴.

Since climate change is a global issue, international cooperation is essential. Yet growing geopolitical competition could make such cooperation more difficult in the years ahead. Also, growing public pushback against environmental regulations may create new challenges for governments⁴⁴.

Rural areas are particularly vulnerable to climate change and environmental degradation, as they are exposed to extreme weather events. The transition to a green economy threatens employment in “brown” sectors (e.g., agriculture, mining, fossil fuel industries) that are often overrepresented in rural areas⁵⁰. This can lead to economic decline and outmigration unless adequately managed⁵⁰. Additionally, housing markets in environmentally degraded areas may collapse, trapping residents and reducing mobility⁵⁰. Policy responses include managed retreat,

⁴⁹ European Commission. (2023). *Climate change: Special Eurobarometer 538, Fieldwork: May – June 2023*. Retrieved April 30, 2025, from <https://europa.eu/eurobarometer/surveys/detail/2954>

⁵⁰ OECD (2024), *Megatrends and the Future of Social Protection*, OECD Publishing, Paris, <https://doi.org/10.1787/6c9202e8-en>.

income replacement programs, and targeted investments in green infrastructure and adaptive housing⁵⁰.

3.3.1.2 Demographic Shifts and Urbanisation

Most countries are facing the long-term effects of an ageing population, as life expectancy rises and birth rates decline⁴⁴. Shifts in population age structure are driven by persistently low fertility and longer life expectancy. Fertility rates remain below the replacement level in nearly all OECD countries⁵⁰. The global population is expected to reach 9.2 billion by 2040 and 9.7 billion by 2050, but growth will be uneven—many developed countries will see population numbers level off⁴⁴.

In the EU, the population is expected to peak at 453 million in 2026 and then slightly decline to about 450 million by 2040 (according to estimates from the UN, EU's population will start declining in 2024 and will reach 436 million by 2040)⁴⁴. Alongside the green and digital transitions, demographic change is one of the key forces shaping Europe's future⁴⁴. By 2040, the EU could have 17 million fewer people of working age than in 2023, with further reductions expected by 2050 if the EU's size remains the same⁴⁴. A shrinking workforce could also contribute to long-term inflation, driven by rising labour costs and reduced savings. These trends will strain public finances and place a heavier burden on younger people, who may face higher taxes, lower net income, and smaller pensions in the future⁴⁴.

While longer lifespans reflect rising living standards—global life expectancy rose from 66.8 years in 2000 to 73.4 years in 2019—this shift also brings new challenges⁴⁴. Countries with ageing populations must invest more in healthcare, long-term care, and infrastructure, while also coping with rising pension costs and labour shortages⁴⁴. In Europe, the old-age dependency ratio could climb from 33% in 2022 to nearly 50% by 2040, increasing pressure on social protection systems and potentially leading to higher poverty and exclusion among retirees⁵¹.

Care responsibilities are still highly gendered, with older women more likely to perform unpaid domestic and caregiving tasks⁵⁰. Unpaid care is critical due to insufficient public long-term care provision, despite formal care costing 1.5 to 3 times an older person's median income in Europe⁵⁰. Limited access to affordable, quality childcare and out-of-school care remains a major barrier to employment, particularly for women. Without adequate long-term or childcare support, many - especially women- face reduced working hours, stress, burnout, and poorer health outcomes^{50,52}. Investment is urgently needed in the formal care, improving pay and conditions for care workers, and in support for unpaid caregivers⁵⁰. Evidence shows fewer people provide daily unpaid care in countries with stronger formal systems⁵⁰, indicating paid care can substitute informal care. With the working-age population shrinking, fully utilising the labour force is crucial⁵⁰.

While Europe remains one of the best regions to live and work, quality of life will vary significantly by location, especially as climate impacts intensify⁴⁴. Urbanisation in the EU is set to reach almost 84% by 2050, while water stress and extreme weather may render some areas less habitable⁴⁴. Despite having its most educated workforce ever, the EU still has 60 million low-skilled adults, and pandemic-related setbacks in youth education raise further concerns⁴⁴. Women, older workers, and those with

⁵¹ Bodnár K. and Nerlich C. (2022), The Macroeconomic and Fiscal Impact of Population Ageing . ECB Occasional Paper No. 2022/296, <https://www.ecb.europa.eu/pub/pdf/scpops/ecb.op296~aaf209ffe5.en.pdf>

⁵² Colombo, F. et al. (2011), *Help Wanted?: Providing and Paying for Long-Term Care*, OECD Health Policy Studies, OECD Publishing, Paris, <https://doi.org/10.1787/9789264097759-en>.

secondary education will represent the largest untapped labour force in Europe by 2030, making their greater inclusion essential⁴⁴.

Urbanisation continues rapidly, with the global urban population projected to reach five billion by 2050. Already, 1.1 billion people live in slums or similar conditions, a figure expected to rise to three billion within 30 years⁵³. One-person households are rising across age groups in many OECD countries, and single-parent households remain stable at 16–17%⁵⁰. Despite more unmarried couples raising children, fewer than two-thirds of OECD countries allow partnership registration, and many reserve tax benefits for married couples⁵⁰. As more children grow up in families with unmarried parents, policies should also aim to equalise the treatment of cohabiting and married couples.

Europe needs to focus on reducing irregular migration while promoting well-managed legal migration and coordinated development policies. This approach could also improve public attitudes toward migration⁴⁴.

Having the above in mind, one could argue that **rural populations are also affected by low fertility rates and have to face youth migration to urban areas as well, leading to them ageing rapidly**. This threatens the sustainability of local economies and the provision of services. Women disproportionately bear caregiving responsibilities for both children and elderly family members, further limiting their labour force participation. Household structures are evolving, with an increasing prevalence of single-person households, which heightens economic vulnerability. These demographic dynamics necessitate adaptable social protection systems that address care infrastructure, family support, and rural service provision.

3.3.1.3 Technological Advancements and Digital Divides

The pace of technological development is accelerating across sectors such as digital, biotech, clean energy, and advanced materials⁴⁴. Technologies are also increasingly converging, driven by global connectivity⁴⁴. The number of connected devices worldwide is expected to rise from 30.4 billion in 2020 to 200 billion by 2030⁵⁴.

Artificial intelligence (AI) and automation are reshaping job creation, working methods, and skills⁵⁵, offering flexibility but also risking greater precariousness and job polarisation⁴⁴. AI in particular could boost productivity and support the green transition. However, new technologies also carry risks, ranging from misuse by malicious actors to impacts on democratic trust and energy use⁴⁴ (the digital sector alone accounts for 5–9% of global electricity use)⁵⁶.

Cutting-edge technologies such as artificial intelligence, space technology, and quantum computing are increasingly regarded as strategic national assets, and at the same time, the open science

⁵³ UNDP (2024). *2024 UNDP Trends Report: The Landscape of Development*. New York, New York. https://www.undp.org/sites/g/files/zskgkq326/files/2024-02/undp_trends_report_2024_0.pdf

⁵⁴ European Commission (2021), *2021 Strategic Foresight Report*. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021DC0750>

⁵⁵ Arregui Pabollet, E., Bacigalupo, M., Biagi, F., Cabrera Giraldez, M., Caena, F., Castaño Muñoz, J., Centeno Mediavilla, I., Edwards, J., Fernandez Macias, E., Gomez Gutierrez, E., Gomez Herrera, M., Inamorato Dos Santos, A., Kampylis, P., Klenert, D., Lopez Cobo, M., Marschinski, R., Pesole, A., Punie, Y., Tolan, S., Torrejon Perez, S., Urzi Brancati, M. and Vuorikari, R., *The changing nature of work and skills in the digital age*, Gonzalez Vazquez, I., Milasi, S., Carretero Gomez, S., Napierala, J., Robledo Bottcher, N., Jonkers, K. and Goenaga Beldarrain, X. editor(s), EUR 29823 EN, Publications Office of the European Union, Luxembourg, 2019, ISBN 978-92-76-09206-3, doi:10.2760/679150, JRC117505. <https://publications.jrc.ec.europa.eu/repository/handle/JRC117505>

⁵⁶ European Commission (2022), *2022 Strategic Foresight Report*. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022DC0289>

movement is gaining momentum⁵⁷. Technological progress, particularly in automation and artificial intelligence, is reshaping labour markets. While these innovations have not yet caused net job destruction, they are altering job content and skill requirements⁵⁰. There is clear evidence that automation has worsened employment prospects in certain sectors, with job declines notably among skilled agricultural, clerical support, forestry, handicraft, and metal and machinery workers⁵⁰.

Governance of emerging technologies is becoming more complex, especially as their societal, economic, and political implications grow⁴⁴. The rapid spread of generative AI may become the most disruptive development in the EU since its founding, with far-reaching effects on education, skills, the welfare state, and the economy⁴⁴. Many emerging technologies will function like essential infrastructure but will be developed and controlled by private companies rather than the state. This shift introduces new dependencies and complex regulatory challenges⁴⁴.

It also remains uncertain whether technological progress will reduce global inequalities or deepen them⁵⁸. The actual impact of technology on employment remains uncertain; an estimated 40% of workers globally, and 60% in advanced economies, are in jobs highly exposed to AI⁵⁹. While technological advancements offer enormous potential, they may also become tools of geopolitical competition⁴⁴. For example, AI and clean tech are increasingly tied to global power dynamics, influencing trade, security, and regulatory influence.

Global investment in R&D continues to rise, with developed economies remaining in the lead⁶⁰. Europe remains a strong global player, contributing around 20% of R&D, patents, and scientific publications. It leads in some areas like clean tech and next-generation materials, but lags in applied research and deep tech, partly due to market fragmentation and less access to venture capital. While the EU accounts for about 17.5% of global R&D investment of the largest 2,500 corporate investors, close to China's 17.8%, the US still dominates with 42%⁴⁴. The US also dominates deep tech funding with over 60%, compared to 14% for Europe and 12% for China⁴⁴.

Regulatory strength remains a European asset. The EU has taken a global lead with frameworks like the Digital Markets Act and the Digital Services Act⁴⁴. However, other global actors are also shaping standards: China is boosting its regulatory influence abroad through infrastructure exports and international engagement, while the US favours a more investor-friendly, light-touch regulatory approach⁴⁴.

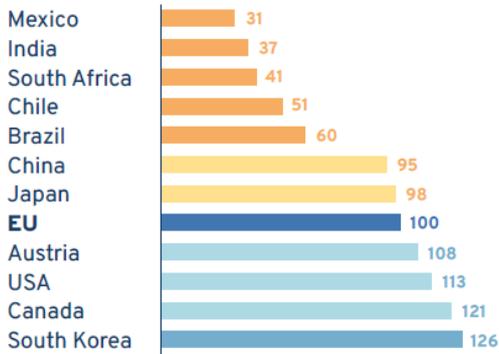
⁵⁷ UNDP (2024) 2024 UNDP Trends Report: The Landscape of Development. New York, New York, <https://www.undp.org/future-development/publications/2024-undp-trends-report-landscape-development>

⁵⁸ Amnesty International (2023) *Digitally Divided – Technology, inequality and human rights*, <https://www.amnesty.org/en/documents/pol407108/2023/en/>

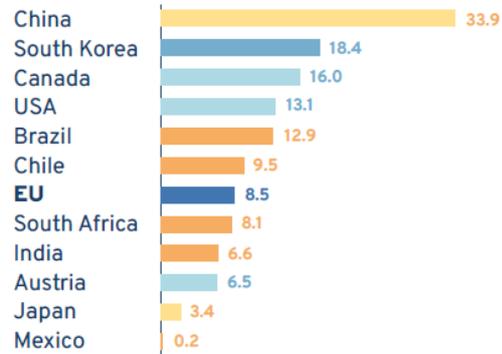
⁵⁹ Cazzaniga M., Jaumotte F., Li L., Melina G., Panton A.J., Pizzinelli C., Rockall E.J., and Mendes Tavares M.(2024). *Gen-AI: Artificial Intelligence and the Future of Work, Staff Discussion Notes 2024*, 001, accessed May 14, 2025, <https://doi.org/10.5089/9798400262548.006>

⁶⁰ UNDP (2024) 2024 UNDP Trends Report: The Landscape of Development. New York, New York, <https://www.undp.org/future-development/publications/2024-undp-trends-report-landscape-development>

EU innovation performance versus global competitors in 2023
(% relative to the EU innovation performance)



Change of global innovation performance from 2016-2023 (difference in scores relative to that of the EU in 2016)



Colours show performance relative to that of the EU in 2023. Orange-yellow: below EU performance; light blue: above EU performance.

Source: European Innovation Scoreboard 2023, European Commission.

Figure 3.3.1.3 EU innovation performance versus global competitors in 2023 (left) & Change of global innovation performance from 2016-2023 (right)

*Source: European Innovation Scoreboard 2023, European commission & European Parliament; General Secretariat of the Council of the European Union; European Commission, Secretariat-General; European Commission, Joint Research Centre; European External Action Service; European Economic and Social Committee; European Committee of the Regions, European Court of Auditors, European Investment Bank, EU Institute for Security Studies, *Choosing Europe’s future*, Barry, G. (editor), Publications Office of the European Union, Luxembourg, 2024, [https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA\(2024\)757825_JRC137474](https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA(2024)757825_JRC137474).

The green and digital transitions demand adaptable education and training systems across Europe⁶¹. Ensuring access to workers with the right mix of technical and soft skills is essential for both the success of these transitions and the EU’s competitiveness⁶¹. Labour shortages are increasing, particularly in sectors like healthcare, construction, and agriculture, partly due to an ageing population. Beyond skill gaps, poor job quality—reflected in low pay, unstable contracts, and limited career prospects—also contributes to recruitment challenges⁶¹. Moreover, digital skills are critical not only for employment but also for informed civic engagement and resilience against misinformation, yet, only 54% of EU citizens currently possess at least basic digital skills⁶¹.

With the above in mind, **rural workers, who are often older and less digitally skilled, face elevated risks of displacement and lower access to upskilling opportunities.** Limited broadband and digital infrastructure in rural areas widen the digital divide, potentially exacerbating income and employment inequalities. Bridging this divide through investment in education, training, and infrastructure is essential to ensure rural inclusion in the digital economy.

3.3.1.4 Geopolitical Turbulence

The world is experiencing a phase of overlapping and sustained crises such as climate change, pandemics like COVID-19, and conflicts such as Russia’s war against Ukraine⁶¹ and the ongoing

⁶¹ European Commission. (2023b). *Strategic Foresight Report 2023: Sustainability and people’s wellbeing at the heart of Europe’s Open Strategic Autonomy*. Luxembourg: Publications Office of the European Union, 2023. https://commission.europa.eu/system/files/2023-07/SFR-23-beautified-version_en_0.pdf

violence in Gaza by Israel for which a 2024 UN special committee raised serious concerns for potential consistency with grave breaches of international law⁶².

These recent crises have shown that the world's major powers are less able to maintain global stability⁶³. Today's geopolitical landscape is marked by growing divisions and weakening international cooperation. Institutions like the United Nations are struggling to respond effectively⁴⁴. Armed conflicts are increasing, global security agreements are breaking down, and military spending hit a record USD 2.24 trillion in 2023⁶⁴, and has been rising since 2014⁶⁵. These trends suggest that global tensions and competition will likely continue through to 2040⁴⁴.

Geopolitical instability in Europe, exemplified by Russia's war against Ukraine, has exposed vulnerabilities to global shocks, most notably through energy price volatility⁵⁰. At the same time, the European Union faces its own challenges, such as a shrinking share of the global economy, an ageing population, and irregular migration⁴⁴.

Climate change is also creating new political pressures, including conflicts over resources and competition for critical raw materials⁴⁴. Without decisive action, up to 216 million people could be displaced within their countries due to climate change by 2050⁶⁶. Rising global inequality could lead to more conflict within countries⁴⁴.

Today, one-third of the world's population lives under authoritarian rule, while only 8% experience full democracy⁶⁷. In many advanced economies, neo-nationalist movements have gained ground by exploiting concerns and fears over immigration and diversity⁴⁴. Extremist groups and targeted disinformation campaigns have fueled sectarianism and hate speech online. Political polarisation and attacks on democratic institutions continue to threaten stability, even in long-standing democracies⁴⁴. Nevertheless, positive developments include the growth of citizen engagement through deliberative democracy, and increased youth mobilisation on key issues such as climate change⁴⁴, showing strong democratic involvement.

⁶² United Nations (2024, November 14). *The Question of Palestine - UN Special Committee finds Israel's warfare methods in Gaza consistent with genocide, including use of starvation as weapon of war - Press release*. <https://www.un.org/unispal/document/un-special-committee-press-release-14nov24/>

⁶³ Kimmage M. and Notte H. (12 October 2023), 'The age of greatpower distraction: what crises in the Middle East and elsewhere reveal about the global order', *Foreign Affairs*, https://www.foreignaffairs.com/middle-east/age-great-power-distraction-kimmage-notte?utm_source=google&utm_medium=cpc&utm_campaign=dsa_middle_east_tfd&qad_source=1&qclid=Cj0KCCQjwn7mwBhCiARIsAGoxjals4w8nXTXk4DBulstvbNSawtQ0JpInTdwFwzb_owSJUNBnbM3l2ylaAkV4EALw_wcB

⁶⁴ *SIPRI Military Expenditure Database*. (n.d.). SIPRI. <https://www.sipri.org/databases/milex>

⁶⁵ World Economic Forum. (2025). *The Global Risks Report 2025: 20th Edition, Insight Report* (ISBN: 978-2-940631-30-8). <https://www.weforum.org/publications/global-risks-report-2025/digest/>

⁶⁶ World Bank (2021), *Groundswell Part 2: Acting on Internal Climate Migration*, <https://openknowledge.worldbank.org/entities/publication/2c9150df-52c3-58ed-9075-d78ea56c3267>

⁶⁷ Economist Intelligence Unit (EIU) *Democracy Index 2022*, <https://www.eiu.com/n/campaigns/democracy-index-2022/>

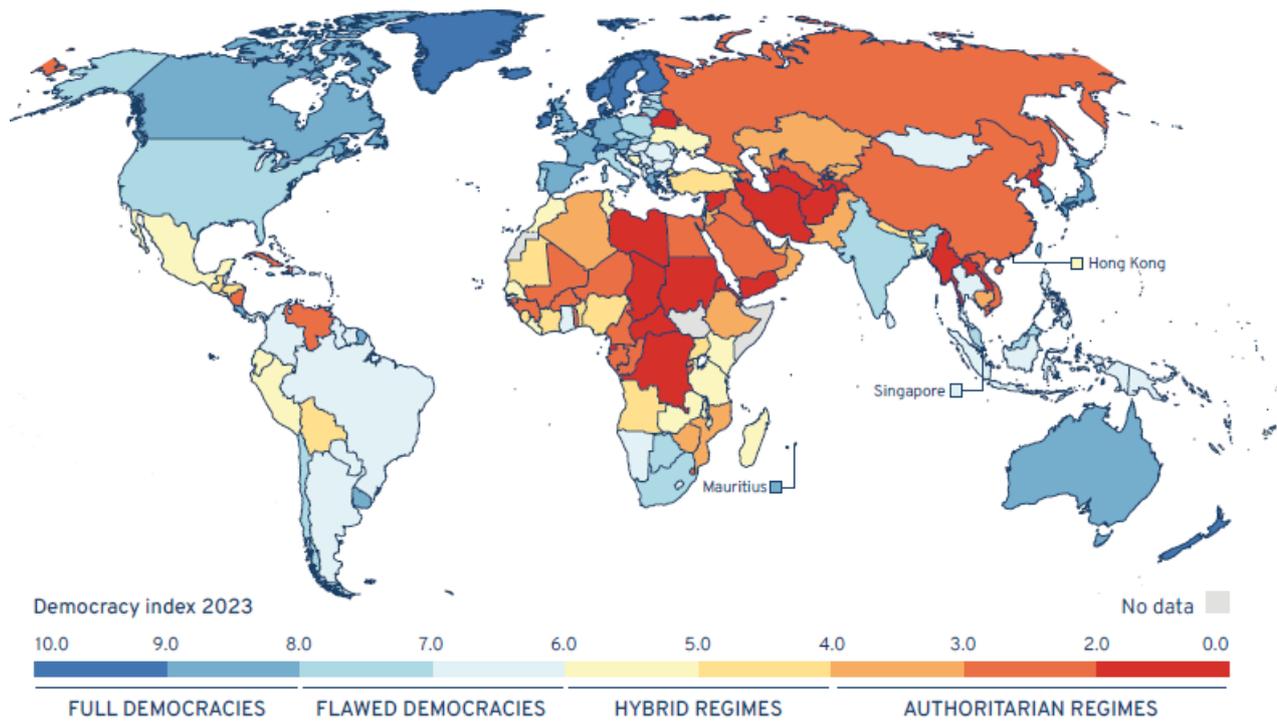


Figure 3.3.1.4 Global map by regime type

Source: EIU Democracy Index 2023, <https://www.eiu.com/n/campaigns/democracy-index-2023/>

Technology will be a double-edged sword in future governance, with the potential to both strengthen and undermine democracy. On the one hand, it has the potential to improve public services, increase transparency in policy making, and broaden civic participation. On the other hand, the misuse of AI, the spread of disinformation, and so-called ‘truth decay’ threaten the resilience of democratic institutions⁶⁸. European societies are becoming more diverse, with surveys showing more positive attitudes towards migrants, even as parties focused on cultural divisions gain support⁶⁹.

A key challenge for the European Union will be balancing the protection of democratic freedoms and open debate with the need to combat disinformation⁴⁴. The European Commission’s 2023 **Defense of Democracy** package is a positive step, but broader, cross-sectoral responses will be required. These must involve economic, technological, and social policy coordination across EU institutions and Member States⁴⁴.

With the above in mind, **rural and low-income households are disproportionately affected by geopolitical instability due to higher relative energy costs and limited fiscal capacity for shock absorption**. These dynamics underscore the need for resilient and targeted social protection systems capable of cushioning such impacts efficiently.

3.3.1.5 Societal and Political Polarisation

⁶⁸ Williams H., & McCulloch C. (2023, August 1). *Truth decay and national security*. RAND. <https://www.rand.org/pubs/commentary/2023/08/truth-decay-and-national-security.html>

⁶⁹ Scharfbillig, M., Smillie, L., Mair, D., Sienkiewicz, M., Keimer, J., Pinho, D. S. R., Vinagreiro, A. H., Vecchione, E., & Scheunemann, L. (2021). *Values and Identities - a policymaker’s guide*. JRC Publications Repository. <https://publications.jrc.ec.europa.eu/repository/handle/JRC126150>

Global efforts to reduce poverty have slowed due to overlapping crises, including the COVID-19 pandemic, the war in Ukraine, and rising living costs. Within the EU, economic inequality has deepened, especially since the pandemic and the cost-of-living crisis⁴⁴. In many cases, work no longer guarantees financial security, with falling purchasing power and increasingly unaffordable housing in many regions⁴⁴. Low-income households are more exposed to rising food and energy prices and spend a larger share of their income on basic needs, leaving them with little room to absorb cost increases⁶¹. They are also more likely to live in polluted areas, increasing health risks - 13.7% of EU citizens report exposure to pollution or environmental hazards⁶¹.

Younger people today may be more educated, but often face lower incomes, unstable employment, and mental health challenges⁴⁴. While 67% of young Europeans feel the EU offers brighter prospects, they also face unstable employment and lower disposable income compared to past generations, making them the age group most at risk of poverty⁶¹. This has raised concerns about intergenerational fairness, as younger people may feel increasingly excluded from decision-making and lose trust in political institutions⁶¹. The nature of work is also evolving due to longer life spans and the need for continuous reskilling. Concepts like 'quiet quitting' and 'job hopping' reflect new expectations for work-life balance among Gen Z and Millennials⁴⁴. At the same time, many elderly people face poverty, health issues and marginalisation. Questions of fairness between and within generations are becoming more important.

Discrimination persists in many areas: 63 countries still criminalise homosexuality, some with the death penalty⁷⁰, around 1.3 billion people with disabilities face inequality in life expectancy, education, and employment (70% are not in the workforce)⁷¹. Ethnic and racial inequalities remain widespread as well⁴⁴. Political debate around these issues has become more intense, adding to societal divisions⁴⁴. Progress towards gender equality remains slow, with full equality projected to take 134 years, pushing the expected date to 2158⁷². This timeline extends about five generations beyond the 2030 target set by the Sustainable Development Goals (SDGs)⁷².

Democratic foundations in the EU are showing signs of strain, with declining electoral participation and a growing sense of political disengagement⁶¹. Nearly half of EU citizens feel their voice does not count, while trust in democratic processes is weakened by disinformation, social media dynamics, and algorithmic bias⁶¹. Regional stagnation and unmet expectations contribute to the "geography of discontent"⁷³, reducing support for European integration⁶¹. Moreover, a growing global ideological divide is emerging between young men and women, influencing both political and everyday choices⁴⁴. Attitudes among young men and women are becoming increasingly polarised and a widening gap in political views has emerged, with young women adopting more liberal positions, while their male peers are shifting in a more conservative direction⁷⁴. This divide is reinforced by social media "bubbles" that create separate online environments, deepening value-based and cultural differences⁴⁴.

⁷⁰ ILGA World Database (accessed April 2025) *Criminalisation of consensual same-sex sexual acts*, <https://database.ilga.org/criminalisation-consensual-same-sex-sexual-acts>

⁷¹ World Health Organization: WHO. (2023, March 7). *Disability*. <https://www.who.int/news-room/fact-sheets/detail/disability-and-health>

⁷² World Economic Forum. (2024). *Global Gender Gap 2024: Insight Report* (ISBN-13: 978-2-940631-89-6). <https://www.weforum.org/publications/global-gender-gap-report-2024/>

⁷³ More information on the geography of EU discontent in: the Rodríguez-Pose, A., Dijkstra, L., & Poelman, H. (2024). The Geography of EU Discontent and the Regional Development Trap. *Economic Geography*, 100(3), 213–245. <https://doi.org/10.1080/00130095.2024.2337657>

⁷⁴ Think Tank | European Parliament (06-03-2025) *Women in local and regional government: Trends, challenges and best practices*, Briefing [https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769526/EPRS_BRI\(2025\)769526_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769526/EPRS_BRI(2025)769526_EN.pdf)

At the same time, the current social contract, rooted in a past socio-economic context, is increasingly misaligned with today’s realities. With 40% of the workforce in non-standard jobs, many (especially young people, migrants, and women) lack adequate social protection⁶¹. These gaps, combined with rising housing costs and insecure work, risk undermining individual wellbeing and the broader sustainability of social systems⁶¹.

Climate change will not affect all areas equally and will hit the poorest and most vulnerable the hardest⁶¹. Many people across economically struggling regions express growing dissatisfaction with inequality in education, jobs, mobility, and public services⁶¹. Constraints on multilateral funding are creating a growing risk of deepening humanitarian crises⁶⁵. Currently, over 90 million people receive humanitarian aid from UN institutions annually, yet needs continue to rise, including among those unable to access assistance⁶⁵. Forced displacement is also increasing, with over 122 million people displaced globally, more than half of them within their own countries⁶⁵. Refugees often end up in low-income countries lacking the resources to support them and frequently face nationalist-driven restrictions, as well as identity-based violence linked to ethnicity or religion⁶⁵.

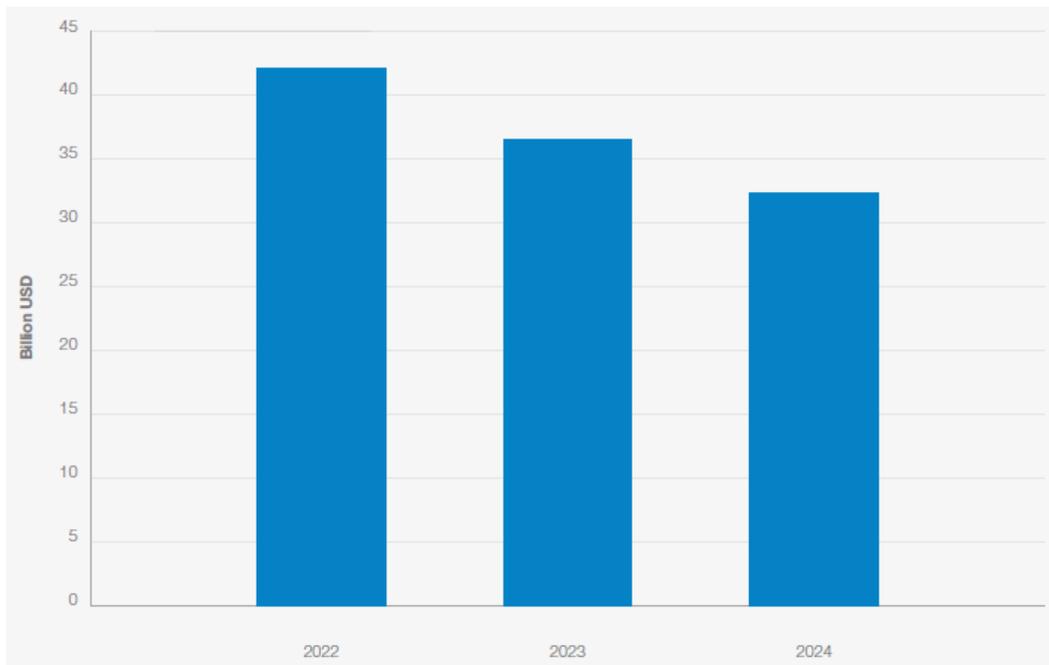


Figure 3.3.1.5 Humanitarian funding (billion dollars), 2022-2024

Source: World Economic Forum. (2025). *The Global Risks Report 2025: 20th Edition, Insight Report* (ISBN: 978-2-940631-30-8). <https://www.weforum.org/publications/global-risks-report-2025/digest/>

Issues like discrimination, gender inequality, ethnic and racial inequalities, are felt even more strongly in rural areas, where 37 million people live. In rural regions, the average household income is 22% lower than the EU average, and demographic decline makes the situation worse⁷⁵. **Rural populations, often dependent on high-emission jobs, may perceive climate policies as unfairly**

⁷⁵ Perpiña Castillo C., Jacobs-Crisioni, C., Barranco, R., Curtale, R., Kompil, M., Vallecillo, S., Auteri, D., & Dijkstra, L. (2023). *Opportunities and challenges for remote rural areas in the European Union*. JRC Publications Repository. <https://publications.jrc.ec.europa.eu/repository/handle/JRC135398>

burdensome⁵⁰, leading to political discontent and polarisation. Similarly, the underinvestment in rural services may further marginalise these communities⁵⁰.

3.3.1.6 Globalisation and Fragmentation

Globalisation is facing major challenges, as repeated crises and rising global tensions put pressure on international trade rules and cooperation⁶¹. The COVID-19 pandemic showed how fragile global supply chains are and revealed the EU's reliance on other countries for important resources like raw materials⁶¹. As trade patterns change, the push to make supply chains more resilient is affecting EU policies and public budgets and highlights the need to reform global systems like the World Trade Organization⁶¹.

Globalisation is changing as the world becomes more divided due to rising conflicts, political tensions, and shifting alliances⁵³. Although countries still rely on each other for trade, especially in key goods and services, the global economy is showing signs of strain⁵³. Trade barriers have increased sharply in recent years, and global trade in goods is expected to shrink. Tensions between major powers, like the US and China, are also pushing countries to move supply chains closer to home or to friendly nations, though in practice, these changes are not always as dramatic as the political messages suggest⁵³. Other signs of fragmentation include limits on technology sharing, money flows, and migration, which are particularly harmful to poorer countries that depend on global markets and knowledge sharing⁵³.

At the same time, countries in the Global South are becoming more independent in how they engage with the world⁵³. Rather than siding fully with one major power or another, many are choosing partnerships based on their own interests, even on sensitive issues like war or digital technologies⁵³. New groups like the expanded BRICS (Brazil, Russia, India, China and South Africa) and a stronger role for the African Union show that global power is spreading more widely⁵³. However, trust in global cooperation has weakened slightly since 2020, as some countries question whether globalisation brings fair benefits⁵³. If this leads to more nationalist or protectionist policies, the world could lose the chance to build a more balanced and inclusive form of global cooperation⁵³.

Social media has become a central tool for communication, information exchange, and social engagement. Platforms such as Facebook, X, Instagram, and TikTok have transformed how people interact, share experiences, and access information⁷⁶. Globalisation has encouraged cultural exchange and diversity (as seen in the global spread of practices like yoga, hip-hop, etc.)⁷⁶. However, it carries the risk of cultural homogenisation, as dominant Western norms can displace local traditions and identities⁷⁶. Media-driven cultural uniformity, especially through global social media platforms, threatens local cultural diversity⁷⁷. These platforms promote global trends that can pressure individuals worldwide to conform, leading to a loss of cultural distinctiveness⁷⁷. Dominant Western narratives (particularly from the United States and Europe), are often amplified through these channels, overshadowing indigenous customs and values⁷⁷. Moreover, social media “bubbles” have

⁷⁶ Balogun S. K., Aruoture E. (2024) *Cultural homogenization vs. cultural diversity: social media's double-edged sword in the age of globalization*, African Journal of Social and Behavioural Sciences (AJSBS) Volume 14, Number 4, ISSN: 2141-209X, https://www.researchgate.net/publication/382994264_CULTURAL_HOMOGENIZATION_VS_CULTURAL_DIVERSITY_SOCIAL_MEDIA'S_DOUBLE-EDGED_SWORD_IN_THE_AGE_OF_GLOBALIZATION

⁷⁷ Anand, K. (2024). Media as a Catalyst of Cultural homogenization: A threat to Diversity of culture in the era of Globalization. [jetjournal.us.https://jetjournal.us/index.php/journals/article/view/367](https://jetjournal.us/index.php/journals/article/view/367)

created separate online environments that reinforce pre-existing beliefs, deepen polarisation, and intensify cultural and ideological divides⁴⁴.

Nonetheless, digital media also has the potential to support cultural pluralism. Social media gives local communities tools to document, share, and celebrate their heritage with global audiences, preserving traditions and engaging younger generations⁷⁷. Social media has transformed communication and activism by enabling personal expression, public discourse, and amplifying marginalised voices⁷⁶. It has played a key role in global grassroots movements such as #BlackLivesMatter⁷⁶, offering new forms of civic engagement and visibility for historically excluded groups.

3.3.2 Structural Drivers of Social Exclusion

This section offers an outline of the **structural drivers of social exclusion**, drawing on the findings of **Task 1.1**, which identified a four-dimensional framework for social inclusion and exclusion and complemented with **complementary perspectives** from relevant policy literature on leaving no one behind (LNOB), inclusive growth, and inclusiveness. Taking also into consideration the areas that the SDGs are aiming to tackle, assisting inclusiveness and equality⁷⁸.

With the term structural drivers, we mean the **deep-rooted, systemic factors and mechanisms**, such as economic inequalities, governance failures, or established social norms, that shape patterns of inclusion and exclusion over time. These drivers operate at macro-levels and often persist across contexts and generations, influencing the distribution of power, resources, and opportunities, and thereby structuring the risks and prospects that different social groups face.

The section lists the critical drivers shaping social exclusion in the interconnected domains: (i) Economic Security & Employment, (ii) Health & Well-being, (iii) Living Conditions, and (iv) Social Participation and Engagement, as well as (v) Policy gaps and governance failures, and (vi) Cross-cutting drivers.

Economic Security & Employment is foundational to social exclusion, with rural areas often facing structural disadvantages in labour market access and income stability. Key structural drivers include:

- **Unemployment and underemployment⁷⁹**: Long-term unemployment and precarious work arrangements (e.g., part-time or temporary contracts) are common in rural economies, especially among youth, women, and low-educated individuals.
- **Informal/shadow economy**: Widespread in rural areas, especially during crises like COVID-19, it supports livelihoods but lacks social protections and stability.
- **Low income and poverty risk**: Factors such as low income, inability to afford essential goods or services, and lack of workforce participation are reasons that put people in high risk of

⁷⁸ OECD (2019), Policy Coherence for Sustainable Development 2019: Empowering People and Ensuring Inclusiveness and Equality, OECD Publishing, Paris, <https://doi.org/10.1787/a90f851f-en>

⁷⁹ Decent work is pursued by SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

poverty or social exclusion. Poverty, especially persistent poverty, can be a major driver of exclusion⁸⁰.

- **Gender and age disparities:** Women and youth are overrepresented in insecure employment and have less access to quality jobs and social security.
- **Youth unemployment:** Young people in rural areas are more vulnerable due to a lack of employment opportunities and are likely to leave for better opportunities.
- **Economic marginalisation of local businesses:** Limited financial and policy support for rural enterprises restricts economic inclusion and sustainability.

Health and Wellbeing inequalities are both causes and consequences of social exclusion, with access to healthcare and well-being outcomes varying widely in rural contexts. Key structural drivers include:

- **Accessibility barriers:** Geographic isolation limits access to health services, particularly specialised care, maternal health, and mental health support.
- **Unmet medical needs:** Due to cost, distance, or long waiting times, these are more prevalent in rural populations.
- **Ageing populations:** Rural areas have higher proportions of elderly people, intensifying needs for long-term and geriatric care.
- **Mental health gaps:** Underdiagnosed and untreated mental health issues affect the person's ability to participate in education, employment, and civic life.

Living Conditions like housing quality⁷⁸, basic infrastructure, and service availability, play a central role in reinforcing rural exclusion. Key structural drivers include:

- **Housing costs:** Rising housing costs, coupled with stagnant wages, are reducing disposable income and limiting access to essential needs like healthcare, education, and transportation.
- **Poor housing quality:** Rural residents often face inadequate housing (e.g., lack of insulation, overcrowding, sanitation issues).
- **Limited access to services:** Including education, transportation, childcare, clean water, waste management, and energy supply.
- **Transport barriers**⁸⁰: Lack of affordable and reliable transport restricts access to essential services, employment, education, and social life. Those without cars are especially affected, as public transport is often inadequate.
- **Digital exclusion:** Lack of reliable broadband infrastructure limits access to education, work, healthcare, and civic participation.

⁸⁰ University of York (2004) The drivers of social exclusion: a review of the literature for the Social Exclusion Unit, UK, Office of the Deputy Prime Minister, London
<https://www.bristol.ac.uk/poverty/downloads/keyofficialdocuments/Drivers%20of%20Social%20Exclusion.pdf>

- **Environmental vulnerabilities⁸¹**: Rural communities are more exposed to climate change effects, and less resilient to overcome crises.

Social Participation and Engagement are foundational for inclusive societies by encouraging community growth, reinforcing social bonds, and supporting the common values and principles that sustain democratic systems. Key structural drivers include:

- **Socioeconomic inequalities** linked to gender, age, disability, and geographic groups and lack of resources can limit the person's participation in cultural, civic, and recreational activities.
- **Weak institutional trust and tolerance**: Perceptions of neglect and limited state presence reduce trust in public institutions and social cohesion. When trust is low and intolerance is high, it can discourage marginalised communities from taking part in public and civic life.
- **Alienation or disenfranchisement of the electoral body** leads to low civic engagement, voter turnout and participation in local governance, especially among youth and marginalised groups.
- **Cultural isolation**: Limited access to cultural venues and activities reduces opportunities for social and identity-based inclusion.
- **Weak social capital⁸⁰**: Social capital (the networks and relationships that support individuals and communities) is often lower in poor areas further isolating individuals from support systems.

Policy gaps and governance failures^{82,83} also structure exclusion in rural Europe through institutional and spatial dynamics. Key structural drivers include:

- **Policy fragmentation, governance imbalance and weak institutional capacity⁸⁴**: The absence of integrated, long-term rural policies contributes to persistent territorial inequalities. Both excessive centralisation and poorly coordinated decentralisation can result in uneven service access and development outcomes. Many local institutions also lack the capacity and resources needed to effectively address these challenges⁸².
- **Unfair local funding**: Bureaucratic obstacles and inefficient resource allocation mechanisms reinforce rural disadvantages. Additionally, misaligned or uneven distribution of EU funding can exacerbate territorial disparities, particularly in border regions⁸².
- **Geographic disadvantage**: Remote, mountainous, border, or island regions face persistent accessibility and infrastructure challenges^{82,83}.

⁸¹ Environmental resilience is pursued by SDG 13: Take urgent action to combat climate change and its impacts.

⁸² EXIT project (2024) Policy Brief, Challenging the Concept of Left-behindness: Drivers and Perception of Territorial Inequalities and their Policy Responses, https://www.exit-project.eu/wp-content/uploads/2024/09/EXIT_Policy-Brief_vf.pdf

⁸³ UN Sustainable Development Group (2022) Operationalizing leaving no one behind - Good practice note for un country teams <https://unsdg.un.org/sites/default/files/2022-04/Operationalizing%20LNOB%20-%20final%20with%20Annexes%20090422.pdf>

⁸⁴ Fair and inclusive institutions are pursued by SDG 16: Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all level.

Cross-cutting drivers that influence outcomes across all domains are inequalities and discrimination⁸⁵ that have to do with deep-rooted norms often inhibiting full participation in community and civic life. They include:

- **age** (elderly, children in poor households),
- **gender**⁸⁶ (gender pay gap, gender employment gap, unpaid caregiving reducing workforce participation),
- **disabilities** (physical, intellectual, or mental) as well as ill-health⁸⁰ in general,
- **ethnicity and immigration** (especially for people from lower income countries), as well as
- **uneven access to education**⁸⁷ and **digital connectivity** and finally,
- **geographic and climate prohibiting factors** (geographical isolation, limited job opportunities, reliance on vulnerable sectors such as agriculture, non-resilient infrastructure).

3.3.3 Impacts of Global Drivers on Rural Areas

Based on what has been discussed in the previous sections about the global mega-trends influencing rural areas and the structural drivers of social exclusion, the following paragraphs offer some conclusions on the potential impacts that might affect rural areas in the near future.

Climate change and environmental degradation: Climate change and environmental degradation disproportionately affect rural areas, leading to increased social exclusion. Extreme weather events, economic decline due to the shift to a green economy, and job losses in traditional sectors, like agriculture and mining, contribute to higher poverty rates and outmigration, particularly among younger generations. Groups in vulnerable situations, such as the elderly, women, and low-income families, face heightened risks as access to housing, healthcare, and social services becomes more limited. With inadequate resources for climate adaptation, rural communities may be left behind, further deepening social inequality. Political resistance to climate policies and the challenges of international cooperation can exacerbate these issues, leaving rural populations marginalised and excluded from opportunities for economic and social advancement. It is important to note here that remote rural areas host a high diversity of natural ecosystems and are rich in natural capital, making them critical for climate change mitigation and biodiversity conservation⁷⁵. These areas are well-positioned to contribute to the EU's green transition but face threats from environmental degradation such as agricultural intensification and soil sealing⁷⁵.

Demographic shifts and urbanisation: Demographic ageing and urbanisation trends have significant implications for social and economic exclusion in rural areas. As younger populations migrate to urban centres for education and employment, rural regions face accelerated depopulation, leaving behind ageing communities with increasing care needs and shrinking tax bases. Labour shortages, especially in healthcare and caregiving sectors, are more pronounced in rural areas, where attracting and retaining skilled workers is already difficult. Limited access to formal care and childcare services exacerbates gender inequalities and reinforces barriers to full labour force participation, particularly for women. In many rural communities, older residents rely heavily on unpaid family care

⁸⁵ One of the five factors of leaving no one behind (LNOB) for assessing the evidence of who is left behind, as seen in UN Sustainable Development Group (2022) Operationalizing leaving no one behind - Good practice note for UN country teams <https://unsdg.un.org/sites/default/files/2022-04/Operationalizing%20LNOB%20-%20final%20with%20Annexes%20090422.pdf>

⁸⁶ Gender equality is pursued through SDG 5: Achieve gender equality and empower all women and girls

⁸⁷ Inclusive and quality education is pursued by SDG 4: Ensure inclusive and equitable quality education and promote life-long learning opportunities for all.

due to inadequate formal support infrastructure. This can deepen social exclusion, strain intergenerational relationships, and perpetuate cycles of poverty. Without targeted investment in care infrastructure, affordable housing, and connectivity, rural areas may struggle to adapt to demographic change, further marginalising residents. Furthermore, remote rural areas are experiencing significant population decline and rapid ageing, with over 20% of EU municipalities affected⁷⁵. These demographic changes reduce the working-age population, put pressure on public services like schools and healthcare, and may lead to further depopulation if not addressed⁷⁵.

Technological advancements and digital divides: Technological advancements, particularly in AI and automation, have uneven impacts across regions, with rural areas facing unique disadvantages. While these technologies can improve productivity and connectivity, rural communities often lack the digital infrastructure and training opportunities needed to fully benefit. This exacerbates the digital divide, leaving many rural residents with limited access to high-speed internet, digital services, and upskilling programs. Digital infrastructure remains inadequate in remote rural areas; over 45% do not meet the EU's 30 Mbps broadband target⁷⁵. Poor digital connectivity limits access to online services, hampers economic diversification, and increases the digital divide between urban and rural populations⁷⁵. Job displacement due to automation is more intense in rural areas where employment is often concentrated in sectors highly susceptible to technological disruption, such as agriculture, forestry, and manufacturing. Without targeted reskilling and employment transition support, these communities risk increased unemployment and long-term socio-economic exclusion. Furthermore, the centralisation of tech development and control by private actors (often located in urban or global hubs) means that rural voices are underrepresented in shaping digital governance. As a result, regulatory frameworks and technological infrastructures may not reflect rural needs, deepening geographic inequalities. To ensure rural inclusion in the digital transition, policies must prioritise investment in broadband infrastructure, support local innovation ecosystems, and provide accessible digital education and training. Without such interventions, technological progress could widen socio-economic disparities between rural and urban areas, undermining territorial cohesion and inclusive growth.

Geopolitical turbulence: Geopolitical instability and weakening global cooperation could have significant implications for rural communities, which are often more exposed to economic shocks and policy volatility. Global conflicts and rising energy prices disproportionately affect rural households, where energy poverty is more prevalent and dependency on fuel and transport is higher. Rural areas may also be more vulnerable to climate-induced migration, both as points of origin, due to environmental degradation and limited adaptation capacity, and as potential destinations for displaced populations. This can strain local services and social cohesion, especially where infrastructure is underdeveloped or where political discourse fuels anti-migrant sentiment. Increased polarisation and disinformation campaigns can deepen social fragmentation in rural communities, particularly in regions facing demographic decline, economic stagnation, or digital exclusion. Limited access to diverse media sources and public forums may also exacerbate mistrust in institutions and feed into authoritarian or extremist narratives. To build rural resilience, EU and national policies must prioritise access to independent information and civic education, local-level democratic participation mechanisms, investment in infrastructure and energy self-sufficiency, tailored integration strategies where migration is involved.

Societal and political polarisation: Rural areas are more economically vulnerable because incomes are lower, populations are shrinking, and many jobs, especially in farming or seasonal work, are at risk due to climate policies. If there's no fair plan to support rural communities during the green transition, people may lose their livelihoods and move away, leading to social breakdown. Many rural places also suffer from poor services like healthcare, schools, transport, and internet, which makes it harder for people to find work, stay connected, or get the support they need. Young people often leave for better chances elsewhere, while older people may be left behind with little help. Climate policies made for cities don't always work in the countryside and can feel unfair unless they come with proper support like job training and better infrastructure. Finally, people in rural areas may feel ignored by national and EU leaders, so it's important to involve them more in decisions and give local communities a stronger voice.

Globalisation and fragmentation: The spread of global culture through social media can push aside local traditions. While digital tools can help rural communities share and protect their heritage, not everyone has the skills or access to use them. Economically, many rural areas depend on farming, raw materials, or money sent from abroad, making them more vulnerable when global trade slows or changes. Remote rural areas struggle to compete economically in a globalised context due to lower productivity and limited sectoral diversification⁷⁵. However, sectors like sustainable tourism and agrifood provide opportunities for these areas to engage with global markets, provided infrastructure and skills gaps are addressed⁷⁵. The growing gap in values between young men and women, often shaped by what they see online, may affect rural communities differently and could lead to more young people moving away. At the same time, limited access to technology can make it harder for people in rural areas to take part in political and social life, which may lead to greater isolation if they are not given enough support.

3.4 Forecasts on Future Trajectories - Results of the Delphi Exercise

Within the framework of the INSPIRE Delphi survey, a total of 49 survey statements were developed, based on literature research and included in an online questionnaire, which were then discussed by field experts. These statements reflect on the probability of appearance of potential drivers (i.e., developments that cause change, affect or shape the future⁸⁸) and trends (e.g., notable characteristics of a phenomenon) in the domains of (i) social inclusion needs of rural areas of different geographical characteristics; (ii) specific needs of groups in vulnerable situations (integrating the intersectional dimension); (iii) impact on access in service delivery; (iv) impact on social entrepreneurship; and (v) potential mitigation measures through enhanced governance.

The study outcomes indicate that **majority agreement** – where more than 75% of the respondents had rated either 4 and 5 (Agree and Fully agree, respectively), or 1 and 2 (Disagree and Fully disagree, respectively) – **occurred in 43 out of 49 statements** (34 statements in the first round and 9 statements in the second round). In comparison, **bipolarity** – where respondents were divided over an issue – **occurred in a total of 6 statements** (see Figure 3.3.3.1). In this section, the main study

⁸⁸ Futures4Europe (2025) <https://www.futures4europe.eu/>

results are presented to provide the reader with meaningful insights and a better understanding of the topics under investigation. The analytical results are available in the Appendices, section 8.4.

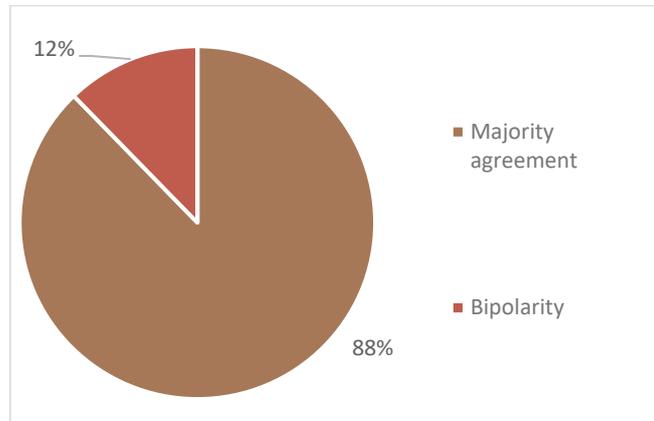


Figure 3.3.3.1 The consensus achieved among participants

3.4.1 Social Inclusion Needs of Rural Areas

The following paragraphs offer forecasts for the next decade and examine the future trajectories of **social inclusion needs in rural areas of different geographical characteristics** (traditional rural, island/coastal, peri-urban, and mountainous).

Experts agreed in the majority that **traditional rural areas** (statement 1) are expected to face declines in agricultural employment. This trend will increase the need for reskilling and support for alternative livelihood pathways. Experts note this will mainly affect native and EU workers, while low-skilled roles may shift to non-EU nationals. Ensuring rural resilience will depend on balancing support for sustainable agricultural practices with the development of inclusive employment opportunities in sectors like agrotourism, the circular economy, digital services, and local crafts. The success of these transitions will depend on locally adapted training, strong partnerships (with agricultural associations, cooperatives and learning institutions), and targeted funding. The majority of experts agree that shrinking and ageing populations in **traditional rural areas** (statement 5) are expected to deepen social isolation and limit economic revitalisation. Experts note that this trend is more pronounced in certain regions, such as Mediterranean inland areas, while some rural areas with modern infrastructure may be less affected. Outmigration of young people in search of better opportunities contributes to these demographic shifts. However, targeted public and private investments, along with the development of care services, community hubs, and intergenerational programmes, can help counteract isolation and stimulate local economies. Success will depend on effective regional planning, community-driven initiatives, and aligning new services with local cultural heritage and green transition goals. Experts agreed that **traditional rural areas** (statement 9) will increasingly need cultural and information services to retain youth and preserve heritage. Experts agree these services can strengthen identity, foster community engagement, and support social cohesion, especially when developed through participatory approaches involving young people. However, such initiatives alone are not sufficient. Their effectiveness will depend on being part of broader strategies that also ensure access to quality housing, transport connectivity, economic opportunities, and robust digital infrastructure.

“ [...] Such services foster a sense of identity and community engagement, which are essential for social cohesion. However, these efforts must be integrated with broader strategies addressing economic opportunities, infrastructure, and digital inclusion. [...] ”

- Participant LFC42

The majority of experts indicated that **island and coastal rural areas** (statement 4) are expected to face increased vulnerability to climate-related displacement, which may impact community stability. Experts highlight that this vulnerability will vary by location, with remote regions being particularly at risk. The extent of impact depends on specific factors like exposure to sea-level rise and extreme weather events. Addressing these challenges will require locally driven climate adaptation strategies, integrated with social inclusion efforts, participatory planning, and the active role of social enterprises and community-led initiatives.

“ Addressing these challenges requires integrated planning that combines climate adaptation with social inclusion, engaging residents in participatory processes to co-design resilient, nature-based solutions that protect both people and place. ”

- Participant LFC42

Expert opinions on statement 7 “Digital nomadism and remote work will offer new social inclusion opportunities for **islands and remote regions**-if infrastructure improves” were divided, revealing both optimism and scepticism regarding the social inclusion potential of digital nomadism and remote work in islands and remote regions. Some experts agreed that, provided digital infrastructure improves, these trends could revitalise local economies, attract diverse populations, and create new services and employment opportunities, particularly if complemented by community-rooted initiatives, like co-working hubs, skills training, and affordable housing measures. However, others questioned whether such inclusion is realistic or sustainable, warning that an influx of remote workers and digital nomads could drive housing shortages, rising living costs, and gentrification, without genuinely integrating newcomers into local communities, which could lead to more social exclusion for the hosting populations. Some stressed that digital nomads are often disconnected from host regions both socially and economically, functioning more as long-term visitors than as contributors to local cohesion. Others noted that social inclusion depends not only on infrastructure, but also on the preparedness, skills, and openness of local populations. Experts emphasised the importance of inclusive policies and safeguards to avoid reinforcing inequalities and ensure local populations benefit meaningfully from these changes.

“ [...] However, this influx can also exacerbate inequalities between relatively affluent digital nomads and local residents, who may face lower wages and higher living costs. To promote true inclusion, policies and designs must address these disparities, ensuring affordable housing, equitable access to services, and active participation of locals in shaping development. ”

- Participant LFC42

Experts agreed in the majority that **mountainous rural areas** (statements 8) will require targeted healthcare delivery systems, including mobile and telemedical solutions, to address geographic isolation and infrastructure limitations. Experts emphasise that while digital tools like telemedicine can improve access (especially for the elderly and people with disabilities) they should not replace the need for physical infrastructure and in-person care. Successful implementation will depend on co-designing solutions with local communities, ensuring accessibility for older populations, and integrating healthcare services with community spaces and digital infrastructure.

“*What they need is primary health care near their residence. This can't be substituted with telemedical support.*”

- Participant M2ZVE

The statement "**Mountainous regions** will face worsening transport and digital infrastructure gaps in comparison to urban areas, reducing access to services and jobs" (statement 2) received mixed reactions from experts, reflecting diverse perspectives and regional differences. While several participants agreed that such gaps may persist or worsen (especially due to depopulation, difficult terrain, or policy delays), others questioned the inevitability of decline. Some emphasised that transport and digital disparities are already a current reality, not a future trend, and that targeted investments (e.g., through tourism development, satellite internet, or community-led digital hubs) could mitigate or reverse these inequalities. It was highlighted that mountainous areas that have already invested in seasonal tourism might not experience these difficulties. Certain experts highlighted the potential for improvement via new technologies or national and EU investments, though others noted that such improvements might be slow or uneven. Participants also stressed the importance of tailored, inclusive solutions that address the specific needs of groups in vulnerable situations in these areas.

Experts agreed that **peri-urban areas** (statement 10) will require integrated urban-rural transport solutions to improve equitable access to economic and social opportunities. Experts note that while most peri-urban regions already have functioning transport systems, these should be strengthened and adapted to address growing disparities caused by rapid development and population change. Ensuring inclusive mobility will depend on coordinated, sustainable transport planning that connects rural and urban areas effectively. Over the next decade, **peri-urban areas** (statement 3) are likely to face increasing challenges with mismatched service provision, driven by rapid urban sprawl, and inadequate planning. As more people move into these zones, services such as transport, healthcare, education, and housing will often lag behind demand, creating inequalities, especially for groups in vulnerable situations like low-income families and migrants. However, this outcome will strongly depend on whether regional and spatial planning becomes more coordinated and inclusive. To avoid deepening exclusion, integrated governance frameworks, collaborative urban-rural planning, and community engagement mechanisms will be essential. If participatory planning, infrastructure investment, and adaptive policy tools are not implemented, the predicted mismatches will persist or worsen, especially in regions with weak institutional support or fragmented development strategies.

““ *The coexistence of rural and urban characteristics often leads to uneven access to services like healthcare, education, and transport, disproportionately affecting vulnerable groups. Effective regional planning and community-driven initiatives are essential to address these mismatches and promote inclusive development.*

- Participant PZSCQ

””

In the coming decade, **peri-urban rural areas** (statement 6) are likely to experience growing social tensions, largely driven by population inflows, uneven access to affordable housing, and disparities in educational opportunities. These pressures will not manifest uniformly but will be most pronounced in regions where public infrastructure, social services, and governance systems fail to keep pace with rapid demographic change. Tensions may arise between long-term residents and newcomers, especially when housing scarcity or school overcrowding becomes visible. However, these tensions are not inevitable. Their severity will depend on whether inclusive planning, participatory governance, and social innovation mechanisms, such as community-led housing initiatives and education partnerships, are adopted.

3.4.2 Needs of Vulnerable Groups

The following paragraphs offer forecasts for the next decade and examine the future trajectories of the **specific needs of groups in vulnerable situations** in rural areas. The groups in vulnerable situations include the elderly (especially digital illiterate), people of low socio-economic status, unemployed youth, persons with disabilities, women (especially single parents), migrants and refugees (especially women and refugees), ethnic minorities (especially Roma), farmers/agricultural workers (especially informally employed).

Expert perspectives did not fully align for statement 11 “**Unemployed rural youth** will remain excluded unless digital and entrepreneurial training becomes widely available”. Some experts agreed that expanding digital and entrepreneurial training is an important factor in reducing exclusion among unemployed rural youth. Many participants stressed that access to such skills is essential for enabling participation in modern labour markets, particularly in regions with few large employers. Several highlighted that rural youth often lack the digital literacy and confidence needed to pursue emerging job opportunities or self-employment. Some emphasised the importance of designing these trainings inclusively and aligning them with local economic contexts and community needs. However, some participants pointed out that training alone is not sufficient to address youth exclusion. Broader structural factors, such as a lack of job opportunities, weak local economies, or limited connectivity, were identified as equally or more important. Others argued that such training is already widely available in some areas, and that what is missing is a mindset shift, mentorship, or systemic reforms. A few respondents noted that green and sustainability skills, cooperative work models, and community-based initiatives are also key elements for tackling rural youth unemployment.

Experts agreed in the majority that **elderly individuals** (statement 12), especially those who are digitally illiterate, will face increasing marginalisation unless digital literacy initiatives are combined with accessible in-person services. Experts emphasise the need for human-centred digital design that minimises the complexity of digital tools and allows easier access for diverse older populations. Co-developing blended service models (combining digital and face-to-face options) with elderly users

ensures they are culturally appropriate, non-disruptive, and responsive to varying needs and preferences. The digital services should be complementary to face-to-face services to address issues like loneliness and social exclusion.

Experts think that **migrants** of lower socioeconomic status (SES) and **refugees, particularly women** (statement 13), will struggle to integrate without tailored housing, language, and employment services. Experts emphasise that integration must be locally adapted, gender-sensitive, and responsive to the specific cultural and social backgrounds of different groups, noting that some communities may face greater integration challenges than others. Co-designed, holistic support services (developed in collaboration with affected populations) are essential to address language barriers, promote employability, and foster community acceptance. A strong role for the social economy, alongside active community engagement and inclusive planning, is key to reducing exclusion and enabling long-term integration and resilience. Experts also agreed in the majority that **migrants** of lower socioeconomic status, **refugees** (especially women), and **minority youth** (statement 20), will require culturally responsive lifelong learning pathways to break intergenerational exclusion. Experts emphasised that such pathways must be inclusive, adaptable, and co-designed with affected communities to reflect their lived experiences and aspirations. Beyond individual support, interventions should also engage majority populations through awareness-raising. Locally rooted learning ecosystems that also offer people the ability of keep learning their own language as well (supported by social economy actors) can promote social mobility, cultural inclusion, and long-term resilience.

The majority of experts agreed that **Roma and other vulnerable ethnic minorities** (statement 14) will continue to face barriers in access to education and health unless policies move beyond legal enforcement alone to include culturally sensitive, community-led approaches. It is important to understand that discrimination is not the only root cause of poor literacy and health. Experts stress the importance of embracing the cultural identity of these groups rather than attempting assimilation, and of designing alternative policies that address structural issues affecting literacy and health directly. Inclusive strategies should involve both minority and majority populations in joint community initiatives and employment efforts to foster trust and participation. Tailored interventions that recognise the specific attributes and needs of each group, supported by participatory governance, are essential to achieve meaningful progress.

“ [...] Alternative policies are needed to improve literacy and health among vulnerable groups. The reference to anti-discrimination implies that discrimination is the root cause of poor literacy and health, which obscures the problem. ”

- Participant FQ11A

Experts agreed in the majority that **informally employed agricultural workers** (statement 15) will remain economically insecure without targeted formalisation policies and access to social protection. Experts highlight the need for legal safeguards, health coverage, and pension schemes, alongside strong policy incentives to transition informal labour into formal employment. Community-based outreach and participatory planning are essential to ensure these measures are trusted, accessible, and adapted to rural conditions. Social enterprises that are active in the field of work integration can

play a key role in this transition, acting as intermediaries to provide formal employment and social benefits. At the same time, enforcement against exploitative practices (such as the use of intermediaries supplying cheap labour) is necessary to uphold fair labour standards.

“It’s not only childcare, but also care for senior parents, so the need will be also for strengthening social services for elderly care.”

- Participant 9KC5

Experts agree that **women in single-parent rural households** (statement 16) will face dual burdens of care and underemployment unless childcare services and flexible job policies are expanded. Experts emphasise that solutions must address both childcare and eldercare responsibilities and be carefully designed to protect work-life balance, avoiding overwork and burnout. Locally adapted employment models (such as those developed by social enterprises) and childcare cooperatives could also offer meaningful support. However, more flexibility in labour market arrangements should be approached with caution to ensure it does not undermine social protection.

Experts agreed in the majority that **people with disabilities** (statement 17) in rural areas will need stronger legal safeguards and inclusive infrastructure to access education and healthcare. Experts highlight that accessibility must extend beyond buildings to include public spaces, mobility, and inclusive services. Legal protections should be reinforced by infrastructure investment and community-based support systems. The application of universal design principles and participatory planning methods is essential to create environments (both physical and digital) that promote independence, dignity, and full social participation.

Expert perspectives on statement 18 “Access to essential physical wellbeing services (e.g., water, energy, telecom) will be increasingly unequal for **vulnerable groups in remote rural areas**” were not fully aligned. Some agreed that vulnerable people in remote rural areas still face problems accessing basic services like water, electricity, and the internet. They stressed that unequal access can limit wellbeing and inclusion, especially as more services (like healthcare) rely on good internet connections. They also pointed out the need for public investment and community-based solutions to fix these gaps. However, others disagreed, saying that access to these services has actually improved over time, often thanks to technology, EU funding, and subsidies. A few said that the problem is not the services themselves, but the economic and political choices behind how they are provided.

Finally, over the next decade, **groups in vulnerable situations** (statement 19) in rural areas are expected to face increasing, compounded risks due to climate change, particularly if social protection systems are not adapted to local environmental vulnerabilities. While the severity and nature of climate impacts will vary by geography, the consensus highlights that events such as floods, heatwaves, and wildfires can disproportionately harm those with limited economic resources, insecure housing, or restricted mobility. This forecast will only hold true if existing safety nets remain generic and fail to address localised risks. To avoid worsening inequalities, countries must implement targeted climate adaptation measures, such as community-based early warning systems, eco-social policies, and resilient infrastructure, while expanding social safety nets to reflect environmental realities. Where governments fail to localise support or prioritise inclusive planning, vulnerable populations will bear the brunt of the climate crisis.

3.4.3 Access in Social Services Delivery

The following paragraphs offer forecasts for the next decade and examine the future trajectories of the **impact on access to social service delivery** in rural areas. They offer insights on gaps and opportunities for essential services, including physical wellbeing services (Transport, Energy, Telecommunications), baseline social conditions services (Healthcare, Housing, Education), economic services (Training, R&D, Accounting, Insurance), services for non-material wellbeing (Information, Cultural creativity, Long-life education).

In the coming decade, experts agree that many rural areas are likely to experience reduced access to essential **healthcare services** (statement 21) due to ongoing trends toward centralisation, especially in countries where healthcare systems are already urban-focused or under-resourced. However, the extent of centralisation will vary across EU member states depending on their administrative structures and policy choices. Where centralisation persists, mobile units and digital outreach (e.g., telemedicine, remote diagnostics) will be critical for ensuring rural inclusion, but only if built on inclusive infrastructure, co-designed with communities, and adapted to users' physical, cognitive, and digital literacy needs. Still, digital and mobile models alone will not fully substitute for in-person, continuous care, particularly for vulnerable populations like the elderly or disabled. It is important to note that relying on mobile/digital methods as the only existing option could result in underserving critical health needs that require direct contact.

 [...] for these solutions to be effective, they must be supported by inclusive infrastructure, community trust, and co-designed service models that consider users' physical, cognitive, and digital literacy needs.

- Participant LFC42



Groups in vulnerable situations across all rural area types will likely face increasing housing insecurity and deteriorating **living conditions** (statement 22) unless housing policies are reformed and adapted to rural realities. Rural regions face distinct and growing challenges, such as the proliferation of abandoned properties, the conversion of homes into holiday rentals or Airbnbs, and limited incentives for renovation or energy efficiency. These trends risk excluding low-income residents, youth, and elderly populations from stable housing. To prevent worsening insecurity, policies must go beyond physical shelter, addressing spatial quality, energy sustainability, and community integration. Critically, rural housing policies must be tailored and designed through participatory processes that reflect local needs and resource constraints.

The statement 23, "**Infrastructure for energy and water** in isolated rural areas will require large-scale investment to avoid exclusion" received mixed reactions by experts. It was broadly agreed that investments are needed to improve water and energy infrastructure in isolated rural areas, particularly in light of the green transition and increasing pressures from climate change. Several participants emphasised that without such investments, rural communities risk being left behind in terms of basic service access, energy security, and environmental resilience. EU and national funding (e.g., Green Deal, REPowerEU) as well as public-private partnerships were seen as critical enablers. The need

for community-driven, resilient, and sustainable solutions was frequently highlighted, especially for renewable energy systems, microgrids, and water resilience. However, there was no consensus on the scale and type of investment required. Some experts challenged the necessity of large-scale investments, while others advocated for a shift toward smaller-scale, decentralised investments, which may be more cost-effective, flexible, and better aligned with local needs.

“ Investments will be needed, but perhaps not state-led large-scale ones. You might have cases in which smart specialisation techniques can be applied to overcome such challenges. ”

- Participant C7L9I

Broadband and telecom access (statement 24) will be as vital as roads for inclusion in remote rural areas. As services move online, the lack of connectivity will deepen exclusion from healthcare, education, and employment. Participants emphasised that digital exclusion is now a critical barrier to economic and social inclusion. Ensuring equal access will require viewing broadband as essential infrastructure, supported by targeted investments and community outreach.

Public transport deficits (statement 25) are likely to deepen isolation among elderly and disabled rural residents, particularly as car use becomes less viable with age or mobility issues. However, this outcome is not inevitable. It will depend on whether inclusive, accessible, and affordable mobility options, such as community transport, on-demand services, and smart village models, are scaled up. Participatory planning is essential to ensure services reflect the actual needs of diverse age and ability groups.

The majority of experts agree that **AI and automation in public service delivery** (statement 26) may widen exclusion for the elderly and low-literacy populations. The statement will hold true unless human-centred design, hybrid service access (digital and in-person), and community-based digital mediation are prioritised. Without these, many may become dependent on younger family members for basic administrative tasks, reinforcing inequality.

Experts agreed that **remote education** (statement 27) may deepen rural educational inequalities unless rural digital infrastructure and local support structures are improved. The statement will remain valid unless rural digital infrastructure is significantly upgraded and paired with local support, such as training hubs, mentoring, and community spaces for in-person learning and investment in digital literacy and access to devices is made.

“ Digital infrastructure must be paired with in-person mentoring, training hubs, and access to devices. ”

- Participant LWY4P

Experts in majority agree that access to **economic services** such as accounting, insurance, and R&D (statement 28) for small rural enterprises will not be accessible without digital service models. While digital service models (e.g., online accounting or insurance platforms) will expand, their effectiveness will rely on foundational infrastructure like electricity and internet access, as well as tailored digital training and human support systems. In many cases, hybrid models combining digital tools with

physical presence, such as rural hubs, local cooperatives, or intermediaries, will be critical to bridge gaps in digital literacy and trust.

In the coming decade, experts think that **infrastructure investments** that lack decentralised governance and genuine community participation are likely to miss the most marginalised rural areas (statement 29). For these investments to be truly inclusive and effective, decision-making power must be shared locally, allowing communities to shape priorities based on their specific needs. Participatory approaches like community-led local development (CLLD) and inclusive budgeting will be crucial to ensure fair distribution of resources.

[...] it is essential to have decentralized governance structures and meaningful involvement of local communities in the decision-making processes. This helps ensure that the needs of the most excluded areas are taken into account.

- Participant PZSCQ

Experts agree that **non-material wellbeing services** (statement 30), such as cultural initiatives and lifelong education, will become essential to prevent mental health decline and community fragmentation in rural areas. These services foster social cohesion, a sense of belonging, and individual resilience, which are especially critical in isolated communities facing challenges like post-pandemic recovery and climate stress. However, their effectiveness will depend on inclusive design, participatory implementation, and balancing digital platforms with in-person community activities that encourage direct social interaction and mutual support.

3.4.4 Social Entrepreneurship

The following paragraphs offer forecasts for the next decade and examine the future trajectories of the **potential impacts and opportunities for associations, cooperatives, mutual organisations, foundations and social enterprises** (food banks, social pharmacies, social housing, etc.).

Experts agree that **social enterprises** are expected to play a central role in addressing service gaps for groups in vulnerable situations in remote rural areas (statement 31). However, for this forecast to hold true, social enterprises must not be viewed as substitutes for the welfare state. Their impact will depend on supportive national contexts, robust redistribution policies, and clear boundaries that position them as complementary actors, empowered to innovate without assuming sole responsibility for essential public services.

Social enterprises should not be expected to replace the responsibilities of the state in guaranteeing equal access to essential services. However, in contexts where public service provision is chronically underfunded or inaccessible, they can play a complementary role—as long as this role remains community-driven and not used to justify state withdrawal. Empowering social enterprises must go hand in hand with strengthening public infrastructure and rights-based policies.

- Participant GZWJP

The majority of experts think that, over the next 10 years, **women entrepreneurs of rural enterprises** will require targeted financial access and mentorship to successfully grow **businesses** that advance social inclusion (statement 32). While all entrepreneurs face challenges, women in rural areas often encounter compounded barriers linked to gender norms, limited networks, and access gaps. For this forecast to hold, support must go beyond generic assistance, offering gender-sensitive financing, tailored mentorship, and inclusive ecosystem-building that considers the specific social and geographic constraints faced by women entrepreneurs. Experts also stressed the importance of following an intersectional approach where more factors are taken into account when it comes to support, along with gender.

Experts agree that **climate-smart rural enterprises** will generate employment in the next decade, provided they receive targeted innovation policy support (statement 33). Realising this potential will depend on tailored strategies that address current barriers, such as limited financing, skills gaps, and inadequate infrastructure. For this forecast to be valid, national and EU-level frameworks must incentivise low-carbon innovation in rural settings, foster community-based energy models, and invest in capacity-building to ensure inclusive, place-based participation in the green transition.

Experts in the majority think that **youth-led rural entrepreneurship** is likely to grow over the next decade, provided it is supported with digital and green skills, seed funding, and reliable market access (statement 34). For this potential to be fully realised, support must go beyond training. Young entrepreneurs will need integrated systems that offer financial and regulatory tools, local and digital networks, and clear opportunities to build sustainable livelihoods within their own communities.

Migrants and refugees in rural areas could become important **drivers of entrepreneurial innovation** over the next decade, if legal and financial barriers are addressed (statement 35), in tandem with deeper structural, social, and cultural factors. While easing residence and employment restrictions is necessary, it is not sufficient. Entrepreneurship will only thrive if basic needs, such as security, housing, and social integration, are met first. It is also essential to recognise that migrants and refugees are not a homogeneous group. Intersectional, context-sensitive policies are needed to reflect their diverse realities (e.g. Ukrainian refugees may face fewer legal obstacles and are less likely to settle in rural areas, while rural migrant and refugee populations often consist of men with low levels of education and non-European cultural backgrounds, etc.).

“ Addressing legal and financial hurdles is not enough for helping migrants and refugees pursue entrepreneurship. Their basic needs (security, food, shelter, community) need to be addressed first. ”

- Participant IKMAA

The majority of experts think that **cooperatives and social foundations** may (re)emerge as key platforms for inclusive rural economic development (statement 36) over the next decade, but only if they receive sustained material, technical, and policy support. While these models offer community ownership, resilience, and shared benefits, particularly where traditional markets fail, they currently face challenges such as limited resources, reputational issues, and the need to adapt to digital and organisational innovation. Their success will depend on targeted incentives, renewed visibility, and alignment with contemporary needs.

Experts agree that **digital platforms** have the potential to help **rural micro-enterprises** scale (statement 37) by expanding market access and operational efficiency, but this potential will only be realised if digital upskilling and infrastructure gaps are addressed. Over the next decade, digital literacy will be a critical determinant of inclusion, especially for older or less-connected populations. While future generations may acquire basic tech fluency, current disparities in skills, connectivity, and tailored support risk deepening structural inequalities. Participatory training programmes and investment in inclusive digital infrastructure is required.

Experts had different opinions on statement 38 “*Peri-urban rural zones will become hotspots for social innovation if integrated into regional entrepreneurial ecosystems.*”. Some agreed that peri-urban areas have good potential for social innovation, as they often combine urban resources (like infrastructure) and more young people are settling in them as they can afford the housing prices. For this to work, there needs to be good planning, local support, and strong connections to nearby cities and businesses. Others were more cautious, saying that this outcome is not guaranteed. They noted that innovation depends on things like people’s skills, motivation, community identity, and good governance.

The majority of experts agree that **informally employed agricultural workers** can gain basic protections through social economy models that promote formalisation of labour. However, this will only be possible in the next 10 years if such models are backed by state involvement, proper enforcement mechanisms, and incentives that make formal work attractive and viable for both workers and employers. Without addressing the root causes of informality, including lack of legal enforcement, cost pressures on employers, and workers' willingness to remain informal (out of need), these models risk limited uptake or even job loss (meaning that informally employed people will lose their jobs).

3.4.5 Governance and Mitigation Measures

The following paragraphs offer forecasts for the next decade and examine the future trajectories of the **enhanced governance and mitigation measures**, looking into gaps and opportunities for advancing democratic participation, administrative efficiency, reduction of bureaucracy, and equality of opportunity.

The majority of experts agree that **multi-level governance and policy reforms** are essential to align national, EU, and local rural inclusion strategies (statement 40). Such alignment ensures that top-down frameworks reflect bottom-up needs, enabling coherent planning, equitable resource distribution, and effective implementation. Without clear coordination between policy levels, rural initiatives risk duplication, fragmentation, or exclusion of vulnerable groups. Stronger vertical and horizontal collaboration, including community co-design and local capacity-building, can make rural inclusion efforts more responsive, efficient, and sustainable.

Experts think that funding and infrastructure decisions should include **consultation exercises in rural areas** to prevent urban bias (statement 41). However, these consultations must ensure genuine participation, including representatives of all social groups of rural areas. Without adequate information sharing and capacity-building beforehand, consultations risk becoming tokenistic and excluding those with less formal education or limited access to policy processes.

“ Before any consultation, information is essential. The knowledge gap is so big that people will not be able to participate in a consultation effectively otherwise.

- Participant IKMAA

”

Public-private-civic partnerships will be key to overcoming fragmentation in rural service delivery and innovation, according to the majority of experts (statement 42). These partnerships can pool resources, expertise, and local knowledge to address complex rural challenges more holistically. When well-designed, they enable shared responsibility, foster innovation, and improve coordination across sectors, ensuring that rural services are better tailored, more efficient, and locally embedded. However, to be truly effective, such partnerships must prioritise public interest, transparency, and inclusive governance, rather than defaulting to market-driven logics.

Cross-border rural areas will require **transnationally harmonised governance tools** to prevent exclusion due to jurisdictional gaps (statement 43), according to experts. In such areas, harmonised governance approaches, while complex to implement, are essential for ensuring continuity in services, access to rights, and the effective coordination of rural inclusion strategies. These tools must remain sensitive to sovereignty and local contexts but should promote shared standards, interoperability, and joint decision-making to support vulnerable populations across administrative boundaries.

“ Coordinated policies and participatory frameworks can help bridge gaps and support vulnerable populations in these complex regions.

- Participant LFC42

”

The majority of experts believe that **digital governance** must be adapted for equitable rural service access (statement 44). To be inclusive, digital governance tools must reflect the specific challenges of rural areas, such as limited connectivity, lower digital literacy, and infrastructural constraints. This adaptation requires blending online and offline engagement methods, ensuring co-designed platforms that reflect local needs, and offering in-person support to bridge gaps.

Local participatory mechanisms will determine the success of rural development policies aimed at vulnerable populations (statement 45), as per the majority of the experts participating in the Delphi exercise. When communities, particularly those most at risk of exclusion, are actively involved in shaping policy, outcomes are more likely to reflect lived realities and local priorities. This not only enhances the inclusiveness and effectiveness of rural interventions but also builds long-term ownership and trust. However, meaningful participation requires capacity-building and support to ensure that groups in vulnerable situations are genuinely able to engage in decision-making processes.

“ Participatory mechanisms will be pivotal, but of equal importance will be the development of civic skills of vulnerable populations to enter the consultation arena. ”

- Participant C7L9I

The majority of experts agree that **inter-municipal cooperation** will be necessary to scale services in sparsely populated areas (statement 46). By pooling resources and coordinating efforts, municipalities can overcome the limitations of low population density, reduce service delivery costs, and enhance access for rural residents. This approach is particularly vital for reaching groups in vulnerable situations that may otherwise be underserved. However, for such cooperation to be effective, it must be supported by broader regional frameworks and governance structures that ensure strategic alignment and long-term sustainability.

Experts agree that **equity-focused subsidy allocation criteria** will be essential to ensure the fair distribution of EU and national funds to disadvantaged rural areas (statement 47). By basing funding decisions on transparent, needs-based indicators, such criteria can help address structural disparities and direct support to communities most at risk of exclusion. While implementation may face challenges due to the complexity of rural development contexts, such an approach is crucial for promoting balanced territorial development.

The majority of experts agree that over the next decade, **climate adaptation planning** (including renewable energy projects and environmental protection measures) must integrate local customs and involve directly affected rural communities (statement 48) to ensure both legitimacy and long-term effectiveness. While the urgency of the climate crisis may require swift action, community co-creation and cultural sensitivity are essential to build trust, avoid resistance, and design context-appropriate solutions. Participatory approaches that respect rural traditions can enhance social cohesion, strengthen local ownership, and increase the adoption of nature-based and technological solutions.

“ [...] Involving directly affected communities through participatory processes ensures that nature-based solutions are tailored to local ecological and cultural contexts. [...] ”

- Participant LFC42

Experts agree in majority that **simplified administrative procedures and accessible legal aid** are essential to empower rural actors, especially marginalised individuals and aspiring social entrepreneurs, to engage meaningfully in development processes (statement 49). Reducing bureaucratic complexity lowers entry barriers, fosters participation, and enhances the capacity of local actors to navigate regulatory frameworks. Legal support mechanisms can further ensure that rights are protected and that rural initiatives are launched and scaled within secure institutional environments.

3.5 Critical synthesis, future scenarios and conclusions for European rural areas

The Delphi survey and macro-level analysis identified several interrelated drivers of social exclusion and inclusion in rural Europe. Main conclusions are as follows:

Social inclusion needs: Many rural areas face systemic gaps in access to essential services and infrastructure. Geographic isolation, low population density and uneven investment contribute to persistent disparities in healthcare, education, transport, and digital connectivity. Addressing these gaps, especially through rural broadband, telehealth and integrated transport systems, is critical for equitable development.

Groups in vulnerable situations: Specific rural populations remain at heightened risk of exclusion. These include older adults, youth not in employment or education, women, ethnic minorities, migrants, people with disabilities and those in informal or precarious work. The intersection of these identities often compounds their vulnerability, requiring targeted, inclusive approaches.

Access to services: Centralised service models do not respond adequately to rural realities. Service delivery challenges include long travel distances, insufficient coverage and high per-capita costs. New approaches such as mobile services, tele-services, and multi-purpose community hubs are essential to ensure fair and effective provision.

Social entrepreneurship: Social enterprises are key actors in rural resilience, offering locally rooted solutions that address service gaps and promote economic inclusion. Yet these initiatives often face structural constraints, such as limited market size, funding barriers and capacity challenges. Supporting them through dedicated financing, training and peer networks is essential.

Governance and participation: Effective and inclusive governance is vital for addressing social exclusion. Locally driven, multi-level governance allows solutions to be better adapted to local contexts. Citizen engagement, especially through participatory governance models like “Smart Villages”, “Smart Mountains” and “Smart Islands”, strengthens both innovation and legitimacy in service provision.

3.5.1 Future scenarios for European rural areas to 2035

The Delphi Survey findings revealed widespread agreement on several future developments, including the growing importance of digital infrastructure, the deepening of demographic imbalances (especially ageing and youth outmigration), and the need for innovative service models tailored to low-density territories. Experts emphasised the increasing vulnerability of specific population groups, such as elderly residents, women, migrants, and youth, who often experience compounded exclusion due to limited access to transport, digital tools, health care, education and employment opportunities.

From these insights, **three plausible future scenarios** for European rural areas by 2035 were constructed:

In the **optimistic scenario**, rural areas undergo inclusive revitalisation driven by investment in digital and physical infrastructure, support for social entrepreneurship, and strong local governance. Technological solutions such as telemedicine, e-learning, and digital public services are effectively deployed, while approaches, like the “Smart Village” concept, foster community innovation and participation. Young people are more inclined to stay or return, and groups in vulnerable situations benefit from improved service access and targeted support. This scenario is characterised by strengthened territorial cohesion and more resilient, connected rural communities.

In the **pessimistic scenario**, current challenges deepen due to policy neglect and uneven development. Rural depopulation accelerates, particularly in remote and mountainous areas. Essential services continue to be centralised, making them less accessible to rural dwellers. The digital divide persists, and governance remains fragmented and reactive. Groups in vulnerable situations face growing isolation, while social initiatives and enterprises lack the capacity or resources to respond. Social exclusion becomes more entrenched, and rural areas risk becoming disconnected from broader social and economic progress.

The **divergent scenario** describes a future where rural development in Europe unfolds unevenly, both between regions and within them. Some rural areas, often those near urban centres or with access to niche economic opportunities, manage to innovate and thrive through proactive governance, targeted investment, and strong community engagement. At the same time, more remote or structurally disadvantaged regions struggle due to limited infrastructure, administrative capacity, or political attention. Even within the same territory, progress may vary across sectors or population groups (for example, digital inclusion and entrepreneurship may advance, while access to healthcare or youth retention remains a challenge). This scenario reflects a fragmented but dynamic rural landscape, where **success depends on the ability to capitalise on local strengths, through smart specialisation and adaptive governance, while mitigating persistent vulnerabilities**. The outcome depends on local initiative and access to enabling conditions rather than a unified territorial policy response.

These scenarios do not predict the future but rather illustrate the possible consequences of different policy and investment choices. The Delphi results emphasise that the future of rural inclusion will be shaped by the decisions made today particularly in areas such as digital connectivity, governance innovation, and social service models.

The insights from the Delphi survey will inform several core components of the INSPIRE project, including the development of a territorial typology on social wellbeing, the design of the Rural Social Inclusion Policy Dashboard, and targeted capacity-building activities focused on digital, business, and governance skills in the 7 pilot areas of the project. By anticipating future needs and mapping credible scenarios, this foresight work contributes to a more strategic, inclusive approach to rural development in Europe.

3.5.2 European rural areas stand at a critical crossroads

This section of the report highlighted the complex, multi-layered dynamics of social exclusion, while also identifying concrete pathways for inclusive transformation. The future of rural Europe by 2035 is not fixed but it depends on the decisions and choices made today. With the right mix of investments, policies, and empowered local actors, it is possible to build rural regions that are resilient, connected, and inclusive. The insights presented here will guide INSPIRE in its ongoing work to support that vision.

4. Meso-Level Analysis

4.1 Introduction

4.1.1 Overview of Task 1.3

The sections presented below report on the activities undertaken as part of Task 1.3. This task examines drivers and barriers to social inclusion at the country level (meso-level). The task contains two main sections: Semi-structured interviews of quadruple helix stakeholders, and a nationally representative survey of the general population.

The aim of this task is to elucidate key barriers to social inclusion and drivers of social inclusion per pilot country. Previous literature has suggested that contextual differences can greatly affect the outcome of social inclusion⁸⁹, and patterns that are prevalent in one country may not apply elsewhere. This can be due to institutional phenomena, where both hard institutions (provision of healthcare, access to services) and soft institutions (perceptions, discrimination) can contribute to higher or lower social inclusion. The interviews with quadruple helix stakeholders will aim to uncover whether there are important between-country differences regarding the main barriers and drivers of social inclusion in those regions.

From the individual perspective, there is at present a lack of information on the prevalence and drivers of social inclusion. One reason for this is that there appears to be no standardised way of measuring social inclusion⁹⁰. Where general measures are available (e.g. AROPE), they are constructed using objective indicators available through national statistics⁹¹. For the purposes of our study, **we employ a novel individual outcome measurement, the Experiences of Social Inclusion Scale (ESIS)**⁹². While this scale has been used before in Finland, as yet the measurement has not been systematically collected and validated across countries. We collect the ESIS instrument across our pilot regions and assess whether known dimensions of social inclusion and determinants of social inclusion are plausibly associated with this scale.

4.1.2 Linkages to other tasks

This particular task builds on previous work within the project. Most notable, the conceptualisation of social inclusion is directly related to deliverable D1.1⁹³, which outlines key considerations in the measurement of social inclusion and its drivers. The results of this task will be used further on in the project, in three places. First, the results of this task will feed into the spatial microsimulations to be undertaken in T2.3. The spatial microsimulations will rely on the survey data collected here to construct a set of synthetic sub-regional populations containing fine-grained data on social inclusion.

⁸⁹ Hulse, K., & Stone, W. (2007). Social Cohesion, Social Capital and Social Exclusion: A cross cultural comparison. *Policy Studies*, 28(2), 109–128. <https://doi.org/10.1080/01442870701309049>

⁹⁰ van Bergen, A. P. L., Wolf, J. R. L. M., Badou, M., de Wilde-Schutten, K., IJzelenberg, W., Schreurs, H., Carlier, B., Hoff, S. J. M., & van Hemert, A. M. (2019). The association between social exclusion or inclusion and health in EU and OECD countries: A systematic review. *European Journal of Public Health*, 29(3), 575–582. <https://doi.org/10.1093/eurpub/cky143>

⁹¹ Mathieson, J., Popay, J., Enoch, E., Escorel, S., Hernandez, M., Johnston, H., & Rispel, L. (2008). Social Exclusion Meaning, measurement and experience and links to health inequalities. *WHO Discussion Paper*.

⁹² Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

⁹³ South-East European Research Centre. (2025) D1.1 Measuring social inclusion and wellbeing in European rural areas: a systematic review, INSPIRE

Finally, the results and implications drawn from this task will feed into the regional typology (T5.1) and policy recommendations (T5.3).

4.2 Part I: Semi-structured interviews with stakeholder

4.2.1 Research Objective: understanding the main themes, challenges, and narratives regarding social exclusion for the pilot regions

The overarching objective of this qualitative study is to gain an in-depth understanding of the main themes, challenges, and narratives surrounding social exclusion within diverse rural pilot regions in six countries - Ireland, France, Poland, Romania, Slovakia and Greece - with a specific focus on identifying regional similarities and differences in these experiences. This investigation aims to explore the multifaceted nature of social exclusion and conversely, social inclusion, as well as barriers to inclusion and drivers of inclusion, particularly in rural areas in the aforementioned countries.

This study proposes to identify consistently vulnerable groups (e.g., individuals with disabilities, older adults, those with low education, traveling communities, migrants, and individuals facing poverty or mental health issues), while critically examining rural geographies themselves as a significant risk factor, acknowledging their remoteness.

It will further explore the consequences of social exclusion, map the prevalent barriers to social inclusion, which are expected to include factors such as limited rural mobility and accessibility, outflow of young talent and discrimination. Finally, key drivers of social inclusion are identified.

4.2.2 Rationale for using interviews

The rationale for using interviews with quadruple helix (QH) stakeholders for this qualitative study is to gain an in-depth, multi-dimensional understanding of social exclusion in rural regions. Interviews are especially suitable for uncovering inherently qualitative information such as "main themes, challenges, and narratives" and exploring the complex issues of marginalisation, isolation, and systemic barriers, as well as identifying vulnerable groups and drivers of inclusion.

The diverse perspectives of academic, policy, social enterprise/community engagement, and advocacy stakeholders provide a comprehensive view, encompassing theoretical insights, policy implementation challenges, practical community engagement, and the lived experiences of marginalised groups, thereby capturing both universal and region-specific characteristics of social exclusion.

4.2.3 Methodology

Data collection strategies and deviations

The data were primarily collected through structured (online) interviews across six distinct contexts: Greece, Ireland, Poland, France, Slovakia and Romania. The partner organisations in charge of conducting the interviews were MedINA, The Wheel, the European Rural Development Network, L'ADAPT, Pedal Consulting and ROMONTANA, respectively. The data collection followed an

interview guide that was created by researchers at the University of Groningen based on best practices from current professional literature⁹⁴ and revised by partners in the respective work package of the INSPIRE project. Then, the interview guide was translated into the local languages for all piloting countries. The data collection protocol explicated the purpose of the interviews and the research as a whole to the pilot countries, as well as the complete procedure of conducting the interviews. Data collection took place between March 19, 2025 and April 19, 2025.

Across all country contexts, all Quadruple Helix interviews were conducted (online) by a single researcher in the local language, with only the interviewer and interviewee present in each session. There was only one instance in France in which two individuals, stakeholders from the same organization, were interviewed at the same time. Following the pre-defined protocol, the interview approach began with a short explanation of the project goal and the use of this research in it. This was followed by open, participant-led discussions, gradually introducing more directed questions related to project themes after establishing rapport. In the beginning, the interviewee was asked to state their background and their relationship to the topic of social exclusion. In the next step, the interviewer asked them to provide definitions of social exclusion and social inclusion from their perspective. After establishing a shared understanding of the concepts, the interview focused on questions around the state of social inclusion in rural areas and any potential barriers to it. The interviewees were also asked to identify groups that they believed to be particularly vulnerable to social exclusion. Having established the challenges and obstacles to social inclusion, the next part of the interview addressed drivers of social inclusion, policy and practical interventions, as well as best practices that the interviewee was aware of. The evolution of topics in the interview was deliberate, starting from the rather negative side, onto discussing positive forces, possible solutions and collaborations between various stakeholders. This particular interview structure facilitated the interviewer to end the interview on a more positive note, potentially leaving the interviewee with motivation and a sense of direction in addition to being heard and seen by the researcher conducting the interview.

The interviews were designed not to last more than one hour. The average duration for interviews ranged from 30 to 45 minutes for all countries. Following the interviews, transcripts were created and, if necessary, translated by the researcher. Most researchers provided the raw translated transcripts to the University of Groningen team for further analysis, the Irish partners provided convenient summaries of the answers given by the interviewees. Even though the transcripts of the Polish interviews were not accessible to the researchers of the University of Groningen at the point of writing this report, they will be included in future analyses for scientific publications. Moreover, the results from the Polish interviews will be directly used in T3.1 for the in-depth profiling of the Polish pilot area.

Positionality of researchers

All interviewers were trained in the methodology that were the structured interviews and had prior experience in conducting interviews. Differences between individual interviewers, their culture or communication style cannot be fully ruled out considering that the research took place in six different

⁹⁴ Flowerdew, R., & Martin, D. (2005). *Methods in Human Geography: a guide for students doing a research project* Second Edition. Boyce, C., & Neale, P. (2006). *Conducting in-depth interviews: A guide for designing and conducting in-depth interviews for evaluation input* (Vol. 2). Watertown, MA: Pathfinder international. (IGAS, Pos. 84)
Preparing a research interview | Step-by-step guide. (2025, February 11). ATLAS.ti. <https://atlasti.com/guides/interview-analysis-guide/preparing-a-research-interview#how-to-create-an-interview-guide> (IGAS, Pos. 85)

countries, with more than ten researchers involved in total. The differences were effectively managed by a strict adherence to the interview protocol, which not only supported the professional conduct of the interviewers but also the standardisation of the procedure, making it possible to compare the interviews across regional contexts.

Participant characteristics and recruitment

For the interviews, we generally aimed to recruit strategic representatives from the Quadruple Helix model, specifically targeting individuals with deep knowledge and direct involvement in social inclusion, policy, and community care, with a particular emphasis on rural or vulnerable contexts. This involved seeking out a diverse range of stakeholders including academics, policy implementers, social enterprise leaders, community programs managers, advocates for marginalized groups (such as immigrants or travelers), government officials (e.g., directors of regional social services), researchers, industry representatives (e.g., care home administrators), community leaders (e.g., NGO and religious leaders), and lawmakers. An inclusive approach to vulnerability was adopted, extending beyond standard definitions to include, for example, island residents. Recruitment was primarily conducted through direct outreach and via the network and contacts of the local partners conducting the interviews, utilising methods such as email, telephone, and professional networking platforms like LinkedIn. All targeted participants were typically high-level decision-makers or stakeholders directly involved in relevant areas, and they agreed to participate after being informed about the purpose and confidential nature of the interview.

The number of participants was determined by predefined targets (8 interviews per region, with a balanced representation of the QH stakeholders). The desired number of interviews was generally met or exceeded across the contexts (e.g., 9 interviews in Ireland and Romania, and 12 in Slovakia). However, challenges were noted in recruiting specific sectors, such as public sector representatives in Greece, and securing interviews with certain groups like women's rights organisations, medical NGOs, and the Church in Greece, despite meeting overall numerical targets. Interviews were conducted by individual researchers or members of the respective research teams, with an emphasis on establishing rapport with participants.

4.2.4 Analytical framework

The data collected through transcribed interviews, which also underwent translation where applicable, were subjected to a rigorous qualitative analysis process: The coding was performed by a researcher at the University of Groningen with prior experience in qualitative data analysis. Due to the exploratory nature of the research, which aimed at developing understanding factors that underlie and influence the process and outcome of social exclusion, the data were coded inductively, meaning that codes and themes emerged from the analysis itself. This iterative process was consistently informed by the data and the overarching questions guiding the INSPIRE project, aligning analytic choices with study goals.

The Mac version of the MAXQDA24 software was used to code the interviews. Coding was systematically conducted interview by interview, organized in clusters of regions, treating each interview transcript as a unit of analysis. The analytic scheme was partially determined by the central questions of the work package - specifically, "What are barriers to social inclusion?" and "What are drivers of social inclusion?" - and further guided by the thematic structure of the interviews.

Consequently, coding categories emerged during the analysis, rather than being predefined. Coding trees per theme can be seen in Figure 4.2.4.1 to Figure 4.2.4.6.

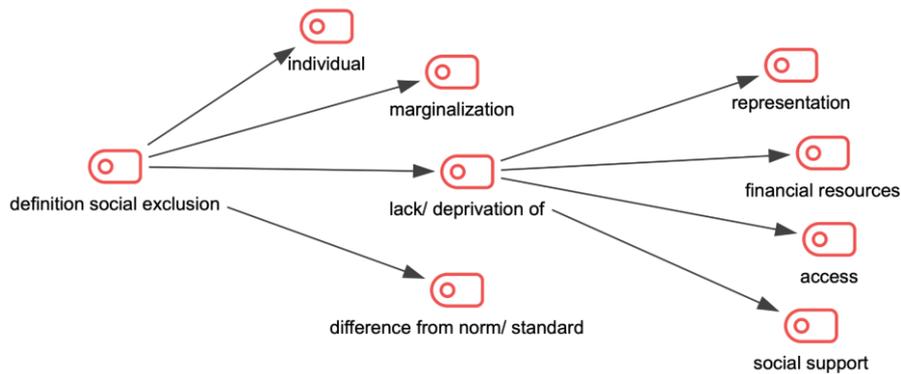


Figure 4.2.4.1 Coding tree for the theme of social exclusion.

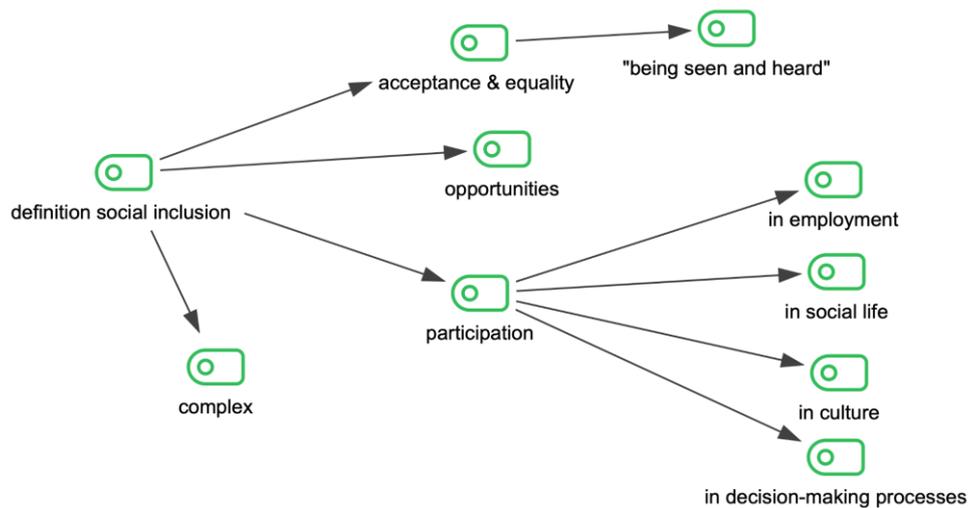


Figure 4.2.4.2 Coding tree for the theme of social inclusion.

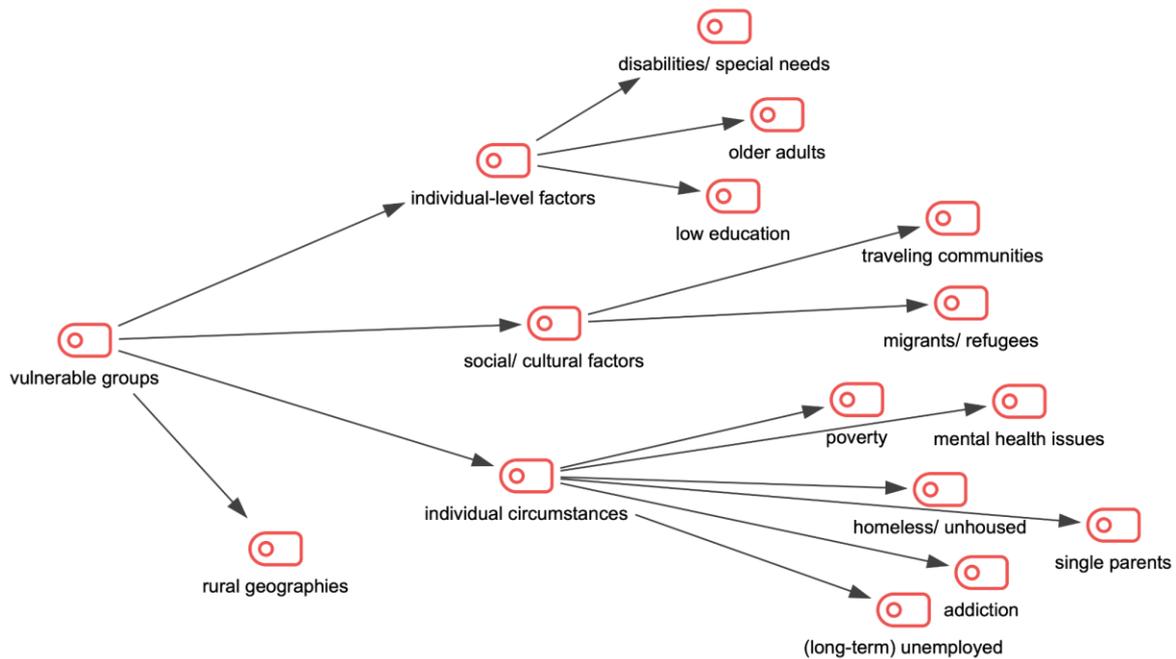


Figure 4.2.4.3 Coding tree for the theme of vulnerable groups.

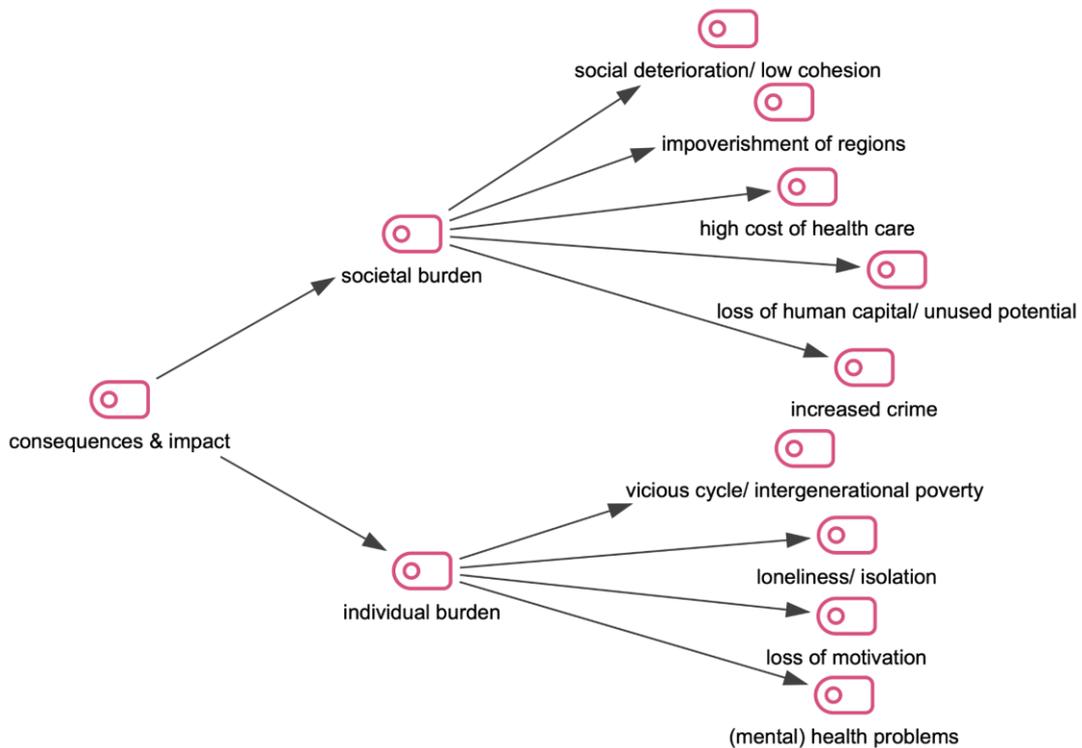


Figure 4.2.4.4 Coding tree for the theme of consequences and impact of social exclusion.

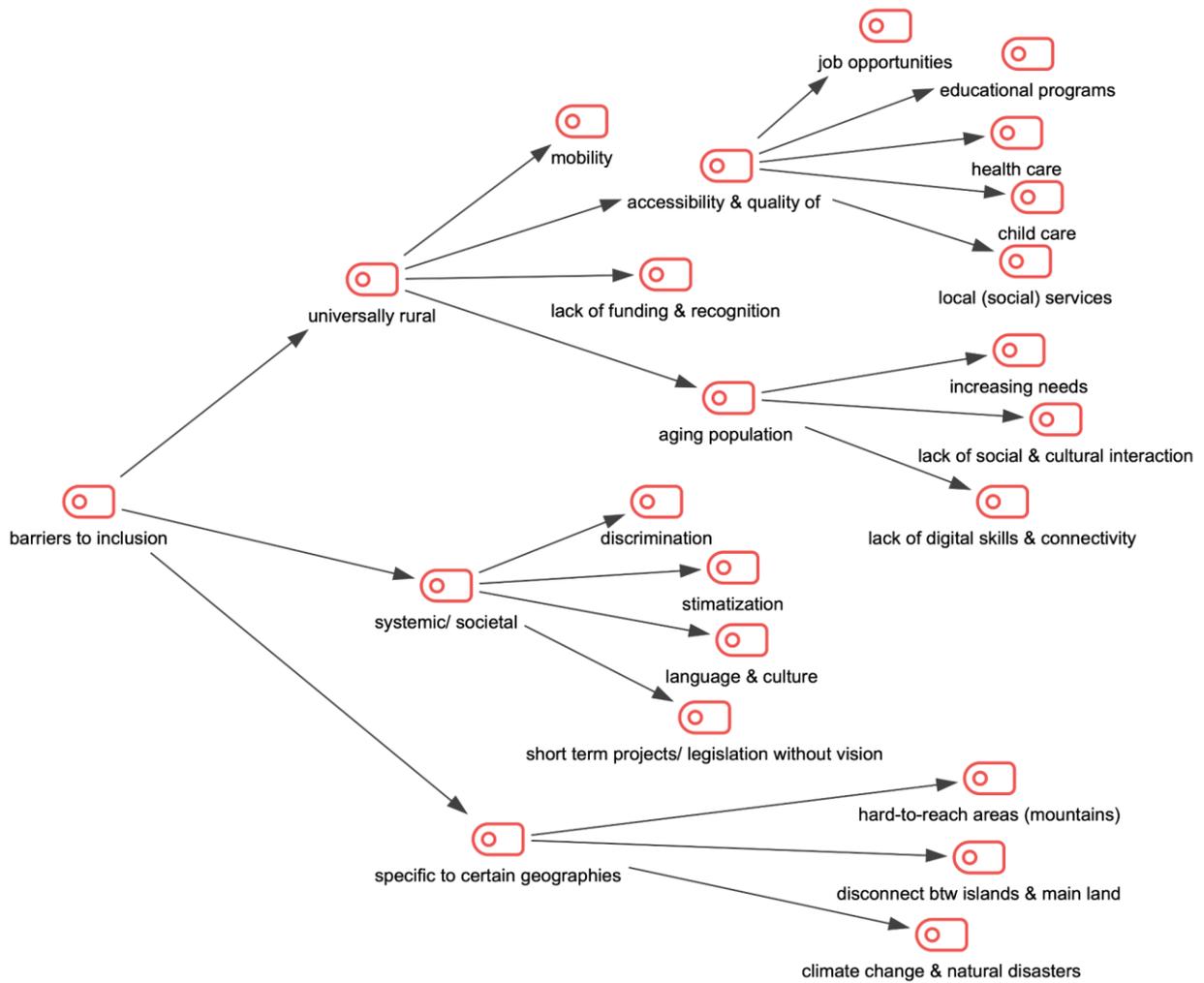


Figure 4.2.4.5 Coding tree for the theme of barriers to social inclusion.

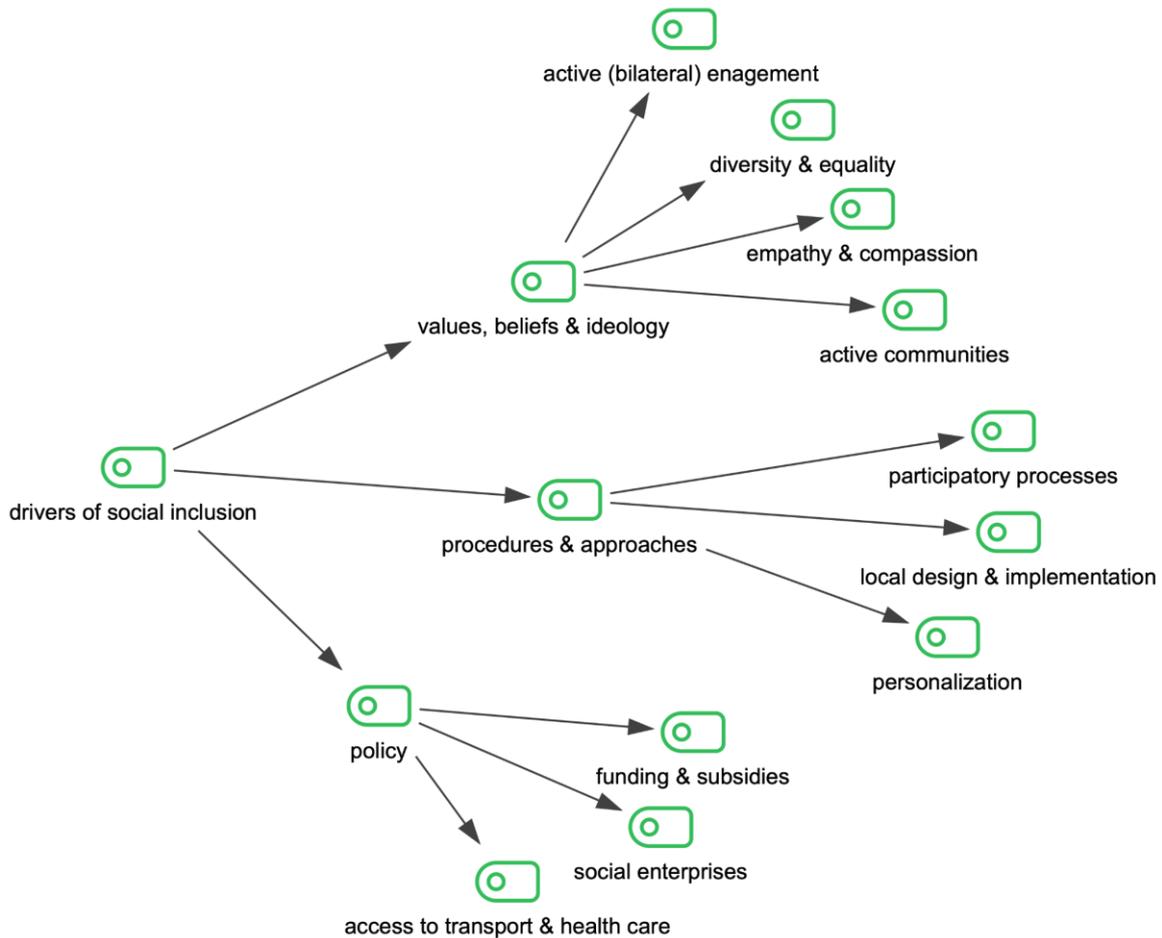


Figure 4.2.4.6 Coding tree for the theme of drivers of social inclusion.

4.2.5 Interview results

Main themes, challenges and narratives for social inclusion

Based on the analysis of the collected interview transcripts, the research findings are presented through key themes and categories that emerged directly from the data. These themes represent the meaning and understandings derived by the researcher from the inductive coding process. The central themes identified include: *the definitions of social exclusion and social inclusion*, which provided foundational understandings from the perspectives of the diverse stakeholders interviewed; the identification and characterization of *vulnerable groups*, reflecting an inclusive approach to vulnerability that extended beyond standard definitions; the exploration of the *consequences and impact of social exclusion*, detailing the lived experiences and systemic effects; and, consistent with the work package's central questions, the comprehensive mapping of *barriers to social inclusion* and *drivers of social inclusion*. These emergent coding categories and themes formed the basic analytic scheme, providing a coherent framework for understanding the complex dynamics of social inclusion within the studied contexts. The results are further discussed by theme.

Definitions of social exclusion and social inclusion

When asked about their definition of social exclusion, a substantial number of interviewees jumped straight into identifying structural problems that they see in their daily work and life. The ones who did give a description of social exclusion - roughly half of the total number of interviewees - mostly agreed on a small number of characteristics: the marginalization, isolation or invisibility of certain groups or individuals, mainly because they are different from the societal norm in any way, and the lack or deprivation of access to basic amenities, financial resources, social support or (political) representation. There was a consensus that the source of social exclusion lies in systemic factors and society rather than the individual in a vulnerable situation: “It means being forgotten...[by society]”, (Interview 5, Romania).

For the definition of social inclusion, there was more of a two-sided story that emerged from the responses: On the one hand, social inclusion, most interviewees agreed, means that a society accepts all individuals as they are and that there are systems in place and available to support those who need it. On the other hand, there was an emphasis on the individual to be able (and willing) to participate in society via employment, social and cultural activities, and active citizenship. The equality of rights and opportunities for all individuals in a society was a central point in many definitions given. This is one example:

“Inclusion means allowing people in vulnerable situations, people with disabilities, people with disabilities, whatever the disability, to have a place, to be a little like everyone else, a place under common law, to have the same concerns, the same springboards, the same opportunities as any person from a so-called ordinary background. It means equality for all, it means ensuring that difference is totally invisible, that difference no longer exists, in a way.” (Interview 8, France).

Groups in vulnerable situation

As the discussion came to who the stakeholders thought were the groups most vulnerable to social exclusion, many populations were mentioned, many of the same were brought up by interviewees across all countries. In order to have a better understanding, not only of who is vulnerable to social exclusion, but also what makes them vulnerable, the groups mentioned in the interviews have been sorted into four different categories covering individual-level factors, social and cultural factors, individual circumstances and rural geographies.

The individual-level factors were mentioned by stakeholders from all QH backgrounds in all countries and more specifically included disabilities or special needs, especially in children and older adults, older adults in general and individuals with low levels of education. These groups are particularly vulnerable because they require specialized care or more care and support than heteronormative, healthy adults do. In the category of groups that are vulnerable due to social or cultural factors, the traveling communities (often still called “Roma” by the interviewees) and migrants, including refugees, were mentioned in most interviews. These groups often have a very different lifestyle and culture than the majority of the population in their respective countries of residence, which makes them targets for discrimination and stigmatization. The individual circumstances that make someone vulnerable to social exclusion are diverse and mainly are seen to have been created by factors that are not controlled by the individual. In order of how often they were mentioned, they are: poverty or lack of financial means, mental health issues, single parenthood (especially for mothers), (long-term)

unemployment, homelessness and addiction. While being a diverse range of circum, all of these limits the opportunities individuals have or can take in order to be an active and engaged member of society. Finally, rural geographies put individuals local to them at risk of social exclusion due to their remoteness, which often comes with limited accessibility of amenities and social services as well as a shrinking and aging population.

Consequences and impact of social exclusion

When describing the consequences of social exclusion, interviewees often mentioned either the consequences for the vulnerable population that they were most familiar with or the greater impact on society. Therefore, the consequences were further classified into two categories, societal burden and individual burden. The increased cost of health care for socially excluded populations who did not receive preventative care was mentioned the most as a societal burden, closely followed by the decreasing social cohesion in local and regional communities. Further points mentioned that weigh on society is the impoverishment of regions that have high rates of socially excluded groups, the loss of human capital created by not using the potential of individuals not included in society and the potential for increasing crime rates as a consequence of poverty and lack of opportunities. Paralleling the two sides to social inclusion, the impact on socially excluded individuals was addressed by many stakeholders of all backgrounds. They especially stressed the (social) isolation and loneliness that results from being socially excluded, the trap of intergenerational poverty that many poor families face and the loss of motivation to take any action that results from these personal circumstances. All of these individual factors are also thought to further foster or increase existing (mental) health problems in socially excluded populations. This is well summarized by interviewee 12 from Slovakia:

“As a result [of the lack of opportunities], their development potential is entirely neglected, leaving them demotivated and further excluded from society, leading to a decline in their overall well-being.”

Barriers to social inclusion

Addressing the barriers to social inclusion that the QH stakeholders observed in their work, an abundance of barriers and hindering factors was identified during the interviews. To further organize the topics brought forward by the interviewees, the barriers were categorized into the following subsections: universally rural challenges, systemic and societal barriers, and barriers that are specific to certain geographies.

Among the group of universally rural challenges, stakeholders most often mentioned the limited mobility that rural communities have due to a lack of infrastructure or public transportation, this especially limits individuals without a driver’s license or their own vehicle. Directly connected to that, accessibility has been identified as an important issue across all countries, as all rural regions face the same trends. With many young people moving to urban areas, for example to follow an education or to take up employment there, rural communities are left without young talent and enough personnel to not only justify the provision of many services but also the personnel to run them, as this French stakeholder explicated:

“There’s a real difficulty maintaining services. Social and Solidarity Economy organizations in rural areas are the last remaining activities, often the main private sector companies, but they’re also

the only activities that can remain in terms of access to services. It's starting to become very problematic." (Interview 4, France).

Overall, a lack of accessibility to amenities such as health care, child care, educational programs and social services is described as one of the main barriers to social inclusion in rural regions, along with the aging populations in rural places. Older adults have an increasing number of needs that cannot be met due to the dwindling number of care providers in the respective areas. Social needs are often mentioned in this context as well, especially in the Romanian interviews. Older adults who are isolated in rural areas are reported to lack social and cultural interactions, which is exacerbated by their lack of digital skills and/ or the lack of connectivity and digital infrastructure for them to stay connected with friends and family via digital means.

When it comes to systemic or societal barriers, the interviewees most often reported discrimination and stigmatization to stand in the way of the inclusion of vulnerable groups. Of course, this particularly pertains to individuals with obvious, striking differences from the norm. The barriers that are most often mentioned in relation to migrants, refugees and the traveling community are language and cultural differences, which may make it difficult for members of these groups to engage with the local communities. Although these barriers were mentioned by many stakeholders, the one that got mentioned at the highest frequency was the short-term planning of many projects aimed at facilitating social inclusion and the level of bureaucracy involved. The lack of vision was cited to be one of the biggest problems, especially for NGOs and initiatives aimed at helping marginalized communities, when it comes to starting and continuing interventions that have a visible practical impact, as these quotes show:

"[The government] lacks a culture of planning, especially long-term, area-specific planning that responds to real local needs" (Interview 4, Greece), *"When the funding ends, there is no stable mechanism to continue the effort, and problems start to emerge."* (Interview 5, Greece).

Barriers that are inherent to certain geographies and cannot necessarily be generalized were mainly mentioned in the Greek interviews, as the regions included there were particularly remote. Therefore, their challenges also result from this remoteness - for mountainous regions, a strong barrier is that they are typically hard to reach with very limited infrastructure, the same is true for small islands, which can often only be accessed by boat or ferry, and life is very disconnected from the mainland. Finally, areas recently hit by or at-risk of natural disasters were mentioned in the Greek context. This can be linked back to the mountains and island regions as they are both directly affected by climate change, potentially exposing more individuals to the risk of social exclusion.

Drivers of social inclusion

On the more positive side of the issue, drivers of social inclusion were also identified and discussed in the interviews. The drivers reported a differentiated understanding of what social inclusion means and looks like in daily life. The separation into bottom-up (from the individual) and top-down (from society) cannot be easily made within this theme, therefore, the categories established only partially reflect the efforts made from different levels of society. Drivers of social inclusion were categorized into values, beliefs and ideology, procedures and approaches, and policy.

Through the analysis, it became very clear that there is a strong affective component to the topic of social inclusion - it moves people to see and discuss the fates and lived realities of disadvantaged communities and individuals, especially when the discussants are in more favourable positions. The values, beliefs and ideology that became apparent in the interviews, that are present in people who actively foster the social inclusion of vulnerable groups, could be described as the conviction that diversity is positive (or neutral rather than negative) and all people deserve equal rights and opportunities. Values further supporting this spirit of inclusion are empathy and compassion. A Slovak stakeholder phrased it like this:

“effective inclusion relies not only on public policy, but on empathy, local trust, and the capacity of institutions to adapt to real-life conditions, not just regulations.” (Interview 10, Slovakia). An Irish stakeholder mentioned *“the role of community leaders in promoting social inclusion and addressing misinformation”* and *“the importance of being friendly and welcoming, especially for those with traumatic experiences”* in this context (Interview 5, Ireland).

Stakeholders further voiced the role that active engagement with the vulnerable communities but also engagement of members of the vulnerable communities play in advocating for and realising social inclusion. Taken together, this showcases the role that interpersonal connections and social cohesion play in social inclusion of marginalised groups.

From a procedures and approaches perspective, stakeholders across all contexts and countries stressed that participatory processes, local design and implementation as well as tailoring the interventions and policies to specific audiences in specific places (*“bespoke, holistic support”* Interview 3, Ireland; *“effective decentralization, local capacity building, data-informed policy design, and sustained public investment”* Interview 3, Romania) was an important factor in the success of advancing social inclusion, as evidenced by the quotes.

In terms of policy, the interviewees mentioned (consistent) streams of funding and subsidies as local drivers of social inclusion as well as social entrepreneurship. NGOs and social enterprises were reported to have positive impacts on various aspects of service delivery and care provision in many of the rural areas discussed in the interviews (*“support the local community by choosing, for example, local suppliers or local companies for partnerships”* Interview 10, Greece; *“investment in mobile social services, and support for local partnerships between public institutions and NGOs.”* Interview 2, Romania; *“social and community enterprises to support local communities”* Interview 2, Ireland; *“community and voluntary sector organisations in being responsive to crises and the importance of maintaining their capabilities”* Interview 3, Ireland).

Access to (public) transport and health care was seen as essential to social inclusion. While often regarded as a governmental duty, NGOs and social enterprises were mentioned as a way to ensure access when not provided by local or regional governments.

4.2.6 Regional similarities and differences regarding main themes, challenges, and narratives

As explained in the previous section, there were no substantial regional differences in the main themes, challenges, and narratives identified. The barriers to and drivers of social inclusion identified in the interviews were found to be universally applicable across rural regions in all pilot countries. The only factor standing out was that many of the Greek interviews focused on farmers and populations in very agricultural

regions, who face challenges that are inherent to their industry in addition to their rural geography and were not represented in the other countries' interviews. For instance, the difficulties faced by these agricultural communities include, but are not limited to, a lack of modern machinery and the necessary new technological skills required for contemporary farming practices. Furthermore, there is a concern regarding the lack of young talent entering the agricultural sector and an outflow of current professionals, which impacts the sustainability and future of these rural industries. Additional challenges mentioned are limited accessibility and infrastructure within these rural farming areas, as well as increasing costs and heightened competition among the farmers themselves. Some of these barriers also apply to rural regions in other European countries, however, a generalisation of challenges specific to mountainous regions that rely on traditional goat and sheep farming might be difficult.

Within the general narrative of rural regions struggling with aging populations, population decrease, outflow of young talent and potential and diminishing local services and amenities, the Greek case of livestock farming can be seen as one specific application of structural deficiencies to a specific sector and population. Other sectors in other regions face similar challenges but have not been specifically addressed in the interviews to such an extent.

4.2.7 Contextualising results in literature on social inclusion

Definitions and nature of social exclusion

The interviewees' consensus on social exclusion as the marginalization, isolation, or invisibility of certain groups or individuals, largely due to systemic factors and societal norms rather than individual failings, aligns strongly with the academic conceptualisation. Collins⁹⁵ defines social exclusion as people being "effectively prevented from participating in the benefits of citizenship or membership of society owing to a combination of barriers". Similarly, Commins⁹⁶ describes it as "malfunctioning of different integration mechanisms" and a concept that points to "system failures" rather than individual failings. Collins further emphasizes that social inclusion aims to secure a minimum level of welfare and seeks to achieve outcomes, including participation in meaningful social life, rather than just offering life-chances. The interviewees' emphasis on the individual's "willingness to participate" also reflects the "paternalist" strand noted by Collins, where social inclusion policies sometimes "require people to become included".

Vulnerable groups and consequences

The diverse array of vulnerable groups identified in the interviews – including those with disabilities, older adults, individuals with low education, migrants, single parents, the unemployed, and residents of remote rural areas – corresponds to the literature's discussion of those disproportionately affected by social exclusion⁹⁷. The interviews' detailed account of the consequences and impact of social exclusion, categorizing them into "societal burden" (e.g., increased healthcare costs, decreasing social cohesion, loss of human capital, increased crime rates) and "individual burden" (e.g., isolation, intergenerational poverty, demotivation, worsening mental health), directly echoes the broader

⁹⁵ Collins, H. (2003). Discrimination, equality and social inclusion. *The modern law review*, 66(1), 16-43.

⁹⁶ Commins, P. (2004). Poverty and social exclusion in rural areas: characteristics, processes and research issues. *Sociologia ruralis*, 44(1), 60-75.

⁹⁷ Collins, H. (2003). Discrimination, equality and social inclusion. *The modern law review*, 66(1), 16-43.

Bernard, J., Contzen, S., Decker, A., & Shucksmith, M. (2019). Poverty and social exclusion in diversified rural contexts. *studia*, 13(2), 29-53.

understanding of social exclusion's pervasive effects. For instance, the literature highlights that long-term unemployment, a key indicator of labour market exclusion, leads to skill loss and demotivation, and contributes to increased numbers of people at risk of poverty and social exclusion⁹⁸. The concept of social cohesion as a desired outcome of social inclusion policies is also explicitly made in the academic discourse^{95,96}.

Barriers to social inclusion

Universally rural challenges were found to be limited mobility due to lack of infrastructure/public transportation, limited accessibility to amenities and services, and the outflow of young talent coupled with aging populations. These findings are strongly corroborated by rural studies, which frequently identify low population densities, distance from services, and demographic shifts (out-migration of youth, aging population) as intrinsic rural disadvantages that lead to weakened services and social disconnection^{95,99}. The inherent "invisibility" of rural poverty due to its dispersal and the prevalence of "idyllic" rural stereotypes, as noted by Commins¹⁰⁰, can further hinder recognition and policy intervention for these universal challenges.

Systemic and societal barriers were identified as discrimination, stigmatization, language and cultural differences, and significant bureaucracy, short-term project planning, and a lack of long-term vision in interventions. The literature confirms discrimination as a direct cause of exclusion⁹⁵, and delves into socio-cultural and moral aspects of exclusion, including stigmatisation⁹⁵. The crucial role of "quality of public institutions" in addressing social problems and facilitating support for disadvantaged workers is emphasised in other sources⁹⁶, suggesting that the identified governmental and bureaucratic shortcomings are indeed significant barriers.

Geography-specific barriers particularly highlighted in the Greek interviews, focus on extreme remoteness, challenging mountainous terrain, and isolated islands susceptible to natural disasters. This aligns with the call in rural poverty research for greater attention to "place-specific factors" and the diverse "local geographies" that shape disadvantage⁹⁵. The unique focus on farmers in very agricultural regions of Greece, facing industry-specific challenges (e.g., lack of modern machinery/skills, outflow of young talent, increasing costs/competition) in addition to their rural geography, provides a concrete example of how place and professional group intersect in creating specific barriers to inclusion⁹⁵.

Drivers of social inclusion

The reported drivers of social inclusion were categorised into values/beliefs/ideology, procedures/approaches, and policy.

The emphasis on empathy, compassion, local trust, and the recognition of diversity reflects the "affective" dimension of social exclusion, concerned with "developing bonds of solidarity" and

⁹⁸ Di Cataldo, M., & Rodríguez-Pose, A. (2017). What drives employment growth and social inclusion in the regions of the European Union?. *Regional Studies*, 51(12), 1840-1859.

⁹⁹ Walsh, K., O'Shea, E., & Scharf, T. (2020). Rural old-age social exclusion: A conceptual framework on mediators of exclusion across the lifecourse. *Ageing & Society*, 40(11), 2311-2337.

¹⁰⁰ Commins, P. (2004). Poverty and social exclusion in rural areas: characteristics, processes and research issues. *Sociologia ruralis*, 44(1), 60-75.

"friendship networks"¹⁰¹. The call for participatory processes, local design, tailored interventions, and sustained public investment aligns with the literature's focus on comprehensive strategies that address "system failures" and adapt to "specific needs of regions"^{100,102}.

The identified policy drivers, such as consistent funding, social entrepreneurship, and the critical role of NGOs in service delivery and access to transport/healthcare, directly address recognised gaps in public service provision in rural areas^{100,98}. The literature supports the importance of diverse welfare systems and public-private partnerships in tackling rural poverty and exclusion¹⁰³. Critically, the sources indicate that good government quality and strong human capital are fundamental elements for reducing long-term unemployment and fostering labour market inclusion¹⁰¹.

4.2.8 Discussion interviews

Summary of main results with a specific focus on regional similarities and differences

The analysis of interview transcripts revealed several main themes and categories that emerged directly from the data across all regions, forming the basic analytic scheme. These included the understanding of social exclusion as the marginalization, isolation, or invisibility of certain groups due to systemic factors, while social inclusion was defined as society accepting all individuals with systems to support them, alongside the individual's willingness to participate and the ensuring of equality of rights and opportunities. Consistently identified vulnerable groups across all countries included individuals with disabilities or special needs, older adults, those with low education, traveling communities, migrants, and individuals facing poverty, mental health issues, or homelessness, with rural geographies themselves posing a risk due to remoteness and limited accessibility. The consequences of social exclusion were categorized into societal burdens like increased healthcare costs and decreased social cohesion, and individual burdens such as isolation, intergenerational poverty, and loss of motivation. Barriers to social inclusion universally included limited mobility and accessibility to amenities in rural areas, an outflow of young talent leading to aging populations and fewer services, discrimination, and critically, the short-term planning and bureaucracy of social inclusion projects. Conversely, drivers of social inclusion emphasized values like empathy and the conviction that diversity is positive, participatory processes, and consistent funding, with NGOs and social enterprises playing a vital role in service delivery and ensuring access to transport and healthcare.

A key finding was the absence of substantial regional differences in these main themes, challenges, and narratives, with the barriers to and drivers of social inclusion being universally applicable across rural regions in all pilot countries. The only factor standing out was the frequent focus in Greek interviews on farmers and populations in highly agricultural regions, who face unique challenges inherent to their industry in addition to their rural geography. These specific difficulties included a lack of modern machinery and technological skills, a concern about the lack of young talent entering the agricultural sector and an outflow of current professionals, limited accessibility and infrastructure within these specific farming areas, and increasing costs and heightened competition among farmers. While some of these barriers might resonate with other rural areas, the Greek case of livestock farming represents a specific application of broader

¹⁰¹ Commins, P. (2004). Poverty and social exclusion in rural areas: characteristics, processes and research issues. *Sociologia ruralis*, 44(1), 60-75.

¹⁰² Di Cataldo, M., & Rodríguez-Pose, A. (2017). What drives employment growth and social inclusion in the regions of the European Union?. *Regional Studies*, 51(12), 1840-1859.

¹⁰³ Bernard, J., Contzen, S., Decker, A., & Shucksmith, M. (2019). Poverty and social exclusion in diversified rural contexts. *studia*, 13(2), 29-53.

structural deficiencies to a particular sector and population within the overarching narrative of rural regions struggling with aging populations, population decrease, outflow of talent, and diminishing local services.

The fact that the analysis revealed no cross-country differences in themes, challenges and narratives of social exclusion is significant for cross-national comparative research in rural studies, which has often been biased towards English-speaking countries and may oversimplify the diversity of European rural contexts¹⁰⁴. While recognizing universal applicability, the distinct focus on agricultural communities in Greece with their industry-specific challenges highlights the importance of "place-specific factors". This nuanced perspective acknowledges that while overarching themes exist, their manifestation can be distinct due to local economic structures and geographic conditions, contributing to a more comprehensive understanding of the diverse forms and drivers of rural social exclusion across Europe.

Results in context of research aim

The primary research objective was to gain an in-depth understanding of the main themes, challenges, and narratives regarding social exclusion across various pilot regions, with a particular focus on identifying regional similarities and differences. This comprehensive aim encompassed discerning how social exclusion was perceived as the marginalization or isolation of groups due to systemic factors, and social inclusion as the acceptance of all individuals with supportive systems and opportunities for participation.

The study sought to identify consistently vulnerable groups (e.g., individuals with disabilities or special needs, older adults, those with low education, traveling communities, migrants, and individuals facing poverty, mental health issues, single parenthood, long-term unemployment, homelessness, or addiction), recognizing rural geographies themselves as a significant risk factor due to remoteness, limited accessibility, and aging populations. Furthermore, it aimed to uncover the consequences of social exclusion (encompassing both societal burdens like increased healthcare costs and decreased social cohesion, and individual burdens such as social isolation, intergenerational poverty, and loss of motivation), and to thoroughly map the prevalent barriers to social inclusion (including limited rural mobility and accessibility to amenities, the outflow of young talent, discrimination, stigmatization, language/cultural differences, and the short-term, bureaucratic nature of social inclusion projects). Conversely, the objective also involved identifying key drivers of social inclusion (such as positive values like empathy and belief in diversity, participatory processes, and consistent funding, with NGOs and social enterprises playing a vital role in service delivery and access).

While the overarching barriers and drivers were found to be universally applicable across the pilot countries, a specific aspect of the objective was also to highlight any distinguishing regional characteristics, such as the particular challenges faced by agricultural communities in Greece due to industry-specific issues like a lack of modern machinery and talent outflow, in addition to general rural struggles. Please note that the specific content of this research objective, detailing the themes and regional focus, is derived from the comprehensive summary of findings provided in our previous conversation, as it is not explicitly stated in the currently provided source excerpts.

¹⁰⁴ Bernard, J., Contzen, S., Decker, A., & Shucksmith, M. (2019). Poverty and social exclusion in diversified rural contexts. *studia*, 13(2), 29-53

Typologies based on the findings from the analysis of the pilot region interviews seem to be better informed by groups of vulnerable communities or certain geographies rather than the countries themselves. As main challenges for social inclusion as well as the driving factors for it seem to be the same across regions, the regional typologies, if generated as planned, might all show very similar patterns and predictions of social exclusion

4.3 Part II: National survey on social inclusion in pilot countries

4.3.1 Introduction

More than one in five individuals in Europe live at risk of poverty or social exclusion¹⁰⁵. There are, however, substantial between-country and between-region variations. In 2019, the proportion of individuals at risk of social exclusion or poverty for the EU-27 varied between 19.2 per cent in towns and suburbs, to 22.4 per cent in rural areas¹⁰⁶. In Bulgaria and Romania, close to 50 per cent of the rural population is at risk of poverty or social exclusion (with urban populations at a substantially lower level of risk), while the proportion of rural residents exposed to the same risk in the Netherlands and Austria is just over 10 per cent¹⁰⁷.

In this section, we present an exploratory analysis of the survey data that were collected in the six pilot countries. Social inclusion (or social exclusion) is generally studied at the population (or regional) level. In a similar vein to poverty research, rather than construct an absolute measure of social inclusion, indicators assess the population at risk of poverty, taking that a compounding set of drivers of social inclusion will correspond to an increased probability of experienced social inclusion (e.g. AROPE). The present study, however, requires a measurement of social inclusion that allows for the identification of associations between axes (determinants), drivers of social inclusion, and individual experienced social inclusion, at the level of the individual rather than the country.

Rather than focus on objective measures of social inclusion and infer (or impose) from that the level of inclusion, the main dependent variable we include is a subjective measure of social inclusion, the Experiences Social Inclusion Scale, or ESIS¹⁰⁸. While other fields have a long-standing tradition of using self-assessed measurements of otherwise intangible concepts (e.g. utility in economics¹⁰⁹, self-assessed health and quality of life¹¹⁰, self-perceived poverty¹¹¹), developments of robust scales of social inclusion have only started relatively recently, with many previous studies adopting ad hoc

¹⁰⁵ EuroStat. (2025). *Living conditions in Europe—Poverty and social exclusion*. EuroStat - Statistics Explained. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Living_conditions_in_Europe_-_poverty_and_social_exclusion

¹⁰⁶ European Commission. (2021). *A long-term Vision for the EU's Rural Areas—Towards stronger, connected, resilient and prosperous rural areas by 2040*. European Commission. <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52021DC0345>

¹⁰⁷ EuroStat. (2019). *Share of people at risk of poverty or social exclusion, analysed by degree of urbanisation, 2019*. EuroStat - Statistics Explained. [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=File:Share_of_people_at_risk_of_poverty_or_social_exclusion,_analysed_by_degree_of_urbanisation,_2019_\(%25\)_LCIE20.png](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=File:Share_of_people_at_risk_of_poverty_or_social_exclusion,_analysed_by_degree_of_urbanisation,_2019_(%25)_LCIE20.png)

¹⁰⁸ Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

¹⁰⁹ Frey, B. S., & Stutzer, A. (2002). What Can Economists Learn from Happiness Research? *Journal of Economic Literature*, 40(2), 402–435. <https://doi.org/10.1257/002205102320161320>

¹¹⁰ Hays, R. D., & Morales, L. S. (2001). The RAND-36 measure of health-related quality of life. *Annals of Medicine*, 33(5), 350–357. <https://doi.org/10.3109/07853890109002089>

¹¹¹ Whelan, C. T., & Maître, B. (2013). Identifying childhood deprivation: How well do national indicators of poverty and social exclusion in Ireland perform? *Economic and Social Review*, 44(2), 135–164.

measurements of social inclusion (e.g. social capital, social empowerment). The ESIS measure of experiences of social inclusion represents a notable development in standardising the measurement of social inclusion at the individual level. The initial assessment of the instrument appears positive, with good internal and external validity¹¹². By focusing on a self-reported measure of social inclusion, we are able to show the associations between social inclusion and the four key dimensions taken from deliverable D1.1, providing insights regarding the association between the general dimensions of social inclusion and the self-assessed outcome¹¹³.

The aims covered in this deliverable are, therefore, twofold. First, we aim to provide a better understanding of the main drivers and characteristics of social exclusion in the general national population, with particular attention to differences across nations and degrees of rurality. Second, we collect data on subjective (self-assessed) social exclusion, related individual-level data of associated dimensions that are associated with social exclusion, and main drivers of social exclusion, building on D1.1 of this project. Comparing self-assessed inclusion across countries has been suggested as a relevant avenue for future research, but has so far not been implemented¹¹⁴. The survey results in this deliverable contribute to the meso-level of specific objective SO1.2: “Reveal driving forces, trends and impacts of social exclusion in rural areas in the macro- (global mega-trends), meso- (nation-state) and micro-level (community layer) to deliver a comprehensive policy state-of-the-art”.

There are two main linkages between the survey results in this deliverable and the other tasks. Deliverable D1.1 (as already mentioned) provides the foundation for the data-collection performed for this deliverable. The collected survey data will be used as the basis for spatial microsimulations and agent-based models, to be performed in Task T2.3, which then feeds into the business model typology in D2.3. The requirement that the data collected in this part of the study were used in spatial microsimulations placed some demands on the type of data collected and the sampling methods. Spatial microsimulations require a representative sample for the broader population¹¹⁵, as the survey data will be sampled to create synthesised sub-regional populations. Next, the surveys need to include a substantial amount of information that can be linked to registry data, or other data that are available for the regions for which data will be simulated¹¹⁶. These considerations informed the construction of our survey instrument.

The remainder of this report is structured as follows. Section 4.3.2 discusses the dimensions and axes of social inclusion developed in D1.1 in brief. Section 4.3.3 discusses the collection of the data, including a brief overview of the setup of the data collection and instrument selection. Section 4.3.4 discusses the analytical framework. Section 4.3.5 discusses the results of the statistical analyses, followed by the discussion of relevant findings in section 4.3.6.

¹¹² Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

¹¹³ Huxley, P., S. Evans, S. Madge, M. Webber, T. Burchardt, D. McDaid, and M. Knapp. 2012. “Development of a Social Inclusion Index to Capture Subjective and Objective Life Domains (Phase II): Psychometric Development Study.” *Health Technology Assessment* 16 (1): 1–248

¹¹⁴ Hassan, Z., Khreich, W., & Osman, I. H. (2022). An international social inclusion index with application in the Organization for Economic Co-Operation and Development countries. *Decision Analytics Journal*, 3, 100047. <https://doi.org/10.1016/j.dajour.2022.100047>

¹¹⁵ Lovelace, R., & Dumont, M. (2016). *Spatial microsimulation with R*. CRC Press.

¹¹⁶ Ballas, D., Broomhead, T., & Jones, P. M. (2018). Spatial Microsimulation and Agent-Based Modelling. In *The Practice of Spatial Analysis* (pp. 69–84). Reviews the state-of-the-art integration between spatial microsimulation and agent-based models

4.3.2 Dimensions and axes of social inclusion

While it goes beyond this document to revisit the entire discussion presented in D1.1, in this section we briefly present short summaries of the key dimensions and axes used in this study. For convenience, we have included the relevant figure from D1.1 report at the end of this section.

Economic security and employment. Economic security is essential for social inclusion and consists of stable jobs, income, income-satisfaction and job-satisfaction¹¹⁷. Long-term unemployment often leads to poverty and social exclusion, especially for vulnerable groups like youth, women, and the less educated.

The risk of poverty or social exclusion (AROPE)¹¹⁸ affects over 21% of EU citizens. It combines low income, material deprivation, and living in jobless households. Rural areas face extra barriers like poor access to transport, healthcare, and childcare.

Social participation: Social participation and civic engagement are key to inclusive, democratic societies, yet access remains unequal across income, age, disability, and geography¹¹⁹. Lower-income individuals participate less in volunteering and cultural life, often due to financial and accessibility barriers¹²⁰. Indicators like voter turnout, advocacy, demonstrations, and digital engagement offer insights into social participation at the regional level. Digital engagement also reflects civic inclusion¹²¹. Social trust and tolerance further shape participation: high trust correlates with stronger civic life, while low trust deters marginalised groups.

Health and well-being: Health disparities and unequal healthcare access drive socioeconomic inequality and social exclusion¹²². Subjective health measures are increasingly used to assess individuals' health statuses¹²³. Subjective measures enable a distinction between the experienced health, including the degree to which the individual can cope, and health outcomes that are more related to absence of disease.

Mental health strongly affects social inclusion, with lack of access to mental health services worsening inequalities¹²⁴. In a meta-analysis across 22 different studies of the main drivers of social inclusion, mental health came out as the main driver¹²⁵.

¹¹⁷ Marksoo, Ü. and Tammaru, T. (2011). LONG-TERM UNEMPLOYMENT IN ECONOMIC BOOM AND BUST: THE CASE OF ESTONIA. *Trames. Journal of the Humanities and Social Sciences*, 15(3), p.215. doi: <https://doi.org/10.3176/tr.2011.3.01>

¹¹⁸ Eurostat (2025). Living conditions in Europe - material deprivation and economic strain. [online] ec.europa.eu. Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Living_conditions_in_Europe_-_material_deprivation_and_economic_strain.

¹¹⁹ Crowley, F. and Walsh, E. (2021). Tolerance, social capital, and life satisfaction: a multilevel model from transition countries in the European Union. *Review of Social Economy*, pp.1–28. doi: <https://doi.org/10.1080/00346764.2021.1957994>.

¹²⁰ Levitas, R., Pantazis, C., Fahmy, E., Gordon, D., Lloyd, E. and Patsios, D. (2007). THE MULTI-DIMENSIONAL ANALYSIS OF SOCIAL EXCLUSION. [online] Available at: <https://dera.ioe.ac.uk/id/eprint/6853/1/multidimensional.pdf>.

¹²¹ Salemink, K., Strijker, D., & Bosworth, G. (2017). Rural development in the digital age: A systematic literature review on unequal ICT availability, adoption, and use in rural areas. *Journal of Rural Studies*, 54, 360–371. <https://doi.org/10.1016/j.jrurstud.2015.09.001>

¹²² Dahlberg, L. and McKee, K.J. (2018). Social exclusion and well-being among older adults in rural and urban areas. *Archives of Gerontology and Geriatrics*, [online] 79, pp.176–184. doi: <https://doi.org/10.1016/j.archger.2018.08.007>.

¹²³ Voukelatou, V., Gabrielli, L., Miliou, I., Cresci, S., Sharma, R., Tesconi, M., & Pappalardo, L. (2021). Measuring objective and subjective well-being: Dimensions and data sources. *International Journal of Data Science and Analytics*, 11(4), 279–309. <https://doi.org/10.1007/s41060-020-00224-2>

¹²⁴ Lenzi, C. and Perucca, G. (2016). Are urbanised areas a source of life satisfaction? Evidence from EU regions. *Papers in Regional Science*, 97, pp.S105–S122. doi: <https://doi.org/10.1111/pirs.12232>.

¹²⁵ van Bergen, A. P. L., Wolf, J. R. L. M., Badou, M., de Wilde-Schutten, K., IJzelenberg, W., Schreurs, H., Carlier, B., Hoff, S. J. M., & van Hemert, A. M. (2019). The association between social exclusion or inclusion and health in EU and OECD countries: A systematic review. *European Journal of Public Health*, 29(3), 575–582. <https://doi.org/10.1093/eurpub/cky143>

Life satisfaction is increasingly used as a concept that measures overall quality of life¹²⁶. Life satisfaction encompasses a broad range of domains and is generally taken to contain an evaluative assessment of a person's current life standing, and has a long tradition (with a revival in the past three decades) in economic research. Life satisfaction is strongly associated with the dimensions of health¹²⁷, but is also an interesting measure as it reflects to what extent an individual is able to adjust to their life circumstances¹²⁸.

Living conditions: Stable, quality housing is central to social inclusion, enabling access to employment, education, and community life¹²⁹. In contrast, housing deprivation—overcrowding, substandard conditions, and homelessness—is closely tied to poverty and exclusion¹³⁰.

The EU's housing cost overburden rate shows that low-income groups often spend over 40% of their income on housing, limiting spending on essentials like health and transport¹³¹. Poor housing conditions—damp, lack of basic facilities—are more common in rural areas and harm health, well-being, and employment opportunities¹³².

Axes of social inclusion: Social exclusion is shaped by intersecting factors including age, with older adults facing isolation due to poor health, limited mobility, and digital illiteracy. Ethnic minorities and migrants often encounter discrimination, language barriers, and limited access to housing, jobs, and services¹³³. Geographic vulnerability, especially in rural areas, amplifies exclusion through poor transport, digital connectivity, and service access¹³⁴.

Digital exclusion is a growing divide, affecting education, job search, and healthcare, particularly among the elderly, low-income groups, and rural residents¹³⁵. Educational attainment shapes opportunities, with lower levels often linked to long-term exclusion.

Gender inequality manifests through pay gaps, caregiving burdens, and gender-based violence, restricting women's social and economic participation¹³⁶. People with disabilities face exclusion due to inaccessible environments, limited services, and systemic discrimination, especially in under-

¹²⁶ Ballas, D. (2021). The economic geography of happiness. In K. F. Zimmermann (Ed.), *Handbook of labor, human resources and population economics* (pp. 1–24). Cham, Switzerland: Springer. https://doi.org/10.1007/978-3-319-57365-6_188-1

¹²⁷ Frey, B. S., & Stutzer, A. (2002). What Can Economists Learn from Happiness Research? *Journal of Economic Literature*, 40(2), 402–435. <https://doi.org/10.1257/002205102320161320>

¹²⁸ Rijnks, R. H. (2020). *Subjective Well Being in a Spatial Context*. University of Groningen.

¹²⁹ Mihaela Simona Ștefănescu, Sofia Elena Colesca, Mihaela Păceșilă, Ioana Maria Precup and Theodor Hărățău (2023). Sustainability of Local and Rural Development: Challenges of Extremely Deprived Communities. *Proceedings of the ... International Conference on Business Excellence*, 17(1), pp.1628–1644. doi: <https://doi.org/10.2478/picbe-2023-0146>.

¹³⁰ European Commission (2018). Wifi4EU Free Wifi for Europeans. [online] wifi4eu.ec.europa.eu. Available at: <https://wifi4eu.ec.europa.eu/#/home>.

¹³¹ Eurostat (2024). INFORMA test - Statistics Explained. [online] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=INFORMA_test&oldid=647993.

¹³² European Commission (2018). Wifi4EU Free Wifi for Europeans. [online] wifi4eu.ec.europa.eu. Available at: <https://wifi4eu.ec.europa.eu/#/home>.

¹³³ Macleod, C.A., Ross, A., SACKER, A., NETUVELI, G. and WINDLE, G. (2017). Re-thinking social exclusion in later life: a case for a new framework for measurement. *Ageing and Society*, 39(1), pp.74–111. doi: <https://doi.org/10.1017/s0144686x17000794>.

¹³⁴ Evans, M.V., Andréambeloston, T., Randriamihaja, M., Ihantamalala, F., Cordier, L., Cowley, G., Finnegan, K., Hanitriniaina, F., Miller, A.C., Ralantomalala, L.M., Randriamahaso, A., Razafinjato, B., Razanahanitriniaina, E., Rakotonanahary, R.J.L., Andriamiandra, I.J., Bonds, M.H. and Garchitorea, A. (2022). Geographic barriers to care persist at the community healthcare level: Evidence from rural Madagascar. *PLOS Global Public Health*, [online] 2(12), p.e0001028. doi: <https://doi.org/10.1371/journal.pgph.0001028>.

¹³⁵ Van Dijk, J.A.G.M. (2017). Digital Divide: Impact of Access. *The International Encyclopedia of Media Effects*, [online] pp.1–11. doi: <https://doi.org/10.1002/9781118783764.wbieme0043>.

¹³⁶ Hobson, B. (2011). The Agency Gap in Work-Life Balance: Applying Sen's Capabilities Framework Within European Contexts. *Social Politics: International Studies in Gender, State & Society*, 18(2), pp.147–167. doi: <https://doi.org/10.1093/sp/jxr012>.

resourced areas¹³⁷. Crime and safety are very relevant in rural areas, although often overlooked. Crime and safety impact the fabric of social life and affect social inclusion and exclusion¹³⁸.

¹³⁷ Garrick, A., Johnson, D. and Arendt, S. (2024). Breaking Barriers: Strategies for Fostering Inclusivity in The Workplace. [online] ResearchGate. Available at: <https://www.researchgate.net/publication/>

¹³⁸ Ceccato, V. and Abraham, J. (2022). Reasons Why Crime and Safety in Rural Areas Matter. SpringerBriefs in Criminology, pp.9–28. doi: https://doi.org/10.1007/978-3-030-98290-4_2.

Social Inclusion/Exclusion Indicators			
(D1) Economic Security & Employment	(D2) Health and Well-being	(D3) Living Conditions	(D4) Social Participation and Engagement
<p>(I1) At risk of poverty or social exclusion (AROPE)</p> <p>1.1 At-risk-of-poverty rate</p> <p>1.2 Population living in (quasi-)jobless households</p> <p>1.3 Severe material and social deprivation rate</p> <p>1.4 Risk of poverty or social exclusion for children and people with disabilities</p> <p>(I2) Income distribution</p> <p>2.1 S80/S20 quintile share ratio</p> <p>2.2 Gini Coefficient</p> <p>2.3 Government expenditure on social protection</p>	<p>(I4) Self-Reported Health Status (LEAKEN)</p> <p>4.1 Healthy life expectancy (based on self-perceived health)</p> <p>4.2 Percentage reporting mental health issues</p> <p>4.3 Overall life satisfaction</p> <p>4.4 Self-reported limitations in daily activities</p> <p>(I5) Life Expectancy at Birth</p> <p>(I6) Healthy life years rate</p>	<p>(I9) Housing Costs</p> <p>9.1 Share of housing costs in total disposable household income</p> <p>9.2 Housing cost overburden rate</p> <p>9.3 Incidence of risk of elderly poverty by housing tenure status</p> <p>9.4 Growth rate in real gross household disposable income</p> <p>(I10) Housing Conditions</p> <p>10.1 People living in under-occupied dwellings (by degree of urbanisation)</p> <p>10.2 Overcrowding rate (by degree of urbanisation)</p> <p>10.3 Housing</p>	<p>(I11) Voter turnout (elections)</p> <p>(I12) Electoral participation</p> <p>(I13) Formal volunteering</p> <p>(I14) Acquisition of citizenship</p> <p>(I15) Social trust</p> <p>(I16) Tolerance</p> <p>(I17) Having someone for help or to discuss personal matters</p> <p>(I18) Social contact with family and friends</p> <p>(I19) Material and social deprivation rate for persons with disabilities</p>

Axes of Social Exclusion					
<p>(DE1) Age</p> <p>DE1.1 Median Age</p> <p>DE1.2 Age Dependency Ratio</p>	<p>(DE2) Ethnic Composition and Immigration</p> <p>DE2.1 Foreign Population Over 15 Years Old</p>	<p>(DE3) Criminality and Safety</p> <p>DE3.1 Police-Recorded Offences</p>	<p>(DE4) Education</p> <p>DE4.1 Primary and Secondary Education</p> <p>DE4.2 Early Leavers from Education and Training</p> <p>DE4.3 Young People Not in</p>	<p>(DE5) Digital access</p> <p>DE5.1 Internet Usage Rate</p> <p>DE5.2 Digital Skills Proficiency</p> <p>DE5.3 Communicatio</p>	<p>(DE6) Geographic and Climate Vulnerability</p> <p>DE6.1 Transport Infrastructure</p> <p>DE6.2 Remoteness</p> <p>DE6.3 Vulnerability to</p>
<p>(DE7) Gender</p> <p>DE7.1 Composite index on gender equality</p> <p>DE7.2 Gender Pay Gap</p>	<p>(DE8) Migration</p> <p>DE8.1 International migration, citizenship</p> <p>DE8.2 Managed migration</p>	<p>(DE9) Disabilities</p> <p>DE9.1 People with physical, intellectual, or mental disabilities</p>			

Figure 4.3.2.1 The four dimensions and axes of social inclusion from D1.1¹³⁹

¹³⁹ South-East European Research Centre. (2025) D1.1 Measuring social inclusion and wellbeing in European rural areas: a systematic review, INSPIRE

4.3.3 Sample and Instrumentation

Sample

As stated in the introduction, one of the key requirements of spatial micro-simulation, for which these data will eventually be used, is that the survey data are based on a nationally representative sample. While the Grant Agreement does not specify this as a requirement, many efforts were made by the pilot partners and consortium leader to facilitate data collection as close as possible to a simple random sample from the entire population in each pilot country (see Table 4.3.1).

To achieve this objective, all pilot countries except Romania employed commercial polling and surveying agencies to distribute the survey. The companies were contracted for the collection of a specified number of respondents, employing a simple random sampling method. As a result, all countries returned sample sizes that are exactly or just over the minimum specified number of respondents per the grant agreement (500 per region). In Slovakia the marginal cost of 500 extra respondents was negligible, so for this region the sample size was doubled. In Romania, ROMANTANA opted for a distribution of the survey throughout their networks and additional sampling using social media channels. The resulting sample size for Romania is almost twice the minimum required number of respondents. While the selection of (a network-based) opportunity sample may hamper its representativeness, the greater size of the sample offers the potential for sample weighting or subsampling in future analyses.

A more detailed description of the sample demographics is presented in Section 3.3.5.

Table 4.3.1 Overview of sampling organisation and returned sample size per country.

Pilot country	Surveying organisation	Response (N)
Ireland	Pureprofile	502
France	Selvitys	500
Poland	Research Park Sp. z o.o.	519
Slovakia	NMS Market Research Slovakia	1004
Greece	Palmos Analysis P.C.	505
Romania	ROMONTANA	912

Instrumentation

The development of the survey takes into account the multidimensional framework of social exclusion as it is outlined in Deliverable D1.1. The aim is to capture key indicators across economic, social, political and cultural aspects of respondents in relation to social exclusion, with a specific focus on rural communities. The variables included in the survey align with the aforementioned objective. In the following sub-section, we elaborate more on each of the aspects mentioned before.

A key requirement of the survey was to limit the length of it to be completed (reasonably) within 10 minutes. There were two main reasons for keeping the survey very short. First, respondent fatigue may limit the number of complete responses, or, tentatively, reduce the attention of respondents later

in the survey, potentially affecting the reliability of their answers. Second, the survey would be used in the CATI surveys targeting vulnerable groups. While the goal is to measure social inclusion, its dimensions, and main axes comprehensively, constructing a list of indicators that included all concepts mentioned in D1.1 would run the risk of exhausting the targeted survey respondents. As a result, we resolved to select those indicators that would provide the greatest overlap with existing data sources that cover a broad range of geographical regions, in particular EU-SILC, the European Social Survey, the European Quality of Life Survey, and the World Values Study.

Outcome variable

The key outcome variable this study uses is a subjective measure of experiences of social inclusion. We use the measure developed by Leemann et al. (2022) called the Experiences of Social Inclusion Scale. The scale has been tested in Finland and displays good psychometric properties regarding internal and external validity. The instrument consists of:

- 1) To what extent do you agree or disagree with the following statements? For each statement, please select the alternative that best describes your personal experience. (measured on a 5 point Likert scale ranging from strongly disagree to completely agree)
 - a) I feel that what I do every day is significant.
 - b) I get positive feedback on what I do.
 - c) I belong to a group or community that is important for me.
 - d) Other people need me.
 - e) I can influence the course of my life.
 - f) I feel that my life has purpose.
 - g) I can strive for things that are important for me.
 - h) I get help when I really need it.
 - i) I feel trusted.
 - j) I can influence some things in my living environment.

The final ESIS score in this study is presented as the sum of all 10 items.

Overview of survey instruments per dimension

The core part of this section regarding the drivers of social inclusion is the survey instrument. As van Bergen et al. (2019) note, there is no generally accepted method of measuring social inclusion, or its subdomains. In this part of the study, we draw on the overview provided in D1.1 of this project to, first, determine which dimensions need measurement, and subsequently, which indicators may be most useful when measuring these concepts.

D1.1 identifies four key dimensions of social exclusion: Employment and economic security; living conditions, amenities, and services; social participation; and health and well-being. In the following subsections we discuss the selected instruments in turn

Employment and economic security

For employment, the respondents are asked to fill in basic information regarding their current employment status. This section of the questionnaire consists of the following seven instruments:

- 1) What is your current employment status?
 - a) Employed
 - b) Unemployed
 - c) Student
 - d) Household activity/homemaker
 - e) Retired
 - f) Other
- 2) How many hours do you work per week?
 - a) Free entry, time
- 3) What is your household's monthly disposable income (net income after deduction of all social contributions but including potential social benefits credits)? (EU-SILC)
 - a) Ordinal ranges on a 100-200 euro interval
 - b) Defined by EU-SILC, harmonised across countries
- 4) How many months have you been unemployed for?
 - a) Free entry, time
- 5) The EQLS instrument for job-security (5-point Likert scale, from "very likely" to "very unlikely"; EQLS)
 - a) How likely or unlikely do you think it is that you might lose your job in the next 6 months?
 - b) If you were to lose or had to quit your job, how likely or unlikely is it that you will find a job of similar salary?
- 6) In the past 12 months, how has your total household income changed? (EU-SILC)
 - a) Increased
 - b) Remained more or less the same
 - c) Decreased
- 7) How satisfied or dissatisfied are you with the current level of your income? (UKBHPS)
 - a) 7-point Likert scale from "completely dissatisfied" to "completely satisfied"
- 8) The EU-SILC instrument for the risk of poverty, consisting of: (measured as binary yes, no; EU-SILC, compound to a sum of the scores, ranging from 0 to 5)
 - a) Can your household afford an unexpected, required expense of (AMOUNT)€ without borrowing?
 - b) Can your entire household afford to go for a week's annual holiday, away from home, including stays in a second dwelling or with friends/ relatives?
 - c) Can your household afford a meal with meat, chicken, fish or vegetarian equivalent every second day?
 - d) Is your household able to keep the dwelling comfortably warm during winter, taking into account the insulation of the dwelling and the heating system you have in place?
 - e) Do you think that you live in poverty according to your present living conditions?

These variables not only capture individuals' ability to purchase goods and services, but also measure the risk of poverty and labour market exclusion.

For the analyses in the present report we include:

Categorical measures: Employment status (1) and income change (6).

Numeric measures: income satisfaction (7), the risk of poverty (8).

We exclude the remaining instruments as they only apply to separate groups (e.g. how many months unemployed only affects those unemployed), resulting either in incomplete analyses (due to missingness), or perfect correlation between (sub-) categories of one variable and another. These variables will be included in the spatial microsimulation to be conducted later.

Social participation and engagement

A key part of the definition of social inclusion is the ability to participate in society. In this dimension, the following three instruments are included:

- 1) How much do you personally trust each of the following institutions on a scale from 0 to 10 where 0 means “I do not trust an institution at all” and 10 means “I have complete trust”? (WVS)
 - a) Your national parliament
 - b) The legal system
 - c) The police
 - d) Politicians
 - e) Political parties
- 2) On a scale of 0 to 10, with ‘0’ being ‘no confidence at all’ and ‘10’ being ‘complete confidence,’ how much confidence do you personally have in other people in your area? (measured on 0 to 10; EQI)
- 3) Do you believe men and women have equal opportunities in your country? (EQI)
 - a) 10 point Likert scale from “strongly disagree” to “strongly agree”
- 4) Advancing women’s and girls’ rights has gone too far, because it threatens men’s and boys’ opportunities. (EQI, reverse-coded)
 - a) 10 point Likert scale from “strongly disagree” to “strongly agree”

For the analyses in this report we include:

Numerical measures: We include the social trust scale and the political trust scale as a single measure for social trust (1,2), and the EQI scales are each separately included (3,4).

Health and wellbeing

Health and well-being are key dimensions of social inclusion. Health can be a serious

- 1) All things considered, how satisfied are you with your life as a whole these days on a scale from 0 to 10 where 0 is extremely dissatisfied and 10 is extremely satisfied? (O-SLW-c-sq-n-11-cd (World database of happiness))
- 2) In general, would you say your physical health is: (SRMH et al., 2014)
 - a) 5-point Likert from poor to excellent
- 3) In general, would you say your mental health is: (SRMH et al., 2014)
 - a) 5-point Likert from poor to excellent

For the analyses in this report we include:

Numerical measures: Life satisfaction (1) and the two health variables are separately included in the analyses (2,3).

Living conditions

Living conditions encompass the critical role that housing and housing conditions play in social inclusion. Broadly speaking, the dimension measures whether both the house and the neighbourhood are a good fit for the individual. The instruments included in this dimension consist of:

- 1) What best describes your housing situation? (EU-SILC)
 - a) I fully own the house/ apartment I am living in
 - b) I own the house/ apartment I am living in but I am still paying off the mortgage
 - c) I am renting the house/ apartment I am living in - at market price
 - d) I am renting the house/ apartment I am living in - at a reduced price (social housing)
- 2) How much of your monthly household income do you spend on rent/ mortgage payments (in %)? (EU-SILC)
 - a) Slider from 0% to 100%
- 3) Do you own a car/ motorized vehicle?
 - a) Yes / No
- 4) Thinking of physical access, distance, opening hours and the like, how easy or difficult is your access to: (measured on 1 to 4, very difficult to very easy, compound measure, arithmetic mean; EQLS)
 - a) local and/or municipal services (e.g., schools, help desk, social services, etc)?
 - b) Public transport facilities (bus, metro, tram, train)?
 - c) Cinema, theatre, museums or cultural centre
 - d) Grocery store or supermarket
 - e) Green space or recreational areas

For the analyses in the present report we include:

Categorical measures: Motorised vehicle (3)

Numeric measures: Rent / mortgage (2), physical access (4)

We exclude the remaining instruments as they only apply to separate groups (e.g. how many months unemployed only affects those unemployed), resulting either in incomplete analyses (due to missingness), or perfect correlation between (sub-) categories of one variable and another. These variables will be included in the spatial microsimulation to be conducted later.

Overview of instrument per axis

The axes (or determinants) of inclusion were measured using the following instruments.

- 1) Age
 - a) How old are you (years)
- 2) Ethnicity
 - a) Are you part of the same ethnic group as most people in your country? (Yes / No; ESS)
- 3) Education
 - a) What is the highest level of education you have obtained?
 - i) Less than Primary
 - ii) Primary

- iii) Lower Secondary
 - iv) Upper Secondary
 - v) Post-secondary non tertiary
 - vi) Bachelor's Degree or equivalent
 - vii) Master's Degree or equivalent
 - viii) PhD or equivalent
- 4) Digital access
- a) How often do you use the internet for: (measured as (1) "Every day" 2) "Several times a week" 3) "Several times a month" 4) "Once a month" 5) "Less than once a month" 6) "Never"; Understanding Society)
 - i) online services (e.g., online banking, scheduling appointments, interacting with governmental institutions)?
 - ii) Posting content on social media/websites and apps (e.g., posting text, images, videos on Facebook, Instagram, X)
 - iii) Interacting with friends or family online (social media, messaging services or video calls)
 - iv) Reading/ watching/ listening to the news
 - v) Playing games (online)
- 5) Gender
- a) Female
 - b) Male
 - c) prefer to self-describe (free entry text field)
 - d) prefer not to say
- 6) Crime
- a) Safety walking home

Connection of the survey with D1.1

The variables that are included in the survey serve several important purposes. First, they show the complex nature of social exclusion, as is being described in the project's conceptual framework (D1.1). Second, they capture challenges that are unique to rural areas, such as living in remote locations, having limited access to services or inadequate infrastructure. Third, they are designed to support both statistical analysis and qualitative analysis. This combination allows the project to explore not only some patterns and trends, but also people's experiences of exclusion.

The survey includes both dynamic indicators, such as how long someone has been unemployed, and social or civic participation variables that show how connected or isolated someone feels. This aligns with the framework from D1.1 where social exclusion is not a fixed situation but something that evolves over time. Furthermore, because exclusion is not always visible or easy to measure directly, we use proxies. For instance, limited trust in public institutions may serve as a signal of political disengagement or a perceived lack of voice.

Importantly, the indicators selected are designed to be useful for real-world policy-making. They align with practical policy areas like health, and social participation. This makes it possible to translate the survey results into concrete policy recommendations for rural development, both at the national and at the regional level.

4.3.4 Analytic Strategy

The aim of this section is to explore the associations between known drivers of social inclusion, and subjective social inclusion. The analytic strategy is divided into two main parts. First, we briefly present the descriptive and bivariate analyses of dimensions.

Descriptive and bivariate analysis of dimensions

First, we show correlations between numerical variables per main dimension, as well as relevant associations between numerical and categorical variables. The aim of this first part is to provide an in-depth understanding of the nature of the dimensions, as measured in our sample. For each dimension we also include the outcome variable of experienced social inclusion for reference. For continuous variables, correlation plots are presented. When presenting categorical variables we show the associations with relevant continuous or interval variables with boxplots or histograms.

Regression analyses

Next, we estimate a series of regressions to show the associations between the main dimensions, and the main axes of social inclusion, as measured in our sample. We first aim to show the associations between drivers and social inclusion at the cross-national level, using the entire dataset. As mentioned in D1.1, there are many interdependencies between the axes and the dimensions. Therefore, we first estimate regressions for each dimension separately. For all regressions we maintain a significance level of $p < 0.05$, unless otherwise stated.

Next, we evaluate the associations between social inclusion and the axes of social inclusion. First we estimate a separate model for the axes of social inclusion, followed by a fully specified model including the axes and the dimension. We compare this fully specified model with the model that only included the dimensions. To analyse the drivers at the national (meso) level, we estimate country by country regressions of the full model. We compare regression coefficients between countries. Finally, we aim to uncover heterogeneity in the associations between drivers and outcomes using a series of stratified regression stratified by rurality. An overview of all the estimated models is presented in Table 4.3.2.

As outlined in D1.1, we expect that there will be substantial overlap between the different dimensions and axes. As a result, we are cautious of multicollinearity impacting our results. We run variance inflation factor analyses on all our regressions and, taking a VIF of 5 as the cut-off (Kim, 2019), find no multicollinearity issues for our analyses.

Table 4.3.2 Progressive regression analyses and stratifications.

Model	Included concepts	Stratification
Model 1.1	Economic security and employment	None
Model 1.2	Social participation	None
Model 1.3	Health and well-being	None
Model 1.4	Living conditions	None
Model 2	Axes of social inclusion	None
	Economic security and employment	
	Social participation	
Model 3.1	Health and well-being	None
	Living conditions	
Model 3.2	Model 3.1 + Axes of inclusion	None

Model 4	Model 3.2	Country
Model 5	Model 4.2	Rurality

4.3.5 Results

Descriptive statistics in detail

In this section, we describe descriptive statistics for the main variables in our dataset. Starting with Table 4.3.3, we see that the total number of respondents per country meet the threshold of 500 respondents for all countries. Both Slovakia and Romania exceed this number, with 1004 and 912 respondents respectively. Examining the ESIS per country, we see that the scores are, on average, similar for all countries, between 34.7 and 36.9, except Romania, where the self-reported average of social inclusion is 42.0. There are no missing values for the ESIS variable for all countries, except Romania, where 31 respondents did not complete the survey instrument.

When it comes to the self-reported assessment of type of place, there are some notable similarities and differences with what is to be expected based on Eurostat regional typologies (Eurostat, 2025, see Appendix 7.5). First, the similarities. The respondent populations for France, Poland, and Slovakia are largely similar to the data reported by EuroStat. For France, most respondents are from small towns, followed by rural regions and finally large towns. While not directly comparable (self-reported versus measured by objective definitions), this is broadly in line with the distribution in EuroStat, with rural regions and small towns slightly overrepresented (EuroStat has these at 26.7 per cent and 37.3 per cent, respectively). The distribution for Poland matches the data from EuroStat closely, with slightly more urban residents than expected (26.0 per cent versus 22.8 per cent), and the other two categories with 2 percentage points of the EuroStat statistics. Slovakia, similarly, is a close match for the EuroStat statistics, with all categories with four percentage points of the expected distributions.

Respondents in Greece, Ireland, and Romania reported living in more urban areas than expected. The data for Greece show that only a small proportion of respondents class themselves as rural, and the majority (72.7 per cent) say they live in a large town. While this distribution is different from the EuroStat (2025) data, Greece is the most urban region out of the pilot countries. EuroStat has the percentage of urban dwellers at 46.8 per cent, and rural at 28.4 per cent. It appears that for Greece, either there are fewer rural dwellers than expected, or individuals self-reported regional classification is more urban than that assigned by EuroStat. In Ireland we find that nearly half of people report living in a large town, with small towns and rural areas each making up around a quarter of the population. This is also more urban than EuroStat, which reports that Ireland has a predominantly rural population (57.0 per cent). Finally, over a third of the respondents from Romania live in a large town (36.4 per cent), while EuroStat has Romania at 12.1 per cent “predominantly urban”.

Table 4.3.3 Summary statistics for experienced social inclusion and rurality.

	FR	GR	IR	PL	RO	SK
Country						
Total N	500	505	502	519	912	1004
ESIS						

Mean (SD)	34.7 (±6.5)	36.0 (±6.4)	36.0 (±7.7)	36.9 (±6.5)	42.0 (±6.0)	36.0 (±6.2)
Missing	0 (0%)	0 (0%)	0 (0%)	0 (0%)	31 (3.4%)	0 (0%)
Rurality						
Rural	173 (34.6%)	34 (6.7%)	127 (25.3%)	191 (36.8%)	259 (28.4%)	454 (45.2%)
Small town	218 (43.6%)	104 (20.6%)	140 (27.9%)	193 (37.2%)	312 (34.2%)	387 (38.5%)
Large town	109 (21.8%)	367 (72.7%)	235 (46.8%)	135 (26.0%)	332 (36.4%)	163 (16.2%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	9 (1.0%)	0 (0.0%)

Moving on to demographic characteristics (Table 4.3.4), we expect to see a slightly higher percentage of women (between 50.5 per cent and 51.5 percent). This is indeed what we observe for France, Poland, Slovakia. For Ireland and Romania, we do have more women in our dataset, but they appear somewhat overrepresented (at 61.4 per cent and 60.6 per cent, respectively). In Greece, slightly more men have filled in the questionnaire (55.4 per cent).

For marital status there is no direct comparison with the EuroStat classifications. All countries report that most individuals are married or in a domestic partnership (between 49.1 and 59.8 per cent), with the next largest category single, accounting for 19.7 per cent to 31.3 per cent. Cohabiting is common in our dataset in Greece, Ireland, Romania and Slovakia, but France and Poland have low levels of cohabitation.

There are relatively few divorcees and widowed individuals in our dataset. Poland has the highest proportion of widowed individuals, with 7.7 per cent, and Slovakia has the highest proportion of divorcees at 10.9 per cent.

Table 4.3.4 Summary statistics for gender and marital status.

	FR	GR	IR	PL	RO	SK
gender						
Female	255 (51.0%)	224 (44.4%)	308 (61.4%)	271 (52.2%)	553 (60.6%)	517 (51.5%)
Male	245 (49.0%)	280 (55.4%)	193 (38.4%)	246 (47.4%)	327 (35.9%)	480 (47.8%)
Other	0 (0.0%)	1 (0.2%)	1 (0.2%)	2 (0.4%)	31 (3.4%)	7 (0.7%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (0.1%)	0 (0.0%)
marital						
Married or domestic partnership	299 (59.8%)	254 (50.3%)	250 (49.8%)	309 (59.5%)	448 (49.1%)	525 (52.3%)
Single (never married)	131 (26.2%)	149 (29.5%)	157 (31.3%)	102 (19.7%)	269 (29.5%)	227 (22.6%)
Cohabiting	17 (3.4%)	59 (11.7%)	56 (11.2%)	25 (4.8%)	103 (11.3%)	98 (9.8%)
Widowed	11 (2.2%)	4 (0.8%)	11 (2.2%)	40 (7.7%)	11 (1.2%)	42 (4.2%)
Divorced	42 (8.4%)	32 (6.3%)	24 (4.8%)	39 (7.5%)	49 (5.4%)	109 (10.9%)

Other	0 (0.0%)	7 (1.4%)	4 (0.8%)	4 (0.8%)	27 (3.0%)	3 (0.3%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	5 (0.5%)	0 (0.0%)

With the exception of Ireland, nearly all individuals are fluent in the local language (Table 4.3.5), with Poland at the highest end (98.7 per cent fluent) and France at the lower end (91.6 per cent). Ireland is different, however, with only 78.5 per cent individuals indicating a fluency in the local language. This is surprising, as both English and Irish would be considered local languages for the purposes of this study. According to the CSO (2016) at the 2016 Census in Ireland, 39.8 per cent of the total population could speak Irish, and the percentage of those speaking English according to the Eurobarometer (2023) is 95 per cent. We have to accept that for Ireland, the question regarding the local language may not measure precisely what was intended.

For ethnicity, similarly, Ireland has a larger proportion of individuals who do not claim to belong to the local majority ethnicity, at 24.1 per cent. For the other countries these shares are much lower, from Poland (at 1.7 per cent) to Romania (12.3 per cent). For France, no data on ethnicity was collected.

Table 4.3.5 Fluency in the local language and ethnicity.

	FR	GR	IR	PL	RO	SK
language						
Fluent	458 (91.6%)	482 (95.4%)	394 (78.5%)	512 (98.7%)	881 (96.6%)	960 (95.6%)
Non-fluent	42 (8.4%)	23 (4.6%)	108 (21.5%)	7 (1.3%)	22 (2.4%)	44 (4.4%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	9 (1.0%)	0 (0.0%)
ethnic						
Majority	0 (0.0%)	444 (87.9%)	381 (75.9%)	510 (98.3%)	789 (86.5%)	903 (89.9%)
Minority	0 (0.0%)	61 (12.1%)	121 (24.1%)	9 (1.7%)	112 (12.3%)	101 (10.1%)
Missing	500 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	11 (1.2%)	0 (0.0%)

For physical health (Table 4.3.6), most people report being in good physical health in all countries, between 42.0 and 48.5 per cent are in good physical health. There are some discrepancies between countries for individuals in poor or fair physical health. For Slovakia, 38.4 per cent report being in poor or fair physical health, followed by Poland with 33.9 per cent. Meanwhile, our sample in Romania appears the healthiest, with only 15.9 per cent of individuals reporting poor to fair physical health.

For mental health, the distributions are very different. In Greece and Ireland, over 30 per cent of individuals report to be in poor or fair mental health. In France, Poland, and Slovakia the share of people in poor or fair mental health are between 25 and 27 per cent, while in Romania, these categories together make up only 15.9 per cent of the population.

Table 4.3.6 Self-reported status of physical and mental health.

	FR	GR	IR	PL	RO	SK
Physical health						
Poor	22 (4.4%)	17 (3.4%)	33 (6.6%)	50 (9.6%)	50 (5.5%)	128 (12.7%)
Fair	119 (23.8%)	115 (22.8%)	113 (22.5%)	126 (24.3%)	95 (10.4%)	258 (25.7%)
Good	239 (47.8%)	210 (41.6%)	211 (42.0%)	242 (46.6%)	442 (48.5%)	424 (42.2%)
Very good	99 (19.8%)	133 (26.3%)	117 (23.3%)	85 (16.4%)	251 (27.5%)	141 (14.0%)
Excellent	21 (4.2%)	30 (5.9%)	28 (5.6%)	16 (3.1%)	64 (7.0%)	53 (5.3%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	10 (1.1%)	0 (0.0%)
Mental health						
Poor	24 (4.8%)	34 (6.7%)	49 (9.8%)	46 (8.9%)	39 (4.3%)	69 (6.9%)
Fair	100 (20.0%)	125 (24.8%)	115 (22.9%)	93 (17.9%)	86 (9.4%)	187 (18.6%)
Good	217 (43.4%)	173 (34.3%)	161 (32.1%)	203 (39.1%)	362 (39.7%)	426 (42.4%)
Very good	114 (22.8%)	125 (24.8%)	122 (24.3%)	128 (24.7%)	290 (31.8%)	216 (21.5%)
Excellent	45 (9.0%)	48 (9.5%)	55 (11.0%)	49 (9.4%)	124 (13.6%)	106 (10.6%)
Missing	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	11 (1.2%)	0 (0.0%)

Moving on to the highest attained level of education (Table 4.3.7), we see that for all countries there are very few individuals with less than primary education, primary education, or lower secondary education. However, in Slovakia, the percentage of individuals with lower secondary education in our sample is relatively high, at 28.6 per cent, while for the other countries this is much lower. The figures by EuroStat¹⁴⁰ in Appendix 7 show that these proportions in 2024 for Slovakia should be closer to 12.7 per cent, meaning the Slovakia data show an overrepresentation of lower educated individuals. The shares of individuals with tertiary education are high in Greece and Romania, while Romania also has a relatively high share of individuals with a PhD. Compared to the statistics in Eurostat, the total share of Bachelors, Masters, and PhDs should be 38.4 per cent in France (underrepresented), 30.4 per cent in Greece (overrepresented), 48.3 per cent in Ireland (equal), 34.3 per cent in Poland (equal), 16.5 per cent in Romania (overrepresented), 20.8 per cent in Slovakia (underrepresented).

In all countries, most people are employed. However, in Greece, Ireland, and Romania, these shares are higher than in France, Poland, and Slovakia. For France and Poland, this discrepancy is explained by a large share of retirees, while for Slovakia a large proportion of respondents listed “other”.

Table 4.3.7 Descriptive statistics for level of education and employment status.

	FR	GR	IR	PL	RO	SK
education						

¹⁴⁰ Eurostat (2025). Population by educational attainment level, sex and age (%).
https://ec.europa.eu/eurostat/databrowser/view/edat_ifs_9903_custom_17280346/default/table?lang=en

Less than primary	4 (0.8%)	0 (0.0%)	2 (0.4%)	0 (0.0%)	1 (0.1%)	3 (0.3%)
Primary	10 (2.0%)	2 (0.4%)	3 (0.6%)	12 (2.3%)	0 (0.0%)	62 (6.2%)
Lower secondary	16 (3.2%)	8 (1.6%)	24 (4.8%)	40 (7.7%)	1 (0.1%)	287 (28.6%)
Upper secondary	240 (48.0%)	121 (24.0%)	128 (25.5%)	223 (43.0%)	268 (29.4%)	414 (41.2%)
Post-secondary	84 (16.8%)	47 (9.3%)	98 (19.5%)	67 (12.9%)	23 (2.5%)	29 (2.9%)
Bachelor	87 (17.4%)	209 (41.4%)	170 (33.9%)	39 (7.5%)	231 (25.3%)	31 (3.1%)
Master	51 (10.2%)	103 (20.4%)	76 (15.1%)	136 (26.2%)	277 (30.4%)	161 (16.0%)
PhD	8 (1.6%)	15 (3.0%)	1 (0.2%)	2 (0.4%)	111 (12.2%)	17 (1.7%)
employment						
Employed	291 (58.2%)	379 (75.0%)	355 (70.7%)	283 (54.5%)	608 (66.7%)	549 (54.7%)
Unemployed	28 (5.6%)	37 (7.3%)	25 (5.0%)	26 (5.0%)	6 (0.7%)	51 (5.1%)
Student	33 (6.6%)	34 (6.7%)	19 (3.8%)	23 (4.4%)	231 (25.3%)	67 (6.7%)
Homemaker	21 (4.2%)	22 (4.4%)	49 (9.8%)	19 (3.7%)	10 (1.1%)	51 (5.1%)
Retired	126 (25.2%)	22 (4.4%)	47 (9.4%)	147 (28.3%)	16 (1.8%)	48 (4.8%)
Other	1 (0.2%)	11 (2.2%)	7 (1.4%)	21 (4.0%)	41 (4.5%)	238 (23.7%)

Descriptive statistics: brief overview

Differences with national statistics

- The self-rated level of urbanity in Greece, Ireland, and Romania skews more urban than would be expected based on the (not directly comparable) measure of urbanisation used by EuroStat.
- Greece has a larger proportion of male respondents, while Romania and Ireland have a slightly higher proportion of female respondents than would be expected based on national statistics.
- In terms of language proficiency, it appears that for Ireland, the level of language proficiency is substantially lower than would be expected from national and census data.

Differences between countries in the sample

- Romania and Greece have relatively high levels of education, while Slovakia and France have lower levels of education.
- Ireland has a larger share of minority ethnicities
- France and Poland have high proportions of retirees compared to the other countries.

Missing values

There are few missing values across the included countries. Aside from the (expected) missing values for ethnicity in France, the only other country with missing values is Romania, where missing values make up only a small fraction of the total sample. Due to the low number of missing values, missing

cases were listwise deleted. For the question on ethnicity, separate models were run including and excluding ethnicity. Since the variable did not significantly affect the outcome measure, we proceed in the main report without the variable on ethnicity, but present the full regressions in the annex for completeness.

Descriptive analyses of dimensions

Psychometric priorities

The internal consistency of the compound measures was assessed using Cronbach’s alpha (Table 4.3.8). All four constructs demonstrated acceptable to excellent reliability. The risk of poverty measure (also termed material and social deprivation) yielded an alpha of 0.732, indicating acceptable internal consistency. This is in line with the measure’s Cronbach’s alpha measured across the EU-27, which varies per country from 0.75 to 0.89¹⁴¹. Accessibility also showed good reliability with an alpha of 0.822. Notably, social trust (0.919) and perceived social exclusion (0.902) exhibited excellent internal consistency, suggesting that the items within these scales are highly cohesive and effectively capture the underlying constructs. The coherence for social trust is usually high, in line with previous findings¹⁴². For our dependent variable, perceived social exclusion, the high Cronbach’s alpha is in line with what the original paper found for Finland¹⁴³. These results support the reliability of the composite measures used in the analysis.

Table 4.3.8 Internal consistency of compound variables.

Compound measure	Cronbach’s alpha
Risk of poverty	0.732
Social trust	0.919
Accessibility	0.822
Perceived social exclusion	0.902

Economic security and employment

the correlations between the risk of poverty, income satisfaction, and experiences of social inclusion. Income satisfaction and the risk of poverty are, as expected, negatively correlated, indicating that a higher degree of income satisfaction corresponds to a lower risk of poverty. The correlation coefficient is -0.44, meaning both variables capture slightly different aspects of economic security. In their association with experienced social exclusion, risk of poverty is negatively associated, and income satisfaction positively associated with experiences of social exclusion.

¹⁴¹ Whelan, C. T., & Maître, B. (2007). Measuring Material Deprivation with EU-SILC: Lessons from the Irish Survey. *European Societies*, 9(2), 147–173. <https://doi.org/10.1080/14616690701217767>

¹⁴² Boda, Z., Medgyesi, M., Fondeville, N., & Özdemir, E. (with European Foundation for the Improvement of Living and Working Conditions). (2018). *Societal change and trust in institutions*. Publications Office of the European Union.

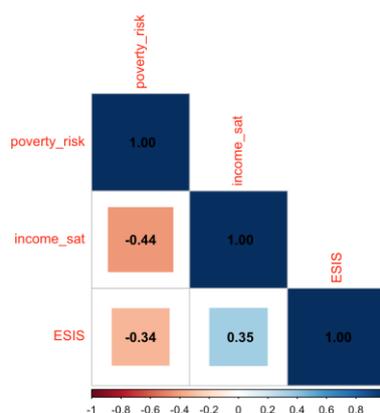
¹⁴³ Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

Most people who are employed, retired, studying, or other experience little to no risk of poverty (Figure 4.3.5.1). For unemployed, the risk of poverty is much more prevalent. The risk of poverty for the group of unemployed individuals shows a relatively uniform distribution, with around equal numbers experiencing deprivation for zero through to all five dimensions measured. A similar pattern is noticeable looking at the levels of the risk of poverty for individuals whose income has decreased. While individuals whose income stayed the same or increased report low risk of poverty, for those whose income has decreased those levels are much higher.

In our population, it is the students who appear happiest with their incomes, closely followed by people in employment. It is interesting to note that the satisfaction with income is lower for retirees, homemakers, and the category other. However, again, it is the unemployed who are least satisfied with their income. On a scale of 1 through 7, the mode is 1, and the next most selected categories are 2 and 3. When we evaluate income satisfaction relative to the changes in income, we see that for people whose income remained unchanged their income satisfaction is slightly to the lower end of the satisfaction distribution. If income has increased, this is related to a slightly positive evaluation of income. However, for those whose income has decreased, again, income satisfaction is low. Most individuals whose income has decreased assign a satisfaction level of 1.

Turning our attention to the association between experiences of social inclusion and employment, we see that those unemployed experience, on average, the least social inclusion. However, the distribution of experienced social inclusion for this group is the widest of all employment categories. Students experience on average the most social inclusion. Excluding the category of unemployed individuals, for all other categories of employment the bivariate differences are relatively small. When people experience an increase in income, this is associated with an increase in experienced social inclusion. For those whose incomes remained unchanged this is slightly lower, and lower still for those whose incomes have decreased.

Summary: the variables in the dimension economic security and employment show the expected association with each other, and with social inclusion. Income satisfaction and risk of poverty are inversely correlated, but both measure different facets of the overall dimension.



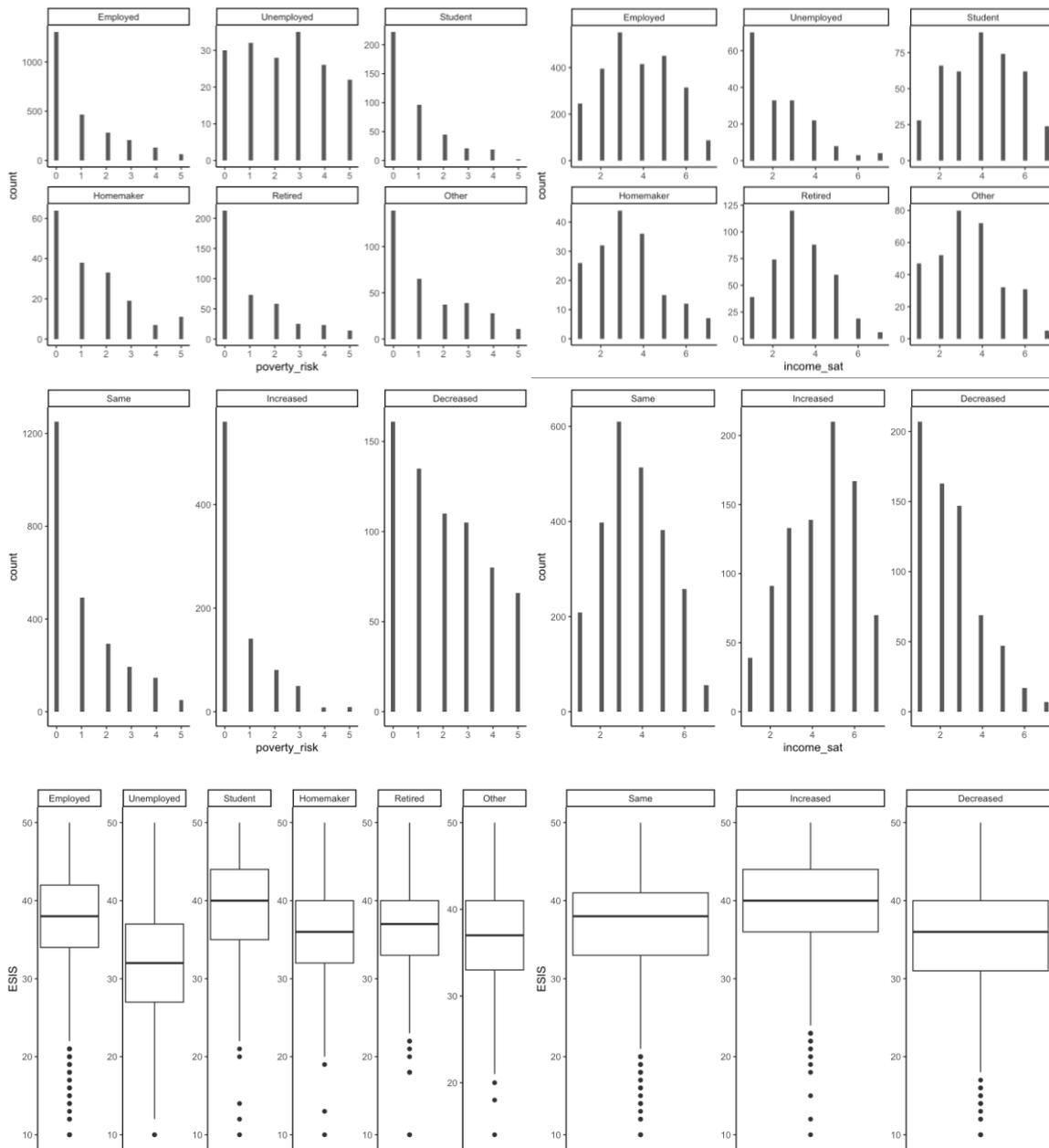


Figure 4.3.5.1 Correlations between economic indicators; b) Employment and poverty risk; c) Employment and income satisfaction; d) Change in income and poverty risk; e) Change in income and income satisfaction; f) Employment and experiences of social inclusion; g) Change in income and experiences of social inclusion

Social participation

The dimension of social participation consists of societal trust, the assessment of whether women have equal opportunities to men in the respective countries, and whether advancing women’s rights has gone too far. We see (Figure 4.3.5.2) that social trust is weakly correlated with whether or not women have the same opportunities in the respective country. While it may seem reasonable to expect a large negative correlation between the two equal opportunities variables, we observe only a correlation of -0.21. Both higher social trust and a higher evaluation of the degree to which women have equal opportunities are associated with experiences of inclusion. However, the correlation

between the opinion that the advancement of women’s rights has gone too far, and social inclusion is positive (albeit very small).

Summary: The associations between the variables in the social participation are broadly what would be expected, although they are not relatively weak.

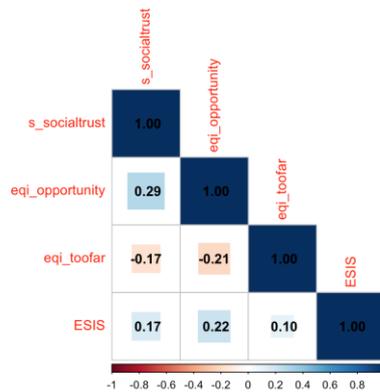


Figure 4.3.5.2 Correlations between indicators of social participation

Health and well-being

This report includes three measurements within the health and well-being dimension (Figure 4.3.5.3). We measure physical health, mental health, and life-satisfaction separately. Overall life-satisfaction is positively correlated with both physical health and mental health, although the association with mental health is stronger. The association between life-satisfaction and experiences of social inclusion is relatively strong, at 0.55. Mental health and physical health are similarly related, although it is clear that they do measure different concepts within health and well-being. Finally, the association between mental health and experiences of social inclusion is stronger than that for physical health, which is consistent with the literature cited previously¹⁴⁴.

Summary: Higher life-satisfaction, and better physical and mental health are all positively associated with social inclusion, and moderately positively associated with each other.

¹⁴⁴ van Bergen, A. P. L., Wolf, J. R. L. M., Badou, M., de Wilde-Schutten, K., IJzelenberg, W., Schreurs, H., Carlier, B., Hoff, S. J. M., & van Hemert, A. M. (2019). The association between social exclusion or inclusion and health in EU and OECD countries: A systematic review. *European Journal of Public Health*, 29(3), 575–582. <https://doi.org/10.1093/eurpub/cky143>

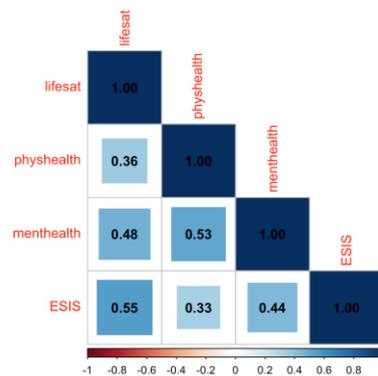


Figure 4.3.5.3 Correlations between indicators of health and well-being

Living conditions

The dimension of living conditions focuses on the combination of housing and neighbourhood fit (Figure 4.3.5.4). In our study, these are measured by looking at the monthly expenditure on housing, the housing ownership situation, and for accessibility, self-rated difficulties of accessing certain services, and vehicle ownership.

We see a weak negative correlation between correlation between the share of the income spent on mortgage or rent, and self-rated accessibility. The more individuals spend on their housing (relative to their income), the lower their accessibility, although it is only a weak correlation. Higher mortgage or rent expenditures are also negatively associated with social inclusion, which seems plausible. Again, this is only a weak correlation. Self-rated accessibility is positively associated with experiences of social inclusion. This is consistent with the (extensive) literature on transport and inclusion. However, we observe only a weak correlation between the two variables. Ownership of a vehicle is associated with slightly higher self-rated accessibility, although for both owners and non-owners the distribution of self-rated accessibility is wide.

Individuals who own their house outright pay little to no rent or mortgage, as would be expected. In the present sample, those who rent have the largest expenditures on housing costs, as a proportion of their overall income. Comparing the ownership situation and experiences of social inclusion, we see that individuals who own their houses outright experience more social inclusion than all other categories, although the difference is small. Social or subsidised renters experience the least social inclusion.

Summary: The association between accessibility and social inclusion is positive, but weak, and greater housing affordability is associated with higher social inclusion. Homeowners experience most social inclusion, social renters the least.

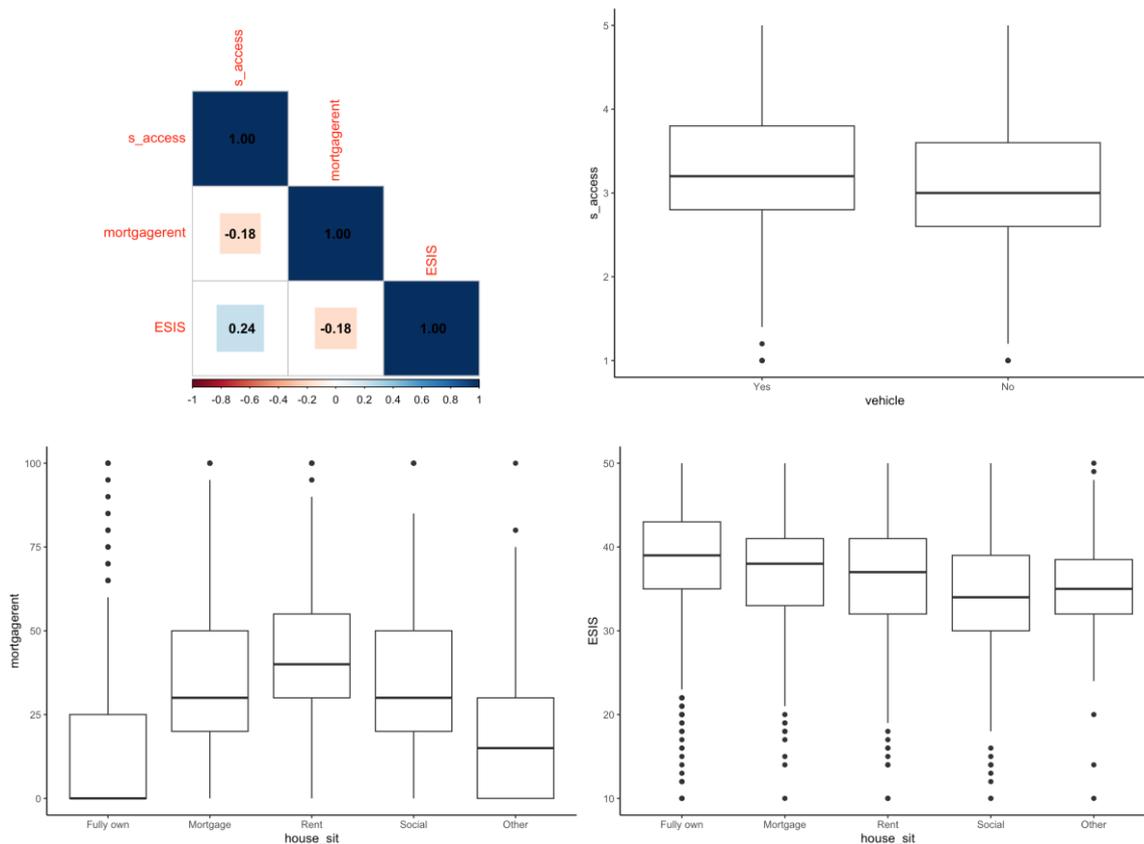


Figure 4.3.5.4 a) Correlations between indicators of living conditions; b) Self-assessed accessibility and vehicle ownership; c) Housing expenditures for mortgage and rent by housing situation; d) Experiences of social inclusion by housing situation

Regression results

Dimensions of inclusion

Table 4.3.9 shows the results of the first set of regressions, regressions 1.1 through 1.4. In these regressions, each of the dimensions of inclusion are separately entered as independent variables. Next, Table 4.3.10 displays the associations between axes of social inclusion and experienced social inclusion. Subsequently (Table 4.3.11), we present a model that has, first, all dimensions together (3.1), and second, all dimensions and the axes of social inclusion (3.2).

Model 1.1 shows the results for the dimension of economic security and employment, associated with experiences of social inclusion. Each of the separate variables is significantly associated with social inclusion. The compound measure for risk of poverty is negatively associated with social inclusion, and the coefficient for income satisfaction is positive. Individuals whose income has increased in the past 12 months report higher social inclusion than people whose income remained the same or decreased. A decrease in income over the past 12 years is not associated with lower social inclusion. Compared to the reference category of employed individuals, unemployment is negatively associated with social inclusion. A similar negative association is observed for homemakers and retirees.

Model 1.2 shows the associations between the dimension of social participation and social inclusion. Again, all variables included in the dimension are significantly related to social inclusion. The coefficient for social trust is positive, indicating that people who trust institutions and their neighbours

report higher levels of social inclusion. People who assess the degree of equality of women’s rights and opportunities as higher, also report higher levels of social inclusion. However, people who state that the advancement of women’s rights has gone too far, report lower levels of social inclusion.

Model 1.3 shows that life satisfaction and social inclusion are closely linked. An increase in life-satisfaction of one is associated with an increase of social inclusion of 1.28. Greater physical health is also positively related to social inclusion, but less strongly compared to greater mental health. It is noteworthy that these three variables alone account for 34.8 per cent of the variation in experiences of social inclusion. Out of the four dimensions, this dimension appears to be most closely related to our outcome variable.

Moving on to model 1.4, which shows the role that the living situation plays in social inclusion, we see, again, that all selected variables are significantly related to social inclusion. However, the association between vehicle ownership (higher social inclusion for those owning a vehicle) is least strong and only significant if we allow a 90 per cent confidence interval. Higher accessibility is strongly associated with social inclusion. Higher monthly housing expenditures relative to overall income are negatively associated with social inclusion, and we see that social renters experience the least social inclusion. It is interesting to note in this list of coefficients that the lower level of social inclusion observed for renters is not simply due to their higher monthly housing expenses.

Summary: When modelled separately, all chosen variables for the four dimensions are related to social inclusion, with the exception of vehicle ownership (only at $p < 0.10$). The variables display the expected signs. The dimension health and well-being accounts for the most variance in experienced social inclusion.

Table 4.3.9 Progressive regression analyses showing the associations between the four dimensions of social inclusion and experienced social inclusion, separately.

Predictors	1.1 ESIS		1.2 ESIS		1.3 ESIS		1.4 ESIS	
	Estimate	s.e.	Estimate	s.e.	Estimate	s.e.	Estimate	s.e.
(Intercept)	35.11 ***	0.34	34.29 ***	0.27	23.44 ***	0.34	31.88 ***	0.57
poverty_risk	-1.05 ***	0.08						
Income satisfaction	0.94 ***	0.07						
employment: Unemployed	-3.27 ***	0.51						
employment: Student	0.57	0.34						
employment: Homemaker	-1.35 **	0.50						
employment: Retired	-0.86 *	0.34						
employment: Other	0.19	0.38						
income_change: Increased	1.01 ***	0.26						
income_change: Decreased	0.14	0.29						
s_socialtrust			0.08 ***	0.01				
Women equal opportunity			0.53 ***	0.04				

Women rights too far		-0.42 ***	0.04		
Life satisfaction				1.28 ***	0.04
Physical health				0.52 ***	0.11
Mental health				1.31 ***	0.11
vehicle: No					-0.57 * 0.25
Accessibility					2.15 *** 0.16
Mortgage / rent					-0.03 *** 0.01
house_sit: Mortgage					-0.11 0.30
house_sit: Rent					-0.89 ** 0.32
house_sit: Social					-3.24 *** 0.46
house_sit: Other					-2.40 *** 0.67
Observations	3911	3868	3910	3852	
R2 / R2 adjusted	0.180 / 0.178	0.088 / 0.087	0.348 / 0.347	0.095 / 0.093	
* p<0.05 ** p<0.01 *** p<0.001					

Axes of social inclusion

Next, we estimate a model that includes the axes of social inclusion. As shown below, the axes of social inclusion explain only a small proportion of the overall variance in experienced social inclusion. The highest level of education obtained is predictably related to social inclusion, with people with lower levels of education reporting lower levels of social inclusion. Men experience less social inclusion than women in our sample. Those who preferred to self-describe or listed their gender as other (combined) appear to experience somewhat higher social inclusion than women ($p < 0.10$), and more than men.

We find no significant association between age and social inclusion. However, there are interesting results regarding the use of the internet. Individuals who use the internet for online interactions report lower levels of social inclusion, whereas individuals who use the internet for playing games report higher levels of social inclusion.

Table 4.3.10 Associations between the axes of social inclusion and experienced social inclusion.

Predictors	ESIS	
	Estimate	s.e.
(Intercept)	39.09 ***	0.47
education: Less than primary	-1.97	2.13
education: Primary	-2.93 ***	0.75
education: Lower secondary	-2.48 ***	0.42
education: Upper secondary	-0.93 **	0.30
education: Post-secondary	-1.46 ***	0.43
education: Master	1.11 **	0.34
education: PhD	2.42 ***	0.60
genderMale	-0.61 **	0.22

genderOther	2.44 *	1.05
Age	0.01	0.01
Services	-0.19 *	0.09
Posting	-0.06	0.06
Interact	-0.95 ***	0.09
News	-0.13	0.08
Games	0.35 ***	0.06
Observations	3906	
R ² / R ² adjusted	0.093 / 0.090	

* $p < 0.05$ ** $p < 0.01$ *** $p < 0.001$

Full cross-national models

Models 3.1 and 3.2 below reflect our model with all social inclusion dimensions (model 3.1) and all dimensions and axes (model 3.2).

In model 3.1 we see that the interrelationship between variables means some of the variables that originally had a significant association with social inclusion are now no longer significant. Risk of poverty, social trust, physical health, and housing expenditures as the share of income are no longer significantly associated with social inclusion (at a cutoff of $p < 0.05$). Housing situation appears to play a less important role regarding social inclusion, as only social renters still report lower social inclusion. With the exception of accessibility, the dimension for living situations appears less important in the full model. For the other dimensions, the associations with social inclusion remain qualitatively the same (same sign, same significance).

Moving across to the model including both dimensions and axes of social inclusion, we see only minor changes to the reported coefficients and significance. Students now have significantly higher social inclusion than employed persons, but other than that there are no substantial changes among the dimensions.

For the variables included as axes (or determinants) of social inclusion, the story is different. Accounting for all the dimensions of inclusion means that the level of education is no longer significantly associated with experienced social inclusion. Men still report lower social inclusion than women. Individuals who interact online, likewise, report lower social inclusion than those who do not, and individuals who play video games online report higher social inclusion.

Table 4.3.11 Fully specified regression models with 3.1) all dimensions and 3.2) all dimensions and axes.

Predictors	3.1 ESIS		3.2 ESIS	
	Estimate	s.e.	Estimate	s.e.
(Intercept)	23.56 ***	0.63	24.82 ***	0.77
poverty_risk	-0.10	0.08	-0.06	0.08
Income satisfaction	0.29 ***	0.07	0.27 ***	0.06
employment: Unemployed	-2.18 ***	0.45	-1.84 ***	0.45
employment: Student	0.69 *	0.30	0.94 **	0.33
employment: Homemaker	-1.51 ***	0.44	-1.32 **	0.44
employment: Retired	-1.91 ***	0.31	-1.60 ***	0.34
employment: Other	0.14	0.34	0.01	0.36
income_change: Increased	0.62 **	0.22	0.68 **	0.22

income_change: Decreased	0.63 *	0.26	0.44	0.25
s_socialtrust	0.01	0.01	0.01	0.01
Women equal opportunity	0.13 ***	0.03	0.17 ***	0.03
Women rights too far	-0.28 ***	0.03	-0.24 ***	0.03
Life satisfaction	1.08 ***	0.05	1.02 ***	0.05
Physical health	0.24 *	0.11	0.24 *	0.11
Mental health	1.19 ***	0.11	1.18 ***	0.11
vehicle: No	0.21	0.21	0.16	0.21
Accessibility	0.58 ***	0.14	0.56 ***	0.14
Mortgage / rent	-0.01 *	0.00	-0.01 *	0.00
house_sit: Mortgage	-0.44	0.25	-0.41	0.25
house_sit: Rent	-0.47	0.27	-0.34	0.27
house_sit: Social	-1.20 **	0.39	-1.07 **	0.38
house_sit: Other	0.04	0.56	-0.01	0.56
education: Less than primary			0.45	1.90
education: Primary			0.04	0.62
education: Lower secondary			-0.02	0.35
education: Upper secondary			-0.37	0.25
education: Post-secondary			-0.63	0.35
education: Master			0.32	0.28
education: PhD			0.27	0.49
genderMale			-1.20 ***	0.18
genderOther			2.29 *	0.91
Age			0.01	0.01
Services			-0.16 *	0.07
Posting			-0.08	0.05
Interact			-0.58 ***	0.08
News			-0.05	0.07
Games			0.23 ***	0.05
Observations	3817		3814	
R2 / R2 adjusted	0.393 / 0.390		0.425 / 0.419	

* $p < 0.05$ ** $p < 0.01$ *** $p < 0.001$

Summary of cross national models

In the models above we distinguish four dimensions of social inclusion. Of the four, social participation and the living situation appear to contribute less to explaining experienced social inclusion than the other two dimensions. When separately modelled, they reach an r-squared of 0.088 (social participation) and 0.095 (living conditions). Health and well-being are most closely associated with social inclusion, with just the three variables of life-satisfaction, mental health, and physical health accounting for 0.348 in the variance of experienced social inclusion.

When the four dimensions are combined, employment and income satisfaction (economic uncertainty and employment), equal opportunities (social participation), life-satisfaction and mental health (health and well-being), and accessibility and social housing (living situation) remain. Together, these four dimensions explain 0.0393 per cent of the variation in social inclusion.

When the axes of social inclusion are added to the full model, the coefficients for the four dimensions remain qualitatively unchanged. However, very few of the coefficients of the variables included as axes of social inclusion are still significant. Men experience less social inclusion, and the internet uses of interacting with others and playing games are, respectively, negatively and positively associated with experienced social inclusion.

Model 3.1 with all dimensions explains 39.3 per cent of variance in our experienced social inclusion scale. Adding the axes in model 3.2 adds little in terms of r-squared. To assess whether model 3.2 improves on model 3.1 we assess their Akaike Information Criterion (AIC) which assesses model fit, penalised by model complexity. A lower AIC is better. The difference in AIC's for the two models (model 3.2 minus model 3.1) is -193.7, meaning we prefer the full model including axes. For the remainder of the analyses we proceed with the fully specified model including the axes and dimensions.

Country stratifications

A key aim of the meso-level analyses is the assessment of between-country differences in the driving forces of social inclusion. To do so, this section presents a series of the fully specified model, developed in the previous section, stratified by country (Table 4.3.12). In this section, indicators are compared across countries to identify where key differences exist.

Economic uncertainty and employment

The risk of poverty is not associated with experienced social inclusion in any of the six pilot countries. While the estimate is generally positive (with the exception of France and Romania), it does not reach the level of statistical significance. Income satisfaction, which was positively associated with social inclusion in the full cross-national model, is only positively associated with social inclusion in Greece (if we permit $p < 0.10$). Again, the estimates are generally positive (with the exception of Romania), and the magnitude of the estimate is larger for both Greece and Slovakia than in the cross-national model. However, the estimates are insufficiently precise.

Reviewing the associations in the employment variable with social inclusion, the results are mixed. Unemployment is negatively associated with social inclusion, but only reaches statistical significance in Romania. Students in Poland report lower social inclusion, but in other countries the estimates are around or above zero (and not significant). Homemakers, who in the cross-national model are significantly negatively associated with social inclusion, only have a negative ($p < 0.10$) association in Greece. Estimates for this category are negative in the other countries as well, excluding Ireland and Slovakia, but do not reach statistical significance. While retirees reported significantly lower levels of social inclusion in the cross-national model, the association is only negative and significant in Poland. In all other countries the estimate is negative, but not large (or precise enough) to be statistically significant.

Finally, income changes are also no longer statistically significant. All the estimates for an increase in income, as well as (curiously but similar to the cross-national model) decreases in income are positive, regarding social inclusion, but insignificant.

Summary Economic uncertainty and employment: At the country by country level, very few of the associations found cross-nationally remain. To a large extent, this appears due to the increase in standard errors for the smaller number of cases in each regression. For the most part, coefficients point in the direction found in the cross-national model (model 3.2), but no longer reach statistical significance.

Social participation

Whereas in the cross-national model, no significant association remained between social trust and social inclusion (once all dimensions were combined), at the country level stratifications we find some evidence that social trust is associated with social inclusion. In Ireland, Romania, and particularly in Slovakia, higher social trust is associated with higher social inclusion. The estimates for all countries for this variable are positive with the exception of France, where it is very slightly negative.

For the variables concerning equal opportunities and whether the advancement of women's rights has gone too far, we find small between-country differences. If we permit a 90 per cent confidence interval, we see a positive association between people's evaluations of women's opportunities in Poland and France. However, the same variable is negatively associated with social inclusion in Slovakia. In all countries except Slovakia, the estimate for equal opportunities is positive.

In Romania, individuals who reported that the advancement of women's rights has gone too far report higher levels of social inclusion ($p < 0.01$). The estimates for this variable are positive and significant ($p < 0.10$) in France and Slovakia, and positive but not significant in Ireland and Poland. In Greece the estimate is slightly negative.

Summary Social participation: Social trust is generally related to social inclusion, although the associations are generally not statistically significant. Those who say that women have more equal opportunities are also more positive about social inclusion, except in Slovakia, although none of these associations reach significance with a 95 per cent confidence interval.

Health and well-being

Life-satisfaction is positively associated with social inclusion across the board. The impact is largest in Greece and Ireland (estimate of 1.16), and the lowest coefficient is from Romania at 0.81. Physical health, however, is not statistically associated with social inclusion. In Poland, the association is positive and significant, if we permit a 90 per cent confidence interval. Across all countries the estimate is positive, with the exception of Slovakia, where we see a slight negative coefficient. Mental health is positively associated with social inclusion in all countries, although in France and Greece only at $p < 0.10$. The impact of mental health on experienced social inclusion is largest in Ireland (estimate of 1.33) and Slovakia (estimate of 1.23).

Summary Health and well-being: Life satisfaction and mental health are positively, and generally significantly, associated with social inclusions across the pilot regions.

Living conditions

Not owning a vehicle reduces experiences of social inclusion in Greece, but is not significantly associated with social inclusion elsewhere. This is interesting, as at the cross-national level the association is the reverse (also not significant). For most countries, the estimate is still negative, with only Romania reporting a positive coefficient for social inclusion. The composite measure of accessibility is positively and significantly associated with social inclusion in all pilot regions except Slovakia and Ireland. For both France and Greece the associations are strongest.

Higher housing expenditures for mortgage or rent are negatively associated with social inclusion, with the exception of Poland. However, the estimates do not reach the level of statistical significance for any of the pilot regions. For the housing situation, very few of the listed categories were significantly associated with social inclusion at the cross-national level and the same is true within countries. One notable outcome, however, is the general lack of a negative association between social renting and social inclusion, a finding that was present at the cross-national level. Slovakia and France return non-significant negative associations, but for the rest of the countries the associations can even be positive compared to homeowners, highlighting the context-dependency of the association between housing situation and social inclusion.

Summary Living conditions: Subjective accessibility is positively associated with social inclusion. While the estimates show vehicle ownership is also positively related to social inclusion, it is not a significant association for most countries. Housing situation is not systematically associated with social inclusion within countries.

Axes of social inclusion

The level of education was not significantly associated with social inclusion at the cross-national level, and we find similar outcomes within countries. Men experience lower social inclusion across most countries with the exception of Slovakia. For the other countries the association is significant ($p < 0.05$) except for Ireland and Romania ($p < 0.10$). There appears no association between social inclusion and age. For the internet use we see some interesting patterns for the countries. The use of the internet for accessing services is negatively associated with social inclusion across all countries, although it is only statistically significant in Romania. Similarly, the use of the internet for interacting online is negatively associated with social inclusion, and again only significant in Romania ($p < 0.95$), although in Greece and Slovakia a similarly sized coefficient (around -0.5) is found, significant at the $p < 0.10$ level. The use of the internet for videogames is positively associated with social inclusion in all countries except Slovakia, where it is slightly below 0. However, the association is only significant, again, in Romania, where it is positively associated with social inclusion.

Summary Axes of social inclusion: The determinant that is most consistent across countries from the axes of social inclusion is that men experience less social inclusion than women (with the exception of Slovakia). For the other determinants we see few patterns when analysed country by country.

Discussion of country level stratifications

The country-level stratified models reveal that while patterns from the cross-national model are directionally consistent, fewer statistically significant results emerge due to reduced precision. Mental

health, life satisfaction, social trust, and subjective accessibility stand out as the strongest and most consistent predictors of social inclusion. Factors such as income, employment, and digital use show greater variability and suggest the need for context-sensitive policy interventions.

Especially for the categorical variables we see that the sample sizes and complexities of the fully specified models may limit our ability to find statistically significant outcomes when analysing the data country-by-country.

Table 4.3.12 Country stratifications of the fully specified model (model 3.2).

Predictors	4.1 GR: ESIS		4.2 IR: ESIS		4.3 PL: ESIS		4.4 RO: ESIS		4.5 SK: ESIS		4.6 FR: ESIS	
	Estimate	s.e.										
(Intercept)	17.17 ***	2.30	21.22 ***	2.37	25.83 ***	1.72	25.33 ***	1.74	23.65 ***	2.41	20.16 ***	2.02
poverty_risk	0.13	0.24	0.34	0.23	0.01	0.22	-0.15	0.14	-0.06	0.24	-0.09	0.17
Income satisfaction	0.42 *	0.20	0.16	0.22	0.16	0.11	-0.16	0.11	0.33	0.28	0.19	0.19
employment: Unemployed	-1.90	1.28	-1.80	1.15	-1.11	2.24	-2.09 **	0.79	-1.20	1.21	-1.18	0.92
employment: Student	0.76	1.47	0.44	1.21	-2.19 **	0.70	0.63	0.67	-0.02	1.25	0.13	1.04
employment: Homemaker	-2.13 *	0.93	0.58	1.22	-1.57	1.60	-0.67	0.87	0.19	1.32	-0.68	1.10
employment: Retired	-0.22	1.13	-0.73	0.82	-4.93 **	1.62	-1.23	0.79	-1.26	0.90	-1.15	1.17
employment: Other	2.99	2.26	-0.33	1.18	-0.48	0.90	-0.61	0.55	-2.10	5.28	0.35	1.50
income_change: Increased	0.10	0.67	0.26	0.53	0.75	0.40	0.86	0.46	0.74	0.72	0.29	0.63
income_change: Decreased	0.13	0.72	0.37	0.70	0.12	0.59	0.23	0.45	1.32	0.72	0.89	0.66
s_socialtrust	0.02	0.03	0.06 **	0.02	0.00	0.02	0.04 **	0.02	0.16 ***	0.03	-0.01	0.02
Women equal opportunity	0.11	0.12	0.10	0.09	0.16 *	0.06	0.10	0.06	-0.26 *	0.12	0.21 *	0.10
Women rights too far	0.04	0.10	-0.15	0.10	-0.11	0.06	-0.27 ***	0.06	-0.26 *	0.11	-0.16	0.08
Life satisfaction	1.16 ***	0.15	1.17 ***	0.14	0.91 ***	0.11	0.81 ***	0.08	1.07 ***	0.17	1.00 ***	0.13
Physical health	0.16	0.34	0.42	0.32	0.50 *	0.23	0.20	0.20	-0.07	0.38	0.43	0.30
Mental health	0.87 **	0.32	1.33 ***	0.29	1.20 ***	0.22	1.12 ***	0.19	1.23 ***	0.34	0.63 *	0.29
vehicle: No	-1.83 **	0.62	-0.23	0.57	-0.37	0.43	0.53	0.36	-1.34	0.91	-0.29	0.57
Accessibility	2.52 ***	0.48	0.63	0.46	1.07 ***	0.32	0.77 **	0.29	0.22	0.34	2.33 ***	0.44
Mortgage / rent	-0.02	0.01	-0.02	0.01	0.02 *	0.01	-0.00	0.01	-0.00	0.02	-0.03 **	0.01
house_sit: Mortgage	1.70 *	0.79	-0.25	0.80	-0.77	0.54	-0.36	0.47	-0.75	0.76	0.88	0.67

house_sit: Rent	1.18	0.84	0.20	0.78	0.30	0.57	-0.11	0.55	-0.59	0.81	0.69	0.62
house_sit: Social	1.37	1.00	1.06	1.10	0.58	1.04	-0.91	0.78	-1.47	0.92	-0.57	1.31
education: Less than primary	-0.04	4.42					2.39	3.09	3.66	3.12		
education: Primary	6.17	3.48	-1.66	1.76			0.63	1.15	1.39	1.82	5.44	3.71
education: Lower secondary	-0.08	1.31	-2.27	1.19	15.10 **	5.16	0.77	0.98	-0.94	1.58	0.93	1.83
education: Upper secondary	0.28	0.71	-1.30	0.91	-0.13	0.63	0.11	0.95	0.80	0.70	0.87	0.61
education: Post-secondary	-0.26	0.77	-0.87	1.05	-1.07	1.20	-1.09	1.32	1.07	0.81	0.80	0.81
education: Master	1.01	0.80	-1.38	0.93	-0.73	0.48	0.46	1.01	0.72	0.98	1.14	0.60
education: PhD	13.22 *	5.71	3.23	3.69	-2.04 **	0.62	0.66	1.54	-1.90	1.97	2.05	1.43
genderMale	-1.79 **	0.57	-1.13 *	0.50	-1.36 ***	0.38	-0.72 *	0.36	0.65	0.51	-1.20 *	0.47
genderOther	-3.16	5.88	0.51	3.63	2.28 *	1.06	-0.56	1.96			-4.18	4.95
Age	-0.00	0.03	0.04	0.02	0.01	0.02	0.03	0.02	-0.02	0.03	-0.01	0.02
Services	-0.26	0.23	-0.13	0.24	-0.01	0.15	-0.33 **	0.12	-0.05	0.22	-0.11	0.21
Posting	0.14	0.17	-0.16	0.14	-0.17	0.10	-0.04	0.10	0.13	0.15	-0.23	0.15
Interact	-0.52 *	0.23	-0.24	0.18	-0.39	0.20	-0.49 **	0.15	-0.49 *	0.20	-0.16	0.21
News	-0.19	0.22	-0.13	0.20	0.20	0.13	-0.16	0.12	-0.19	0.19	0.15	0.20
Games	0.03	0.15	0.05	0.12	0.11	0.10	0.30 ***	0.08	-0.01	0.14	0.08	0.13
house_sit: Other							0.03	0.60				
Observations	502	519		822		1004		462		505		
R2 / R2 adjusted	0.512 / 0.474	0.458 / 0.419		0.356 / 0.328		0.373 / 0.349		0.392 / 0.342		0.481 / 0.442		

* p<0.05 ** p<0.01 *** p<0.001

Stratification by rurality

Next we stratify our regression results by rurality (Table 4.3.13). We analyse the regression table in a similar fashion as for the country stratifications.

Economic uncertainty and employment

The risk of poverty is not significantly associated with social inclusion in rural or small town contexts, but in large towns, it is negatively associated ($p < 0.10$). Income satisfaction has a positive relationship with social inclusion across all areas, reaching statistical significance in large towns. Unemployment is strongly and negatively associated with social inclusion in rural areas, but this relationship is not significant in towns. Being a student is positively associated with social inclusion in rural areas, while homemakers report significantly lower social inclusion in small towns only. Retired individuals report significantly lower inclusion in all rural and large town settings ($p < 0.10$), with the strongest effects observed in small towns ($p < 0.05$). Changes in income, both positive and negative, show a positive association with social inclusion, although we find no significant results except in large towns. An increase in income is significantly associated with greater social inclusion in large towns ($p < 0.05$), while a decrease in income is also positive significant ($p < 0.10$) in this context.

Social participation

Social trust does not exhibit a significant association in any setting. People who think women have equal opportunities experience more social inclusion in small towns and large towns, while the belief that women's rights have gone too far is negatively associated with inclusion across all geographies.

Health and well-being

Life satisfaction and mental health consistently show strong, positive, and statistically significant associations with social inclusion across all contexts. However, physical health has a positive but non-significant relationship. In the cross-national regressions we found tentatively positive results for physical health, which did not quite reach the level of statistical significance.

Living conditions

Lack of vehicle access is not significantly associated with social inclusion in any setting. Accessibility is positively associated with inclusion in rural and large town contexts, but not in small towns. Housing expenditures (mortgage or rent) show no significant associations. Regarding housing tenure, renting socially is negatively associated with social inclusion in small towns ($p < 0.10$). The coefficient for renting socially is negative across all contexts.

Axes of social inclusion

Education level does not exhibit a consistent pattern. In rural areas, individuals with post-secondary education report significantly lower inclusion than those with a bachelor's degree (the reference category, $p < 0.10$), though this is not observed elsewhere. Gender is a consistent predictor: men report significantly lower social inclusion than women across all settings. Respondents identifying as "other" gender show a significant positive association in rural areas, although it is important to note that the subgroup of individuals who report their gender as "other" and live in a rural area consist only of 16 people. Age has no significant effect.

Among digital variables, using the internet to access services and to post information online shows mixed or weak associations, with a negative effect for posting in small towns ($p < 0.10$). Interacting online is negatively associated with social inclusion in all contexts. Watching news has no effect, while playing games online is positively associated with social inclusion, particularly in small and large towns ($p < 0.05$). In rural regions, playing games is only significant at the $p < 0.10$ level.

Table 4.3.13 Regression stratified by degree rurality.

Predictors	5.1 Rural: ESIS		5.2 Small Town: ESIS		5.3 Large Town: ESIS	
	Estimate	s.e.	Estimate	s.e.	Estimate	s.e.
(Intercept)	23.02 ***	1.41	27.18 ***	1.34	23.98 ***	1.35
poverty_risk	0.18	0.15	-0.03	0.14	-0.26 *	0.13
Income satisfaction	0.22	0.12	0.20	0.11	0.38 ***	0.11
employment: Unemployed	-3.06 ***	0.79	-1.31	0.76	-1.07	0.82
employment: Student	1.95 **	0.61	0.32	0.56	0.57	0.59
employment: Homemaker	-0.16	0.73	-2.60 ***	0.74	-1.23	0.88
employment: Retired	-1.19 *	0.55	-1.89 **	0.60	-1.62 *	0.63
employment: Other	-0.34	0.67	-0.12	0.59	0.07	0.64
income_change: Increased	0.26	0.42	0.66	0.38	1.09 **	0.36
income_change: Decreased	0.68	0.44	-0.21	0.43	0.89 *	0.44
s_socialtrust	0.03	0.02	0.02	0.01	-0.00	0.01
Women equal opportunity	0.09	0.06	0.24 ***	0.06	0.19 **	0.06
Women rights too far	-0.24 ***	0.06	-0.27 ***	0.05	-0.20 ***	0.05
Life satisfaction	1.02 ***	0.09	1.00 ***	0.08	1.05 ***	0.08
Physical health	0.14	0.20	0.26	0.20	0.33	0.20
Mental health	1.35 ***	0.19	1.13 ***	0.18	0.94 ***	0.18
vehicle: No	0.41	0.41	0.11	0.36	-0.11	0.34
Accessibility	0.90 ***	0.26	0.05	0.24	0.81 **	0.26
Mortgage / rent	-0.01	0.01	-0.01	0.01	-0.01	0.01
house_sit: Mortgage	0.15	0.46	-0.36	0.42	-0.94 *	0.43
house_sit: Rent	-1.00	0.56	0.16	0.45	-0.45	0.43
house_sit: Social	-0.54	0.75	-1.46 *	0.63	-0.89	0.64
house_sit: Other	1.13	0.81	-0.32	0.94	-4.69 **	1.69
education: Less than primary	2.32	2.53	0.87	5.32	-4.06	3.85
education: Primary	-1.63	0.99	1.12	1.01	2.34	1.69
education: Lower	-0.56	0.62	0.05	0.61	0.41	0.76

secondary

education: Upper secondary	-1.08 *	0.51	-0.17	0.44	-0.02	0.42
education: Post-secondary	-1.55 *	0.71	-0.18	0.59	-0.47	0.57
education: Master	1.07	0.63	0.08	0.48	0.22	0.41
education: PhD	-0.26	1.15	0.23	0.91	0.26	0.68
genderMale	-1.14 ***	0.34	-1.04 ***	0.31	-1.45 ***	0.31
genderOther	5.10 **	1.61	0.75	1.70	0.55	1.47
Age	0.02	0.01	0.01	0.01	0.00	0.01
Services	-0.32 *	0.13	-0.13	0.12	-0.04	0.14
Posting	0.12	0.10	-0.20 *	0.09	-0.13	0.09
Interact	-0.56 ***	0.14	-0.60 ***	0.13	-0.59 ***	0.14
News	-0.01	0.12	-0.14	0.12	-0.01	0.12
Games	0.17 *	0.09	0.25 **	0.08	0.27 ***	0.08
Observations	1196		1315		1303	
R2 / R2 adjusted	0.430 / 0.411		0.418 / 0.401		0.468 / 0.453	
* p<0.05 ** p<0.01 *** p<0.001						

4.3.6 Summary and discussion of survey outcomes

Summary of main findings

survey into experiences of social inclusion. The report contributes a unique perspective by using the recently developed ESIS (Experiences of Social Inclusion Scale)¹⁴⁵ across multiple countries¹⁴⁶, while focusing on four key dimensions of social inclusion: economic uncertainty and unemployment, social participation, health and well-being, and living conditions¹⁴⁷. The survey was distributed using commercial surveying and polling organisations in five of the six pilot regions, each reaching or exceeding the anticipated survey quota of 500 respondents per country. In Romania, the survey was distributed through existing networks by the local pilot partner.

The main results from the survey analyses reinforce the importance of health and well-being as predictors of social inclusion, with life satisfaction and mental health strongly and positively correlated. Economic factors such as income satisfaction and employment status also played roles, though the risk of poverty was no longer significant once all dimensions were included.

¹⁴⁵ Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & and Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

¹⁴⁶ van Bergen, A. P. L., Wolf, J. R. L. M., Badou, M., de Wilde-Schutten, K., IJzelenberg, W., Schreurs, H., Carlier, B., Hoff, S. J. M., & van Hemert, A. M. (2019). The association between social exclusion or inclusion and health in EU and OECD countries: A systematic review. *European Journal of Public Health*, 29(3), 575–582. <https://doi.org/10.1093/eurpub/cky143>

¹⁴⁷ South-East European Research Centre. (2025) D1.1 Measuring social inclusion and wellbeing in European rural areas: a systematic review, INSPIRE

Social participation findings revealed mixed associations, with perceived gender equality generally linked to higher inclusion. For social trust, the initial positive association with experienced social inclusion disappeared once all four dimensions were included in the same model.

Living conditions, especially subjective accessibility, are positively associated with experiences of social inclusion, while social renting and housing costs showed weaker or context-dependent effects.

Among demographic axes, men consistently reported lower social inclusion than women, digital engagement patterns varied—with online social interaction linked to lower inclusion and online gaming to higher—and education and age were largely non-significant once other factors were controlled. Collectively, the model explained a substantial portion of variance in social inclusion.

Country-level stratifications revealed reduced statistical significance, most probably due to smaller sample sizes, but confirmed mental health, life satisfaction, social trust, and subjective accessibility as consistent predictors. Economic variables and living conditions returned more varied results, which could highlight the important role of context.

Rurality analyses showed life satisfaction and mental health as robust predictors across rural, small town, and large town settings. Economic insecurity and employment effects differed by rurality, with poverty risk negatively associated with inclusion only in large towns, and unemployment significantly impacting rural inclusion. Social trust's role was limited across rural contexts, while gender equality perceptions and women's rights attitudes displayed nuanced associations. Accessibility remained significant in rural and large towns but not small towns. Digital engagement patterns followed similar trends across rurality levels, with gender disparities persistent.

Discussion of results

The results found in this study correspond to a large degree with the results found in the existing literature, either due to consistency of the findings for key variables (such as health and well-being), or due to the heterogeneity of the findings. However, it is important to note a few key observations regarding the manner in which the research was conducted and their potential implications for the results.

The descriptives reveal that, generally, the populations in the sample qualitatively agree with what is known about the national distributions for populations regarding gender and degree of rurality from Eurostat. There are some discrepancies (and the measurement of subjective rurality does not quite match the measurement of rurality in Eurostat), but some deviations are to be expected. For education, we do see some notable divergences. In Romania, just over two thirds of our sample has completed some form of tertiary education, compared to just 16.5 per cent in Eurostat. This represents a substantial overrepresentation of higher educated individuals. Similarly, Romania represents an outlier in the employment statistics, as a substantially larger share of the sample is currently a student. It is reasonable to suspect that the sampling method chosen in Romania has impacted these results. In the other five countries, the survey was distributed using a simple random sample across five of the six pilot regions, whereas in Romania the data were collected using convenience sampling and distribution across existing networks. Fortunately, the sample size in Romania is larger than what was

minimally required, meaning future analyses might benefit from reweighting the sample. This is of particular relevance for the spatial microsimulation to be undertaken with these data.

Regarding the regression results, there are some notable absences of significant findings.

First, once all dimensions are included in the model, some covariates are no longer significant. While in general absence of proof is not proof of absence¹⁴⁸, there are specific reasons to the topic researched here as why we must be careful with inferring an absence of a relationship here. As discussed in the introduction, and more extensively in deliverable D1.1¹⁴⁹, there are many interrelations between the indicators across the four identified key dimensions. As a result, some indicators may not be significant when modelled simultaneously with indicators that are related to a similar latent construct. The regression models presented here represent an exploratory analysis of the underlying patterns, and not a more analytical null-hypothesis significance testing. The inclusion of all dimensions in the model may also mean that mediating variables are included, capturing some of the effects of the parent variable¹⁵⁰.

Second, it is evident from the stratifications by country that a number of associations that were previously identified as significant no longer reach that threshold. The significance of an association in these regressions depends to a large extent on the size of the sample. This especially the case when dealing with categorical variables. The numbers of individuals in each of the subsamples that might have, for instance, a specific level of education or employment may be so small that the statistical power of our tests is no longer sufficient. Again, this may mean that we are unable to detect a significant association even if one were to exist in the data.

Conclusions

The general results we find in our assessment of experienced social inclusion, its dimensions, and its drivers, show overlap with the current state of the art regarding the associations between drivers and dimensions of social inclusion, and experienced social inclusion. The associations we find for key dimensions are similar to those found in the paper that proposed the ESIS survey instrument¹⁵¹, and the strength of the health and well-being scales are in line with the results from a 22 country meta-analysis¹⁵². We find plausible results in the dimension-by-dimension progressive models for each of the underlying dimensions and reveal a more detailed understanding of the impacts of the separate indicators that make up the dimensions. In addition, the results of this study show that the ESIS measure can be successfully applied to different national contexts¹⁵³, beyond where it was originally

¹⁴⁸ Wright, W. (1888). *The empire of the Hittites* (Paper read at the ordinary meeting on January 3, 1887). *Journal of the Transactions of The Victoria Institute, or Philosophical Society of Great Britain*, 21, 55–59. The Victoria Institute. <https://babel.hathitrust.org/cgi/pt?id=uc1.b3765761&view=1up&seq=59>

¹⁴⁹ South-East European Research Centre. (2025) D1.1 Measuring social inclusion and wellbeing in European rural areas: a systematic review, INSPIRE

¹⁵⁰ Pearl, J. (2014). Interpretation and identification of causal mediation. *Psychological Methods*, 19(4), 459–481. <https://doi.org/10.1037/a0036434>

¹⁵¹ Leemann, L., Martelin, Tuija, Koskinen, Seppo, Härkänen, Tommi, & Isola, A.-M. (2022). Development and Psychometric Evaluation of the Experiences of Social Inclusion Scale. *Journal of Human Development and Capabilities*, 23(3), 400–424. <https://doi.org/10.1080/19452829.2021.1985440>

¹⁵² van Bergen, A. P. L., Wolf, J. R. L. M., Badou, M., de Wilde-Schutten, K., IJzelenberg, W., Schreurs, H., Carlier, B., Hoff, S. J. M., & Hemert, A. M. (2019). The association between social exclusion or inclusion and health in EU and OECD countries: A systematic review. *European Journal of Public Health*, 29(3), 575–582. <https://doi.org/10.1093/eurpub/cky143>

¹⁵³ Whelan, C. T., & Maître, B. (2007). Measuring Material Deprivation with EU-SILC: Lessons from the Irish Survey. *European Societies*, 9(2), 147–173. <https://doi.org/10.1080/14616690701217767>

proposed. The data in the survey provide a solid basis for further analyses, which may take the form of more conventional null-hypothesis significance testing, as well as a solid foundation for the proposed spatial microsimulation, with the present analyses providing insights into necessary adjustments and reweighting across regions.

4.4 Synthesis of interviews and surveys

In this section we provide a brief overview of the main outcomes from the interviews and the surveys combined. The key aim of this task was to assess the impacts of drivers and dimensions of social inclusion for the meso-level (countries). Of particular interest were between-country differences, but given the overall interest of the project, this study also emphasised the distinctions between rural and urban regions.

On the whole, we find very little evidence of substantial between-country differences. Conceptualisations of social inclusion, as well as main drivers, are consistent across the six studied countries. When we examine the results from the survey, we find a broadly similar pattern. There appear some smaller differences when looking at, for instance, specific categories of education or housing situation, but no structural differences are established.

Focusing on the qualitative component, this study reveals consistent conceptualizations of social exclusion as systemic marginalization, isolation, or invisibility of certain groups, and of social inclusion as societal acceptance supported by structural systems, individual agency, and equal opportunities. Vulnerable populations identified across regions included people with disabilities or special needs, older adults, those with low educational attainment, migrants and traveling communities, individuals experiencing poverty or homelessness, and those facing mental health issues. Rurality itself emerged as a risk factor due to geographic remoteness and service inaccessibility. The consequences of social exclusion were multifaceted, spanning individual burdens such as social isolation and psychological distress, and societal burdens including reduced cohesion and increased public health costs.

Interview data highlighted common barriers to inclusion such as limited mobility, demographic aging, discrimination, and bureaucratic inefficiencies in project implementation. Conversely, social inclusion was fostered by empathy, appreciation of diversity, participatory engagement, sustained funding, and the critical role of NGOs and social enterprises in bridging service gaps. Importantly, few regional differences emerged across the pilot countries, indicating a broadly shared narrative of exclusion and inclusion across rural Europe. The main exception was in Greece, where interviews emphasized agriculture-specific challenges, including technological deficits, youth outmigration, and sectoral competitiveness, reflecting how place-specific economic structures shape experiences of exclusion.

Quantitative findings reinforced the main outcome of similarity of processes across countries. The survey results highlight the prominence of health and well-being as predictors of social inclusion. Life satisfaction and mental health were consistently and positively associated with inclusion across all countries and levels of rurality, while physical health showed a weaker effect or no effect. Economic factors such as income satisfaction and employment status were also relevant, although the effect of poverty risk diminished when considered alongside the other dimensions and axes. Social participation findings were mixed: perceived gender equality was positively associated with inclusion, while the belief that women's rights had gone too far correlated negatively. Social trust lost

significance when all four dimensions were included in the full model. Living conditions also played a role, with subjective accessibility strongly associated with inclusion, while housing costs and tenure type had weaker or context-dependent effects.

The demographic axes identified gender disparities, with men consistently reporting lower inclusion than women. Digital engagement patterns revealed that online social interaction was negatively associated with inclusion, while gaming was positively linked, particularly in small and large towns. Age and education showed limited significance after controlling for other factors. Stratified models by country and rurality confirmed the importance of mental health, life satisfaction, and accessibility as consistent predictors, although other associations—particularly those involving economic insecurity and employment—varied depending on sample size, local context, and statistical power.

In conclusion, this study set out to assess the role of drivers and dimensions of social inclusion across countries and finds that social inclusion, both in the assessment of quadruple helix stakeholders, and as a self-reported outcome measure, is driven by broadly the same structural processes across countries. The findings help demonstrate the applicability of the ESIS tool in diverse national contexts. While the results here underscore the importance of universal patterns of social inclusion, we recognise that these processes may be shaped by sectoral, institutional, and geographic specificities beyond the scope of our data.

5. Micro-Level Analysis

We turn now into the micro-layer to better understand social inclusion needs and challenges of communities and individuals in rural areas. This section details both the methodology and the findings from both quantitative and qualitative information in seven local communities, which will nurture the typology to be made in T1.5.

5.1 Methodology

The methodology designed under Task 1.4 serves the goal of providing micro-level information for the analysis of social inclusion in rural areas that can complement the macro- and meso-levels. To approach hard-to-reach populations in the pilot areas, a blend of data collection methods has been employed:

- To begin, the questionnaire developed under task T1.3 has been used by the different pilot partners to conduct **CATI Surveys** in the region of each pilot site, with the goal of capturing 30 responses per pilot area.
- Secondly, **paper-based surveys** using the same questionnaire were used on site during the observational fieldwork by the researchers to interview vulnerable groups, with a goal of at least 20 paper-based interviews per pilot.
- In parallel, the different pilot partners conducted an **observational fieldwork** to get a finer idea of the challenges in those rural areas with special emphasis on vulnerable population. In each pilot site, a rural community was selected, in which the research team spent roughly 2 weeks for observational fieldwork, capturing behaviours, social norms, and community patterns on social inclusion. To that end, MedIna prepared a guide for observational fieldwork and provided training to support pilot partners.

To align research insight with concrete pilot interventions, the rural communities that were selected for the micro-level research are expected to be the locales where each of the 7 Smart Village Labs will be co-created and operate later on during and beyond the INSPIRE project. This selection ensures continuity between research and policy and provides an example of evidence-based pilot interventions in the context of the project.

To ensure that micro-level insights align directly with the project's conceptual framework, **all data collection was explicitly structured around the four key domains identified in Deliverable 1.1:**

1. **Economic Security**
2. **Health & Wellbeing**
3. **Living Conditions & Environment**
4. **Social & Civic Participation**

The University of Barcelona (UB) is the overall responsible for Task 1.4, including the coordination, and oversight of the observational fieldwork in rural communities. UB led the development of the

methodological framework for this task, ensuring consistency with the broader WP1 conceptual framework. UB also supported partners throughout the preparation and implementation phases, facilitating alignment across pilot regions and integration with previous tasks.

5.1.1 Pilot Area Selection

First of all, we want to highlight that to showcase the complementarity of our sample of areas, we gather evidence from **7 pilot territories with distinct characteristics**. Our pilot areas cover a variety of territories:

- ❖ **Košice Region, Slovakia** – Traditional rural
- ❖ **Eastern and Midland Regions, Ireland** – Traditional rural
- ❖ **Lubelskie Voivodeship, Poland** – Traditional rural
- ❖ **Kythera, Greece** – Island/coastal
- ❖ **Konitsa, Greece** – Mountainous
- ❖ **Maramureş & Suceava, Romania** – Mountainous
- ❖ **Bourgogne, France** – Peri-urban

At the same time, all of our 7 pilot territories belong to regions that are formally defined as “predominantly rural regions” or “intermediate regions” according to Eurostat’s classification of European regions in terms of rurality. This will enable us to tailor different service delivery mechanisms and policies that capitalise on inherent natural resources and competitiveness, focus on specific types of vulnerabilities, and therefore proposing a **plethora of social economy (SE) solutions in our project**. Moreover, our pilot selection will enable us to build a novel territorial taxonomy of European rural areas that covers **not just the “usual suspects” of rural categories**, but also more nuanced, intermediate and complex forms of rurality. Figure 5.1.1.1 offers an overview of our complementary pilot cases.

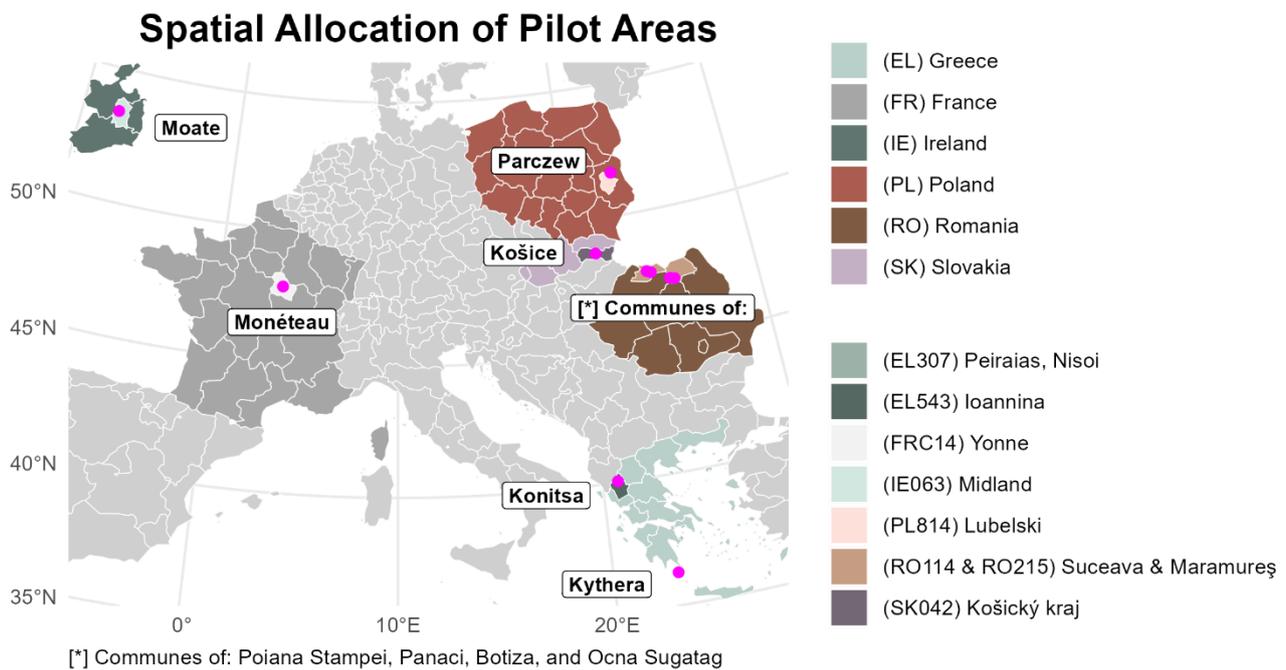


Figure 5.1.1.1 Spatial Allocation of the Pilot Areas

The pilot partners were responsible for the selection of rural communities in their respective countries where the fieldwork was conducted. To select the specific site, the Czech University of Life Sciences Prague (CZU) partner created a brief questionnaire where the basic information of the different options should be filled in. Basically, each pilot partner was asked to identify a number of relevant sites with a bit of information to better understand and help in the selection of the exact community for each pilot (e.g., a municipality, a certain village/group of villages, a certain rural settlement/group of settlements). The information requested in the questionnaire referred to the following categories concerning the targeted communities:

- **Country Name and NUTS2 and NUTS3 Levels and Codes.**
- **Targeted Municipality/Community/Village:** These can be small towns, villages, or communes within the NUTS3 regions.
- **Location in Map.**
- **Main Target Population:** Number and description of inhabitants or social groups who are the focus of the territorial development initiatives. These populations may include the general resident population or vulnerable groups such as the elderly, youth, or homeless.
- **Specific Challenges Faced:** Details the primary issues each community is dealing with, such as depopulation, poor infrastructure, unemployment, or lack of educational opportunities. These challenges are central to defining development priorities.
- **Existing Interventions:** Summarises the actions already taken to address community challenges. These can include investment in infrastructure, educational programmes, social services, or housing projects, among others.

- **Key Stakeholders Involved:** Identifies local authorities, NGOs, religious institutions, or other actors who are instrumental in designing and implementing interventions.
- **Opportunities for Innovation:** Highlights areas where novel approaches, technologies, or strategies could be introduced to enhance development outcomes. This includes community-led strategies, smart rural development, and digital inclusion.
- **Current Technological Infrastructure:** Describes the state of ICT (Information and Communication Technology) infrastructure within the community, including internet access, digital literacy, and technical capacity.
- **Remarks:** Additional notes, clarifications, or contextual details not captured in the structured fields.

The main characteristics of these Pilot-regions are described as follows:

Region 1. Yonne (FRC14)

95 of the region's 113 inter-communities are rural and are home to 55% of the population. Rural communities face many social weaknesses. Main challenges are lack of employment opportunities, difficulty in accessing local services, and weak broadband internet coverage. The population is declining. The main sectors in which social services are provided are: retirement homes, home care and assistance, health care, disability, social support, and training. The social economy accounts for 11.4% of the total number of employees. People with disabilities are a particularly vulnerable group, facing exclusion due to limited access to the transport network.

- **Pilot area #1:** The pilot municipality of **Monéteau**, exemplifies the dual challenge of managing suburban expansion while maintaining services for people with disabilities and limited mobility. Although the municipality benefits from proximity to regional hubs, it continues to face accessibility issues for vulnerable groups. Local authorities have partnered with associations such as LADAPT to improve social inclusion, but further steps are needed in sustainable urban planning, infrastructure coordination, and social integration policies to strengthen community resilience.

Region 2. Peiraias, Nisoi (EL307)

Kythera Island (part of the Peiraias and Nisoi region) lies in southern Greece, between the central and eastern Mediterranean. Kythera is classified as a remote, less-favoured rural area. Agriculture and apiculture are still prominent occupations. Kythera is mountainous and sparsely populated. Traditional social structures predominate, while youth out-migration and brain drain are persisting trends. The local community lacks or has limited access to a wide range of social services. Farmers do not have access to any professional services. Unemployed youth is the most significant vulnerable group. Young people need community visioning workshops, vocational support, upskilling, and a startup incubator. However, the social economy has played a pivotal role in the development of the island, with important infrastructures built by voluntary work.

- **Pilot area #2:** The island municipality of **Kythera**, illustrates the specific vulnerabilities of insular rural territories. Challenges include seasonal fluctuations in economic activity, limited healthcare and educational services, and difficulty in retaining a stable population base. Yet the community also demonstrates strong civic engagement and innovation potential, especially around sustainable tourism, local food systems, and digital participation.

Stakeholders have emphasised the importance of combining place-based development with improved inter-island connectivity and smart village strategies to overcome spatial and demographic isolation.

Region 3. Ioannina (EL543)

Ioannina is located in north-eastern Greece (Epirus region), in a mountainous area bordering Albania. Approximately 35% of the population are skilled farmers, stockbreeders, fishermen, and craftsmen—second only to those employed in services. Epirus is one of the most aged and sparsely populated areas of Greece. Ethnic minorities and refugees (comprising 7% of the population) and unemployed youths are among the most vulnerable groups. The increasingly ageing population is also vulnerable. Education and skills development are critically needed, as well as effective community integration and expanded employment opportunities. Forestry, agriculture, cultural tourism, community services, hunting, and fishing are the most critical sectors. Social enterprises could greatly benefit from increased funding to address the limited financial opportunities they face.

- **Pilot area #3:** The municipality of **Konitsa** reflects the demographic and economic pressures affecting many rural and upland areas. It is characterised by an ageing population, youth outmigration, and underutilisation of its rich natural and cultural assets. Despite the presence of conservation organisations and existing tourism infrastructure, broader strategic coordination is lacking. Local stakeholders are exploring alternative development models, including nature-based tourism and cross-border cooperation with Albania. Digital exclusion remains a significant barrier, particularly among older residents, highlighting the need for targeted investment in digital literacy and broadband infrastructure.

Region 4. Eastern and Midlands Regions (IE063)

They are one of the four main administrative regions of the country. We focused on the NUTS 3 area of the Midlands, which is impacted by the Twin Transition. 38.3% of the population live in rural areas, with the agriculture, forestry and fishing sector employing approximately 56,900 people. Most important vulnerable groups include elderly, young unemployed persons, and migrants. Social services focus on rural transport, adapted healthcare services, rural social schemes, and farm management advice services.

- **Pilot area #4: Moate** embodies the characteristics of rural peripherality in terms of access to services and employment diversification. The local civil society landscape is particularly active, with high levels of community engagement and volunteerism. Challenges include ageing infrastructure, insufficient transport services, and a need for inclusive policies targeting underrepresented populations, including migrants and people with disabilities. At the same time, there is a strong emphasis on education, youth initiatives, and digital innovation as levers for future growth.

Region 5. Dębowa Kłoda – Lubelskie (PL814)

The Dębowa Kłoda commune is located in the Lubelskie, near the border with Ukraine and Belarus. It is typically agricultural (agricultural land covers 63%) and inhabited by 3.8 thousand people—53.7% of whom are women. 58.8% of active residents of the commune work in the agricultural sector (agriculture, forestry, hunting and fishing). People working in agriculture are the most vulnerable

group, with women and Ukrainian refugees being particularly exposed to social exclusion. The social economy sector is still in its infant stage in the area.

- **Pilot area #5: Parczew** represents a broader eastern voivodeship context rather than a specific municipality. It captures the socio-economic realities of one of the country's least urbanised and lowest-income areas. Depopulation, high unemployment, and limited access to quality services remain persistent issues, particularly in more remote rural communes. However, the region also benefits from EU-funded development programmes, cross-border cooperation with Ukraine, and a growing focus on social economy initiatives. There is potential to build on existing agricultural know-how and cultural heritage through agri-tourism and short supply chains, though digital connectivity and administrative fragmentation remain barriers.

Region 6. Suceava (RO215) and Maramureş (RO114)

The counties of Maramureş and Suceava are located at the border with Ukraine and have 82% and 67% of the territory inside the mountain area official delimitation. The region has a strong rural specificity, but it faces out-migration, population ageing, the decline of traditional agricultural activities, and low levels of investment in infrastructure. Overall, the level of social services is low. However, there are social enterprises in the inception/start-up phase that can be mostly multiplied with operation in tourism and agriculture. Main vulnerable groups include elders, youths, and ethnic minorities of Ukrainians, Ruthenians, and Hutsuls.

- **Pilot area #6:** The communes of **Poiana Stampei, Panaci, Botiza and Ocna Şugatag**, in the mountainous North-East region, is part of the officially designated mountain zones, which are widely recognised as structurally disadvantaged due to harsh climatic conditions, low agricultural productivity, and limited accessibility. The local population is ageing, and youth migration remains a pressing concern. Nonetheless, significant efforts have been made to revitalise the area through investments in public infrastructure, including modernised schools, healthcare support facilities, kindergartens, and sport infrastructure. A notable emphasis is placed on education and social inclusion, with initiatives ranging from digital literacy programmes and therapeutic services to local development strategies and ecotourism promotion. The commune is also well-integrated into wider governance networks, benefiting from partnerships with county authorities, national ministries, NGOs, and regional development agencies. There is a clear potential for further innovation in areas such as mountain product certification, agri-food supply chains, and renewable energy. However, connectivity (both physical and digital) and the fragmentation of support services remain structural challenges.

Region 7. Košický kraj (SK042)

Rural areas in the Košický kraj are suffering large gaps in GDP per capita, high long-term unemployment levels, and high levels of brain-drain among young people, and low infrastructure investments. On the other hand, there is a trend toward digitalisation and social farming with added value for socially weak or vulnerable communities. The main sectors of social services are healthcare for seniors and people with disabilities. New social enterprises and social farming projects are emerging, developing new concepts. Most vulnerable groups are disabled persons, young people, elderly people, and Romani people.

- **Pilot area #7:** The city of **Košice** and its surrounding areas are marked by strong urban-rural contrasts, with advanced infrastructure and public services concentrated in Košice, while more peripheral areas face poverty, marginalisation, and limited institutional capacity. Social cohesion is further challenged by high Roma populations and systemic exclusion. Notable efforts have been made to strengthen local governance, especially in terms of crisis response (e.g. refugee support), youth inclusion, and interfaith cooperation. The region also shows promising use of digital platforms and community-based initiatives, but requires stronger integration of rural needs in regional development planning.

5.1.2 Survey Design and Adaptation for CATI and Paper-Based Surveys

The national-level questionnaire developed by RUG—based on the inclusion and exclusion dimensions from Task 1.1—was also deployed at the micro level, enabling direct comparison and the integration of meso- and micro-data for deeper, more cohesive insights. The piloting partners reviewed and translated the data collection tools provided by RUG into their local language to administer them to the respective target population in the piloting region. We did not need to adapt the questionnaire originally designed for the national survey for use in the CATI and paper-based surveys. Using a common questionnaire has the advantage of enabling us to directly compare data from the pilot areas with the national-level results.

While the CATI data quantify patterns and prevalence with greater statistical power, the paper-based survey captures lived realities, localised barriers, and subtle contextual variations within rural communities. Together, the two approaches provide a more textured and comprehensive interpretation of rural socio-economic dynamics.

It must be said that one of the most relevant challenges during the observational fieldwork was the difficulty in finding participants willing to complete the paper-based surveys. As a solution, it was proposed to hand over the surveys to engaged participants and give them a couple of days to self-complete the questionnaire. The details in the elaboration of the questionnaires as well as the response rates in each pilot have been already given in the corresponding sections of Task 1.3.

5.1.3 Observational Fieldwork

MedINA, in collaboration with UB and the rest of the partners, developed the core tools for field implementation. This included the creation of the **Master Observational Protocol, the Fieldwork Guide, and standardised observation templates**. MedINA also delivered online training sessions to pilot partners on the 30th of January and the 11th of February 2025 to ensure correct and consistent application of the methodology during fieldwork.

Observational fieldwork research is a **qualitative method** that explores human behaviour through the observation of individuals and groups. The most common form of this method is natural observation, in which subjects are observed in their natural environments. Unlike other techniques (e.g., surveys or interviews) that rely on self-reported information, observational research captures actual behaviours, providing valuable insights into what people do rather than what they claim to do. Still, it is often combined with other methods or used as a preliminary step. With roots in anthropology and sociology, natural observation involves researchers immersing themselves in the study setting, where they may take on various roles ranging from passive observers to active participants, carefully documenting their observations through detailed field notes. Although observational research offers

a unique perspective on human behaviour, it does present certain challenges. It can be time-consuming, and its subjective nature may lead to differing interpretations among researchers.

Natural observation is **employed in the INSPIRE project primarily for five reasons:**

1. To observe behaviour in its natural context, ensuring authentic data that reflects real-life interactions.
2. To witness behaviour as it happens, allowing for spontaneous and undistorted insights.
3. To avoid biases inherent in self-reported data, such as exaggerations or misremembering.
4. To reduce the influence of standardised metrics that may not suit local or cultural contexts.
5. To support other research methods or identify new topics, making it a complementary tool in broader research designs.

Indeed, although natural observation can be used independently, in this project, the data coming from was **combined with interviews and surveys (CATI and paper-based)**. In such a way, it can also serve as a precursor to more structured research as the one made in Task 1.5 developing a typology of rural areas in European regions. The idea is to effectively integrate observation with these other methods.

Among the **advantages of natural observation**, we highlight the following:

- **High Validity:** It captures actual behaviour, not just what people say they do.
- **Openness:** Researchers can discover new, unanticipated data with minimal bias.

Rich Data: Firsthand observation allows for deep, contextual insights that are difficult to obtain through surveys or interviews.

However, despite its strengths, this method also has several **limitations:**

- **Time-Consuming:** Long periods are needed to capture meaningful behaviour.
- **Low Reliability:** Different researchers may interpret the same scene differently.
- **Limited Generalisability:** Findings may not extend beyond the specific context or sample observed.
- Another major challenge is the **Hawthorne Effect:** The tendency for people to change their behaviour when they know they're being observed. This can distort results. However, this effect diminishes over time as subjects become accustomed to the researcher's presence.

All in all, natural observation is a powerful tool for studying real-world behaviour in context. It offers high validity and rich data, often revealing things that other methods miss. However, it demands considerable time, preparation, and adaptability. By understanding its strengths and limitations, and by carefully planning where, when, and how observations are conducted and recorded, as done in the Fieldwork Research Plan and Master Observational Protocol, researchers can leverage this method effectively, especially when combined with complementary techniques like interviews and surveys, as it is our case.

Observational Fieldwork Research Plan and Master Observational Protocol

MedINA prepared an **Observational Fieldwork Research Plan** which offers a concise overview of observational research, emphasising its key features. It covers when and where to conduct observations, what to observe, and what to document. In addition, the guide discusses the

advantages and disadvantages of this research method, along with critical ethical considerations. It outlines the essential steps in the research process with suggestions for further reading. It is important to note that this guide did not specifically concentrate on the observational research activities that may occur within INSPIRE; instead, it offered a broader perspective that could be useful in various contexts. The full text of the Observational Fieldwork Research Plan can be found in Appendix A10. This document was shared with all the partners in WP1 and discussed through a round of feedback. As a result of this round of comments, MedINA prepared the **Master Observational Protocol**, which comprises seven essential elements that are vital for ensuring clarity and effectiveness of the data collection process:

Element 1 – Why: Objectives and Conceptualisation

- Main goals:
 - Provide qualitative insights.
 - Reduce bias from self-reported data.
 - Detect challenges in hard-to-reach populations.
 - Fill data gaps and support typology development.
 - Immerse researchers in the social context.
- Specific goals:
 - Observe social inclusion barriers.
 - Assess challenges in rural, vulnerable communities.
 - Inform the design of Smart Village Labs.

Element 2 – How: Observation Methods

Type of observation? The type of observation chosen depends on the research question and strategy. Researchers typically begin by defining their goals, the target population, the behaviours of interest, and the locations where those behaviours occur. It is common to blend observation types and assume multiple roles—such as being both an insider and outsider—during the process.

- Naturalistic observation is prioritised to:
 - Capture real-time behaviours.
 - Avoid self-reporting bias.
 - Complement existing surveys (paper and CATI).
- Observation types:
 - Begin with non-participatory.
 - Potentially shift to participatory depending on setting and time.

Element 3 – Where: Observation Locations

Where? Natural observation occurs in the actual environments where people live or operate, such as playgrounds, hospitals, markets, or online forums. The selected setting must align with the research focus and must be specific. The selection process must take into account factors such as depopulation, infrastructure gaps, and the presence of vulnerable populations.

- Based on prior profiling, target areas include:
 - Social spaces: marketplaces, parks, cafes, religious sites.
 - Workplaces and civic spaces: shops, farms, town halls.
 - Public services: hospitals, schools, care centres.

- Social initiatives: soup kitchens, NGOs, community groups.

Element 4 – When: Timing and Duration

- Observation sessions should align with:
 - Venue-specific activity patterns (e.g., morning for services, evening for public spaces).
 - Limited time requires prioritising key observation windows.

Element 5 – Who: Observation Teams

Who Conducts the Observation? Observations can be done individually, in pairs, or teams, based on what suits the research best.

- Team setup:
 - Preferably in pairs or groups.
 - Daily debriefs are essential.
 - Identify local informants and maintain consistent documentation tone.
 - Prioritize observation over interpretation.

Element 6 – What and Whom: Observation Focus

What to observe? What researchers choose to observe is guided by their objectives, practical constraints, and the level of structure in their approach. Typical categories include:

Category	Elements to Observe
Appearance	Age, gender, clothing, group affiliations
Verbal behaviour	Conversation patterns, tone, language/dialect used
Physical behaviour	Tasks, interactions, signs of emotion or hierarchy
Human traffic	Movement patterns, duration and frequency of visits
Personal space	Physical proximity, social relationships inferred from spacing
Notable individuals	People who stand out—either due to unfamiliarity or prominence

The level of structure depends on the research phase: early-stage studies benefit from open, less structured observation, while later stages may require a focused and systematic approach. Since we are in an early-stage analysis here, we decided to leave it quite open.

- Four key location categories with guiding questions:
 1. Social spaces: Look at interaction dynamics, inclusion/exclusion, sensory environment.
 2. Workplaces: Focus on employment, informal economy, gender/youth participation, governance.
 3. Public services: Assess access, infrastructure, service inclusivity.
 4. Social initiatives: Observe coverage, participation, impact, inclusiveness.
- Emphasis: Be open to emergent insights and responsive observations.

Element 7 – How: Documentation System

How to Document Observations? Data collected during observation must be recorded in field notes, which capture what the researcher sees, hears, and experiences. These notes also include personal reflections on the researcher’s role and potential biases. There are typically two stages of note-taking:

- Scratch notes: Brief, sometimes messy notes taken during or shortly after observation.
- Full field notes: Expanded, cleaned-up versions that offer detailed accounts and reflections.

Specifically, we decided to:

- Use the “Scratch notes template” during fieldwork (native language is fine). It can be found in Appendix 11.
- Expanded field notes in English, based on scratch notes.
- Final documentation follows the “Narrative example template”, as in Appendix 12.

A more detailed explanation of the Protocol can be found in Appendix 13, which served as basis for the protocol in each pilot area.

Once the Plan and the Master Protocol were developed to support the implementation of the observational fieldwork, several online workshops were conducted to train the pilot partners involved in this activity. To this end, MedINA designed a **training exercise** which was discussed to serve as the basis for the final observational fieldwork exercise to be made in each pilot site. It focused on observational fieldwork in urban public transportation settings. Given that the majority of Europeans live in urban areas—where transport is a major source of greenhouse gas emissions—the exercise emphasised the relevance of studying urban environments. Participants were asked to conduct one hour of observation on public transportation (e.g., buses, trams, or subways), with the goal of assessing passenger satisfaction, understanding on-board behaviour, and evaluating the accessibility of services for vulnerable groups. The scenario was framed as a consultancy assignment for a city transport organisation aiming to improve its services.

The exercise involved a structured protocol, starting with reviewing objectives, selecting methods, and preparing documentation strategies. Fieldwork preparation included crafting a self-introduction and an action plan. During the observation, participants were instructed to remain unobtrusive, make neutral notes, and avoid interpreting behaviours in real time. After the observation, participants made a short presentation summarising their process, observations, and reflections, which was shared in a follow-up meeting. This allowed the pilots to share the main limitations they encountered in order to be better prepared for the real observational fieldwork. The pilot partners carried out the observational exercises and paper-based interviews with local residents and stakeholders between March 17th and April 6th, 2025, during a minimum of two working weeks.

5.2 Findings from Surveys (CATI and paper-based)

5.2.1 Introduction

As observed in previous stages, rural and peripheral communities require a specific and tailored approach to adequately understand localised drivers and manifestations of social exclusion. This is largely due to the notable lack of data available at this fine level of territorial disaggregation. To extend

the analysis beyond what official statistics alone can offer, we conducted two complementary surveys in 7 pilot areas, focusing on particular rural and peripheral regions.

This methodological approach enabled systematic exploration of complex multidimensional phenomena in contexts marked by demographic ageing, infrastructural challenges, and varying levels of institutional trust. By standardising the questionnaire framework across distinct regional settings—including Region 1.- Yonne (FRC14), Region 2.- Peiraias, Nisoï (EL307), Region 3.- Ioannina (EL543), Region 4.- Eastern and Midlands Regions (IE063), Region 5.- Dębowa Kłoda – Lubelskie (PL814), Region 6.- Suceava (RO215) and Maramureş (RO114) and Region 7.- Košický kraj (SK042)—the analysis facilitates cross-regional comparison while respecting local socio-economic particularities.

The primary objectives of the CATI survey analysis are threefold:

1. **To delineate socio-demographic profiles and labour market participation patterns** of rural inhabitants, emphasising gender, age, educational attainment, and employment types, including informal and seasonal work. This provides insights into economic resilience and vulnerabilities within these communities.
2. **To assess access to and quality of infrastructural resources**, such as housing, transport, and digital connectivity, and their implications for social inclusion and mobility. Understanding these factors is critical for identifying structural barriers to participation in public life and service accessibility.
3. **To evaluate subjective dimensions of well-being, social cohesion, and institutional trust**, capturing residents' perceptions of governance effectiveness, civic engagement opportunities, and the responsiveness of local and national authorities. This aspect highlights gaps between formal democratic frameworks and lived realities in peripheral regions.

Together, these objectives contribute to a comprehensive understanding of rural socio-economic dynamics and show the interplay between material conditions and subjective experiences. The findings from the CATI survey offer a solid empirical foundation for policy recommendations aimed at advancing territorial sustainability, promoting inclusive digital and mobility infrastructures, and fostering participatory governance in Europe's rural peripheries.

The second survey, conducted through face-to-face interviews in selected pilot communities inside these respective regions. They were carried out in: Pilot 1.- Monéteau, Pilot 2.- Kythera, Pilot 3.- Konitsa, Pilot 4.-Moate, Pilot 5.-Parczew, Pilot 6.-Poiana Stampei, Panaci, Botiza & Ocna Şugatag and, finally, in Pilot 7.-Košice,

The main goal of this exercise was to capture detailed and contextually rich socio-economic, demographic, and institutional information—particularly in rural or peripheral areas where digital or telephone-based methods may be less feasible due to infrastructural or connectivity limitations due to the profile of part of the citizenship in these rural areas. This approach enables real-time clarification of questions, which can enhance both the quality and completeness of the data collected. In addition, the personal nature of face-to-face interaction often helps foster trust and encourages more open responses, particularly on sensitive issues such as economic hardship, social engagement, and perceptions of local governance.

However, this method is not without its challenges. Smaller sample sizes are common, owing to the time-intensive and resource-demanding nature of in-person data collection, which may limit the statistical representativeness and broader applicability of the findings—especially in those places where the number of respondents has been very low. There is also the potential for interviewer presence to influence responses, despite the use of standardised protocols and thorough training. Furthermore, manual data entry from paper questionnaires introduces an additional risk of error, necessitating rigorous quality assurance procedures.

Given these limitations, the findings should be interpreted with appropriate caution. The results offer valuable qualitative and exploratory insights into the socio-economic realities of less populated and often isolated rural communities across Europe. However, due to the relatively small and localised samples, they are not intended to be fully generalisable to wider regional populations. Further research, based on larger and more representative samples, would be necessary to validate and expand upon these initial findings.

As will be seen later, comparing the results obtained from Paper-based survey with the broader CATI survey—implemented across the same countries with larger, statistically robust samples— we observe strong alignment of key trends. Demographic structures, labour market engagement, sectoral employment profiles, living conditions, health status, social trust, digital access, and economic insecurity observed in the face-to-face data broadly mirror the CATI findings. This convergence reinforces confidence in the overall validity of the socio-economic patterns identified through both methodologies. In following sections, we delve deeper inside of each survey.

5.2.2 The CATI Survey Analysis

The present analysis is grounded in data collected through Computer-Assisted Telephone Interviews (CATI) conducted across the 7 pilot European regions. The CATI survey methodology was selected for its ability to efficiently gather rich, comparable, and timely socio-demographic, economic, and institutional data from dispersed populations often difficult to reach through face-to-face methods. The surveys targeted residents actively engaged in rural or semi-rural community life, with a focus on capturing diverse experiences related to social participation, economic integration, mobility, digital access, and perceptions of governance.

A detailed analysis of the CATI results per pilot area is provided in Appendix A6, structured around six key thematic blocks: (1) demographics and background information; (2) economic security and employment; (3) living conditions and access to essential amenities and services; (4) health, language, or cultural barriers; (5) digital access; and (6) social participation and engagement, including the risk of poverty and social exclusion. By examining these interrelated dimensions across diverse territorial contexts, the study aims to identify both shared patterns and region-specific challenges, thereby offering a robust evidence base for tailored policy responses that strengthen rural resilience and inclusion throughout Europe.

When aggregated, the analysis reveals that the **demographic profile** of respondents consists largely of mature populations, with varying gender distributions and diverse household structures. Educational attainment shows wide regional variation and is closely linked to local labour market participation and broader socio-economic outcomes. Overall labour market engagement is strong,

with most respondents either employed or economically active, though substantial differences emerge in occupational sectors, working hours, and job stability.

Access to essential services remains a pressing concern. Many respondents report difficulties in reaching healthcare facilities, public transport, cultural venues, and retail outlets. Although the extent of these barriers varies across regions, they consistently impact daily mobility, social inclusion, and quality of life, highlighting persistent infrastructural deficiencies in rural areas.

Self-perception of health are generally positive, with most respondents indicating good physical and mental well-being. Nonetheless, a considerable minority reports chronic health conditions or activity limitations that affect every-day functioning, emphasising the need for responsive and locally adapted healthcare and social support systems.

Levels of social participation and interpersonal trust are moderate across most areas. However, trust in formal political institutions appears more fragmented. Scepticism toward political parties and varying degrees of confidence in governance structures point to ongoing challenges in enhancing political engagement and strengthening democratic legitimacy within rural communities.

Patterns of digital access and usage are mixed. While a segment of the population is digitally engaged, a significant share experiences limited connectivity or use. This digital divide restricts equal participation in the digital economy and hampers access to vital information and services, posing a substantial obstacle to both social and economic inclusion.

Economic vulnerability is widespread, though it differs in intensity across regions. Many households face difficulties managing unforeseen expenses or affording discretionary spending, such as annual holidays. Perceptions of employment security are similarly varied, reflecting uncertainties within local labour markets that may undermine economic resilience.

Taken together, these findings underscore the heterogeneity and complexity of rural life across Europe. Rural realities are shaped by a combination of demographic, economic, infrastructural, health-related, social, and digital factors. They reveal both areas of strength and pockets of vulnerability, reinforcing the need for a nuanced and context-sensitive understanding of rural lived experiences.

This comprehensive empirical portrait provides a crucial basis for further research and policy engagement. It enhances awareness of the diverse challenges faced by rural populations and identifies key domains for targeted intervention to promote greater inclusion, well-being, and sustainability across Europe's rural peripheries.

5.2.3 The Paper-Based Survey Analysis

The face-to-face paper-based survey adds meaningful depth and nuance to the statistical breadth provided by the CATI survey. As with the previous survey, a detailed analysis of the results per pilot area is presented in Appendix A9. While the CATI data quantify patterns and prevalence with greater statistical power, the paper-based survey captures lived realities, localised barriers, and subtle contextual variations within rural communities. Together, the two approaches provide a more textured and comprehensive interpretation of rural socio-economic dynamics.

No substantial contradictions emerge between the two datasets. Instead, their complementarity highlights the layered nature of rural life; shaped by demographic ageing, gender imbalances, diverse occupational structures, infrastructural shortcomings, health disparities, social fragmentation, digital exclusion, and economic vulnerability. Collectively, these insights illuminate both the challenges and the resilience strategies that characterise Europe's rural and peripheral populations.

Material conditions such as homeownership and vehicle possession are **often relatively favourable**, offering a degree of economic stability. However, significant barriers remain in accessing essential services, including healthcare, transportation, cultural amenities, and retail facilities. These accessibility constraints vary by region but consistently shape the everyday experiences and well-being of rural residents.

Health perceptions are generally positive across most surveyed areas, though a notable minority reports chronic health issues or limitations in daily activity. These variations underscore the need for flexible and inclusive health and social care provision in rural settings. Social participation and **interpersonal trust** tend to be moderate, while trust in formal political institutions is typically lower and more fragmented—pointing to complex dynamics in civic engagement and perceptions of legitimacy.

Patterns of digital access and usage reveal persistent disparities. While many respondents report regular use of the internet for information and social interaction, substantial digital divides continue to restrict equal participation in the digital economy and society. Economic vulnerability is also widespread, reflected in limited capacity to handle unexpected expenses, afford holidays, or maintain stable employment—though the intensity of these challenges varies across contexts.

Taken together, these findings underscore the heterogeneous and multi-dimensional nature of rural Europe. The interplay between demographic, economic, infrastructural, health-related, social, and digital factors create diverse and complex local realities that shape rural well-being and social cohesion. Recognising this complexity is essential for understanding the lived experiences of rural populations and designing effective policy responses.

5.2.4 SWOT analysis of Rural-Peripheral Regions.

The combined evidence from the face-to-face and CATI surveys offers a robust, multi-layered portrait of rural Europe. Drawing on these insights, a structured SWOT (Strengths, Weaknesses, Opportunities, and Threats) framework has been developed to facilitate a comprehensive analysis. This structured approach offers a strategic lens for interpreting the socio-economic realities of rural and peripheral regions across Europe, integrating both the statistical breadth of the CATI data and the contextual depth captured through in-person interviews. By systematically identifying internal strengths and weaknesses—such as robust labour force participation, homeownership, or digital inequalities—alongside external opportunities and threats related to demographic change, economic uncertainty, service accessibility, and institutional trust, the SWOT framework enables a nuanced understanding of the multifaceted dynamics shaping rural life. The resulting analysis is presented in

Table 5.2.1.

Table 5.2.1 SWOT Analysis of Rural-Peripheral Regions.

Strengths (Internal Positive Factors)	Weaknesses (Internal Negative Factors)
<ul style="list-style-type: none"> • Moderate interpersonal trust and social networks supporting resilience. • High homeownership provide economic stability. • Active labour market participation with diverse occupational roles. • Growing digital engagement among a core group of rural residents. 	<ul style="list-style-type: none"> • Limited access to healthcare, transport, retail, and cultural facilities. • Significant digital divide and digital literacy gaps. • Low institutional trust and political disengagement. • Economic precarity: difficulty managing expenses, uncertain job security. • Health disparities with chronic illness and limited healthcare access.
Opportunities (External Positive Factors)	Threats (External Negative Factors)
<ul style="list-style-type: none"> • Targeted infrastructure investments funded by EU and national bodies. • Digital inclusion initiatives expand broadband and digital literacy. • Participatory governance to rebuild institutional trust and engagement. • Economic diversification via green tech, remote work, and rural SMEs. • Development of community-based health and social services. 	<ul style="list-style-type: none"> • Rural depopulation and ageing exacerbating labour and service deficits. • Widening socio-economic inequalities and marginalisation. • Persistent political disengagement weakens democratic stability. • Vulnerability to economic shocks with limited financial buffers. • Environmental/climate challenges threatening traditional rural livelihoods.

The SWOT analysis highlights a complex but instructive portrait of rural and peripheral regions in Europe. Among the internal strengths are moderate levels of interpersonal trust, high rates of home and vehicle ownership, strong labour market engagement, and a growing segment of digitally connected residents. However, these are counterbalanced by critical weaknesses, including limited access to essential services, significant digital divides, low institutional trust, economic vulnerability, and persistent health disparities. On the external front, promising opportunities emerge from the analysis done, through targeted infrastructure investment, digital inclusion efforts, participatory governance, and diversification via green technologies and rural entrepreneurship. Yet, these potentials are threatened by ongoing depopulation, widening inequalities, political disengagement, economic fragility, and environmental pressures—all of which challenge the sustainability and inclusivity of rural development.

All in all, this SWOT facilitates more informed decision-making and supports the development of targeted, integrated approaches to strengthen rural resilience, promote inclusive development, and ensure the long-term sustainability of Europe’s diverse rural landscapes.

5.3 Findings from Observational Fieldwork

This section synthesises observational fieldwork conducted in the seven rural regions across Europe: Greece (Konitsa and Kythera), Ireland (Moate), Slovakia (Košice), Poland (Parczew), France (Auxerre), and Romania (four communes in Suceava and Maramureş counties). Each locality offers unique insights into vulnerable populations, the social inclusion dynamics, community behaviours,

and institutional responses. Research teams spent approximately two weeks in each location, from late March to early April 2025. They engaged directly with local environments, documenting physical conditions, community interactions, public services, and institutional practices.

This section offers the resulting qualitative data in two ways. First, we present the main findings in each pilot separately. Second, we made a synthesis of all the previous information, grouped into three primary thematic areas:

- I. Insights for certain vulnerable groups,
- II. Social inclusion needs and challenges,
- III. Community behaviours and patterns.

This way, the findings highlight not only common structural problems but also the specific cultural, geographical, and historical factors shaping social inclusion in each location. Consequently, we also make a comparative analysis in order to highlight the common aspects as well as the specificities of the rural areas in the different pilot regions.

5.3.1 Main findings from the observational fieldwork in each pilot

France: Auxerre and Monéteau (FRC14)

Observational site: Conducted in March 2025 in the Auxerre (Auxerrois) region of Burgundy Bourgogne), particularly focusing on the city of Auxerre and the LADAPT rehabilitation facility located in Monéteau. The area studied includes both urban and rural spaces, and the observation aimed to evaluate accessibility, social vulnerability, institutional coordination, and inclusion levels for vulnerable populations, including people with disabilities. Observations covered the city centre of Auxerre, peripheral communes (e.g., Saint-Fargeau and Saint-Florentin), and the immediate surroundings of the LADAPT site in Monéteau. A particular attention was made to the lived experiences of LADAPT beneficiaries and the socio-political environment shaping their access to services and community life.

Key vulnerabilities identified:

- **Urban inequality and spatial segregation:** Auxerre exhibits a fragmented urban environment where social classes coexist without meaningful interaction. The city centre hosts visible signs of affluence (private mansions and a bourgeois population) alongside residents experiencing severe social precarity. Individuals with addiction issues, those panhandling, and visibly homeless persons are regularly seen. This juxtaposition creates an atmosphere of invisible segregation and minimal shared public space, reducing opportunities for inclusive engagement.
- **Peripheral isolation of the LADAPT facility:** The LADAPT centre in Monéteau is located on the outer edge of town, within a secluded industrial zone. The geographic isolation is compounded by inadequate transport and urban planning. Beneficiaries must walk 30 minutes along the Yonne River to reach the nearest shops and services (which is a pretty big distance for individuals with limited mobility, chronic pain, or overweight conditions). This physical detachment reinforces the social separation of beneficiaries from the local community.
- **Lack of interconnection between local services:** Despite the presence of multiple NGOs and associations promoting inclusion, such as Secours Catholique, their activities are not very well coordinated. LADAPT beneficiaries were unaware of accessible community initiatives like

the Smile Café, highlighting a lack of communication and inter-association synergy. This limits the reach and effectiveness of each initiative and leaves vulnerable groups uninformed and underserved.

- **Institutional underfunding and political apathy:** Stakeholders across Auxerre and Yonne consistently reported decreasing state and local funding for healthcare and social services. This decline has translated into stricter eligibility criteria and reduced support, even as needs increase (especially among youth following the Covid 19 crisis). The orientation of local governance appears to deprioritise social inclusion policies, resulting in a limited policy response to growing social vulnerability.
- **Symbolic and physical barriers to community participation:** The LADAPT site is physically enclosed with a fence (which acts as a boundary), creating a break in the landscape. Even though the centre is adjacent to a local daycare, there is no interaction between the two populations. The site feels cut off from the town, which limits spontaneous contact and fosters a perception of “otherness.”

Community coping strategies:

- **Professional proximity and informal coordination:** A significant strength of the Auxerrois region is the informal but effective communication between social and medico-social actors. The relatively small size of the city enables service providers (such as MDPH, associations, and local health actors) to coordinate rapidly, particularly when managing complex individual cases. This agility partly compensates for formal institutional shortcomings.
- **Personal appropriation of space by beneficiaries:** LADAPT beneficiaries have developed a strong sense of belonging and ownership within the facility. They often personalise their rooms, even during short stays. This appropriation of space fosters stability and psychological comfort, which are essential to individual resilience and recovery.
- **Utilisation of natural environment:** Despite isolation, the facility’s riverside location is a considerable asset. Some beneficiaries regularly use the river path for exercise or reflection, supported by trainers. The setting (quiet, green, and low-traffic) offers therapeutic value, though its full potential is underutilised. Promoting outdoor activities could improve both health outcomes and community interaction.
- **Emerging social awareness despite detachment:** While LADAPT remains distant from the town’s daily life, residents often know about its existence. It could represent a potential entry point for future engagement, outreach, and shared activities that promote visibility and reduce stigma.

Greece: Konitsa (EL543)

Observational site: A fifteen-day on-site research was conducted in Konitsa in various sites: Konitsa Central Square, Café Mpalkonaki – Central Square, Pastry & Coffee Shop, NOSTOS Cultural Centre, KEP Konitsa (Citizen Service Centre), Konitsa Health Centre, Women’s Association of Konitsa “Myrtali”, Konitsa Theater Group – Municipal Library, Mountaineering Club of Konitsa, Konitsa Main and Secondary Squares

Key vulnerabilities identified:

- **Accessibility issues in public services:** The municipal building housing social and administrative services lacks an elevator, limiting access for individuals with disabilities to upper floors. While a ramp exists for ground-floor access, this does not resolve the broader accessibility challenge. The Health Centre of Konitsa operates in an outdated building with worn furniture and facilities, reflecting broader systemic underfunding of healthcare in Greece. Patients face long waiting times for free morning appointments, and limited medical specialties are available due to staff shortages.
- **Personnel shortages:** Public services in Konitsa suffer from a lack of personnel, exacerbated by austerity measures following Greece's financial crisis. Many positions remain unfilled after retirements, impacting service delivery. This shortage is particularly evident in the municipality's social services, which rely on the Civil Service Centre (KEP) to share responsibilities like handling social benefits, especially for older citizens who struggle with digital processes.
- **Social disconnection and substance abuse:** A group of middle-aged men in Konitsa, unemployed and struggling with personal hardships, has turned to substance abuse (primarily alcohol). Their lack of purpose and social integration is visible in their aimless wandering through public spaces. The loss of their informal meeting space—a small square transformed into a café—has further isolated them from the community.
- **Conservative social climate:** Konitsa's society is heavily influenced by conservative values tied to the Church and nationalist ideals. This conservatism often resists new ideas and initiatives, creating barriers for progressive groups like the Theater Group and Women's Association. The Theater Group faces challenges performing locally due to opposition from influential conservative figures who deny them access to suitable venues.
- **Declining population and limited civic engagement:** Konitsa's proximity to borders and its declining young population contribute to a lack of civic engagement. Social initiatives like the Mountaineer Club struggle to mobilize participation despite interest from locals.
- **Mental health challenges:** Residents of the "NOSTOS" Psychosocial Rehabilitation Unit face stigma and isolation despite efforts at reintegration into society. While the unit provides comprehensive care and skill-building activities, broader community acceptance remains limited.

Coping Strategies:

- **Municipal efforts:** The municipality has implemented local action plans to promote employment and entrepreneurship, including vocational training centres and counseling services for job seekers. Collaboration with Civil Service Centre (KEP) provides administrative assistance to vulnerable groups, such as renewing unemployment cards and processing handicap benefits.
- **Community initiatives:** The newly established Theater Group perseveres despite opposition, seeking alternative venues outside Konitsa to perform their play while continuing efforts for local acceptance. The Mountaineer Club organizes excursions in nearby natural landmarks like Vikos-Aoos Geopark and Zagori Cultural Landscape, fostering appreciation for the region's natural beauty despite low participation rates.
- **Women empowerment programmes:** The Women Association "Myrtali" actively empowers women through social activities (e.g., events on Women's Day), traditional contributions (e.g., offering pies during festivities), excursions, and counselling sessions addressing issues like

menopause and domestic abuse. Cooperation with professional counselling centres in Ioannina aims to provide specialised support for women dealing with family pressures and societal expectations.

- **Mental health rehabilitation:** The "NOSTOS" centre focuses on reintegration by training residents in life skills (e.g., hygiene, cooking) and organising group activities like art therapy, gardening, and excursions into the community. These efforts aim to reduce institutionalisation and foster social connections.
- **Healthcare Adaptations:** Despite systemic challenges, the Health Centre offers emergency medical services free of charge to all residents, including immigrants and tourists. A 24-hour ambulance service ensures accessibility for urgent cases.
- **Digital Innovations:** KEP utilizes digital platforms like "myKEPlive" for scheduling appointments and accessing documents online, streamlining bureaucratic processes for citizens while assisting elderly individuals through representatives when needed.

Greece: Kythera (EL307)

Observational site: Different places on the island of Kythera during the month of April 2025: Athens Airport & Kythera Airport, Chora Kythera, Livadi Square Kythera, Livadi Agricultural Cooperative, Holy Metropolis of Kythera, Central Square of Chora Kythera, Nursing Home of Kythera, Skandeia Café village of Mitata, Agricultural Cooperative of Potamos Kythera, Church of Panagia Ilariotissa Potamos Kythera, Diakofti Kythera.

Key vulnerabilities identified:

- **Accessibility issues:** To begin with, ferry connections to Piraeus are unavailable during the winter months, leaving the island dependent on Laconia, which can only be accessed by car from Athens. Bus services (KTEL) are infrequent and do not align with ferry schedules. Air travel is prohibitively expensive, excluding a large portion of the population that cannot afford it. Also, public transportation on the island is virtually non-existent, limiting the mobility of those who cannot drive or afford taxis. Despite residents' repeated complaints, no permanent solution has been provided. The only bus service (KTEL) available is for transporting students from the main town (Chora) to the other villages.
- **Staff shortages:** Public services are understaffed and underperforming, which is a common complaint and contributes to a general sense of dissatisfaction. The municipal government has received criticism from residents due to its policies. Church seems to be the main provider of charitable services. In the health sector, despite the existence of a modern Hospital–Health Centre in Chora since 2014, it lacks permanent medical and nursing staff. As a result, it operates below capacity. Sometimes retired doctors residing on the island offer their services. Most health needs are met by rural doctors. Emergency cases are referred to hospitals in Crete or the Peloponnese.
- **Population decline and shortages:** Fewer and fewer young people choose to live on the island, resulting in a predominantly aging population, which affects both the social and economic fabric of Kythira.
- **Challenges related to education and inclusion of individuals and children with special needs:** There are no specialised schools for students with special needs or disabilities, forcing families to relocate to the Peloponnese or Athens to access appropriate education. Gaps in

educational services on the island are filled by temporary and emergency teaching staff. Primary school classes are scattered across the island. Transportation needs are met through the local bus services (KTEL), taxis, or, in some cases, by the parents themselves. Although playgrounds have been fully renovated in accordance with international standards, very few have ramps for children with disabilities. The same goes for tactile markings for visually impaired individuals.

- **Exclusion of agricultural groups from the national financial support policies and programmes:** Relations between local residents and economic migrants (who support the entire construction sector) are relatively stable but stagnant. Migrants are typically housed in small, uncomfortable homes in the narrow streets of Chora and the villages. They work without days off, even on national holidays like March 25th, to meet demands for the upcoming tourist season.

Coping strategies:

- **Public and private structure:** Economic hardship and poverty are largely addressed by the Charity Fund of the Kythira Metropolis, which acts discreetly and confidentially to support families, often compensating for the shortcomings of public services. The Social Grocery Store supports many poor families of the island as well. It is a public structure that is also supported by donations from private donors and big supermarket chains. Both institutions strive to counter racism and assist all groups in need. However, complaints exist regarding the legislation (criteria that determine whether a household qualifies as "poor") under which the Social Grocery Store operates as it excludes many people who receive no government support or subsidy policies. Agricultural Cooperatives try to include all interested farmers or olive producers in their collective actions to help them survive through state and EU subsidies. These cooperatives respond to both economic and social needs and have had a positive impact on the island. The Kythera retirement home presents a mixed picture: it provides care for the elderly and chronically ill but struggles financially, relying heavily on donations and income from bequests both on and off the island. Residents feel relatively safe and are generally receptive to their caregivers.
- **Volunteering and community:** Finally, it is important to emphasize the role of the community itself in addressing both its internal needs and disputes. Kythera is a united community that often acts voluntarily, expressing deep frustration towards the municipal and state policies. It offers help where needed and tries to create an inclusive and equitable environment for its diverse population. Through informational workshops, small-scale policies, and the support of Kytherians, placed in key positions in major urban centres, the community strives to handle daily life difficulties and improve the quality of life on the island. Residents strongly believe that if the state authorities managed to collaborate at the same level as they are, Kythera could be an ideal place to live.

Ireland: Moate (IE063)

Observational site: The fieldwork was conducted in Moate, County Westmeath, throughout March 2025. Fieldwork was conducted across multiple locations in Moate, including the Moate Library, SuperValu supermarket, Tuar Ard Arts Centre, and the Pastoral Centre, with special attention to public spaces, cultural events, and local services.

Key vulnerabilities identified:

- **Challenges in integration:** Moate is increasingly home to a diverse population, especially with the presence of the nearby Direct Provision (DP) centre at Temple Lodge and the Grand Hotel housing refugees and asylum seekers. These individuals are regularly seen participating in events such as the Walk and Talk and the choir performance, signalling that integration efforts are underway. However, despite these positive examples, a noticeable divide remains in day-to-day social interactions, with certain spaces (like cafes and supermarkets) not reflecting the town's cultural diversity. Most notably, newcomers are rarely seen in places like Tuar Ard Arts Centre or the Pantry, suggesting that while they engage in community activities, they remain largely absent from everyday social spaces, likely due to financial constraints. Indeed, the fieldwork revealed that while social initiatives are successful in the short term, challenges to long-term integration persist. Many newcomers, particularly those from the DP centre, face difficulties when their paperwork is processed and they are transferred elsewhere, leading to a high turnover of participants in integration programmes. This constant churn prevents deeper integration, as many newcomers are moved to different locations once their status changes, making it difficult for them to establish lasting connections within the community.
- **Ageing population and absence of teenagers:** A notable demographic observation was the ageing population, especially among churchgoers and patrons of social spaces like coffee shops. Older individuals were frequently seen in places like the Tuar Ard Café and the Pantry, contributing to the town's strong sense of tradition. In contrast, teenagers were notably absent from social spaces, except for places like the supermarket and fast-food restaurants. The lack of engagement among teens, particularly on weekends, points to a gap in youth-oriented activities within the town. Interestingly, teens were also absent from community events such as the Ubuntu Voices performance, further highlighting their disconnect from broader town initiatives.
- **Volunteer-driven social inclusion:** The success of community events relies heavily on the work of a few dedicated volunteers. From local businesses to event organisers, volunteers are instrumental in bridging gaps and making newcomers feel welcome. However, the reliance on a small group of volunteers poses a risk to the long-term sustainability of these initiatives. Volunteer burnout is a concern, and there are no clear succession plans in place for ensuring that these efforts continue to thrive in the future.

Coping strategies:

- **Community cohesion through volunteering:** The strong sense of community in Moate is largely driven by volunteers and local businesses. Initiatives like Tidy Towns and the Sanctuary Runners Walk and Talk create an environment where individuals of all backgrounds, including those from the DP centre and the Grand Hotel, can participate and interact with locals. However, as mentioned, this inclusivity relies heavily on a small pool of volunteers, which limits the sustainability of these programmes.
- **Cultural exchange and inclusion:** Moate has made considerable strides in fostering cultural exchange, with initiatives like the Ubuntu Voices choir performance offering a platform for both locals and newcomers to share their traditions and talents. However, as the field researcher noted, the cultural diversity observed during special events does not translate into everyday

interactions in spaces like local coffee shops, where ethnic diversity is largely absent. This indicates that, while surface-level integration is occurring, deeper social connections are harder to achieve, often due to the financial and social barriers that newcomers face.

- **The role of local businesses:** Local businesses, particularly those with a social mission, play a key role in facilitating integration. For example, the Tuar Ard Arts Centre and Moate Library provide crucial support by offering warm spaces for gatherings, free events, and even private rooms for personal calls. These businesses and cultural institutions are essential in providing the infrastructure for inclusive social activities, yet there is still a need for greater engagement from businesses in everyday spaces like cafes and shops, where integration is less visible.
- **Public services and social spaces:** The town is home to vital social spaces, such as the library and supermarket, that cater to both locals and newcomers. The library hosts inclusive events like the Music Generation choir, fostering a sense of belonging among diverse participants. Similarly, SuperValu supermarket serves as a gathering point for teens and adults alike, with interactions often revolving around everyday needs like snacks or groceries.
- **Cultural and social initiatives:** Several events and initiatives aim to promote cultural integration and social cohesion. The Sanctuary Runners' Walk and Talk, the Ubuntu Voices choir performance, and volunteer-led initiatives such as Tidy Towns all encourage interaction between locals and newcomers. These events also demonstrate Moate's ongoing efforts to create an inclusive environment despite the challenges.

Poland: Parczew (PL814)

Observational site: Carried out in the Parczew district between March 15 and March 31, 2025. Observations covered various locations including public institutions, healthcare centres, local markets, employment offices, and informal social spaces.

Key vulnerabilities identified:

- **Economic insecurity:** Many residents face challenges related to low income, unemployment, and rising costs of living. Budget-conscious behaviour was commonly observed in markets and shops.
- **Agricultural instability:** Conversations at local markets and community spaces revealed ongoing concerns among farmers regarding animal epidemics (e.g., ASF, bird flu), inspections, and low market prices for produce and livestock. These pressures are contributing to rural economic uncertainty and stress.
- **Generational divide:** Youth are often disengaged from traditional community life and display different behavioural patterns. While older residents seek social connection through in-person interactions, youth are often absorbed in digital devices or express interest in leaving the region. This divide may challenge community cohesion in the long term.
- **Limited access to healthcare:** Long waiting times and overcrowded clinics are common. Elderly residents and those unable to afford private care depend heavily on public health services.
- **Aging population and demographic shifts:** The elderly dominate healthcare facilities and local shops, while youth are either disengaged or seeking opportunities elsewhere.
- **Digital exclusion:** A significant portion of the older population continues to rely on in-person services due to limited digital literacy and trust in online systems.

- **Poor transportation infrastructure:** Rural residents face difficulty accessing urban centres due to irregular or unavailable public transport, which limits employment and service access.
- **Under-resourced institutions:** Observations at labour offices, clinics, and public offices point to stretched staff, limited seating, lack of digital systems, and long queues. Although personnel are often polite and helpful, systemic underfunding affects efficiency and user experience.

Coping strategies:

- **Social cohesion:** Local markets, community centres, and social gatherings act as vital hubs for interaction and emotional support. Older residents in particular rely on these spaces to maintain social ties.
- **Use of public services:** Despite their limitations, public institutions such as labour offices, post offices, and banks play a central role in daily life and support systems.
- **Grassroots initiatives:** Events organised by local groups, such as women's associations and youth sports clubs, foster community engagement and intergenerational integration.
- **Frugal practices:** Many residents adopt budgeting strategies, shop during promotions, and choose lower-cost alternatives to manage financial stress.
- **Interest in migration and mobility:** Younger people consider emigration or military service as pragmatic routes toward personal advancement.
- **Support through informal networks:** Informal help and exchange of information occur in markets, clinics, post offices, and even bus stops. People often offer advice, share stories, and show empathy, reinforcing social bonds and easing everyday burdens.
- **Engagement in social and cultural activities:** Institutions like the Chamomile Land heritage centre or youth football matches not only offer entertainment but also strengthen local identity, preserve traditions, and engage various generations in shared experiences.
- **Practical adaptation to services:** Residents use in-person services strategically—timing visits to avoid crowds, preparing documents in advance, or relying on familiar staff. Some strategically coordinate multiple errands during one trip to Parczew due to transportation constraints.

Romania: Suceava and Maramures (RO215 & RO114)

Observational site: The fieldwork was conducted between March 21 and April 6, 2025, across four mountainous rural communes in the pilot area of Suceava and Maramures counties from Northern part of Romania: Botiza and Ocna Şugatag (Maramures county), Panaci and Poiana Stampei (Suceava county). Observations covered local markets, town halls and central areas, public spa facilities and dispersed rural settlements.

Key vulnerabilities identified:

- **Physical accessibility barriers:** In Botiza (weekly market place) and Ocna Şugatag (public salt baths), physical infrastructure was inadequate for elderly and disabled individuals. Muddy, uneven surfaces and the absence of paved paths or ramps significantly limited access.
- **Institutional formalism and limited support:** In town halls such as Botiza and Panaci, while interactions were polite, they remained formalistic and procedural, lacking proactive support for vulnerable citizens. Elderly individuals often hesitate to ask questions and struggle to complete administrative tasks without assistance.

- **Social and physical isolation:** In Panaci and Ocna Şugatag peripheral villages (Sat-Sugatag and Glodu), profound isolation was observed. Poor infrastructure, lack of institutional outreach, and minimal social interaction exacerbated exclusion risks for elderly residents and marginalised groups.
- **Educational and infrastructure gaps in rural areas:** In Poiana Stampei commune (Dornişoara village), despite strong motivation among children and parents, the lack of paved walkways, sheltered bus stops, and after-school programmes made accessing education and complementary services difficult.
- **Limited presence of institutional support:** Across isolated and marginalised communities, particularly in villages like Sat-Sugatag (Ocna Sugatag commune) and Glodu (Panaci commune), there was a visible absence of social workers, healthcare outreach, or organised community support systems.
- **Risk of complete social exclusion:** Particularly in Glodu village, the combination of aging demographics, lack of mobility, and total absence of public services created a context where minor health or mobility issues could lead to absolute isolation.
- **Latent segregation:** In Sat-Sugatag village from Ocna Sugatag commune, Roma residents experienced both physical and social segregation, with minimal integration into broader communal life and poor access to official information channels.
- **Fragile infrastructure and climate risks:** Harsh weather conditions, combined with fragile transport infrastructure (e.g., unpaved, muddy roads) in mountainous areas, increase vulnerabilities and further restrict access to services, especially during winter and rainy seasons.

Coping strategies:

- **Resilience and mutual support:** In all observed areas, informal mutual aid among neighbours, family members, and even strangers (as seen at Botiza commune weekly marketplace and Dornişoara village bus stop) played a critical role in overcoming everyday difficulties.
- **Adaptation to adverse conditions:** Residents demonstrated remarkable resilience in navigating physically difficult spaces, improvising solutions (e.g., homemade school bags, informal transportation) and adjusting behaviours to limited resources.
- **Commitment to education:** Despite material shortages and infrastructural gaps, parents and children in Dornişoara village showed strong engagement with education, highlighting education as a perceived pathway to a better future.
- **Use of available institutional channels where accessible:** In Poiana Stampei Town Hall, proactive and inclusive administrative practices set a positive model. Friendly staff, clear communication, and accessible premises encouraged broader civic participation.
- **Solidarity networks:** Small-scale informal networks, such as mutual aid between market vendors, spontaneous assistance at town halls, and neighbourly support in isolated villages, continue to provide critical social buffering.
- **Persistence and cultural strength:** Cultural traits of perseverance, dignity, and mutual respect, particularly among elderly rural residents, strengthen community resilience even under adverse conditions.

- **Institutional good practices (where present):** Poiana Stampei Town Hall demonstrated how inclusive practices, clear communication, and barrier-free facilities can significantly improve access for vulnerable citizens.

Slovakia: Košice (SK042)

Observational site: The fieldwork was conducted across ten diverse locations in Košice and its peri-urban and rural surroundings between March 18 and March 28, 2025: Urban Library & Shopping Centre (SK05), Hospital Environments (SK03), Main Bus Station & Public Transport Nodes (SK04), City Centre and Promenade (SK06), Peri-Urban Leisure Zones and Malls (SK07), Rural and Peri-Urban Charity & Social Centres (SK08), Roma Crisis Centre and Public Transport Observation (SK09), Oáza Shelter for the Homeless (SK10), Village Crisis and Community Settings (SK01, SK02), Hospitals, Outpatient and Rehabilitation Settings (SK01, SK02).

Key vulnerabilities identified:

- **Gaps in accessibility and infrastructure:** Despite technical claims of 'barrier-free' infrastructure, real-life conditions frequently expose critical gaps. Issues such as platform mismatches at bus stations, missing ramps, long internal hospital distances, and outdated facilities hinder access for people with disabilities and homeless individuals.
- **Inequitable public behaviour and passive discrimination:** Support and sensitivity toward vulnerable populations vary significantly. Wheelchair users sometimes receive assistance, while individuals with less visible disabilities (e.g., spastic gait) are ignored. Roma individuals often face avoidance or fear-based reactions from the public, contributing to their exclusion.
- **Inconsistent health and transport support:** Healthcare facilities often fail to follow up with post-operative patients, especially homeless individuals. Public transport systems do not meet the mobility needs of disabled users due to design flaws and lack of staff training or engagement.
- **Limited social and leisure opportunities:** People with disabilities lack access to inclusive and accessible leisure activities, particularly in peri-urban and rural zones. Bullying, absence of staff support, and inaccessible infrastructure prevent meaningful participation.
- **Social segregation and stigma:** Roma communities and individuals with mental health issues face strong social exclusion. Observed interactions show that cross-group dialogue is minimal, with avoidance behaviours and institutional neglect deepening segregation.
- **Emotional and critical incidents:** Fieldwork uncovered distressing incidents: a man left in underwear post-surgery; a child with a disability unsupported in a play zone; a disabled youth freezing before boarding a bus. These moments highlight failures in dignity, safety, and empathy.

Coping strategies:

- **Supportive individuals and informal networks:** In several settings, individuals from the public offered spontaneous support—for example, to a girl with Down syndrome in a café or a child in a play zone. Such acts of empathy suggest potential for grassroots solidarity.
- **Structured rehabilitation and day centres:** Facilities like the 'NOSTOS' centre or Roma day centres provide structured daily activities, emotional support, and rehabilitation services.

These centres aim to integrate marginalised individuals by developing life skills and reducing institutionalisation.

- **Inclusive public models:** Certain inclusive public venues (e.g., cafés welcoming to individuals with disabilities) serve as positive models. They offer safe, relaxing spaces for social interaction and community bonding.
- **Rural and peri-urban community initiatives:** Though limited, some community programmes and charity centres work toward supporting homeless and disabled individuals. Initiatives include basic services, daytime shelter, and emotional respite.

5.3.2 Compendium of findings per themes

Insights from vulnerable groups

The identification of vulnerable groups was central to the observational fieldwork. Each region displayed unique characteristics, but there were consistent categories of residents experiencing exclusion or systemic disadvantage.

- ***Elderly Populations***

The elderly was among the most visible vulnerable groups, particularly in Kythera, Romania, and Poland. In Kythera, aging residents live in isolated villages, lacking both adequate health services and accessible public transport. In the Romanian mountains, poor infrastructure and social isolation often mean elderly people are unable to leave their homes during the winter months. In Parczew, Poland, elderly individuals struggle with long wait times at clinics and the digitalization of services, which they often cannot use.

- ***People with Disabilities***

Physical infrastructure frequently excludes people with disabilities.

- In Konitsa, the lack of elevators in municipal buildings and outdated healthcare facilities severely restrict access for disabled and elderly residents.
- In Slovakia, individuals with visible and invisible disabilities faced behavioural and physical exclusion, notably in transport and healthcare settings.
- In Kythera, playgrounds and public squares lack ramps, and public transport is mostly inaccessible.
- In Monéteau, the location of LADAPT on the town's outskirts isolates its disabled residents, making it hard to access basic services without a car.

- ***Migrant Workers and Refugees***

In Greece and Ireland, migrants—especially from Albania and the Balkans—fill essential labour roles but remain on the social periphery. In Kythera, many migrants live in cramped, poor-quality housing and are excluded from civic ceremonies and public life. In Moate (Ireland), refugees from Direct Provision centres are welcomed at cultural events, but financial barriers prevent them from participating in everyday community life, such as visiting cafés or cultural venues.

- ***Women and Single Mothers***

Conservative gender norms restrict the participation of women in Greece and Romania. In Konitsa, traditional expectations keep many women out of the labour market or limit their roles to caregiving. Public support for childcare or women's employment is limited, and gender-sensitive policy initiatives are rare.

- **Youth**

Youth disengagement is widespread. In France and Poland, young people are increasingly disconnected from local identity and show a strong desire to migrate. In Moate (Ireland), teens are largely absent from community events, indicating either a lack of interest or limited opportunities for meaningful participation.

- **Roma and Ethnic Minorities**

- In Slovakia, Roma communities suffer from behavioural stigmatisation and physical segregation, with minimal interaction with the general population.
- In Romania, Roma populations in Sat-Şugatag are physically and socially segregated with poor access to information and services.

Social inclusion needs and challenges of communities

The fieldwork uncovered consistent systemic barriers to social inclusion, alongside community-led attempts to mitigate their effects. These challenges span infrastructure, institutional practices, cultural norms, and economic inequality.

- ***Inadequate Infrastructure and Accessibility***

In all regions, poorly maintained or absent infrastructure—unpaved roads, lack of ramps, inaccessible transport—limits mobility and service access for vulnerable populations. Across all sites, physical accessibility remains a key barrier. From absent ramps and poor public transport in Romania and Slovakia, to inaccessible public spaces in Greece and Ireland, infrastructure limits inclusion. In Kythera and Romanian mountain villages, winter makes many areas completely isolated.

- ***Institutional Deficits and Under-resourcing***

Many public institutions are understaffed and disconnected from rural populations. In Poland, France, and Greece, clinics and labour offices operate with limited hours and long queues, suffering from under-resourced healthcare and municipal services. In Romania, the absence of social workers in marginalised villages results in zero outreach. Staff shortages, long wait times, and digital exclusion persist, especially for the elderly and disabled.

- ***Exclusion by Design***

Urban planning and administrative procedures often ignore the needs of the most excluded. In Monéteau, LADAPT's location in an industrial zone highlights how placement of essential services can itself be exclusionary. Many institutional interfaces assume digital literacy, disadvantaging older adults.

- ***Isolation and Declining Civic Engagement***

In Romania and Greece, declining populations and geographic isolation hinder civic participation. Traditional social spaces such as town squares and cafes are underused or socially segmented.

- ***Youth Disengagement***

In several regions, youth are absent from public and civic life. In Ireland and Poland, they are largely disengaged, suggesting a generational disconnect and lack of targeted programming.

- ***Cultural Resistance to Diversity***

Host communities sometimes exhibit passive or active resistance to integration efforts. Deep-rooted traditions and social norms contribute to exclusion, particularly in conservative settings. In Slovakia and Kythera, Roma and migrant communities face implicit exclusion, highlighting cultural barriers to cohesion. In Konitsa and rural Romania, gender roles and ethnonational narratives limit inclusive dialogue and participation for women, migrants, and Roma communities.

Community behaviours and patterns

The behaviours observed in each region reveal how communities respond to exclusion, adapt to adversity, and negotiate their social spaces. Patterns of resilience, solidarity, and segregation co-exist, as explained next.

- ***Informal Solidarity Networks***

In Romania and Poland, informal help between neighbours is a survival mechanism. Elderly residents depend on nearby relatives or friends to access medical services. This kind of organic support fills the gap left by under-resourced state institutions. Romania's rural communities rely heavily on informal networks at markets, bus stops, and among neighbours to cope with institutional gaps.

- ***Volunteering and Local Engagement***

In Moate, Ireland, the success of cultural initiatives and integration activities such as choir concerts or town beautification projects relies heavily on a core group of committed volunteers. This model has brought newcomers and locals together, though it risks collapse without broader community engagement. In addition, burnout is a risk.

- ***Segregated Use of Public Spaces***

In Kythera and Monéteau, spatial segregation reflects deeper social divides. Migrants and working-class residents often occupy different public venues than wealthier locals. In Kythera's squares and cafés, migrants drink in separate areas than Greek residents.

- ***Spatial and Emotional Segregation***

In France's Auxerre region, despite physical proximity, many social initiatives remain fragmented due to institutional positioning and weak inter-organisation linkages. Slovakia showed stark emotional segregation between different disability types, with some groups rendered invisible by the broader public.

- ***Role of Religious Institutions***

In Greece and Romania, churches serve as important providers of charity and social integration. In Konitsa, the Church of St. Luke organises assistance for vulnerable individuals, while in Kythera, local elites and church authorities play a dominant role in shaping inclusion narratives. These efforts, however, often replace rather than complement state social services.

- **Gendered Participation**

In Konitsa, the new Women's Association "Myrtali" represents a grassroots response to patriarchal constraints, organising social and psychological support programmes. In agricultural cooperatives across Kythera, women often assume leadership roles, reflecting nuanced gender empowerment in the economic domain.

5.3.3 Comparative Analysis

The observational fieldwork across the seven rural communities reveals both shared patterns of social exclusion and unique local characteristics shaped by geography, history, and cultural dynamics. Moreover, Deliverable 1.2 highlights context-specific expressions of exclusion across pilot areas, aligned with the quantitative and qualitative indicators categorised in Deliverable 1.1.

Common trends across rural areas

- ❖ **Vulnerable Populations.** Elderly residents and people with disabilities were consistently identified as among the most vulnerable segments of the local populations across all sites. Economic migrants and ethnic minorities (notably Roma in Slovakia and Romania) also face systematic exclusion, while youth disengagement from local life was a shared concern in Poland, France, and Greece.
- ❖ **Barriers to Inclusion:**
 - Accessibility issues, ranging from poorly adapted infrastructure to inadequate public transportation, are universal.
 - Under-resourced institutions in healthcare and education hinder inclusion.
 - Digital exclusion limits elderly access to services.
- ❖ **Community Resilience and Informal Networks.** Despite structural weaknesses, all areas demonstrate strong informal social ties and grassroots-level solidarity. These often compensate for the absence of robust institutional support.
- ❖ **Institutional Challenges.** Services are often isolated or overstretched, making it difficult for vulnerable residents to engage with public resources.

Key differences and local specificities

- **Kythera (Greece):** Shaped by tourism inequality and church-led services.
- **Konitsa (Greece):** Demonstrates grassroots efforts, especially through women-led associations.
- **Moate (Ireland):** Volunteer-driven inclusion efforts are vibrant but at risk due to volunteer fatigue and transitory asylum seeker population.
- **Košice (Slovakia):** Notable for emotionally charged exclusions. Infrastructure exists but behavioural barriers persist, especially for Roma and disabled.

- **Parczew (Poland):** Coping through informal support. Digital exclusion and institutional constraints are pronounced.
- **Monéteau (France):** Service fragmentation and spatial disconnection limit engagement despite quality facilities.
- **Suceava & Maramureş (Romania):** Geographic isolation and poor infrastructure define challenges. Cultural resilience and mutual aid are strong.

Despite variations in language, governance and geography, the seven rural communities share several core characteristics: an over-reliance on informal support networks, fragmented public services and frequent mismatches between local needs and national policy frameworks. Social cohesion tends to be strong at the micro level—among families and close-knit neighbourhood groups—while broader integration into regional and national structures remains fragile. In later stages of the INSPIRE project, a full-scale, in-depth profiling of each pilot area will be undertaken, through which more detailed categories of key vulnerable groups will be identified and analysed. The table below offers a comparative summary across four key dimensions: (i) key vulnerable groups; (ii) main inclusion barriers; (iii) community strengths; and (iv) distinctive features.

Table 5.3.1 Delphi Survey Questionnaire (1st round).

Region/Country	Key Vulnerable Groups	Main Inclusion Barriers	Community Strengths	Distinctive Features
Kythera (Greece)	Elderly, migrants, children with disabilities	Limited transport and healthcare, seasonal economy	Strong local solidarity, active cooperatives	Tourism-driven segregation, church-led charity
Konitsa (Greece)	Women, elderly, disabled, youth	Inaccessible public services, patriarchal culture, conservatism	Emerging women’s organisations, cultural pride	Highland isolation, cultural conservatism
Moate (Ireland)	Refugees, asylum seekers, elderly, youth, low-income	Transience of newcomers, economic inequality	Volunteer engagement (though risk of fatigue), inclusive public events	Direct provision impact, cultural events for inclusion
Košice (Slovakia)	Roma, disabled individuals, homeless	Discrimination, inaccessible infrastructure	Some inclusive spaces, emotional support examples	Strong Roma-Rest divide, emotional critical incidents
Parczew (Poland)	Elderly, low-income families, youth	Digital exclusion, poor and irregular transport, poverty	Frugality, grassroots events, strong social ties	Market-centric interaction, informal advice networks
Monéteau (France)	People with addictions, disabled (LADAPT beneficiaries)	Spatial isolation, fragmented services, distance to services	Quality of care spaces, green environment	Gated services, disconnected awareness of initiatives
Suceava & Maramureş (Romania)	Elderly, Roma, rural poor	Infrastructural gaps, geographic isolation	Mutual aid, value of education, informal networks	Mountain terrain challenges, cultural cohesion

Note: Authors’ own elaboration

As observed, despite geographical and cultural differences, similar dynamics emerged across the study sites. Each region exhibited strong social networks, yet these were often informal and could not compensate for lacking infrastructure or state support. Social inclusion efforts, where present, relied heavily on local champions rather than systemic approaches.

5.4 Conclusions: Critical synthesis and policy recommendations for European rural areas

Building on the main conclusions of both the CATI survey and the face-to-face interviews, their combined evidence underscores the multifaceted challenges confronting these regions, with **infrastructural deficiencies** emerging as one of the most pervasive. Residents frequently report difficulties reaching healthcare facilities, public transport, retail outlets, and cultural amenities—services vital for sustaining social inclusion, well-being, and quality of life. These barriers not only restrict individuals' ability to meet basic needs but also exacerbate social isolation and limit opportunities for economic participation, educational advancement, and community engagement. At the same time, strengths such as high levels of homeownership and vehicle possession provide rural households with a foundation of economic stability and mobility. Political efforts must therefore **prioritise investments to improve transportation infrastructure and enhance the availability and quality of healthcare, retail, and cultural services within reasonable proximity to rural populations**. Such improvements would alleviate daily hardships, reduce inequalities of access, promote social participation, and ultimately foster more resilient, vibrant, and inclusive rural societies.

In tandem with physical infrastructure, **digital connectivity** emerges as a pivotal and urgent domain demanding political attention. Despite the growing centrality of digital technologies in economic activity, education, governance, and social interaction, a significant portion of rural populations remains digitally excluded or insufficiently connected. This persistent digital divide risks deepening existing socio-economic inequalities, marginalising vulnerable groups, and limiting rural residents' capacity to engage fully in contemporary society. Accordingly, expanding high-speed broadband infrastructure to underserved rural and peripheral areas must remain a core priority. However, infrastructure alone is not enough. **Targeted initiatives to improve digital literacy—particularly among older adults, low-income households, and other disadvantaged groups**—are essential to empower meaningful digital participation. Furthermore, the inclusive design of digital platforms and public services must be emphasised, ensuring they are user-friendly, context-sensitive, and adapted to the lived realities of rural populations. Effectively bridging the digital divide will unlock new opportunities for remote work, online education, telemedicine, and civic engagement, thereby reducing isolation and supporting broader inclusion.

The findings of the surveys also reveal a **complex and often fragile relationship between rural communities and political institutions**. While interpersonal trust within communities remains moderate—a social strength that underpins informal networks and resilience—confidence in formal political bodies and parties tends to be low, fragmented, and in some cases, deeply sceptical. This widespread political disengagement represents both a critical weakness and an external threat to democratic stability. To address this, we point to **participatory governance as a major opportunity for rebuilding trust**. More inclusive and transparent models of governance that actively involve rural citizens in local, regional, and national decision-making are needed.

Economic vulnerability also emerges as a recurrent and pressing theme across analysed territories. Many households report difficulties managing unforeseen expenses, limited discretionary income, and job insecurity—particularly in labour markets characterised by seasonal, precarious, or low-wage employment. These conditions reflect structural weaknesses that expose rural populations to acute

socio-economic threats, including the risk of poverty and exclusion. In order to transform rural economies, we envisage the **diversification of economic activity through green technologies, support for rural SMEs, the promotion of remote and flexible working models, and the development of community-based health and care services**. Strategic investment in vocational training, entrepreneurship, and digital skills development is also essential for fostering workforce adaptability and creating pathways for sustainable local economic growth. By combining responsive social protection with forward-looking economic development strategies, policymakers can reduce economic precarity and promote inclusive prosperity across rural Europe.

Finally, the **pronounced heterogeneity observed across rural and peripheral regions**—in demographic structures, economic profiles, social conditions, and infrastructural capacities—calls for **policy responses that are carefully tailored, locally grounded, and co-created with community stakeholders**. Policymakers must engage local governments, civil society organisations, businesses, and residents collaboratively throughout the policy cycle.

In addition to the insights from the CATI and paper-based surveys, the observational fieldwork across the seven European rural contexts uncovered a spectrum of vulnerabilities and community-driven resilience strategies, enabling us to tailor more nuanced policy implications. These findings also reinforce the multi-threshold framework from D1.1: rather than viewing exclusion as a simple binary, the data show how individuals and communities can experience multiple, overlapping levels of exclusion across economic, social, digital, and health domains. Find next a list of policy insights that can be envisaged from the analysis done through the observational fieldwork:

1. Strengthen Local Infrastructure and Accessibility

- Prioritise investment in transport, digital connectivity, and accessible public buildings across rural areas.
- Ensure compliance with universal design principles in schools, health centres, and playgrounds.

2. Support Grassroots and Volunteer Initiatives

- Provide institutional support, grants, and training for grassroots associations (e.g., women's groups, theatre collectives).
- Develop volunteer networks with sustainable participation models to avoid burnout.

3. Enhance Youth Engagement

- Create after-school programmes, youth councils, and local sports/culture clubs to foster youth involvement.
- Include digital engagement platforms tailored to rural youth to bridge traditional and modern community life.

4. Expand Inclusive Education and Health Services

- Introduce mobile health units and specialist education services to reach isolated communities.

- Incentivise healthcare and educational professionals to work in rural settings through benefits or housing schemes.

5. Promote Intercultural Dialogue and Inclusion Campaigns

- Develop local campaigns to address stigma and promote positive narratives around Roma and migrant communities.
- Use inclusive public spaces and events (e.g., cafés, markets, festivals) as engagement points for social mixing.

6. Institutional Capacity Building

- Simplify bureaucratic processes and improve staff training for empathetic and inclusive service delivery.
- Encourage cross-sector collaboration between municipalities, NGOs, and service providers to enhance reach and cohesion.

Indeed, regional/local governments and NGOs must collaborate to strengthen institutional outreach, support volunteer networks, and create platforms for sustained community engagement. Only then can rural inclusion move beyond event-based participation towards meaningful, long-term integration. Community solidarity, grassroots activism, and targeted local engagement offer pathways forward. A shift toward inclusive design, institutional empathy, and strategic investment can enable these rural communities to thrive as inclusive and participatory spaces for all residents.

6. Conclusion, Deliverable Contributions and Limitations

6.1 Conclusions and contribution to T1.5

This section synthesizes findings from macro, meso, and micro levels of analysis within the INSPIRE project, contributing directly to the development of Task 1.5 (Typology on social wellbeing, resilience and exclusion of European rural areas). The triangulated methodology has generated a holistic understanding of how social exclusion manifests in diverse rural contexts and which conditions foster inclusion. The integration of the three levels has yielded a nuanced and multidimensional understanding of rural social exclusion across Europe.

At the macro level, the Delphi foresight methodology provided critical anticipatory knowledge about the trajectory of rural exclusion through the perspectives of 65 experts. The identification of key transnational and structural mega-trends, including climate change, demographic shifts, technological change, and political fragmentation, demonstrates the persistent pressures on rural social cohesion and inclusion. These broad forces exert downward pressure on social inclusion unless adequately addressed by national policies and grassroots innovations. Experts emphasized the importance of new service delivery models (mobile, digital, and integrated) as key strategies to overcome geographic remoteness and institutional fragmentation. Furthermore, inclusive governance and the underutilised potential of social entrepreneurship were repeatedly identified as critical levers for transformation.

The meso-level analysis, involving stakeholder interviews and national surveys, illuminated how institutional frameworks shape the lived realities of rural residents. Across countries, systemic weaknesses such as short-term funding, bureaucratic complexity, and lack of tailored policies emerged as key barriers. Conversely, participatory processes, targeted funding, and the engagement of civil society organizations enabled more resilient, inclusive systems. Vulnerable groups, including the elderly, migrants, Roma populations, and women caregivers, face disproportionate challenges due to limited access to services, education, and representation.

At the micro level, insights from seven pilot communities provided detailed accounts of how exclusion is experienced locally. CATI and paper-based surveys alongside in-depth observational fieldwork revealed the tangible impacts of macro and meso drivers in everyday rural lives. Local communities face multifaceted vulnerabilities: ageing populations, limited access to services, digital exclusion, economic insecurity, and sociocultural marginalization, and infrastructural neglect. The findings confirmed and deepened macro-level projections by illustrating how these structural pressures manifest on the ground. For instance, digital divide concerns outlined in the Delphi study were empirically supported by survey data highlighting limited broadband access and low digital literacy in pilot areas. However, community cohesion, voluntary organizations, and localized innovation offered strong counterweights. The importance of place-based approaches, informed by residents' lived realities, was consistently affirmed.

Altogether, this multi-layered research informs T1.5 by offering grounded evidence for categorising rural territories based on vulnerability and resilience indicators. It enhances the INSPIRE typology by embedding real-world complexity, thereby increasing the precision and applicability of future policy

tools and dashboards. This typology will be provided in Deliverable D1.3 and will provide a rigorous, empirically grounded framework for classifying rural areas by their exclusion profiles.

Moreover, this deliverable contributes to the co-creation of Smart Village Labs by identifying location-specific needs and opportunities, paving the way for context-sensitive, locally driven pilot actions. The alignment of evidence across scales significantly enhances the validity and utility of policy interventions proposed in later phases of the project.

6.2 Implications and policy insights

The findings presented in this deliverable underscore the urgent need for differentiated, territorially sensitive policies that acknowledge the diversity of rural realities across Europe. Policy insights must address both systemic drivers and context-specific manifestations of social exclusion.

- 1. Advance Multi-Level Governance Coordination:** Rural exclusion cannot be tackled in silos. Policies must reflect coherence across EU, national, regional, and local levels. Synergies should be created between territorial cohesion policy, agricultural subsidies, social innovation programs, and digitalisation efforts.
- 2. Expand Investment in Digital Infrastructure and Literacy:** Bridging the digital divide is essential to economic inclusion, education, health, and civic participation. Rural broadband rollouts should be accelerated, accompanied by tailored digital skills programs, particularly targeting older populations and women. They are essential to enable equitable access to public services, employment, and civic participation.
- 3. Support Social Entrepreneurship and the Social Economy:** Social enterprises are instrumental in delivering services and activating marginalised populations. Indeed, social enterprises in pilot areas already demonstrate capacity to address unmet needs and offer dignified employment. Public funding schemes, legal frameworks, and capacity-building initiatives should be adapted to scale their role in rural areas.
- 4. Design Gender- and Age-Sensitive Interventions:** The feminisation of care and the invisibility of older adults in rural strategies must be tackled. Rural women disproportionately bear the burden of unpaid care, which restricts labour market engagement. Integrated long-term care strategies, flexible work arrangements, and community-based care models must be tailored to rural realities.
- 5. New service delivery models should be piloted in remote regions:** The Delphi insights affirmed the potential of mobile, online, and hybrid public service delivery. These approaches should be adapted to the micro-level contexts where physical and digital barriers persist.
- 6. Institutionalise Participatory Planning at the Local Level:** Rural residents should not only be consulted but empowered to co-create interventions. Participatory and inclusive governance is essential. Evidence shows that top-down approaches often fail to engage rural residents meaningfully. Policy frameworks should institutionalise participatory mechanisms and devolve decision-making authority to local actors. Mechanisms such as Smart Village Labs can serve as living laboratories for governance innovation.

7. Tailor Public Services to Rural Realities: Health, education, mobility, and housing policies must reflect the sparse geography and unique demography of rural regions. Mobile service units, multipurpose centers, and community-based schemes are envisaged as crucial.

8. Embed Resilience into Rural Development Models: Rural policy must intersect with broader agendas (climate adaptation, demographic resilience, and digital transitions), ensuring rural voices are represented in European green and digital strategies. Policymaking should embrace complexity, co-design solutions with communities, and embed equity across domains. This requires anticipatory planning, territorial foresight, and social innovation funding lines.

By acting upon these suggestions, policymakers can foster more equitable, resilient, and inclusive rural territories.

6.3 Challenges and limitations

6.3.1 Data collection challenges

The implementation of the multi-level analytical approach faced several methodological and practical challenges. While the combination of macro, meso, and micro data collection has produced a robust and multifaceted understanding, certain limitations must be acknowledged.

The macro-level Delphi method, while effective in gathering expert consensus, is inherently limited by its reliance on expert perceptions and the risk of bias due to overrepresentation of certain regions or disciplines. Some thematic areas, such as intersectional identities or informal economies, received less coverage than anticipated due to lack of specialised expertise among participants. In addition, the Delphi method, while robust for foresight, can oversimplify complex socio-political realities due to its emphasis on expert consensus. It does not fully capture emergent or minority perspectives, particularly those of marginalised rural actors.

At the meso-level, the cross-national comparison is challenged by differing welfare regimes, legal systems, and cultural expectations. Standardised tools sometimes lack sensitivity to national nuances, leading to interpretative caution in aggregating data.

At the micro level, limited participation from particularly marginalised groups, such as Roma communities or undocumented migrants, restricted the generalisability of some insights. Moreover, though rich in context, observational and community-level findings are not statistically generalisable. Each site exhibited unique features (e.g., island versus mountainous versus peri-urban), which limit direct extrapolation to broader rural typologies.

A further limitation concerns the complexity of integrating qualitative and quantitative data. Although methodological triangulation enriched the analysis, challenges arose in aligning thematic categories, ensuring coherence, and avoiding redundancy or misinterpretation. Nevertheless, the triangulated design (merging expert knowledge, institutional analysis, and local realities) ensures a high degree of internal consistency and policy relevance

6.3.2 Mitigation strategies

Several adaptive strategies were employed to overcome the data collection challenges described above.

- **Hybrid Data Collection:** Data collection tools were diversified and adapted. Combining CATI, face-to-face, and observational methods allowed triangulation and reached otherwise excluded voices. Indeed, the use of both CATI and paper-based surveys allowed flexibility in reaching different population segments.
- **Partnerships with Local Stakeholders:** Pilot partners leveraged existing trust networks within their communities. By collaborating with local NGOs, faith groups, social workers, and volunteers, researchers were able to engage marginalised populations more effectively. These intermediaries provided cultural translation and facilitated access to otherwise unreachable groups.
- **Cultural and Linguistic Adaptation:** Questionnaires were translated and adapted with local idioms and examples to improve understanding and comfort.
- **Flexible Timelines:** Fieldwork periods were extended to accommodate seasonal or staff constraints.
- **Training and Standardised Protocols:** Training sessions and capacity-building activities were central to enhancing fieldwork quality. The Master Observational Protocol, along with workshops and field simulations, standardised observation practices and ensured alignment across pilot regions. These efforts improved the reliability and comparability of qualitative insights while allowing context-specific modifications.
- **Finally, a feedback was established between data collectors and coordinators.** Iterative reflection allowed adjustments to protocols, identification of emerging issues, and refinement of strategies. These adaptive practices not only improved data collection but also laid the groundwork for more inclusive and context-sensitive research.

These mitigations enhanced the robustness and inclusivity of the INSPIRE research effort and may serve as replicable models for future rural studies.

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8. Appendices

8.1 APPENDIX 1 – Delphi Survey Questionnaire (1st round)

Delphi Questionnaire: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon)

Introduction:

This Delphi exercise aims to gather expert opinions across two rounds on the future trajectories impacting social inclusion in rural areas. It focuses on different geographical characteristics, vulnerable groups, essential services, social entrepreneurship, and governance reforms. At least 50 EU-wide experts on social inclusion and rural development are invited to participate.

Instructions:

Please rate the following statements based on the extent to which you agree or disagree they are likely or important by 2035. Use the scale: 1 (Fully Disagree) to 5 (Fully Agree). You may leave a statement unanswered. There is an option to comment under each statement if you wish. Estimated time to complete: **25–30 minutes**.

Key Definitions

Vulnerable Groups: Includes the elderly (especially digitally illiterate), unemployed youth, persons with disabilities, women (especially single parents), migrants and refugees (especially women and Ukrainian refugees), ethnic minorities (especially Roma), and farmers/agricultural workers (especially informally employed).

Mega-trends: Broad, transformative global forces such as climate change, demographic shifts, and technological advancement that affect societal structures.

Structural Drivers: Underlying developments like economic inequalities or governance failures that shape future risks and opportunities.

Traditional Rural Areas: Sparsely populated regions typically centered around agriculture or forestry, with long-established communities and limited access to urban services.

Island and Coastal Rural Areas: Rural communities located on islands or along coastlines, often reliant on fisheries or tourism, and affected by geographic isolation and climate-related risks.

Mountainous Rural Areas: High-altitude regions characterized by rugged terrain, low population density, and difficult access to transportation, healthcare, and public services.

Peri-Urban/Rural Areas: Transitional zones on the outskirts of urban centers, where rural and urban features coexist, often experiencing rapid development and service mismatches.

Services for Physical Wellbeing: Services related to transport, energy, telecommunications, and water supply.

Services for Baseline Social Conditions: Services including healthcare, housing, and education.

Economic Services: Services covering training, research and development (R&D), accounting, and insurance.

Services for Non-Material Wellbeing: Services supporting information access, cultural creativity, and lifelong education.

A. Future Social Inclusion Needs in Rural Areas of Different Geographical Characteristics

1. In traditional rural areas, declining agricultural employment will increase demand for reskilling and alternative livelihoods.
2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.
3. Peri-urban areas will struggle with mismatched service provision due to rapid urban sprawl and inadequate planning.
4. Island and coastal rural areas will see increased vulnerability to climate-related displacement, impacting community stability.
5. Shrinking and ageing populations in traditional rural areas will deepen social isolation and limit economic revitalization.
6. Peri-urban rural areas will face increasing social tensions due to population inflows and unequal access to housing and education.
7. Digital nomadism and remote work will offer new social inclusion opportunities for islands and remote regions—if infrastructure improves.
8. Mountainous rural areas will require targeted healthcare delivery systems, including mobile or telemedical solutions.
9. Traditional rural areas will increasingly need cultural and information services to retain youth and preserve heritage.
10. Peri-urban areas will require integrated urban-rural transport solutions to improve equitable access to economic and social opportunities.

B. Specific Needs of Vulnerable Groups

11. Unemployed rural youth will remain excluded unless digital and entrepreneurial training becomes widely available.
12. Elderly individuals, especially digitally illiterate, will face increasing marginalization unless digital literacy and in-person services are co-developed.
13. Migrants of lower socioeconomic status (SES) and refugees, particularly women, will struggle to integrate without tailored housing, language, and employment services.
14. Roma and other vulnerable ethnic minorities will continue to face barriers in access to education and health unless anti-discrimination enforcement improves.
15. Informally employed agricultural workers will remain economically insecure without formalization policies and social protection.
16. Women in single-parent rural households will face dual burdens of care and underemployment unless childcare and flexible job policies are expanded.

17. People with disabilities in rural areas will need stronger legal safeguards and inclusive infrastructure to access education and healthcare.
18. Access to essential physical wellbeing services (e.g., water, energy, telecom) will be increasingly unequal for vulnerable groups in remote rural areas.
19. Vulnerable groups will face compounded risks from climate change unless social safety nets are adapted to local environmental vulnerabilities.
20. Migrants of lower socioeconomic status (SES), refugees (especially women), minority youth will require culturally responsive long-life learning pathways to break intergenerational exclusion.

C. Impact on Access to Social Service Delivery

21. Essential healthcare services will be increasingly centralized, making mobile or digital outreach critical for rural inclusion.
22. Without improved housing policies, vulnerable groups in all rural types will face growing insecurity and substandard living conditions.
23. Infrastructure for energy and water in isolated rural areas will require large-scale investment to avoid exclusion.
24. Telecom and broadband access will become as critical as roads for inclusion in remote rural areas.
25. Public transport deficits will increasingly isolate elderly and disabled rural populations.
26. AI and automation in public service delivery will risk excluding low-literacy and elderly populations unless specific provisions are made.
27. Remote education access will widen gaps unless rural digital infrastructure and local support structures are improved.
28. Economic services (accounting, insurance, R&D) will remain inaccessible to small rural enterprises without digital service models.
29. Without decentralised governance and community involvement, new infrastructure investments risk bypassing the most excluded areas.
30. Non-material wellbeing services (e.g., cultural initiatives, life-long education) will be essential to prevent mental health decline and community fragmentation in rural areas.

D. Social Entrepreneurship

31. Social enterprises will play a central role in filling service gaps for vulnerable groups in remote areas.
32. Rural women entrepreneurs will need targeted financial access and mentorship to scale inclusion-driven businesses.
33. Climate-smart rural enterprises will create new employment if supported through tailored innovation policies.
34. Youth-led rural entrepreneurship will flourish if supported with digital skills, seed funding, and market access.
35. Migrants and refugees in rural areas will increasingly become sources of entrepreneurial innovation if legal and financial hurdles are addressed.

36. Cooperatives and social foundations will re-emerge as key platforms for inclusive rural economic development.
37. Digital platforms will enable rural micro-enterprises to scale, but risks of exclusion remain high without digital upskilling.
38. Peri-urban rural zones will become hotspots for social innovation if integrated into regional entrepreneurial ecosystems.
39. Informally employed agricultural workers will benefit from social economy models that formalize work and provide basic protection.

E. Enhanced Governance and Mitigation Measures

40. Multi-level governance and policy reforms will be essential to align national, EU, and local rural inclusion strategies
41. Funding and infrastructure decisions should include consultation exercises in rural areas to prevent urban bias.
42. Public-private-civic partnerships will be key to overcoming fragmentation in rural service delivery and innovation.
43. Cross-border rural regions will require harmonised governance tools to prevent exclusion due to jurisdictional gaps.
44. Digital governance must be adapted for equitable rural service access.
45. Local participatory mechanisms will determine the success of rural development policies aimed at vulnerable populations.
46. Inter-municipal cooperation will be necessary to scale services in sparsely populated areas.
47. Equity-focused subsidy allocation criteria will ensure fair distribution of EU and national funds to disadvantaged rural areas.
48. Climate adaptation planning (Renewable Energy projects, environmental protection measures) should take into consideration rural customs and traditions and involve participation from directly affected communities.
49. Simplified administrative procedures and legal aid will empower rural actors to engage in development and social entrepreneurship.

8.2 APPENDIX 2 - Delphi Survey (Second round)

Delphi Questionnaire: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon)



Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Welcome message page

Welcome to the 2nd Round of the INSPIRE Delphi exercise on social exclusion in rural areas.
During this round, you will have the opportunity to revise your answers on the **15 of the original 49 statements** in the light of other participants' views.
The survey takes **less than 10 minutes** to complete.
Thank you for contributing your time and insight!

7%

to

NEXT →

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Informed consent page

Informed Consent Page

Please read and agree to the following statements before continuing:

- I agree to take part in this study.
- I understand that participation in this study is voluntary and that I can withdraw from the study at any time. Here you can find the **Data Subject Request Form**
- I confirm that I have read and understood the information sheet provided for this study.
- I understand that my data will be used in an anonymised format and my name will not be used in any reports or publications resulting from the study.
- I understand the meaning of the above statements.

Read more about our **Privacy Policy**,

By clicking "Next," you confirm your consent to participate in this study.

14%

← BACK

I DO NOT CONSENT

I CONSENT →

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Survey page

Instructions:

- You will be presented with the 15 statements out of the 49 of the first round divided into five thematic areas for social exclusion in rural areas that did not reach consensus (100%) or Majority Agreement (75%).

1) First, you can access other participants' views through this field:

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Delphi - Qualitative (fixed scale) page Show stats as: PERCENTAGE ABSOLUTE

[VIEW PREVIOUS ROUND COMMENTS](#)

Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.	<input type="radio"/> 2%	<input type="radio"/> 23%	<input type="radio"/> 28%	<input checked="" type="radio"/> 25%	<input type="radio"/> 23%	

2) Click here to see the distribution of other participants' views on absolute terms instead of percentages.

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Delphi - Qualitative (fixed scale) page Show stats as: PERCENTAGE ABSOLUTE

[VIEW PREVIOUS ROUND COMMENTS](#)

Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.	<input type="radio"/> 2%	<input type="radio"/> 23%	<input type="radio"/> 28%	<input checked="" type="radio"/> 25%	<input type="radio"/> 23%	

3) The highlighted button reflects the option that you made in the previous round. Now, you can revise your answer if you wish.

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Delphi - Qualitative (fixed scale) page Show stats as: PERCENTAGE ABSOLUTE

[VIEW PREVIOUS ROUND COMMENTS](#)

Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.	<input type="radio"/> 2%	<input type="radio"/> 23%	<input type="radio"/> 28%	<input checked="" type="radio"/> 25%	<input type="radio"/> 23%	

4) Click here to see all the comments that participants made during the first round.

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Delphi - Qualitative (fixed scale) page Show stats as: PERCENTAGE ABSOLUTE

[VIEW PREVIOUS ROUND COMMENTS](#)

Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.	<input type="radio"/> 2%	<input type="radio"/> 23%	<input type="radio"/> 28%	<input checked="" type="radio"/> 25%	<input type="radio"/> 23%	

- You may change or keep your first round answer by stating your level of agreement with each statement using a 5-point scale:

- 1 = Fully Disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Fully Agree

- For each item, you may also provide an optional comment or suggestion.

- Your responses are **anonymous**. There are no right or wrong answers.

21%

[← BACK](#)

[NEXT →](#)

A. Future Social Inclusion Needs in Rural Areas of Different Geographical Characteristics

Traditional Rural Areas: Sparsely populated regions typically centered around agriculture or forestry, with long-established communities and limited access to urban services.

Island and Coastal Rural Areas: Rural communities located on islands or along coastlines, often reliant on fisheries or tourism, and affected by geographic isolation and climate-related risks.

Mountainous Rural Areas: High-altitude regions characterized by rugged terrain, low population density, and difficult access to transportation, healthcare, and public services.

Peri-Urban/Rural Areas: Transitional zones on the outskirts of urban centers, where rural and urban features coexist, often experiencing rapid development and service mismatches.

	Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
2.	Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.	<input type="radio"/> 2%	<input type="radio"/> 23%	<input type="radio"/> 28%	<input type="radio"/> 25%	<input checked="" type="radio"/> 23%	
3.	Peri-urban areas will struggle with mismatched service provision due to rapid urban sprawl and inadequate planning.	<input type="radio"/> 0%	<input type="radio"/> 12%	<input type="radio"/> 17%	<input type="radio"/> 46%	<input checked="" type="radio"/> 25%	
6.	Peri-urban rural areas will face increasing social tensions due to population inflows and unequal access to housing and education.	<input type="radio"/> 2%	<input type="radio"/> 9%	<input type="radio"/> 20%	<input checked="" type="radio"/> 46%	<input type="radio"/> 23%	
7.	Digital nomadism and remote work will offer new social inclusion opportunities for islands and remote regions—if infrastructure improves.	<input type="radio"/> 5%	<input type="radio"/> 8%	<input type="radio"/> 17%	<input type="radio"/> 38%	<input checked="" type="radio"/> 32%	

B. Specific Needs of Vulnerable Groups

Vulnerable Groups: Includes the elderly (especially digitally illiterate), unemployed youth, persons with disabilities, women (especially single parents), migrants and refugees (especially women and Ukrainian refugees), ethnic minorities (especially Roma), and farmers/agricultural workers (especially informally employed).

	Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
11.	Unemployed rural youth will remain excluded unless digital and entrepreneurial training becomes widely available.	<input type="radio"/> 5%	<input type="radio"/> 9%	<input type="radio"/> 23%	<input type="radio"/> 40%	<input checked="" type="radio"/> 23%	
18.	Access to essential physical wellbeing services (e.g., water, energy, telecom) will be increasingly unequal for vulnerable groups in remote rural areas.	<input type="radio"/> 5%	<input type="radio"/> 15%	<input type="radio"/> 20%	<input type="radio"/> 29%	<input checked="" type="radio"/> 31%	
19.	Vulnerable groups will face compounded risks from climate change unless social safety nets are adapted to local environmental vulnerabilities.	<input type="radio"/> 3%	<input type="radio"/> 9%	<input type="radio"/> 20%	<input type="radio"/> 34%	<input checked="" type="radio"/> 34%	

C. Impact on Access to Social Service Delivery

Services for Physical Wellbeing: Services related to transport, energy, telecommunications, and water supply.

Services for Baseline Social Conditions: Services including healthcare, housing, and education.

Economic Services: Services covering training, research and development (R&D), accounting, and insurance.

Services for Non-Material Wellbeing: Services supporting information access, cultural creativity, and lifelong education.

	Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
21.	Essential healthcare services will be increasingly centralized, making mobile or digital outreach critical for rural inclusion.	<input type="radio"/> 6%	<input type="radio"/> 9%	<input type="radio"/> 15%	<input type="radio"/> 40%	<input checked="" type="radio"/> 29%	
23.	Infrastructure for energy and water in isolated rural areas will require large-scale investment to avoid exclusion.	<input type="radio"/> 0%	<input type="radio"/> 12%	<input type="radio"/> 23%	<input type="radio"/> 35%	<input checked="" type="radio"/> 29%	
28.	Economic services (accounting, insurance, R&D) will remain inaccessible to small rural enterprises without digital service models.	<input type="radio"/> 2%	<input type="radio"/> 9%	<input type="radio"/> 17%	<input checked="" type="radio"/> 49%	<input type="radio"/> 23%	

D. Social Entrepreneurship

Social Entrepreneurship (SE) is characterized by:

- Democratic principles
- Entities such as cooperatives, associations, mutual societies, and public-private partnerships
- Focused on **inclusive and community-oriented solutions** rather than profit maximization.

SE includes **heterogeneous entities** that:

- Operate across formal and informal sectors
- Aim to deliver **economic, social, cultural, and ecological impact**
- Are grounded in **solidarity, participation, and needs-based innovation**

	Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
31. Social enterprises will play a central role in filling service gaps for vulnerable groups in remote areas.		<input type="radio"/> 2%	<input type="radio"/> 6%	<input type="radio"/> 22%	<input checked="" type="radio"/> 32%	<input type="radio"/> 38%	
35. Migrants and refugees in rural areas will increasingly become sources of entrepreneurial innovation if legal and financial hurdles are addressed.		<input type="radio"/> 2%	<input type="radio"/> 9%	<input type="radio"/> 22%	<input type="radio"/> 43%	<input checked="" type="radio"/> 25%	
36. Cooperatives and social foundations will re-emerge as key platforms for inclusive rural economic development.		<input type="radio"/> 2%	<input type="radio"/> 6%	<input type="radio"/> 18%	<input type="radio"/> 43%	<input checked="" type="radio"/> 31%	
38. Peri-urban rural zones will become hotspots for social innovation if integrated into regional entrepreneurial ecosystems.		<input type="radio"/> 2%	<input type="radio"/> 5%	<input type="radio"/> 32%	<input checked="" type="radio"/> 42%	<input type="radio"/> 20%	

E. Enhanced Governance and Mitigation Measures

Enhanced Governance: Community-based, multi-actor, digitally supported governance framework that aligns rural strategies at EU, national, and local levels, fostering participatory and inclusive decision-making.

Mitigation Measures: Targeted tools and interventions (e.g., co-designed services, training, infrastructure, participatory tools) to reduce structural and emerging exclusion risks in rural areas.

	Details	Fully Disagree	Disagree	Neither Agree or Disagree	Agree	Fully Agree	Comment
43. Cross-border rural regions will require harmonised governance tools to prevent exclusion due to jurisdictional gaps.		<input type="radio"/> 2%	<input type="radio"/> 3%	<input checked="" type="radio"/> 28%	<input type="radio"/> 34%	<input type="radio"/> 34%	

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Thank you message page

Thank you for your valuable input!
Your responses have been successfully recorded.

If you wish to receive a summary of the findings, please send us an email to
Ioannis Konstas: konstas@qplan-intl.gr
Elli Roma-Athanasiadou: roma@qplan-intl.gr
website: <https://inspireproject.eu>

8.3 APPENDIX 3 – Informed Consent

Delphi Exercise: Future Trajectories of Social Inclusion in Rural Areas (2035 Horizon) | Round 2 | Informed consent page

Informed Consent Page

Please read and agree to the following statements before continuing:

- I agree to take part in this study.
- I understand that participation in this study is voluntary and that I can withdraw from the study at any time. Here you can find the **Data Subject Request Form**
- I confirm that I have read and understood the information sheet provided for this study.
- I understand that my data will be used in an anonymised format and my name will not be used in any reports or publications resulting from the study.
- I understand the meaning of the above statements.

Read more about our **Privacy Policy**.

By clicking "Next," you confirm your consent to participate in this study.

14%



BACK

I DO NOT CONSENT

I CONSENT

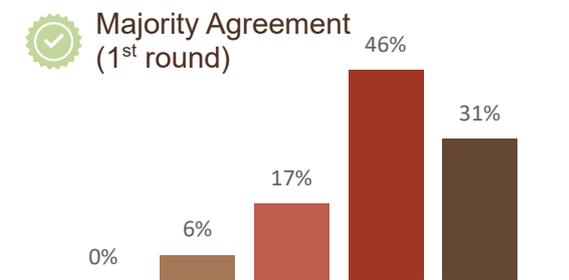


8.4 APPENDIX 4 – Delphi Survey Outcomes in Figures

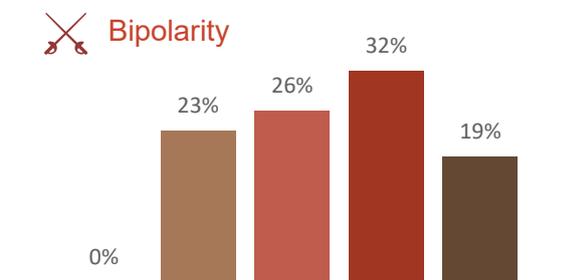
The final results of the INSPIRE Delphi survey are presented below, combining the outcomes of the first and the second rounds (49 and 15 statements, respectively). Where a majority agreement was reached already in the first round (34 statements in total), it is indicated. All other statements either reached majority agreement in the second round (9 statements) or didn't, resulting in bipolarity (6 statements in total, also indicated).

(Note: Fully Disagree ■, Disagree ■, Neither Agree or Disagree ■, Agree ■, Fully Agree ■)

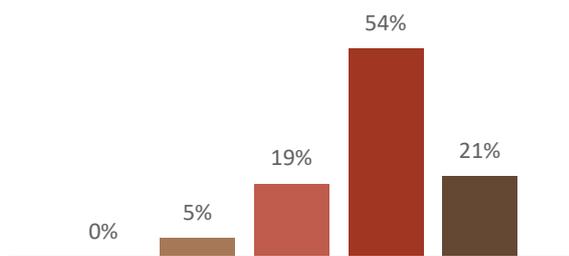
A. Future Social Inclusion Needs in Rural Areas of Different Geographical Characteristics



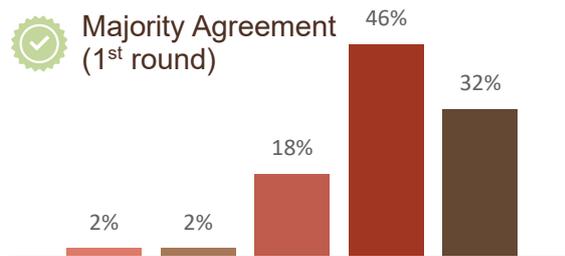
1. In traditional rural areas, declining agricultural employment will increase demand for reskilling and alternative livelihoods.



2. Mountainous regions will face worsening transport and digital infrastructure gaps, reducing access to services and jobs.

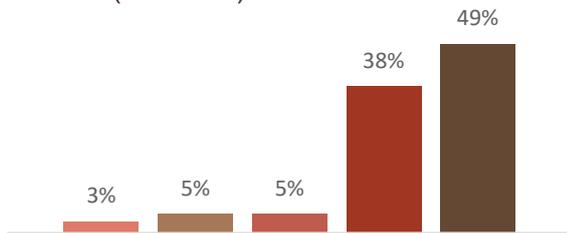


3. Peri-urban areas will struggle with mismatched service provision due to rapid urban sprawl and inadequate planning.

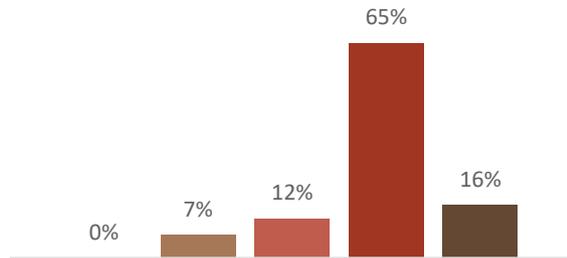


4. Island and coastal rural areas will see increased vulnerability to climate-related displacement, impacting community stability.

 Majority Agreement (1st round)

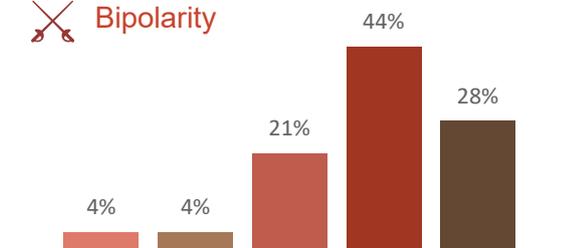


5. Shrinking and ageing populations in traditional rural areas will deepen social isolation and limit economic revitalization.



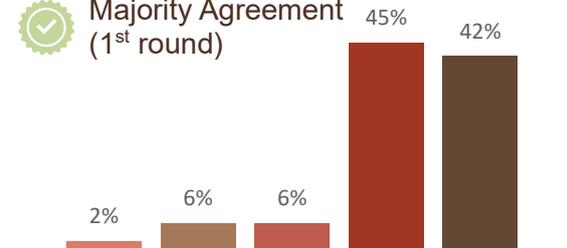
6. Peri-urban rural areas will face increasing social tensions due to population inflows and unequal access to housing and education.

 Bipolarity



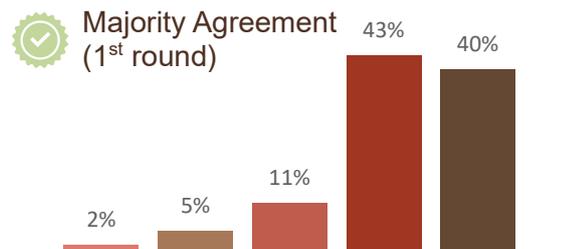
7. Digital nomadism and remote work will offer new social inclusion opportunities for islands and remote regions—if infrastructure improves.

 Majority Agreement (1st round)



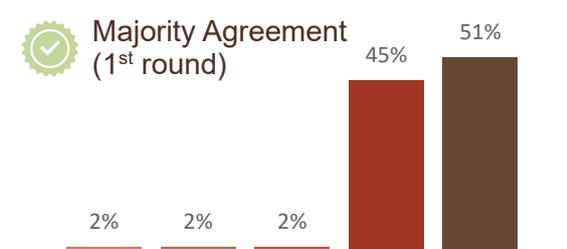
8. Mountainous rural areas will require targeted healthcare delivery systems, including mobile or telemedical solutions.

 Majority Agreement (1st round)



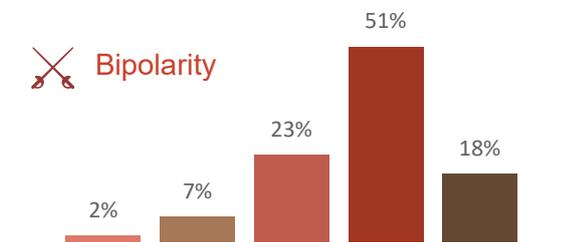
9. Traditional rural areas will increasingly need cultural and information services to retain youth and preserve heritage.

 Majority Agreement (1st round)

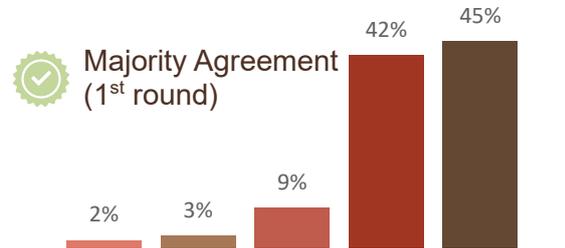


10. Peri-urban areas will require integrated urban-rural transport solutions to improve equitable access to economic and social opportunities.

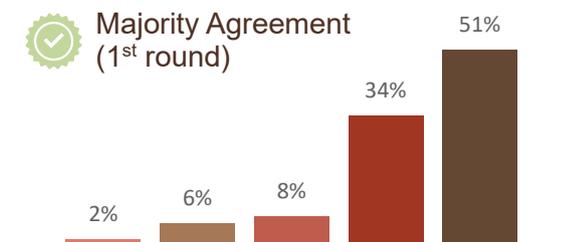
B. Specific Needs of Vulnerable Groups



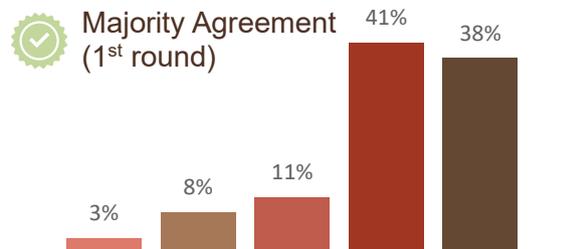
11. Unemployed rural youth will remain excluded unless digital and entrepreneurial training becomes widely available.



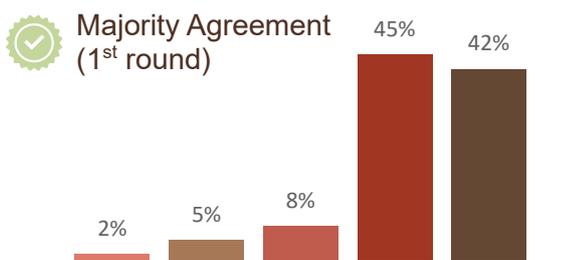
12. Elderly individuals, especially digitally illiterate, will face increasing marginalization unless digital literacy and in-person services are co-developed.



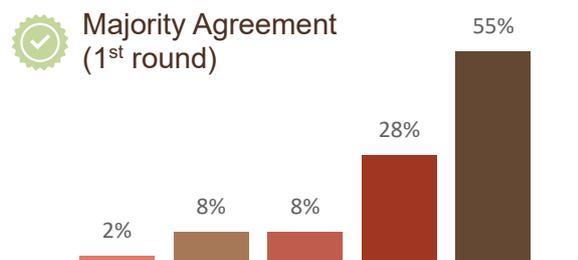
13. Migrants of lower socioeconomic status (SES) and refugees, particularly women, will struggle to integrate without tailored housing, language, and employment services.



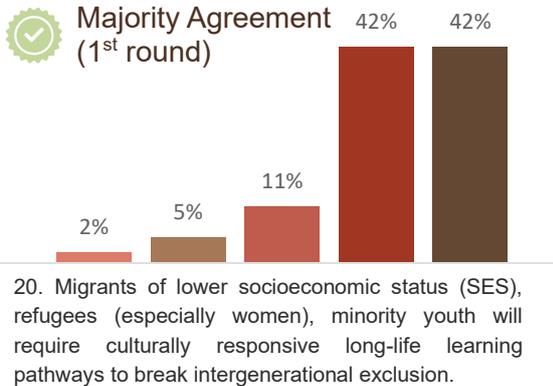
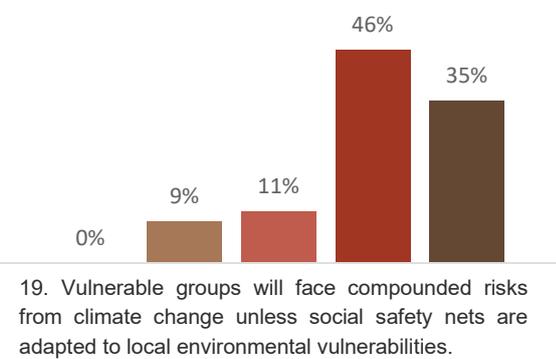
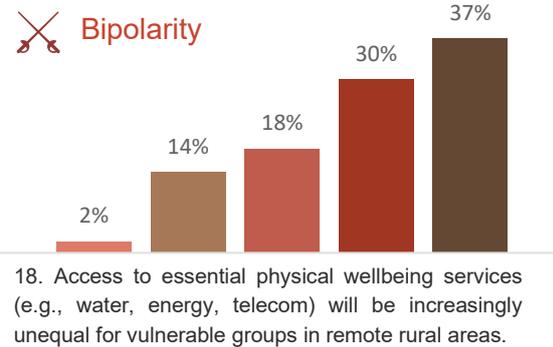
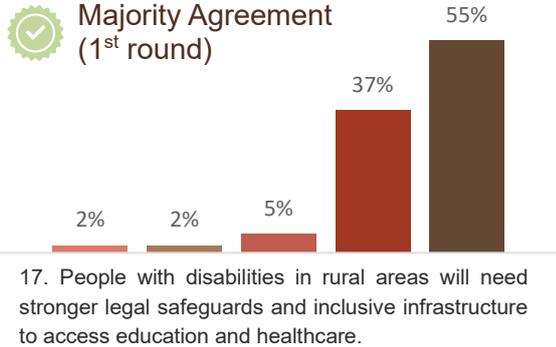
14. Roma and other vulnerable ethnic minorities will continue to face barriers in access to education and health unless anti-discrimination enforcement improves.



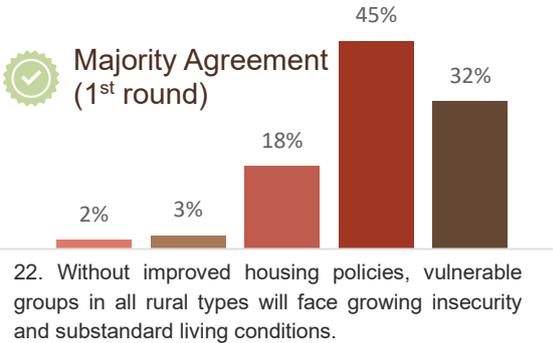
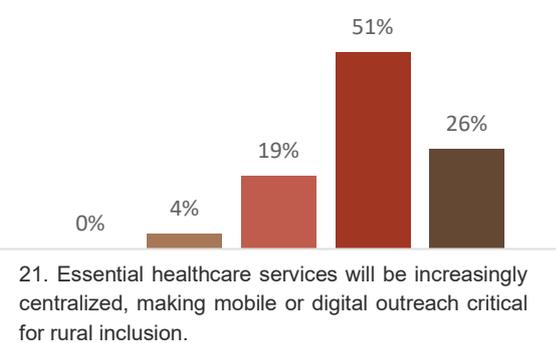
15. Informally employed agricultural workers will remain economically insecure without formalization policies and social protection.



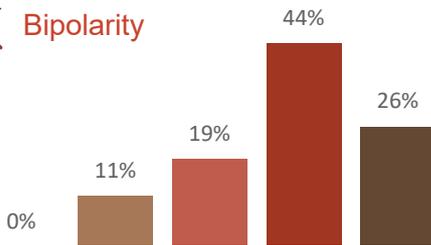
16. Women in single-parent rural households will face dual burdens of care and underemployment unless childcare and flexible job policies are expanded.



C. Impact on Access to Social Service Delivery

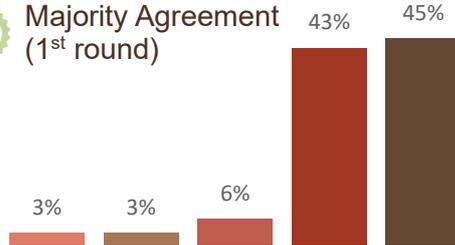


 **Bipolarity**



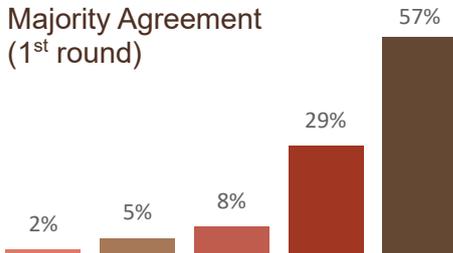
23. Infrastructure for energy and water in isolated rural areas will require large-scale investment to avoid exclusion.

 **Majority Agreement (1st round)**



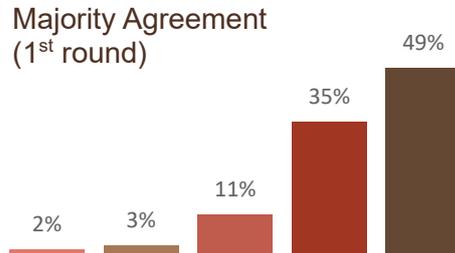
24. Telecom and broadband access will become as critical as roads for inclusion in remote rural areas.

 **Majority Agreement (1st round)**



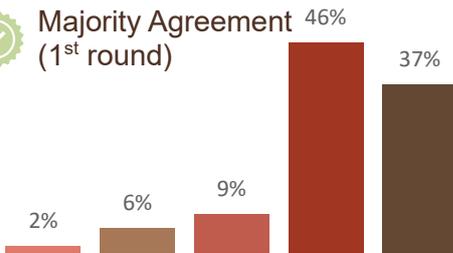
25. Public transport deficits will increasingly isolate elderly and disabled rural populations.

 **Majority Agreement (1st round)**

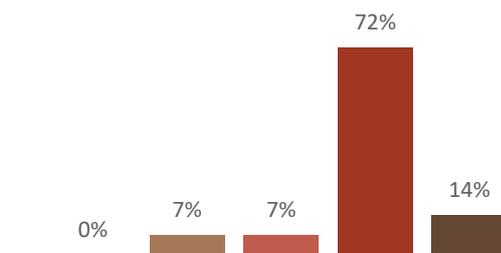


26. AI and automation in public service delivery will risk excluding low-literacy and elderly populations unless specific provisions are made.

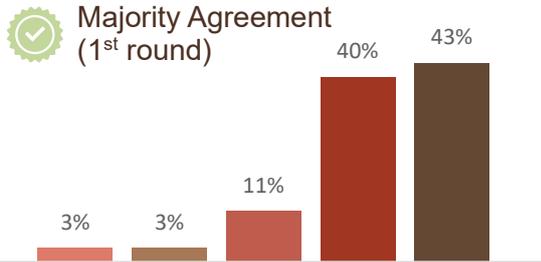
 **Majority Agreement (1st round)**



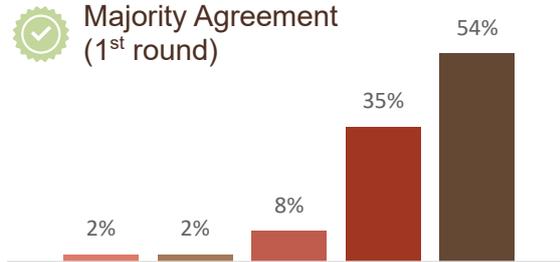
27. Remote education access will widen gaps unless rural digital infrastructure and local support structures are improved.



28. Economic services (accounting, insurance, R&D) will remain inaccessible to small rural enterprises without digital service models.

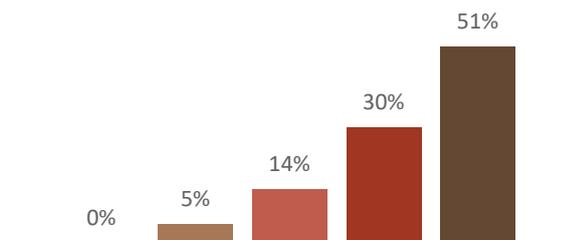


29. Without decentralised governance and community involvement, new infrastructure investments risk bypassing the most excluded areas.

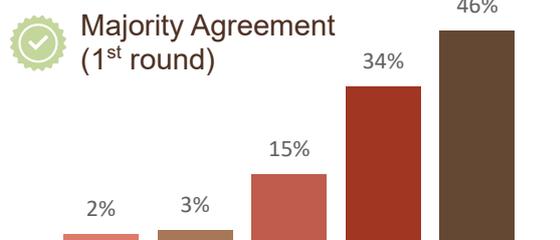


30. Non-material wellbeing services (e.g., cultural initiatives, life-long education) will be essential to prevent mental health decline and community fragmentation in rural areas.

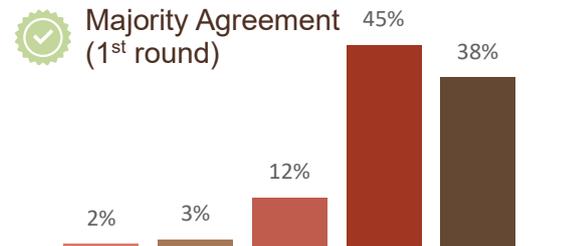
D. Social Entrepreneurship



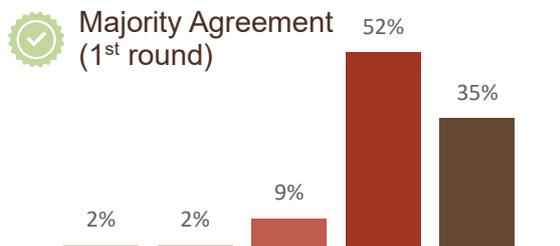
31. Social enterprises will play a central role in filling service gaps for vulnerable groups in remote areas.



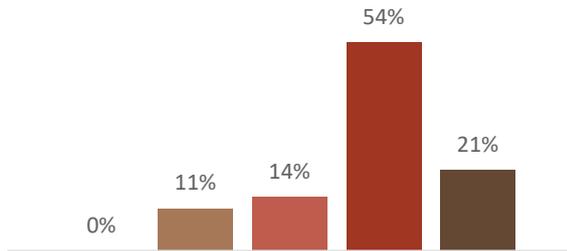
32. Rural women entrepreneurs will need targeted financial access and mentorship to scale inclusion-driven businesses.



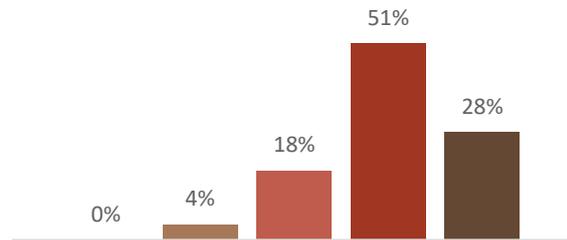
33. Climate-smart rural enterprises will create new employment if supported through tailored innovation policies.



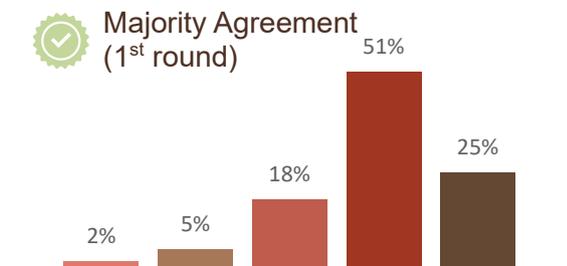
34. Youth-led rural entrepreneurship will flourish if supported with digital skills, seed funding, and market access.



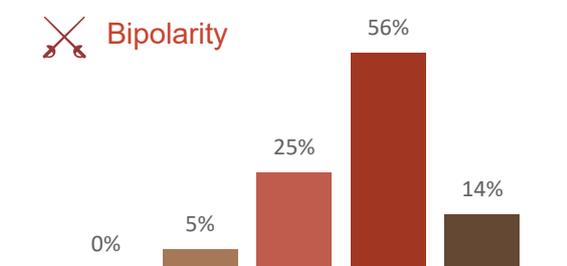
35. Migrants and refugees in rural areas will increasingly become sources of entrepreneurial innovation if legal and financial hurdles are addressed.



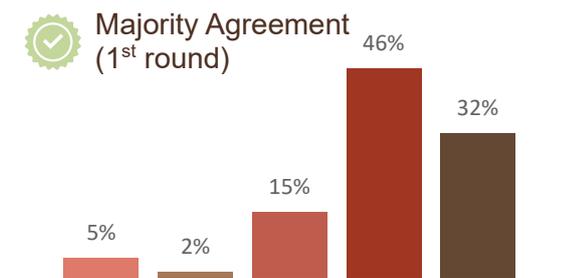
36. Cooperatives and social foundations will re-emerge as key platforms for inclusive rural economic development.



37. Digital platforms will enable rural micro-enterprises to scale, but risks of exclusion remain high without digital upskilling.

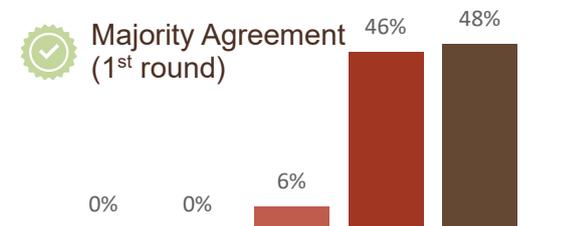


38. Peri-urban rural zones will become hotspots for social innovation if integrated into regional entrepreneurial ecosystems.

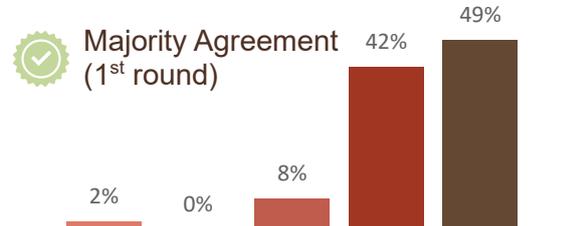


39. Informally employed agricultural workers will benefit from social economy models that formalize work and provide basic protection.

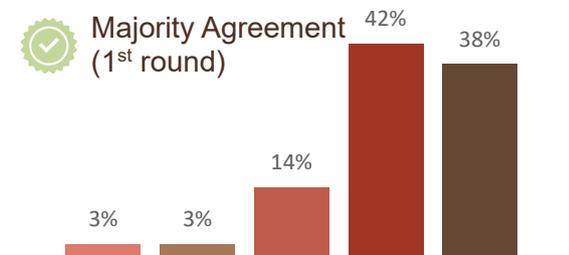
E. Enhanced Governance and Mitigation Measures



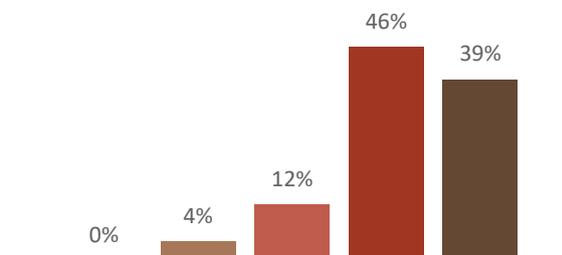
40. Multi-level governance and policy reforms will be essential to align national, EU, and local rural inclusion strategies



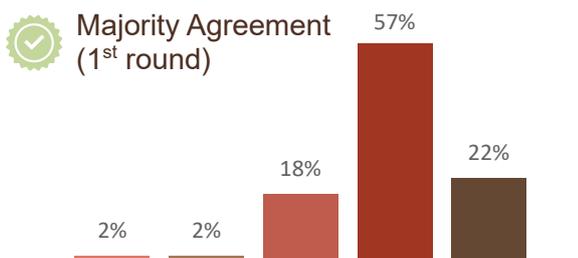
41. Funding and infrastructure decisions should include consultation exercises in rural areas to prevent urban bias.



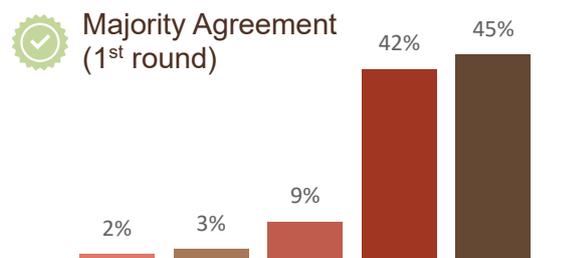
42. Public-private-civic partnerships will be key to overcoming fragmentation in rural service delivery and innovation.



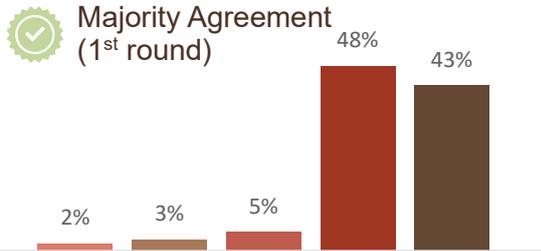
43. Cross-border rural regions will require harmonised governance tools to prevent exclusion due to jurisdictional gaps.



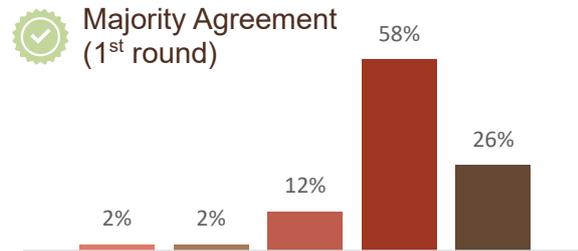
44. Digital governance must be adapted for equitable rural service access.



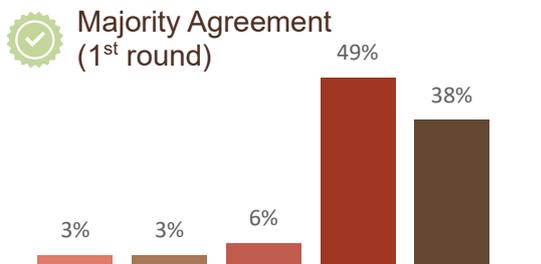
45. Local participatory mechanisms will determine the success of rural development policies aimed at vulnerable populations.



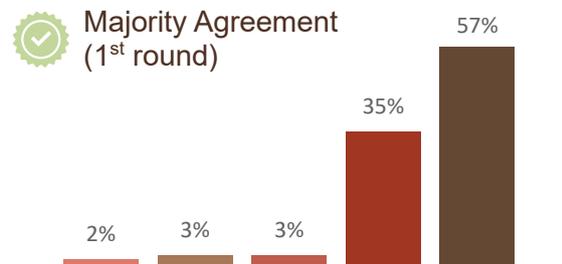
46. Inter-municipal cooperation will be necessary to scale services in sparsely populated areas.



47. Equity-focused subsidy allocation criteria will ensure fair distribution of EU and national funds to disadvantaged rural areas.



48. Climate adaptation planning (Renewable Energy projects, environmental protection measures) should take into consideration rural customs and traditions and involve participation from directly affected communities.



49. Simplified administrative procedures and legal aid will empower rural actors to engage in development and social entrepreneurship.

8.5 APPENDIX 5. National interviews guide

Purpose & procedure

Overall, this research aims to create insights into social inclusion drivers, barriers, as well as risks of social exclusion in rural areas, identifying thriving rural areas and those in need of support. The interviews outlined in this interview guide contribute to the project goal by providing us with expert opinions and experiences from the quadruple helix stakeholders (government, industry, community & academia), which offer a more detailed view on matters of social inclusion in rural areas.

Due to the fact that the interviews will be held with stakeholders from different backgrounds and fields of expertise, the questions are formulated in a way that accounts for the diversity of the target group. All qualitative data generated via the stakeholder interviews will be linked to and contrasted with quantitative data collected in surveys among representative groups of individuals of the respective countries. When combined, the insights from the interviews and the survey will allow for a thorough understanding of what different populations and stakeholders perceive to be the most important influence factors of social inclusion and social exclusion in rural regions across selected European countries.

Interview

I. Introduction and Rapport Building

I would like to start by thanking you for taking the time to meet with me for this interview today. My name is _____ and I would like to talk to you about your perception of national drivers of and barriers to social inclusion, as well as risks of exclusion in the rural areas of your country. Mainly, I am interested in your professional opinion and experiences with the topic itself, groups at risk for social exclusion and policies to foster social inclusion, specifically in rural areas. Within the scope of the INSPIRE project, your insights help us identify possible directions for future interventions and support for groups at risk of social exclusion.

The interview should not take longer than an hour. As you have been informed and agreed upon according to our consent form, this interview will be recorded. All comments as well as your personal information will be kept confidential and your responses will only be shared with the research project team. We are going to ensure that any information included in our (future) reports does not identify you as the

respondent. Additionally, all answers are voluntary and you can choose to end the interview at any time without further justification.

Do you have any questions about this before we start the interview?

II. Background and Context/ definition of social exclusion

Start with an easy question to build rapport and understand the interviewee's role:

- 1) "Can you briefly describe your role and how you encounter the topics of social exclusion and inclusion?"
- 2) "What does social exclusion mean to you in the context of your work?"
- 3) "What does social inclusion mean to you in the context of your work?"
- 4) "How do you perceive the current state of social inclusion in rural areas in your country?"

III. Barriers to Social Inclusion and risks of Social Exclusion

- 5) "What do you see as the primary barriers to social inclusion in rural areas in your region?"
- 6) "In your opinion, what systemic factors contribute to social exclusion in rural areas of your country?"
- 7) "Which, if any, specific groups or populations you think are more vulnerable to social exclusion in your country?"
 - "Could you describe specific instances where you have witnessed these vulnerabilities or instances of social exclusion?"
- 8) "What are the potential risks or negative consequences of social exclusion for individuals and the community?"

IV. Drivers of Social Inclusion

- 9) "What do you believe are the key national drivers that can promote greater social inclusion in rural areas?"
- 10) "What kind of national initiatives or strategies have you seen succeed or fail in fostering inclusion?"
- 11) "What kind of resources and support would be most beneficial to advance social inclusion nationally or in the rural areas of your region?"

V. Policy and Practice

- 12) "How are national policies and programs designed to address social exclusion in your country?"
- "In your opinion, how effective are these policies in reducing social exclusion?"
 - "Can you share examples of successful interventions you've been involved in or aware of nationally or in your region?" (*clarify whether the example(s) provides is (are) national or regional*)
- 13) "From your experience, how are the needs and voices of vulnerable communities integrated into the planning and implementation of national social inclusion strategies?"

VI. Stakeholder Engagement and Collaboration^o

- 14.1) **Government:** "What policies or programs is the government currently implementing or considering to promote social inclusion?"
- 14.2) **Industry:** "How does your organization promote inclusion, or what challenges does your organization face?"
- 14.3) **Community:** "What actions can community members take to foster social inclusion at a grassroots level?"
- 14.4) **Academia:** "What current research or evidence can be used to address social inclusion in this context?"

VII. Wrap up and Closing

- 15) "What are some final thoughts or recommendations you have?"
- 16) "Is there anything else that you would like to mention?"

(if there are no further remarks, end the interview by providing the interviewee with the following information:)

In the following weeks, our research team will be analyzing the information that you and other interviewees provided and drafting the report with our findings. All interview responses will be anonymized, so that no information used in the report contains any personally revealing information. I would be happy to share a copy of the report with you, if you are interested. (*note down the contact information of the participant, if they would like to receive the report upon finalization*)

You will also be able to access the report that is informed by the interview data on the INSPIRE project website once it has been finalized.

You are also welcome to contact me again any time should you have further questions about the research or the processing of your data.

Thank you for your time and input!

Key Considerations for interviewers¹⁵⁴:

- **Flexibility:** The interview guide is not rigid. Be prepared to adjust questions based on the flow of the conversation and the experience of the interviewee.
- **Probes and prompts:** Prepare prompts to explore answers more deeply. For example: "Can you give an example?" or "What were you thinking at that moment?"
- **Cultural Sensitivity:** Be aware of cultural norms when phrasing questions and discussing sensitive topics.
- **Silence:** Allow periods of silence for reflection.

¹⁵⁴ This interview guide was compiled following the guide by Boyce & Neale (2006) and the brainstorming input of Notebook LM based on the ATLAS.ti guideline for preparing a research interview guide. Boyce, C., & Neale, P. (2006). *Conducting in-depth interviews: A guide for designing and conducting in-depth interviews for evaluation input* (Vol. 2). Watertown, MA: Pathfinder international. *Preparing a research interview | Step-by-step guide*. (2025, February 11). ATLAS.ti. <https://atlasti.com/guides/interview-analysis-guide/preparing-a-research-interview#how-to-create-an-interview-guide>

8.6 APPENDIX 6. Meso and Micro (CATI and Paper-based) Questionnaire.

INSPIRE Survey

Do you have some time to answer a **short 10–12-minute survey on social inclusion?**

This survey is part of the INSPIRE project, funded under the European Union's Horizon Europe Research and Innovation Programme. We are exploring what influences a person's perception of social inclusion in different European regions. In this way, the aim is to support and connect groups at risk of social exclusion.

If you have 10-12 minutes, I would be grateful for your time. There are no right or wrong answers, only your personal views and experiences. **All data and responses will be anonymized, and your privacy is guaranteed for research purposes by the INSPIRE project.** If you have any questions concerning the project's data collection practices, you may contact us at any time at (INSPIRE project email)

1. How old are you?

2. What gender do you most identify with?

- Female
- Male
- Prefer to self-describe: _____
- Prefer not to say

3. What is the highest level of education you have obtained:

- Less than primary
- Primary
- Lower Secondary
- Upper Secondary
- Post Secondary non tertiary
- Bachelor's Degree or equivalent
- Master's Degree or equivalent
- PhD or equivalent

4. What is your employment status?

- Employed
- Unemployed
- Student
- House activity/homemaker
- Retired
- Other

5. How many hours do you work (on average) per week?

6. Which sector do you work in?

- Agriculture, Forestry and Fishing,

- Mining and Quarrying,
 - Manufacturing,
 - Electricity Gas Steam and Air Conditioning Supply,
 - Water Supply; Sewerage Waste Management and Remediation Activities,
 - Construction,
 - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles,
 - Transportation and Storage,
 - Accommodation and Food Service Activities,
 - Information and Communication,
 - Financial and Insurance Activities,
 - Real Estate Activities,
 - Professional Scientific and Technical Activities,
 - Administrative and Support Services Activities,
 - Public Administration and Defense; Compulsory Social Security,
 - Education,
 - Human Health and Social Work Activities,
 - Arts Entertainment and Recreation,
 - Other Service Activities
7. Which category best describes your occupation?
- Manager
 - Professional
 - Technicians and Associate Professional
 - Clerical Support Worker
 - Service and Sales Worker
 - Skilled Agricultural, Forestry and Fishery Worker
 - Craft and Related Trades Worker
 - Plant and Machine Operators, and Assembler
 - Elementary Occupation
 - Armed Forces Occupation
8. What is your household's monthly disposable income (*net income after deduction of all social contributions but including potential social benefits credits*)?
-
9. What is your marital/relationship status?
- Single (never married)
 - Cohabiting
 - Married or in a domestic partnership
 - Widowed
 - Divorced
 - Other
10. How many children are part of your household?
- 0
 - 1

- 2
 - 3
 - 4
 - 5+
- 11. Are you part of the same ethnic group as most people in Ireland?**
- Yes
 - No
- 12. Would you say you live in a rural area or village, small or medium sized town or large town?**
- Rural area or village
 - Small or medium sized town
 - Large town/city
- 13. Can your household afford an unexpected, required expense of €1200 without borrowing?**
- Yes
 - No
- 14. Can your entire household afford to go for a week's annual holiday away from home, including stays in a second dwelling or with friends/relatives?**
- Yes
 - No
- 15. Can your household afford a meal with meat, chicken, fish or vegetarian equivalent every second day?**
- Yes
 - No
- 16. Is your household able to keep the dwelling comfortably warm during winter, taking into account the insulation of the dwelling and the heating system you have in place?**
- Yes
 - No
- 17. Do you think that you live in poverty according to your present living conditions?**
- Yes
 - No
- 18. How many months have you been unemployed for?**
-
- 19. How likely or unlikely do you think it is that you might lose your job in the next 6 months?**
- Very likely
 - Rather likely
 - Neither likely nor unlikely
 - Ather unlikely
 - Very unlikely
- 20. If you were to lose or had to quit your job, how likely or unlikely is it that you will find a job of similar salary?**

- Very likely
- Rather likely
- Neither likely nor unlikely
- Rather unlikely
- Very unlikely

21. In the past 12 months, how has your total household income changed?

- Increased
- Remained more or less the same
- Decreased

22. How satisfied or dissatisfied you are with the current level of your income?

- Completely dissatisfied
- Mostly dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Mostly satisfied
- Completely satisfied

23. What best describes your housing situation?

- I fully own the house/ apartment I am living in
- I own the house/ apartment I am living in, but I am still paying off the mortgage
- I am renting the house/ apartment I am living in - at market price
- I am renting the house/ apartment I am living in - at a reduced price (social housing)

24. How much of your monthly household income do you spend on rent/ mortgage payments (in %)?

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

25. Do you own a car/motorized vehicle?

- Yes
- No

26. Thinking of physical access, distance, opening hours and the like, how easy or difficult is your access to:

	Very difficult	Rather difficult	Rather easy	Very easy
Local and/or municipal services (e.g. schools, help desk, social services etc.)				
Public transport facilities (bus, metro, tram, train)				
Cinema, theatre, museums or cultural centre				
Grocery store or supermarket				
Green space or recreational space				

27. In general, would you say your physical health is:

- Poor
- Fair
- Good

- Very good
 - Excellent
28. In general, would you say that your mental health is:
- Poor
 - Fair
 - Good
 - Very good
 - Excellent
28. How many days during the past month were you unable to do your daily activities due to (an) illness?
- None
 - 1-3 days
 - 4-7 days
 - >1 week, <1 month
 - All of the time
29. Do you fluently speak and understand (one of) the official language(s) of the country where you reside? *(Do you speak and understand the language(s) well enough to comprehend official documents and government communication in the language(s)?)*
- Yes
 - No
30. There are different ways of trying to improve things in Ireland or help prevent things from going wrong. During the last 12 months, have you done any of the following? Have you...
- | | Yes | No |
|---|-----|----|
| ...signed a petition, taken part in a public demonstration, or posted/shared anything about politics online, for example, on social media such as Facebook, Instagram or Twitter? | | |
| ...volunteered for a not-for-profit or charitable organisation? | | |
31. Did you vote in the most recent election?
- Yes
 - No
32. Compared to other people of your age, how often would you say you take part in social activities?
- Much less than most
 - Less than most
 - About the same
 - More than most
 - Much more than most
33. Please say to what extent you agree or disagree with the following statement: I feel close to the people in my local area.
- Strongly disagree
 - Disagree

- Neither agree nor disagree
- Agree
- Strongly agree

34. On a scale of 0 to 10, with '0' being 'no confidence at all' and '10' being 'complete confidence,' how much confidence do you personally have in other people in your area?

1	2	3	4	5	6	7	8	9	10

35. How much do you personally trust each of the following institutions on a scale from 0 to 10 where 0 means "I do not trust an institution at all" and 10 means "I have complete trust"?

	1	2	3	4	5	6	7	8	9	10
Your national parliament										
The legal system										
The police										
Politicians										
Political parties										

36. Do you believe that men and women have equal opportunities in Ireland? (Where 0 means "strongly disagree" and 10 means "strongly agree"?)

1	2	3	4	5	6	7	8	9	10

37. Advancing women's and girls' rights has gone too far, because it threatens men's and boys' opportunities. (Where 0 means "strongly disagree" and 10 means "strongly agree")

1	2	3	4	5	6	7	8	9	10

38. How often do you use the internet for online services (e.g., online banking, scheduling appointments, interacting with governmental institutions)?

- Every day
- Several times a week
- Several times a month
- Once a month
- Less than once a month
- Never

39. How often do you use the internet for personal use in the following activities?

	Every day	Several times a week	Several times a month	Once a month	Less than once a month	Never
Posting content on social media/websites and apps (e.g., posting text, images, videos on Facebook, Instagram, X)						

Interacting with friends or family online (social media, messaging services or video calls)							
Reading/ watching/ listening to the news							
Playing games (online)							

40. All things considered, how satisfied are you with your life as a whole these days on a scale from 0 to 10 where 0 is extremely dissatisfied and 10 is extremely satisfied?

1	2	3	4	5	6	7	8	9	10

41. Taking all things together, how happy would you say you are on a scale from 0 to 10 where 0 is extremely unhappy and 10 is extremely happy?

1	2	3	4	5	6	7	8	9	10

42. On a scale of 0 to 10 where 0 means 'Completely dissatisfied' and 10 means 'Completely satisfied', how dissatisfied or satisfied are you with your present job overall?

1	2	3	4	5	6	7	8	9	10

43. To what extent do you agree or disagree with the following statements? For each statement, please select the alternative that best describes your personal experience.

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Completely agree
I feel that what I do every day is significant.					
I get positive feedback on what I do.					
I belong to a group or community that is important for me.					
Other people need me.					
I can influence the course of my life.					
I feel that my life has purpose.					
I can strive for things that are important for me.					
I get help when I really need it.					
I feel trusted.					

I can influence some things in my living environment.					
---	--	--	--	--	--

44. Please indicate the extent to which you agree with each of the following statements by using the following scale:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Completely agree
I tend to bounce back quickly after hard times.					
I have a hard time making it through stressful events.					
It does not take me long to recover from a stressful event.					
It is hard for me to snap back when something bad happens.					
I usually come through difficult times with little trouble.					
I tend to take a long time to get over set-backs in my life.					

45. Does your health in any way limit your daily activities compared to most people?

- Yes
- No

45. 1 Are you able to meet socially with friends or relatives?

- Yes
- No

45. 2 In the past 4 weeks, how often have you lost sleep over worry?

- Always
- Most of the time
- Some of the time
- Hardly ever
- Never

45. 3 In the past 4 weeks, how often have you been able to enjoy your recreational activities?

- Always
- Most of the time
- Some of the time
- Hardly ever
- Never

45. 4 How suitable or unsuitable is your accommodation for your needs?

- Very suitable
- Fairly suitable

- Neither suitable nor unsuitable
- Fairly unsuitable
- Very unsuitable

45. 5 Please indicate how safe you feel walking alone in the area near your home.

- Very safe
- Fairly safe
- Neither safe nor unsafe
- Fairly unsafe
- Very unsafe

45. 6 Please indicate how likely you believe it to be that you will be assaulted in the future (including sexual and domestic assault).

- Very likely
- Fairly likely
- Neither likely nor unlikely
- Fairly unlikely
- Very unlikely

45. 7 How likely do you think it is that you will experience discrimination?

- Very likely
- Fairly likely
- Neither likely nor unlikely
- Fairly unlikely
- Very unlikely

45. 8 (IF Q45.7=FAIRLY/VERY LIKELY) On what grounds do you think it is likely that you will be discriminated against?

- Race/ethnicity
- Gender
- Religion
- Sexual orientation
- Age
- Health or disability (including mental health)

45. 9 Please indicate how strongly you agree or disagree with the following statements:

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Completely agree
I am able to influence decisions affecting my local area.					
I am free to express my views, including political and religious views.					
I am able to appreciate and value plants, animals and the world of nature.					

I respect, value and appreciate the people around me.					
I find it easy to enjoy the love, care and support of my family and friends.					
I am free to decide for myself how to live my life.					
I am free to use my imagination and to express myself creatively (e.g. through art, literature, music, etc.).					
I have access to interesting forms of activity (or employment).					

8.7 APPENDIX 7. Eurostat demographic reference tables (relation to meso-level national survey)

Table 8.7.1 Population by type of region.

	Predominantly urban regions	Intermediate regions	Predominantly rural regions
European Union - 27 countries (from 2020)	41.6	39.2	19.2
Ireland	28.4	14.6	57.0
Greece	46.8	24.8	28.4
France	36.0	37.3	26.7
Poland	22.8	39.2	38.0
Romania	12.1	43.2	44.7
Slovakia	13.5	37.5	49.0

Source: EuroStat. (2025a). *Population on 1 January by five year age group, sex and other typologies*. EuroStat - Data Browser. https://ec.europa.eu/eurostat/databrowser/view/urt_pjangrp3_custom_17252613/default/table?lang=en

Table 8.7.2 Population by sex.

	Males	Females
Ireland	49.5	50.5
Greece	48.5	51.5
France	48.4	51.6
Poland	48.4	51.6
Romania	48.9	51.1
Slovakia	48.7	51.3

Source: EuroStat. (2025b). *Population on 1 January by age and sex*. EuroStat - Data Browser. https://ec.europa.eu/eurostat/databrowser/view/demo_pjan_custom_17253437/default/table?lang=en&page=time:2024

Table 8.7.3 Population by level of education.

	Less than primary, primary and lower secondary education (levels 0-2)	Upper secondary and post-secondary non-tertiary education (levels 3 and 4)	Tertiary education (levels 5-8)
Ireland	16,5	35,2	48,3
Greece	21,8	47,8	30,4
France	20,9	40,7	38,4
Poland	11,8	53,9	34,3
Romania	22,4	61,0	16,5
Slovakia	12,7	61,5	25,7

8.8 APPENDIX 8. Consolidated CATI Survey Analysis

8.8.1 Introduction: Methodology and Objectives of the CATI Survey Analysis

This report presents a detailed analysis of CATI survey data collected from selected rural and peripheral regions across six European countries: France, Greece (specifically the municipalities of Konitsa and the island of Kythera), Ireland, Poland, Romania, and Slovakia (218 respondents). The analysis was structured around six main thematic blocs: demographics and background information; economic security and employment; living conditions and accessibility of essential amenities and services; health, language, or cultural barriers; digital access; and social participation and engagement, including risk of poverty and social exclusion. By examining these interrelated dimensions across diverse territorial contexts, the study aims to identify both common trends and unique regional challenges, providing a robust empirical foundation for tailored policy responses that enhance rural resilience and inclusion throughout Europe.

8.8.2 Case Study: France – Yonne (FRC14).

The CATI survey conducted in rural region of Yonne (30 respondents) offers a detailed demographic portrait of the local population, revealing key characteristics that shape community life (see Figure 8.8.2.1). The sample is predominantly female, comprising 70% of respondents, while men account for 30%. Age distribution indicates a mature population, with median ages of approximately 60 years for women and slightly lower but comparable ages for men, spanning broadly from around 30 to 80 years old. Marital status data shows that a clear majority (60%) of respondents are married or living with a domestic partner, while smaller proportions identify as widowed (13.3%), single or never married (10%), cohabiting (10%), and divorced (6.7%).

Educational attainment is concentrated primarily at the post-secondary non-tertiary level (53.3% of respondents), with only a small minority holding higher education degrees—1 respondent each with a bachelor's and a master's degree—and a minority having upper secondary (10%) or lower educational levels such as primary or less than primary (16.7%). This suggests that most individuals have some formal education beyond secondary school but relatively few have attained university-level qualifications.

Family structure data reflects a range of household sizes, with the modal number of children being zero or two, both reported by 9 respondents, followed by smaller numbers of families with one (4 respondents), three (4 respondents), four (3 respondents), and five children (1 respondent). This distribution suggests moderate family sizes consistent with contemporary rural demographic trends.

Demographic Characteristics - FR

Region 1. Yonne CATI Survey

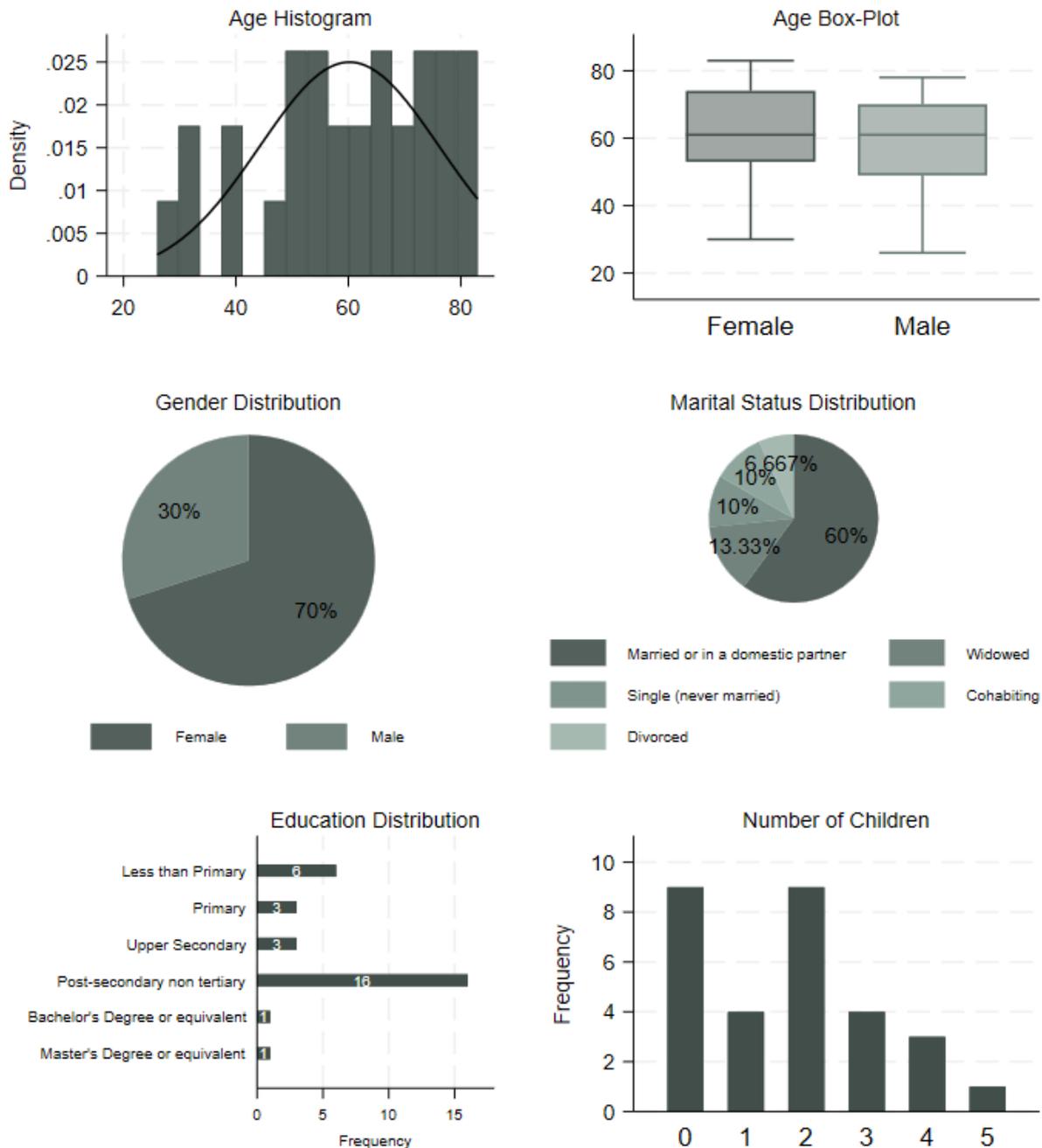


Figure 8.8.2.1 Yonne (FR). Demographic Characteristics

The labour market and occupational environment of the French CATI survey respondents (see **Error! Reference source not found.**) reflect a mixed but predominantly active population. Slightly more than

half of participants (53.3%) report being employed, while a substantial proportion (43.3%) are retired, and a small minority (3.3%) are unemployed. Employment sectors are diverse, with wholesale and retail trade representing the largest group (6 respondents), followed by agriculture, forestry, and fishing (3 respondents). Smaller numbers work in administrative and support services (3), human health and social work activities (2), accommodation and food services (1), and professional, scientific, and technical fields (1). This distribution indicates a local economy anchored in trade and service activities, with some presence of primary and specialised sectors.

Occupational roles further illustrate this diversity. The majority of employed respondents work as clerical support workers (5) or service and sales workers (5), indicating a predominance of support and customer-oriented positions. Skilled agricultural and forestry workers number 3, while managerial, professional, and technician roles are less represented, each with one respondent.

Working hours data reveals a bimodal pattern, with a notable peak at zero hours—likely reflecting retired or unemployed individuals—and a secondary concentration around 35 to 40 hours per week, consistent with full-time employment. This split highlights the dual nature of the sample's labour market status.

Household income levels vary widely, ranging from below €1,000 to nearly €5,000 per month, with a modal peak around €2,000. The distribution suggests a moderately stable economic situation for many respondents, albeit with some heterogeneity in financial resources.

Regarding residential setting, a dominant majority (83.3%) reside in rural areas or villages, with smaller shares living in small or medium-sized towns (13.3%) and only a marginal portion in larger towns or cities (3.3%). This spatial distribution underscores the rural focus of the survey and the associated socio-economic dynamics.

Figure 8.8.2.3 illustrates the living conditions and accessibility challenges experienced by respondents in rural France. Housing tenure is notably stable, with a strong majority (66.7%) fully owning their homes or apartments. An additional 16.7% own their home but are still paying a mortgage, while only small minorities rent at reduced prices (10%) or at market rates (6.7%). This high level of homeownership suggests considerable material security among the surveyed population.

Vehicle ownership is also widespread, with 90% of respondents possessing a car or motorised vehicle, underscoring personal mobility as a key factor in daily life. However, access to local and municipal services presents a mixed picture: while 36.7% find access “rather easy”, an almost equal proportion (33.3%) consider it “very difficult” and 30% “rather difficult”, indicating significant variability in service availability or infrastructure quality.

Public transport access is similarly uneven, with 43.3% reporting it as “rather easy” to use and 20% as “very easy”. On the opposite, 20% rate it “very difficult” and 16.7% as “rather difficult”. These responses reflect persistent challenges in rural mobility options, despite some positive experiences.

Cultural facilities show a divided experience: 40% find access “rather easy”, yet 26.7% describe it as “very difficult”, with the remainder split between “rather difficult” (23.3%) and “very easy” (10%). Access to grocery stores or supermarkets is perceived as moderately challenging, with half of respondents indicating “rather difficult” and 30% “very difficult” highlighting concerns about food retail availability.

Access to green spaces or recreational areas appears comparatively more favorable, with 53.3% rating it “rather difficult” but a notable 30% still find it “very difficult” and only 16.7% consider it “rather easy.” This suggests that while natural amenities are present, their accessibility may be limited by infrastructural or geographic factors.

Labour Market and Environment - FR

Region 1. Yonne CATI Survey

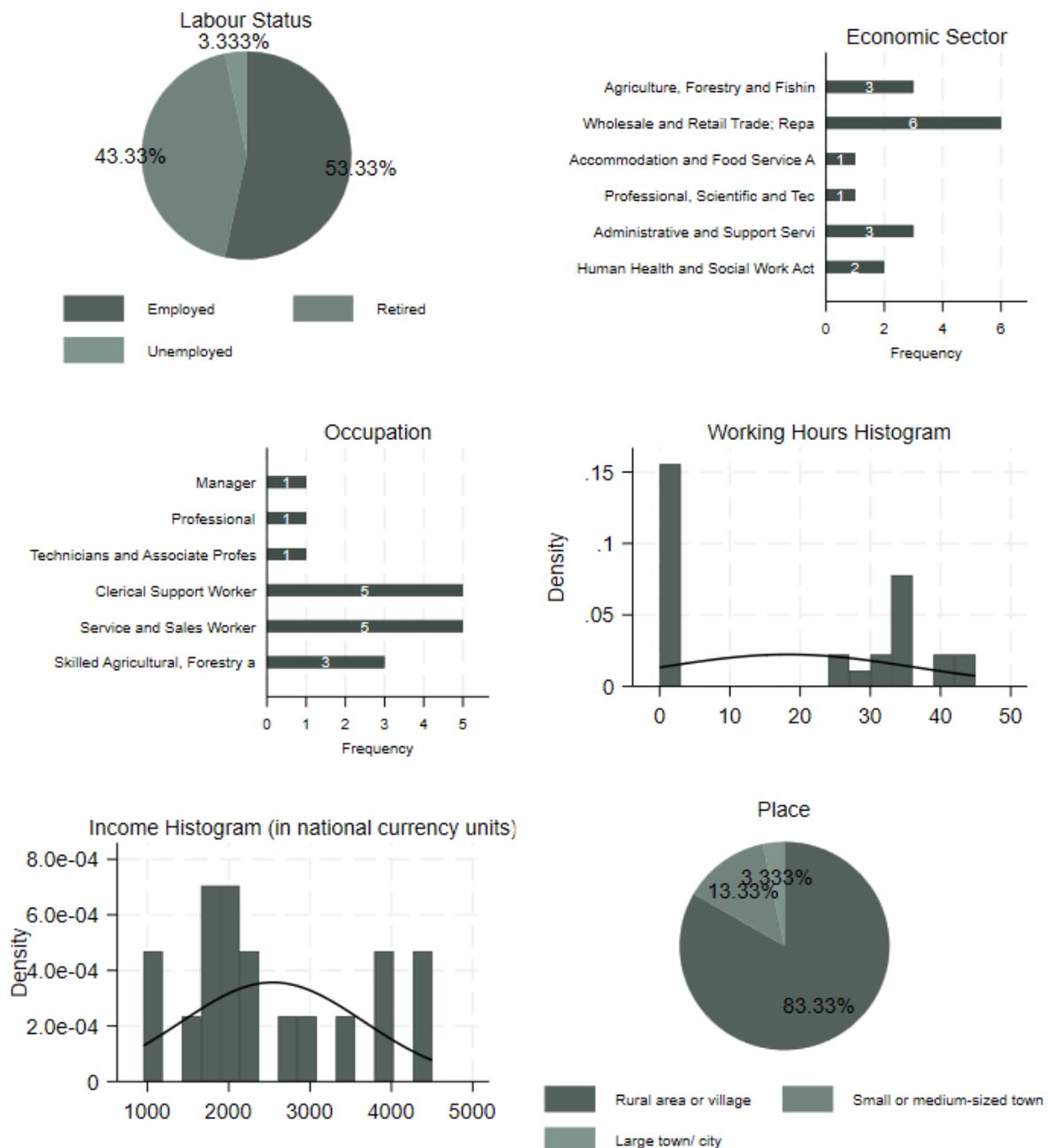


Figure 8.8.2.2 Yonne (FR). Labour Market and Environment

Regarding housing costs, respondents report spending between 10% and 50% of income on rent or mortgage payments, with a distribution peak around 20-30%, indicating a moderate housing cost burden for most households.

Living Conditions & Accessibility - FR

Region 1. Yonne CATI Survey

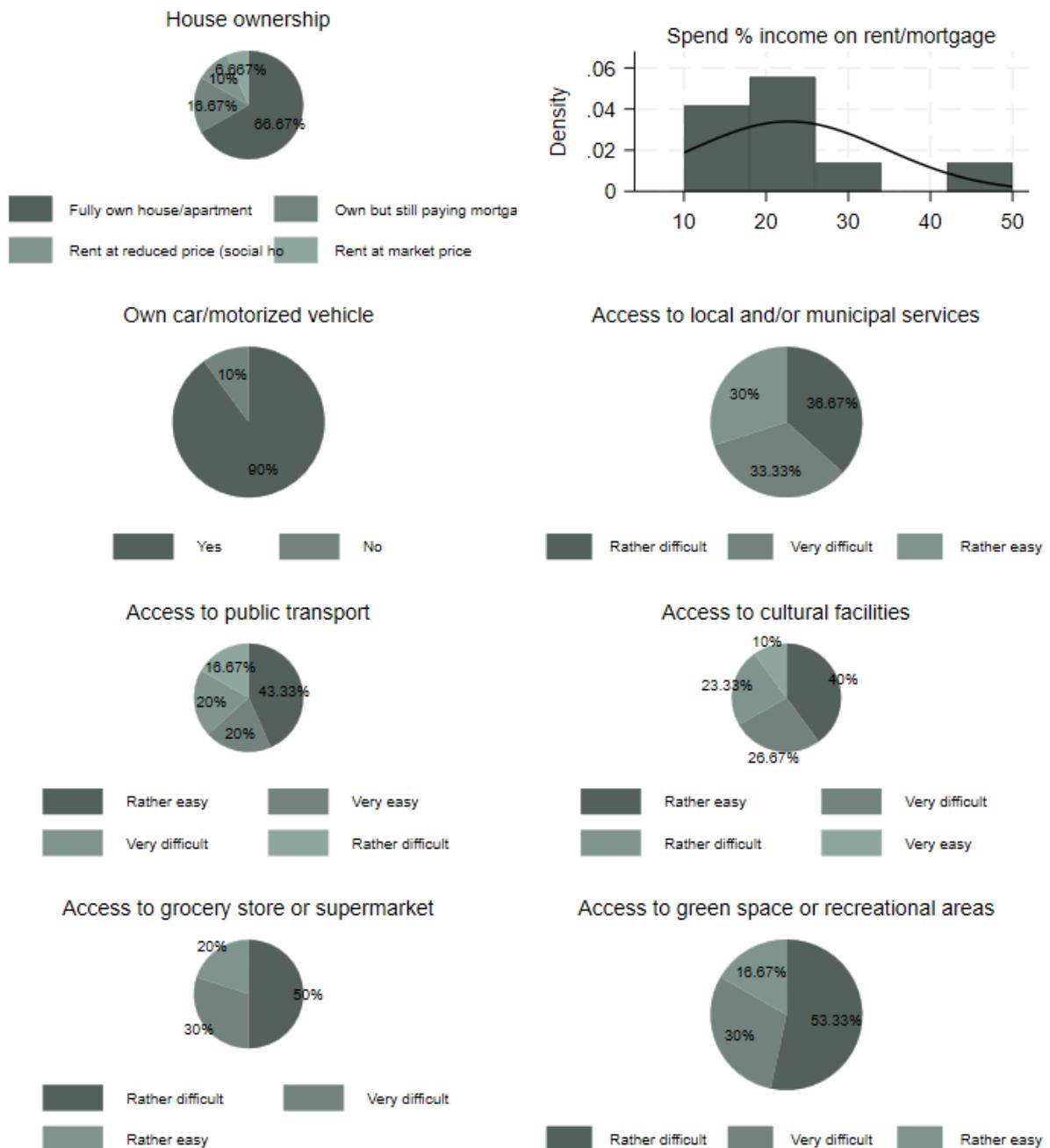


Figure 8.8.2.3 Yonne (FR). Living Conditions & Accessibility

Figure 8.8.2.4 depicts self-reported physical and mental health alongside the frequency of illness-related activity limitations among rural French respondents. Regarding physical health, 36.7% of participants rate their condition as “good”, while 23.3% consider it “excellent”, and 6.7% report “very good” health. Conversely, 23.3% describe their physical health as “fair”, and 10% as “poor”, indicating a mixed but generally positive perception of physical well-being.

Mental health self-assessments are somewhat more favorable, with a majority (56.7%) rating their mental health as “good”, complemented by 10% who describe it as “fair” and 3.3% as “very good”. A notable minority (23.3%) report “excellent” mental health, while 6.7% indicate “poor” status. These figures suggest relatively high psychological resilience among respondents

Regarding functional health, over half (56.7%) of respondents report being unable to perform daily activities due to illness for 4–7 days in a typical month, while 23.3% experience such limitations “all of the time”. Smaller percentages report shorter durations of incapacity: 10% for 1–3 days, 6.7% for none, and 3.3% for periods exceeding one week but less than a month.

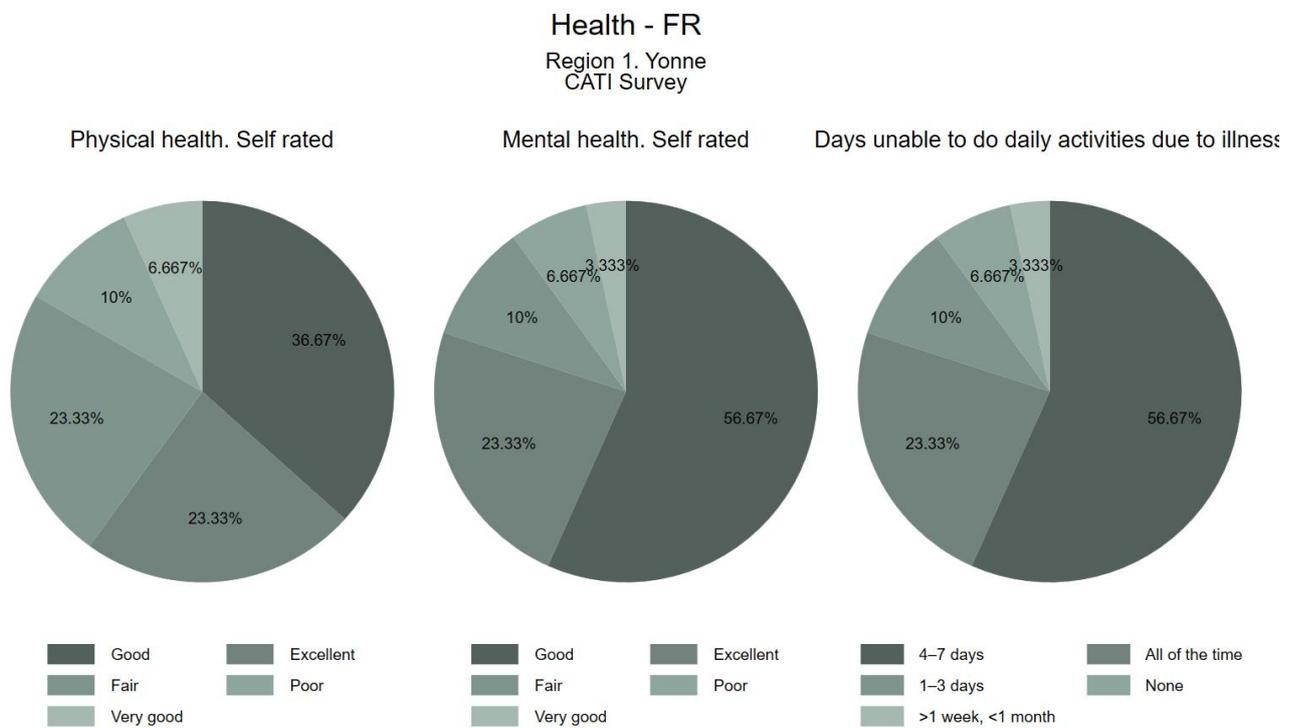


Figure 8.8.2.4 Yonne (FR). Health Self-perception

Figure 8.8.2.5 presents an overview of social participation and engagement among rural French respondents. Half of the participants (50%) strongly disagree with feeling close to people in their local area, while smaller proportions express neutrality or agreement: 16.7% neither agree nor disagree, 13.3% disagree, 13.3% agree, and only 6.7% strongly agree. This distribution suggests a generally weak sense of local social cohesion or connectedness.

Confidence in others within the community tends to be relatively high, with many respondents rating their trust in people in the area between 7 and 10 on the confidence scale. Conversely, confidence in political institutions appears more limited and variable. Regarding the national parliament, responses

cluster predominantly at low to moderate confidence levels, with a notable density at the lower end (0–5). Similar patterns emerge for confidence in the police, which centres around a moderate score of 4 to 5.

Social participation & engagement - FR

Region 1. Yonne CATI Survey

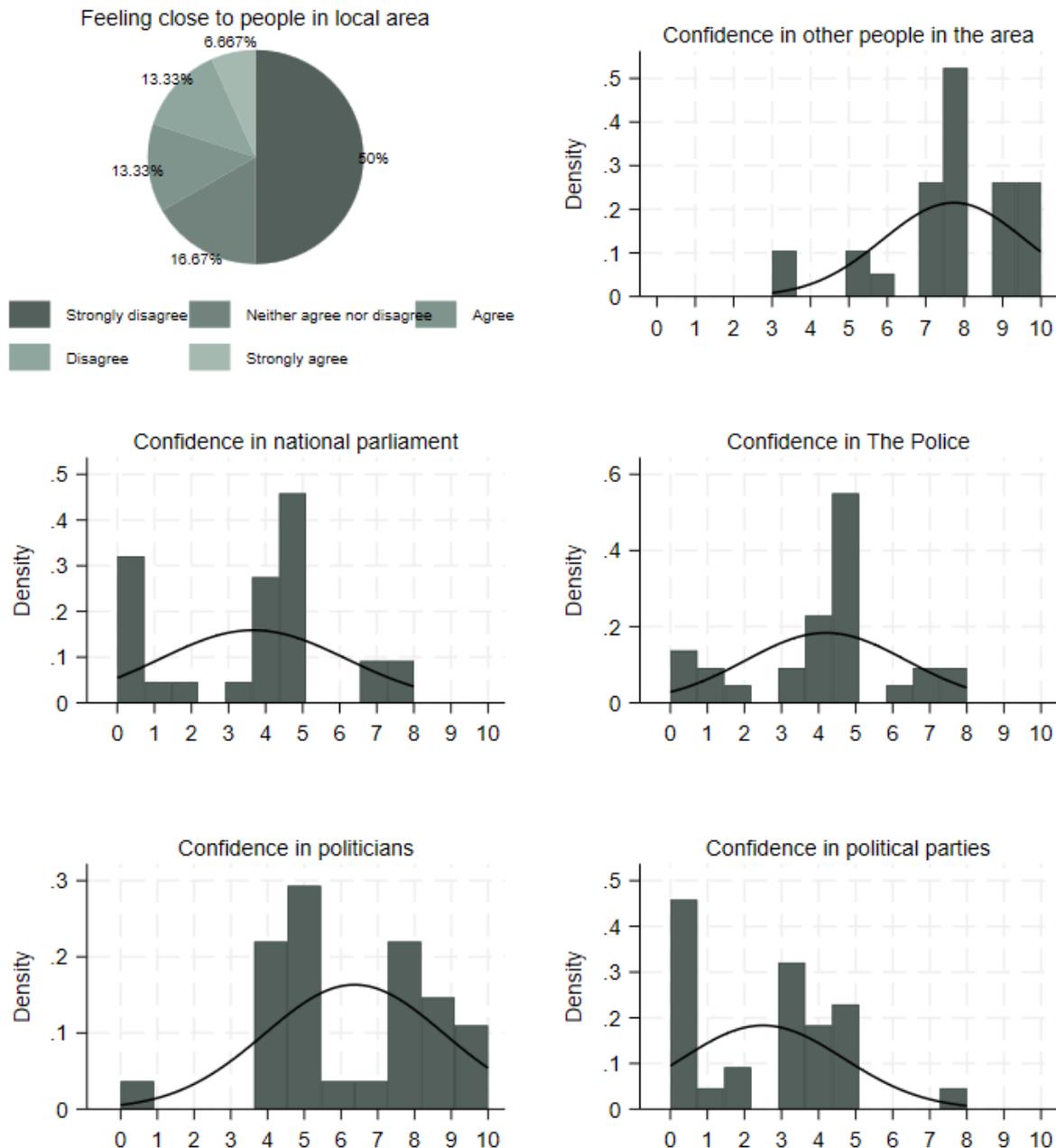


Figure 8.8.2.5 Yonne (FR). Social Participation & Engagement

Confidence in politicians and political parties is generally low to moderate. For politicians, respondents mostly rate confidence between 4 and 8, with some higher ratings but also significant scepticism. Confidence in political parties is even more subdued, with a substantial number of respondents scoring between 0 and 4, reflecting widespread political distrust.

Figure 8.8.2.6 provides insights into digital access and internet usage patterns among rural French respondents. Use of the internet for online services varies widely: 40% of participants report never using online services, while 23.3% use them every day and 23.3% several times a week. Smaller shares engage with online services less frequently, with 6.7% using them several times a month, and minor proportions less than once a month or once a month.

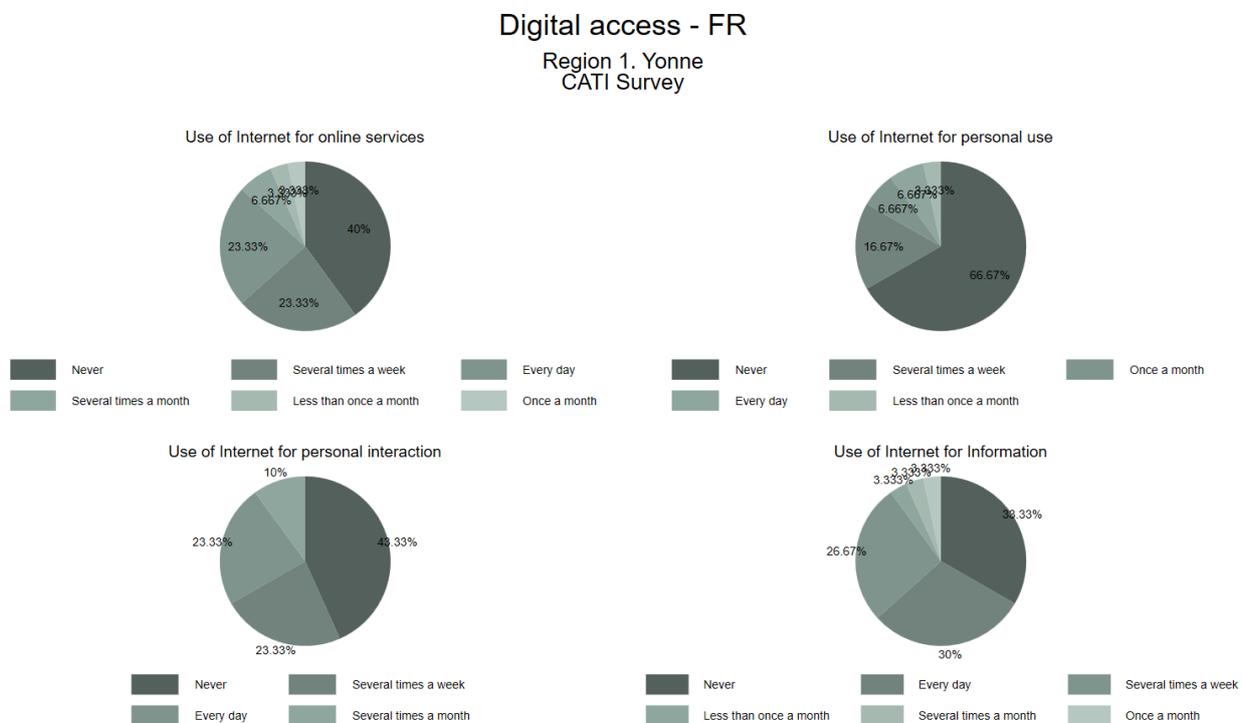


Figure 8.8.2.6 Yonne (FR). Digital Access

Regarding personal internet use, 66.7% of respondents declare never accessing the internet every day and 16.7% several times a week.

Internet use for personal interaction shows more variability. While 43.3% never use the internet for social interaction, nearly a quarter (23.3%) do so every day, and a similar proportion (23.3%) several times a week. Around 10% engage several times a month.

When it comes to using the internet for information, 33.3% of respondents never use it for this purpose, but 30% report daily usage, and 26.7% several times a week. Smaller percentages use the internet once or several times a month or less frequently.

Figure 8.8.2.7 provides an overview of the risk of poverty and social exclusion experienced by respondents in rural France. Just over half of households (53.3%) report being unable to afford an unexpected but necessary expense, while 46.7% indicate they could cover such costs, highlighting a significant economic vulnerability within the sample. When considering discretionary spending, 73.3% of households report they can afford a week-long annual holiday, with 26.7% unable to do so.

Risk of poverty & social exclusion - FR

Region 1. Yonne CATI Survey

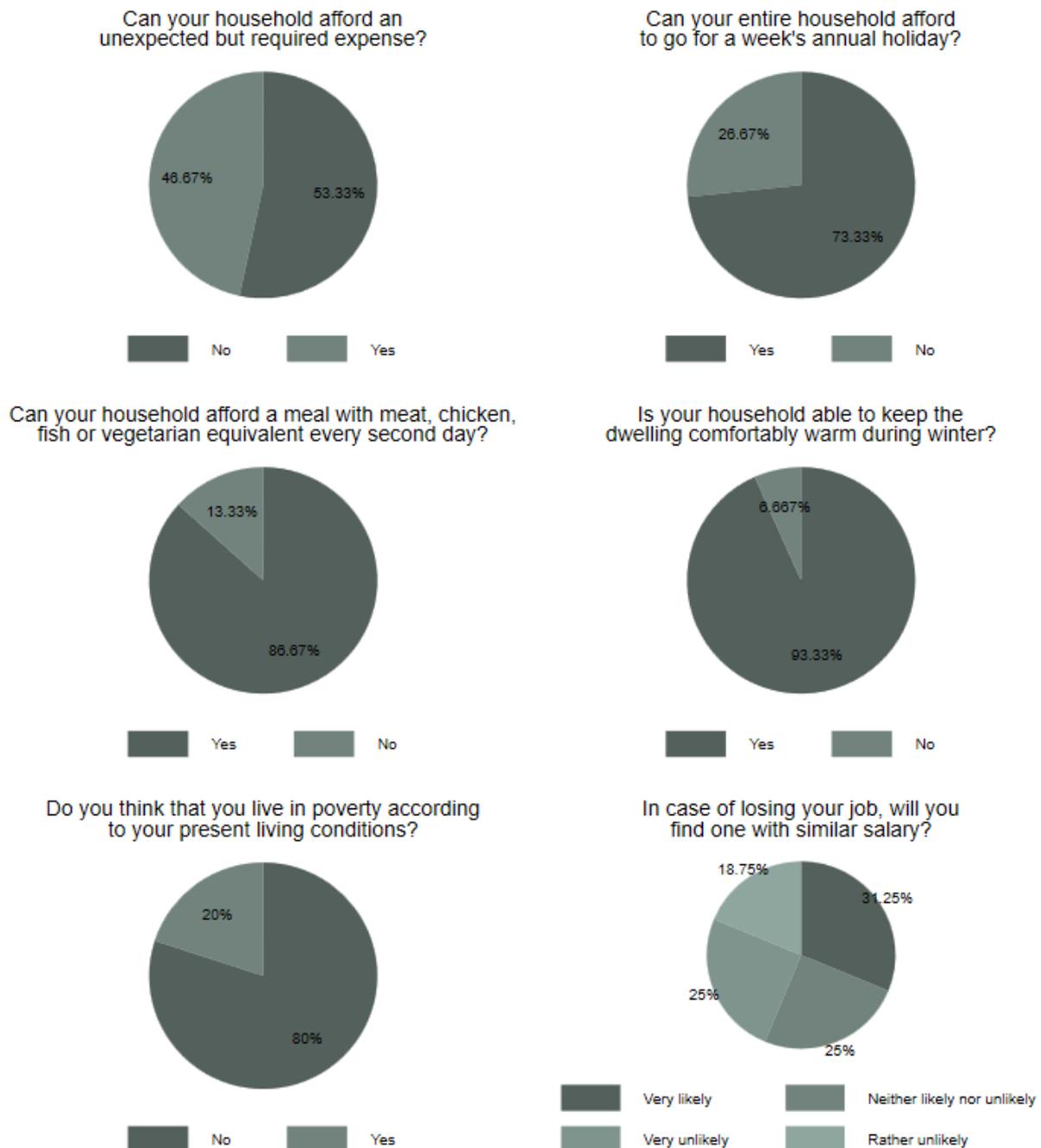


Figure 8.8.2.7 Yonne (FR). Risk of Poverty & Social Exclusion

Food security appears relatively strong, as 86.7% of respondents can afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day, though 13.3% face difficulties in this

regard. Housing conditions are largely secure, with 93.3% able to keep their dwelling comfortably warm during winter, while a small minority (6.7%) experience hardship.

Perceptions of poverty are notable: 20% of respondents feel that they currently live in poverty given their living conditions, while 80% do not share this view. Employment security concerns emerge as mixed; when asked about the likelihood of finding a new job with a similar salary if they were to lose their current one, 31.3% believe it is very likely, 25% are neutral, 25% find it unlikely, and 18.8% consider it very unlikely.

The analysis of Yonne reveals a rural population marked by demographic ageing, moderate labour participation, and a strong reliance on personal vehicles. While homeownership is widespread and digital infrastructure is generally adequate, limited access to healthcare, retail, and cultural services poses significant barriers to quality of life. Although food security and housing stability are relatively secure, economic stress and low institutional trust point to the need for targeted interventions in social cohesion and service accessibility.

8.8.3 Case Study: Greece – Peiraias, Nisoi (EL307).

The CATI survey conducted on the region of Peiraias, Nisoi (30 respondents), focusing on the Kythera island, offers a unique perspective on the socio-economic and infrastructural realities of an insular and geographically peripheral rural community in Greece. Characterised by an ageing population, limited local employment opportunities, and distinct challenges related to accessibility and digital inclusion, Kythera exemplifies the complex interplay of demographic, economic, and social factors shaping life in remote island settings. This case study explores these dynamics in depth, providing valuable insights into the lived experiences, vulnerabilities, and resilience strategies of Kythera's residents, and highlighting key policy implications for sustainable island development.

Figure 8.8.3.1 presents the demographic characteristics of the CATI survey respondents from Kythera, Greece. The age distribution is relatively broad, with a concentration of individuals aged between 35 and 60 years. Median ages appear slightly higher for men, spanning from the early 30s to the mid-70s, while women's ages are generally clustered between 40 and 60 years. The gender balance is perfectly even, with men and women each representing 50% of the sample.

Marital status is distributed evenly between those married or living with a domestic partner (40%) and those single or never married (40%), while widowed and cohabiting individuals each account for 10%. This distribution suggests a community with diverse household arrangements and significant proportions of both family-based and single-person households.

Educational attainment is varied, with notable shares holding primary education (6 respondents), upper secondary (7), and post-secondary non-tertiary qualifications (7). A smaller number have completed lower secondary education (4), bachelor's degrees (3), master's degrees (1), and doctoral qualifications (2). This indicates a population with a mix of educational backgrounds, leaning towards secondary and post-secondary non-tertiary levels.

Family sizes vary considerably, with the modal number of children being zero (12 respondents), followed by two children (9 respondents), and smaller numbers with one (2), three (2), or five or more children (3). This distribution reflects a mix of family sizes, with a notable share of childless households.

Dealing with the labour market status and occupational environment of CATI respondents in Kythera, Greece, the main characteristics can be observed in Figure 8.8.3.2. The majority of participants (76.7%) report being employed, while 16.7% are retired, 3.3% unemployed, and a similar proportion engaged in housework or homemaking. Economic sectors are diverse but primarily service- and agriculture-oriented, with agriculture, forestry, and fishing accounting for the largest share (6 respondents). Other sectors include manufacturing (2), accommodation and food services (2), education (3), human health and social work (2), and smaller numbers in construction, professional, scientific, technical, and other service activities.

Occupational roles vary widely, with elementary occupations being the most frequent (3 respondents), followed by equal numbers of managers, professionals, service and sales workers, and skilled agricultural workers (2 each). Clerical support workers, technicians, and armed forces personnel are less represented. This diversity indicates a mixed occupational structure balancing traditional and service sector employment.

Demographic Characteristics - EL - Kythera

Region 2. Peiraias, Nisoi CATI Survey

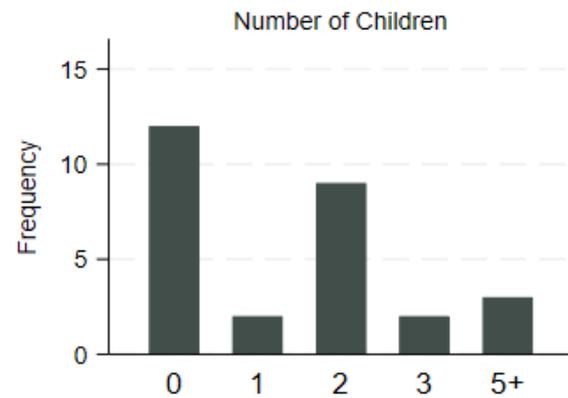
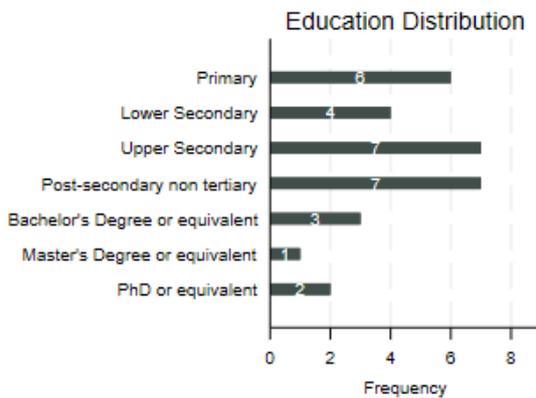
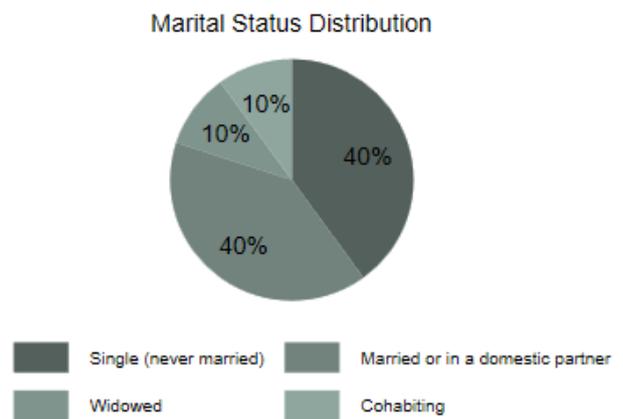
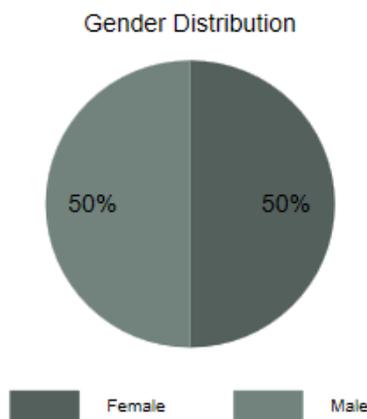
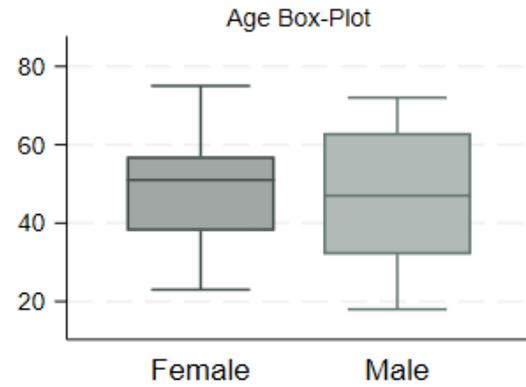
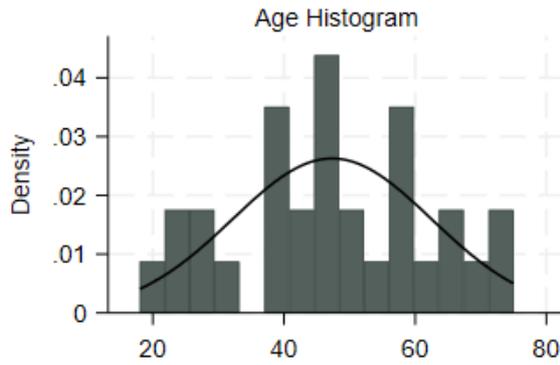


Figure 8.8.3.1 Peiraias, Nisoi (EL). Demographic Characteristics

Working hours data reveals a prominent peak around 40 hours per week, indicative of full-time employment, but with some respondents reporting extended hours up to 120, reflecting possible irregular or seasonal work patterns.

Labour Market and Environment - EL - Kythera

Region 2. Peiraias, Nisoi CATI Survey

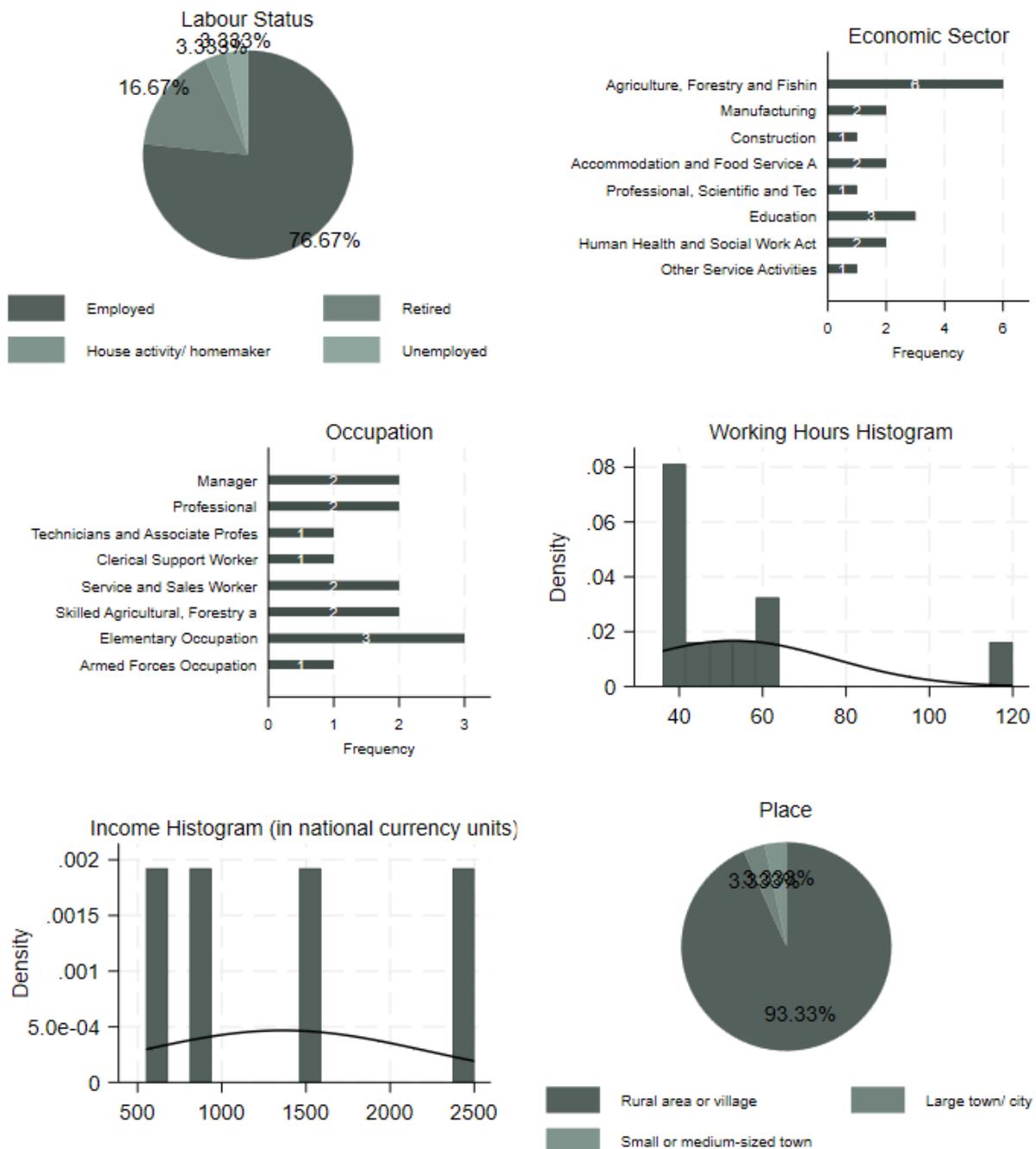


Figure 8.8.3.2 Peiraias, Nisoi (EL). Labour Market and Environment

Income levels appear relatively low and dispersed, with respondents mostly earning between €500 and €2,500 per month, suggesting modest economic means consistent with rural island contexts.

Spatially, the vast majority (93.3%) reside in rural areas or villages, with very few living in small or medium towns or cities, reinforcing the rural and peripheral character of the sample (see).

Figure 8.8.3.3 highlights the living conditions and accessibility challenges faced by CATI respondents in Kythera, Greece. Homeownership is prevalent, with 70% fully owning their homes or apartments, while 6.7% are still paying a mortgage. Smaller shares rent at market price (16.7%) or reduced prices (6.7%). Vehicle ownership is high, with 90% of respondents owning a car or motorised vehicle, facilitating mobility in this rural island context.

Access to local and municipal services is predominantly difficult: 66.7% report “very difficult” access, and 33.3% “rather difficult”, indicating significant infrastructural barriers. Public transport accessibility is mixed, with 53.3% rating it “very easy”, but a combined 46.7% find it rather or very difficult, suggesting uneven transport options.

Cultural facilities are accessible to some degree, with 36.7% describing access as “very difficult”, 6.7% “rather easy”, 23.3% “rather difficult”, and 33.3% as “very easy”. Access to grocery stores or supermarkets is a challenge for most respondents: 76.7% find it “very difficult”, and 16.7% “rather difficult,” highlighting significant food retail accessibility issues.

Access to green spaces or recreational areas is mostly difficult, with 76.7% indicating “very difficult”, 20% “rather difficult”, and only 3.3% reporting “very easy” access. Housing costs, as a share of income spent on rent or mortgage, cluster around 10-30%, indicating a moderate financial burden.

These data underscore the considerable challenges in accessing essential services and amenities that shape quality of life in Kythera’s rural and insular environment.

Figure 8.8.3.4 illustrates self-rated physical and mental health along with the frequency of illness-related activity limitations among CATI respondents from Kythera, Greece. Physical health assessments are varied, with 40% rating their health as “good”, 23.3% as “very good”, 20% as “excellent”, 16.7% as “fair”. This distribution reflects a relatively positive overall perception of physical well-being, though a notable share experience some health challenges.

Mental health self-ratings are similarly distributed, with 30% reporting “good” mental health, 26.7% “very good”, 23.3% “fair”, and 20% “excellent”. These results suggest generally favourable mental well-being across the population.

Regarding limitations on daily activities due to illness, responses are fairly evenly spread: 30% report being unable to perform daily activities for 4–7 days per month, 26.7% experience such limitations “all of the time”, 23.3% for 1–3 days, and 20% for periods exceeding one week but less than a month. These findings highlight the presence of chronic or episodic health issues affecting daily functioning for a significant portion of respondents.

Living Conditions & Accessibility - EL - Kythera

Region 2. Peiraias, Nisoi CATI Survey

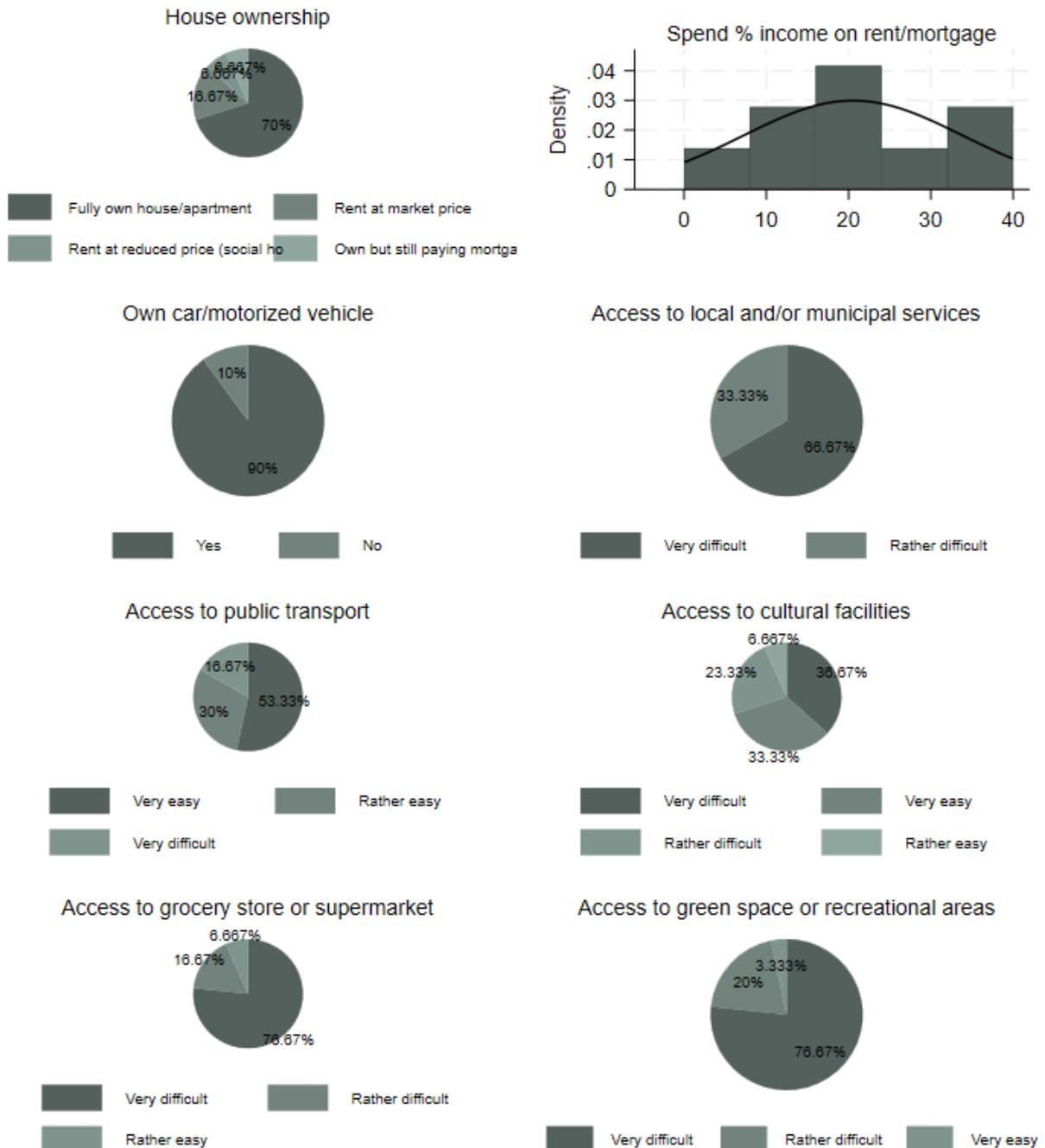


Figure 8.8.3.3 Peiraias, Nisoi (EL). Living Conditions & Accessibility

Health - EL - Kythera
Region 2. Peiraias, Nisoi
CATI Survey

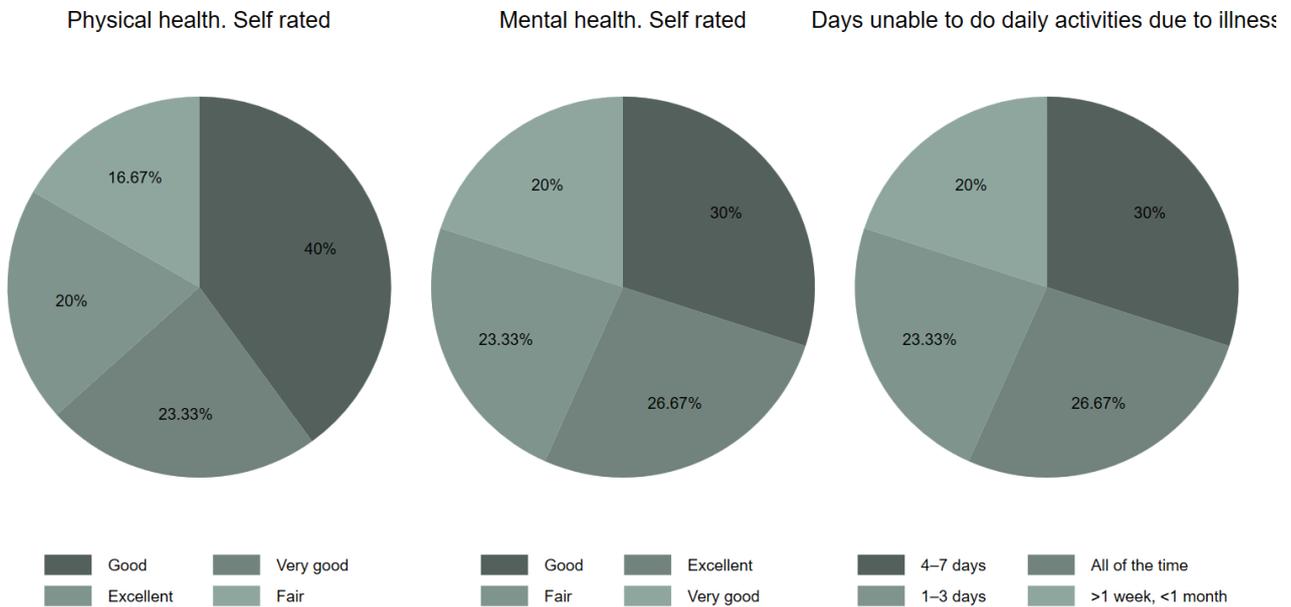


Figure 8.8.3.4 Peiraias, Nisoi (EL). Health Self-perception

Figure 8.8.3.5 reveals patterns of social participation and institutional trust among CATI respondents from Kythera, Greece. Regarding local social connectedness, responses are varied: 43.3% neither agree nor disagree that they feel close to people in their area, while 23.3% disagree, 13.3% agree, 10% strongly agree, and 10% strongly agree. This distribution reflects a moderate but somewhat fragmented sense of community belonging.

Trust in other people within the area is generally high, with confidence ratings clustering at the upper end of the scale (7 to 10), indicating strong interpersonal trust among many respondents.

Institutional trust, however, is considerably lower and more dispersed. Confidence in the national parliament is low, with a significant portion of respondents rating their trust between 1 and 3, and only a few expressing higher confidence. Confidence in the police shows a bimodal pattern, with peaks at both low (around 2) and high (around 9 to 10) trust levels, suggesting polarised opinions on law enforcement.

Confidence in politicians is mixed but tends toward the moderate, with many ratings around 4 to 6 and some outliers at both ends of the scale. Confidence in political parties is generally low, with many respondents giving the lowest scores (1 to 2), indicating widespread scepticism toward political parties.

Social participation & engagement - EL - Kythera

Region 2. Peiraias, Nisoi CATI Survey

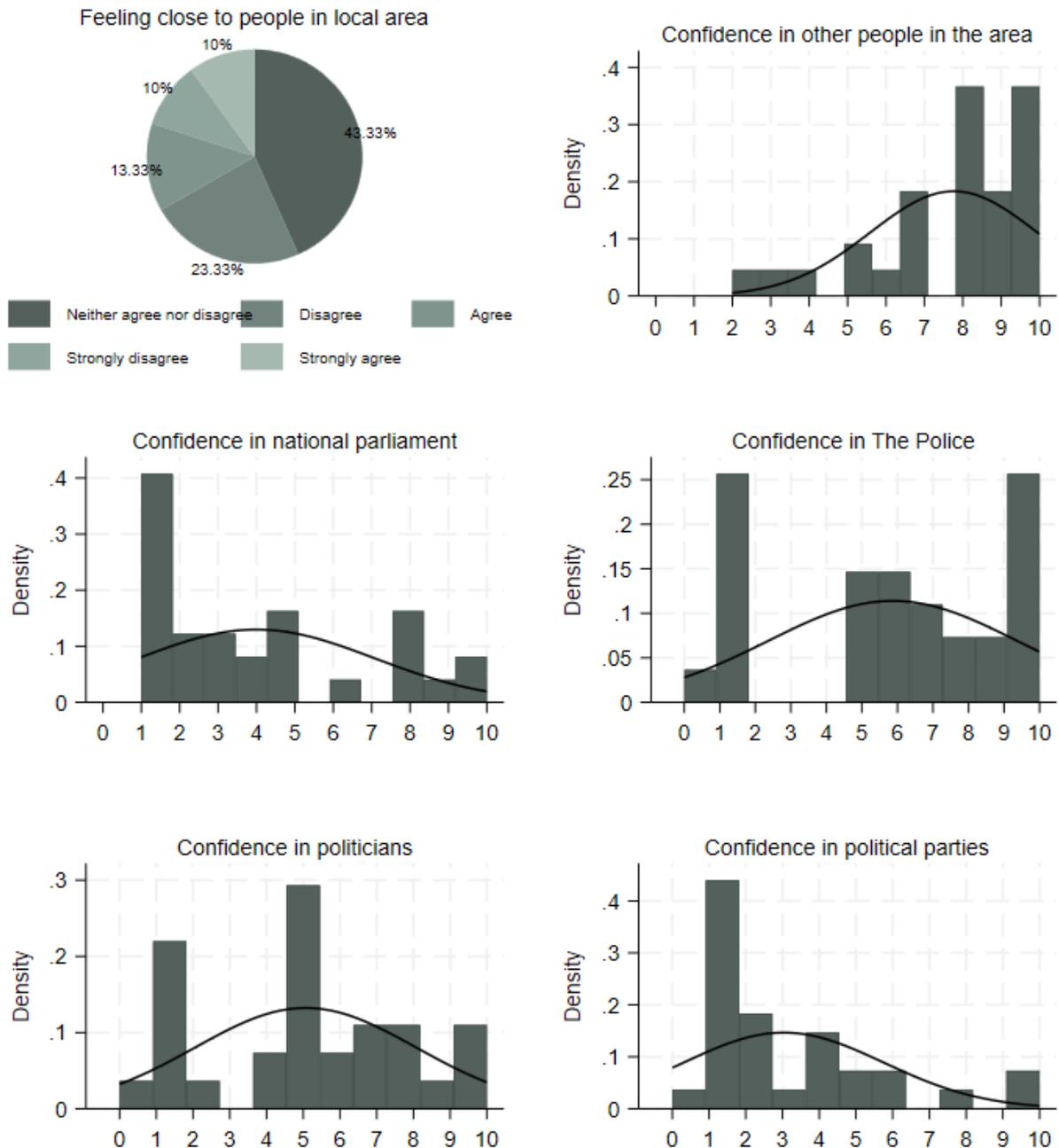


Figure 8.8.3.5 Peiraias, Nisoi (EL). Social Participation & Engagement

Figure 8.8.3.6 depicts the patterns of digital access and internet usage among CATI respondents in Kythera, Greece. Use of the internet for online services is moderate, with 26.7% of respondents using

such services once a month, 23.3% every day, and an equal never using them, highlighting some digital exclusion.

Digital access - EL - Kythera

Region 2. Peiraias, Nisoi
CATI Survey

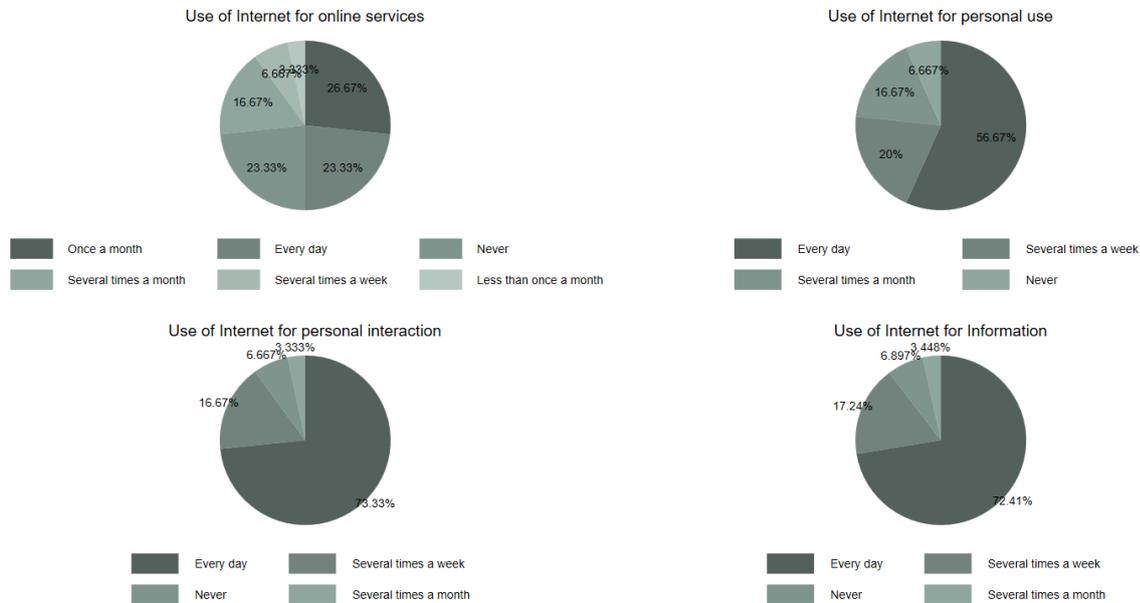


Figure 8.8.3.6 Peiraias, Nisoi (EL). Digital Access

Personal internet use is higher, with 56.7% accessing the internet every day, 20% several times a week, and 16.7% several times a month. A small minority (6.7%) never use the internet for personal purposes, indicating substantial but not universal digital engagement.

Regarding internet use for personal interaction, a majority (73.3%) use it every day, while 16.7% do so several times a week, and only 6.7% never engage in personal interaction online. Use of the internet for information shows similar engagement levels, with 72.4% accessing information every day, 17.2% several times a week, and a minority never using it.

Figure 8.8.3.7 provides insights into the economic vulnerabilities and social exclusion risks faced by CATI respondents in Kythera, Greece. Just over half of households (53.3%) report being unable to afford an unexpected but required expense, highlighting financial fragility. Similarly, 53.3% indicate their household cannot afford a week-long annual holiday, suggesting limitations on discretionary spending.

Food security appears relatively strong, with 76.7% able to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day, while 23.3% report difficulties in this area. Housing warmth is largely maintained, as 89.7% affirm they can keep their dwellings comfortably warm during winter, leaving a minority (10.3%) facing heating challenges.

Perceptions of poverty are relatively low, with 13.3% feeling that they currently live in poverty based on their present living conditions, while the majority (86.7%) do not share this perception. Regarding employment security, 52.4% consider it very likely they would find a job with a similar salary if they

lost their current one, though 33.3% view this as very unlikely. Smaller proportions are neutral (9.5%) or rather likely (4.8%).

Risk of poverty & social exclusion - EL - Kythera

Region 2. Peiraias, Nisoi CATI Survey

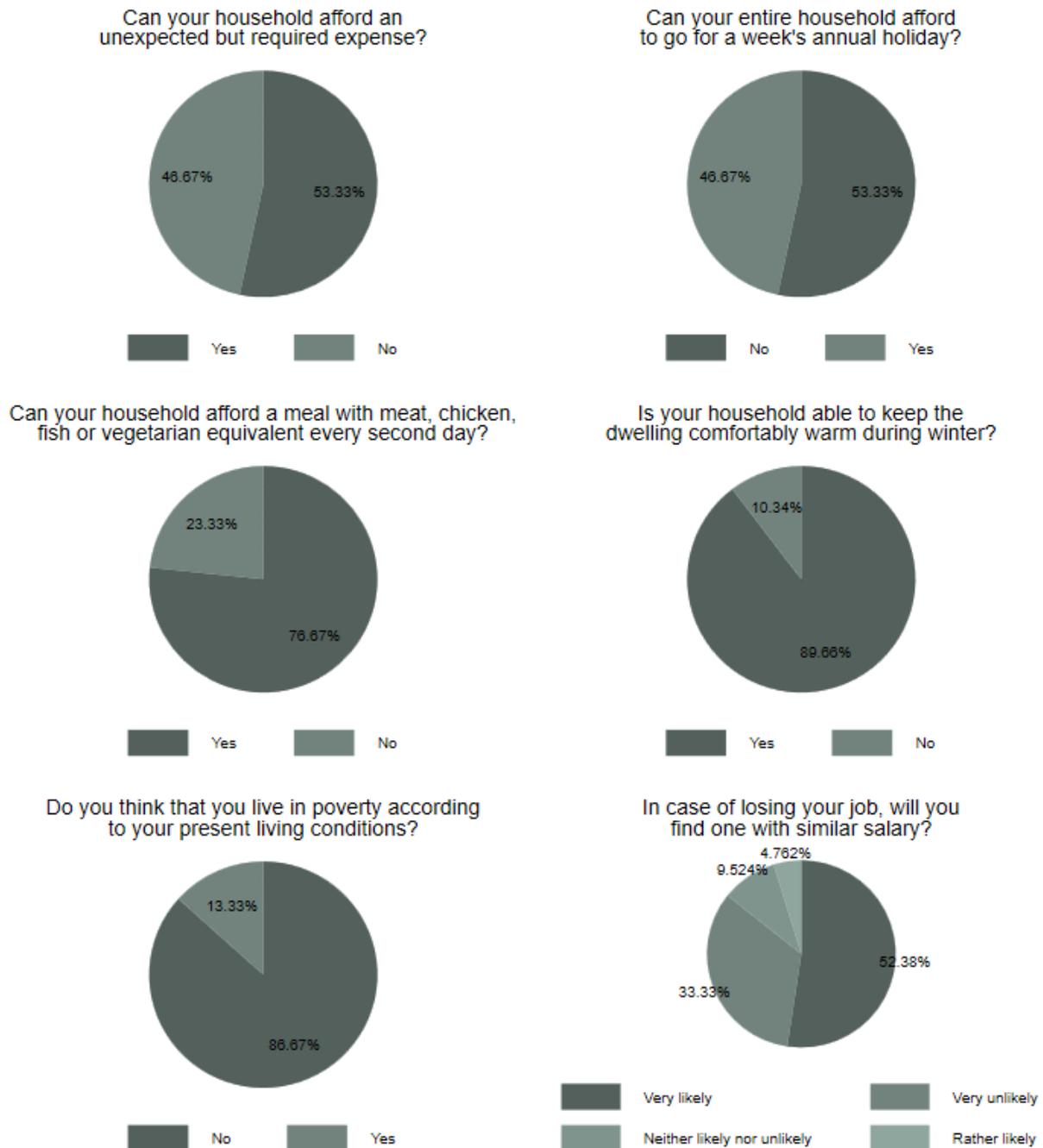


Figure 8.8.3.7 Peiraias, Nisoi (EL). Risk of Poverty & Social Exclusion

The case of Peiraias, Nisoi highlights the distinct challenges of insular rurality, where demographic decline, economic fragility, and limited connectivity intersect. While the community benefits from strong social bonds and local initiative, service fragmentation and environmental vulnerability remain persistent. Enhanced digital infrastructure and sustainable local development are critical to reversing current trends and promoting resilience.

8.8.4 Case Study: Greece – Ioannina (EL543).

The demographic profile of the CATI survey respondents from Ioannina (20 respondents), Greece, can be observed at Figure 8.8.4.1. It reveals a mature population with a median age around 50 to 55 years, slightly higher for men than women, and an age distribution concentrated between 45 and 60 years. Women represent 70% of the sample, reflecting a strong gender imbalance similar to other rural European contexts. The majority of respondents (65%) are married or living with a domestic partner, while 25% are single (never married), and smaller proportions are divorced (5%) or cohabiting (5%).

Demographic Characteristics - EL - Konitsa

Region 3. Ioannina CATI Survey

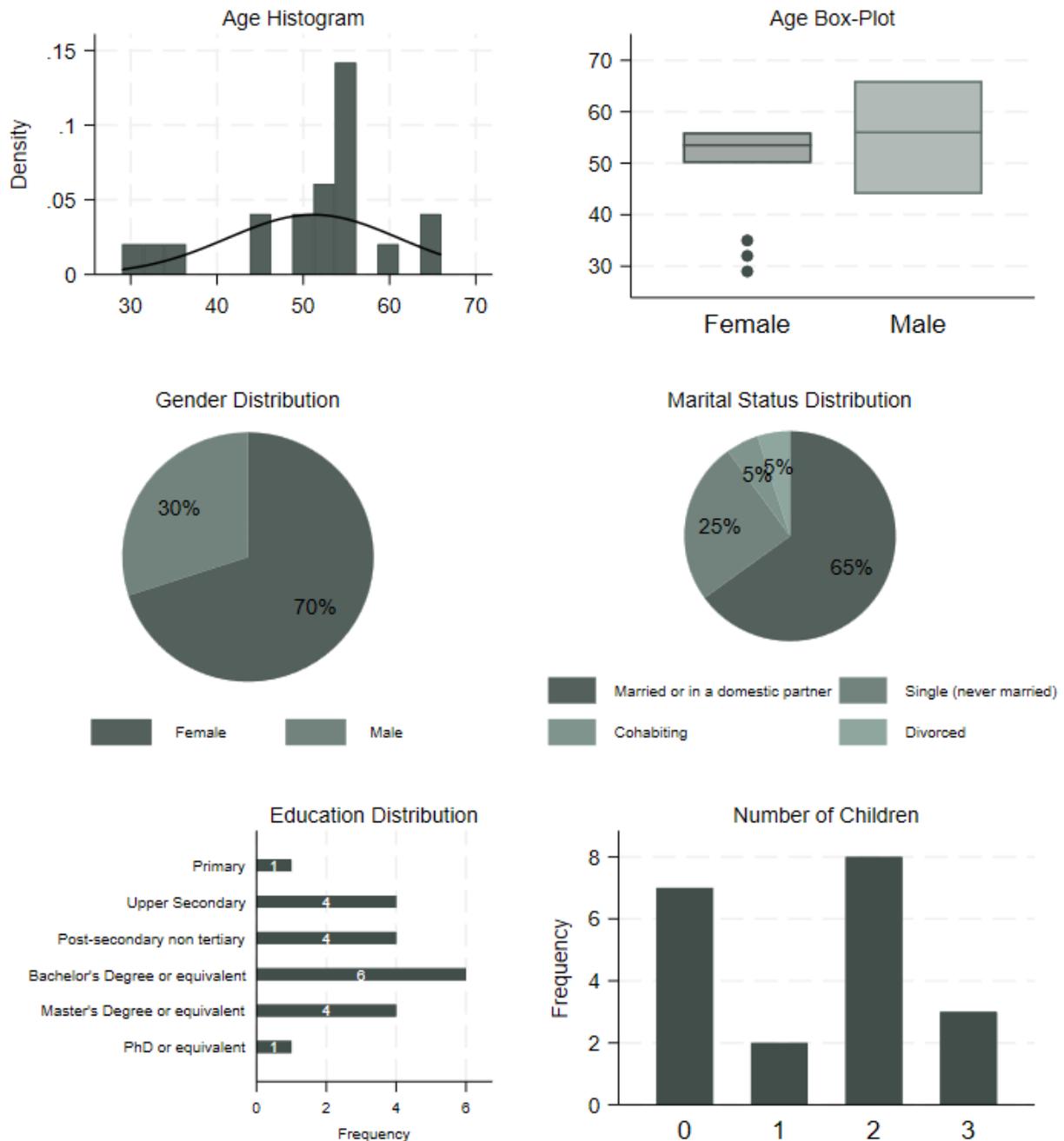


Figure 8.8.4.1 Ioannina (EL). Demographic Characteristics

Educational attainment is relatively varied: the largest group holds bachelor's degrees or equivalent qualifications (6 respondents), followed by a notable number with master's degrees (4) and equal

shares with upper secondary and post-secondary non-tertiary education (4 each). A minority have primary education (1) or doctoral-level qualifications (1), indicating a generally well-educated population compared to other rural areas.

Family sizes tend to be small to moderate, with two children being the most common household size (8 respondents), followed by zero children (7 respondents), one child (2 respondents), and three children (3 respondents). This suggests a mix of family structures, with a tendency towards smaller nuclear families or childless households.

Figure 8.8.4.2 outlines the labour market participation and occupational environment of CATI respondents from Konitsa, Greece. A large majority of participants (75%) report being employed, with smaller shares retired (10%), unemployed (10%), or classified as other (5%). The economic sectors represented are varied, with the most common being “other service activities” (5 respondents), followed by information and communication (4), and administrative and support services (4). Smaller numbers are employed in accommodation and food service activities (2), professional, scientific and technical sectors (1), public administration and defence (1), and arts, entertainment, and recreation (1), highlighting a diverse but service-oriented local economy.

Occupational roles are dominated by clerical support workers (9 respondents), followed by professionals (3), elementary occupations (2), with managers and technicians each represented by a single respondent. This indicates a workforce largely engaged in administrative and support functions, with limited presence in managerial or technical positions.

Working hours are concentrated primarily between 40 and 50 hours per week, consistent with full-time employment patterns, although a small number of respondents report zero working hours, possibly reflecting retirees or unemployed individuals. Income levels are relatively low and concentrated below €1,000 per month for most respondents, with a few outliers reaching up to €3,000, indicating modest financial resources in the sample.

Regarding residential location, 60% live in rural areas or villages, 35% reside in small or medium-sized towns, and only 5% inhabit larger towns or cities, confirming the rural and semi-rural focus of the survey (see Figure 8.8.4.2).

Figure 8.8.4.3 highlights key aspects of living conditions and accessibility experienced by CATI respondents in Konitsa, Greece. A strong majority of households (73.7%) fully own their homes or apartments, while 21.1% are still paying a mortgage, and a small minority benefit from reduced-price social housing. Vehicle ownership is nearly universal, with 94.7% of respondents possessing a car or motorised vehicle, underscoring personal mobility as a critical asset in this rural context.

Access to local and municipal services is predominantly challenging: 65% find it “very difficult”, with an additional 30% rating it as “rather difficult”, and only 5% reporting “very easy” access. Public transport accessibility is also mixed, with responses fairly evenly distributed across “very difficult” (29.4%), “rather difficult” (29.4%), “very easy” (23.5%), and “rather easy” (17.6%), indicating persistent infrastructural barriers.

Cultural facility access shows some variation; 44.4% rate it as “very easy”, and 33.3% find it “rather easy”, while smaller shares report “very difficult” or “rather difficult” access. Grocery shopping is a

considerable challenge, with 85% describing access to supermarkets or grocery stores as “very difficult” and 15% as “rather difficult”.

Labour Market and Environment - EL - Konitsa

Region 3. Ioannina CATI Survey

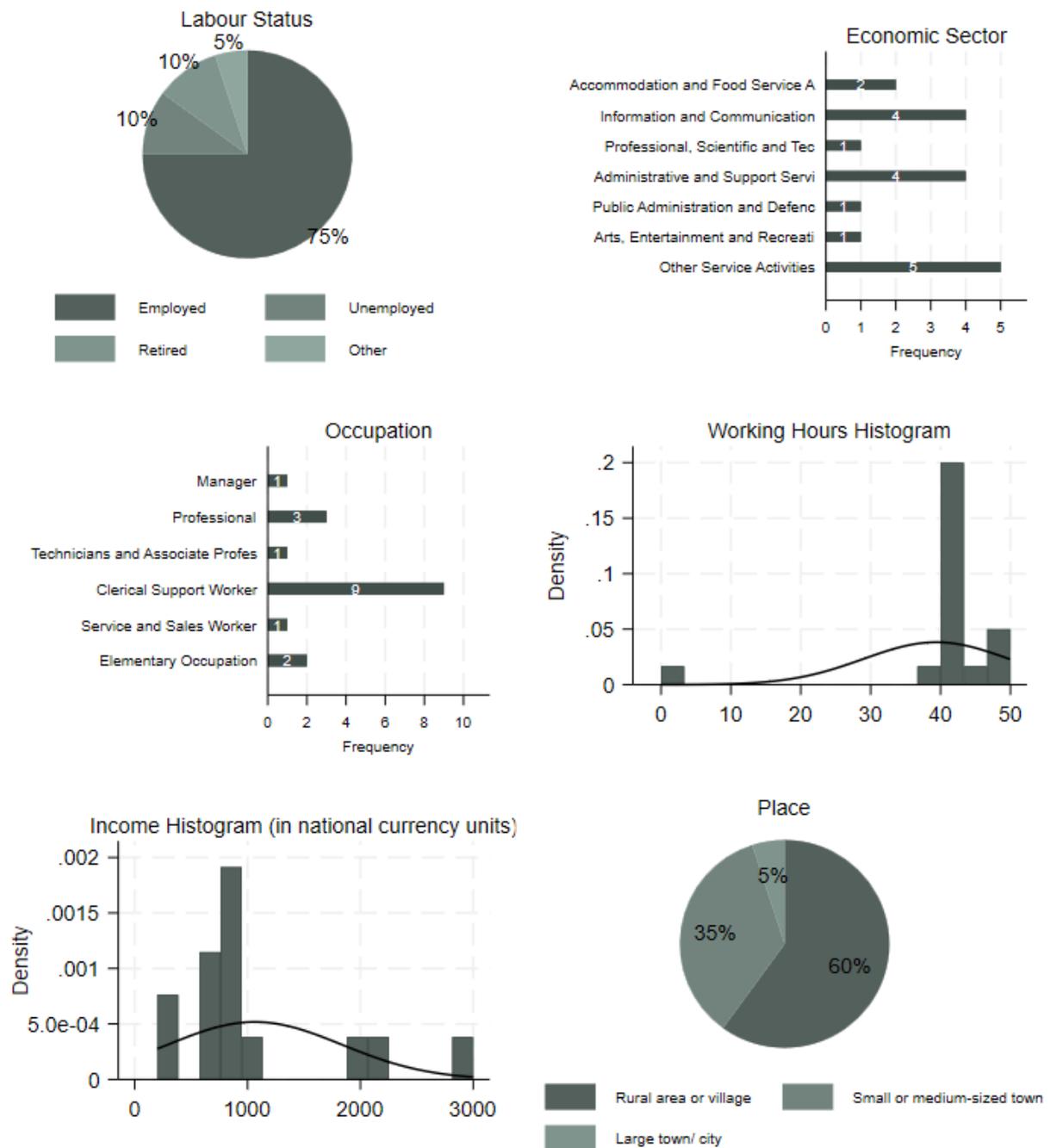


Figure 8.8.4.2 Ioannina (EL). Labour Market and Environment

Access to green spaces or recreational areas is generally difficult, with 84.2% indicating “very difficult” access, 10.5% “rather difficult”, and only a small minority (5.3%) reporting “rather easy” availability.

Living Conditions & Accessibility - EL - Konitsa

Region 3. Ioannina CATI Survey

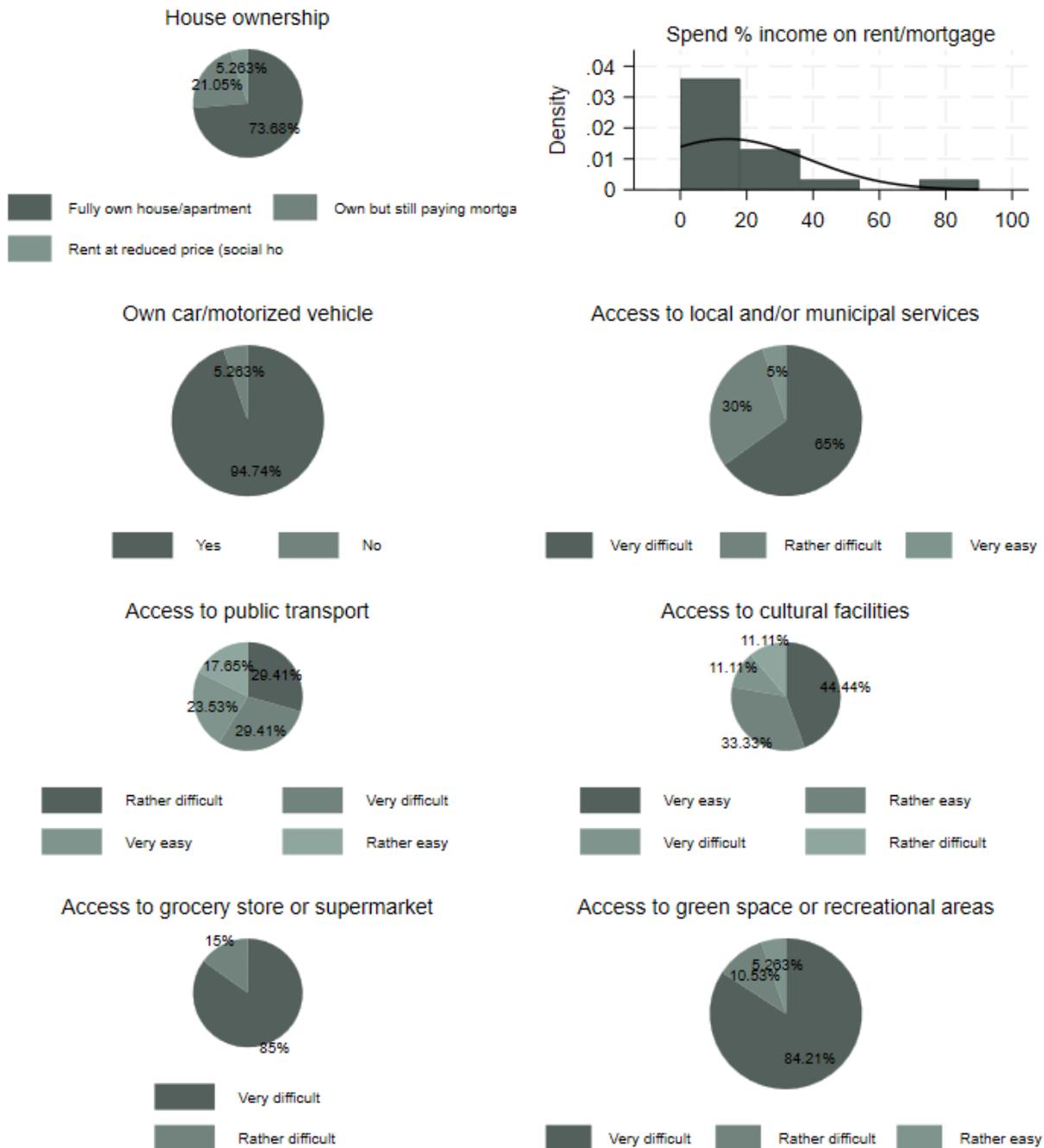


Figure 8.8.4.3 Ioannina (EL). Living Conditions & Accessibility

Regarding housing costs, respondents typically spend a relatively low percentage of their income on rent or mortgage payments, with a density peak below 20%, though some outliers report higher burdens.

Figure 8.8.4.4 presents self-assessed physical and mental health alongside limitations in daily activities due to illness among CATI respondents in Konitsa, Greece. Physical health ratings are varied, with 30% describing their health as “excellent”, 35% as “fair”, 15% as “very good”, 15% as “good”, and 5% reporting “poor” health. This distribution indicates a broad spectrum of health statuses, with a notable proportion facing moderate challenges.

Mental health assessments reveal a more optimistic outlook: 31.6% rate their mental health as “fair”, 26.3% as “excellent”, 21.1% as “very good”, and 21.1% as “good”, reflecting a generally positive mental well-being among respondents.

Regarding illness-related activity limitations, responses are relatively evenly spread. About 32% of respondents report being unable to perform daily activities for 1–3 days per month, 26.3% indicate being limited “all of the time”, 21.1% experience limitations for 4–7 days, and 21.1% report more extended periods (over one week but less than a month).

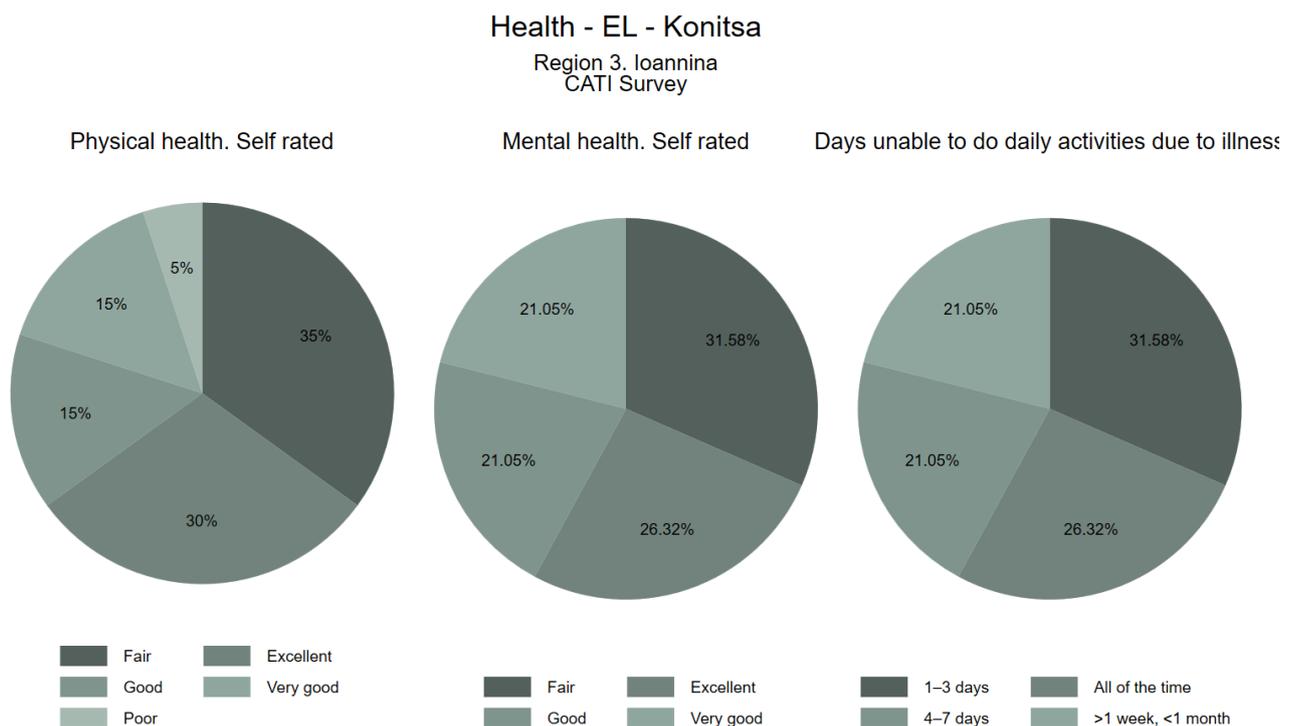


Figure 8.8.4.4 Ioannina (EL). Health Self-perception

Figure 8.8.4.5 presents a nuanced view of social participation and institutional trust among CATI respondents in Konitsa, Greece. When asked about feeling close to people in their local area, responses indicate a community with a moderate sense of social connectedness: 40% neither agree nor disagree, suggesting ambivalence, while 30% actively disagree, pointing to a notable segment experiencing social distance or isolation. On the other hand, 20% agree and 10% strongly agree that they feel close to others, reflecting pockets of stronger community ties.

Social participation & engagement - EL - Konitsa

Region 3. Ioannina CATI Survey

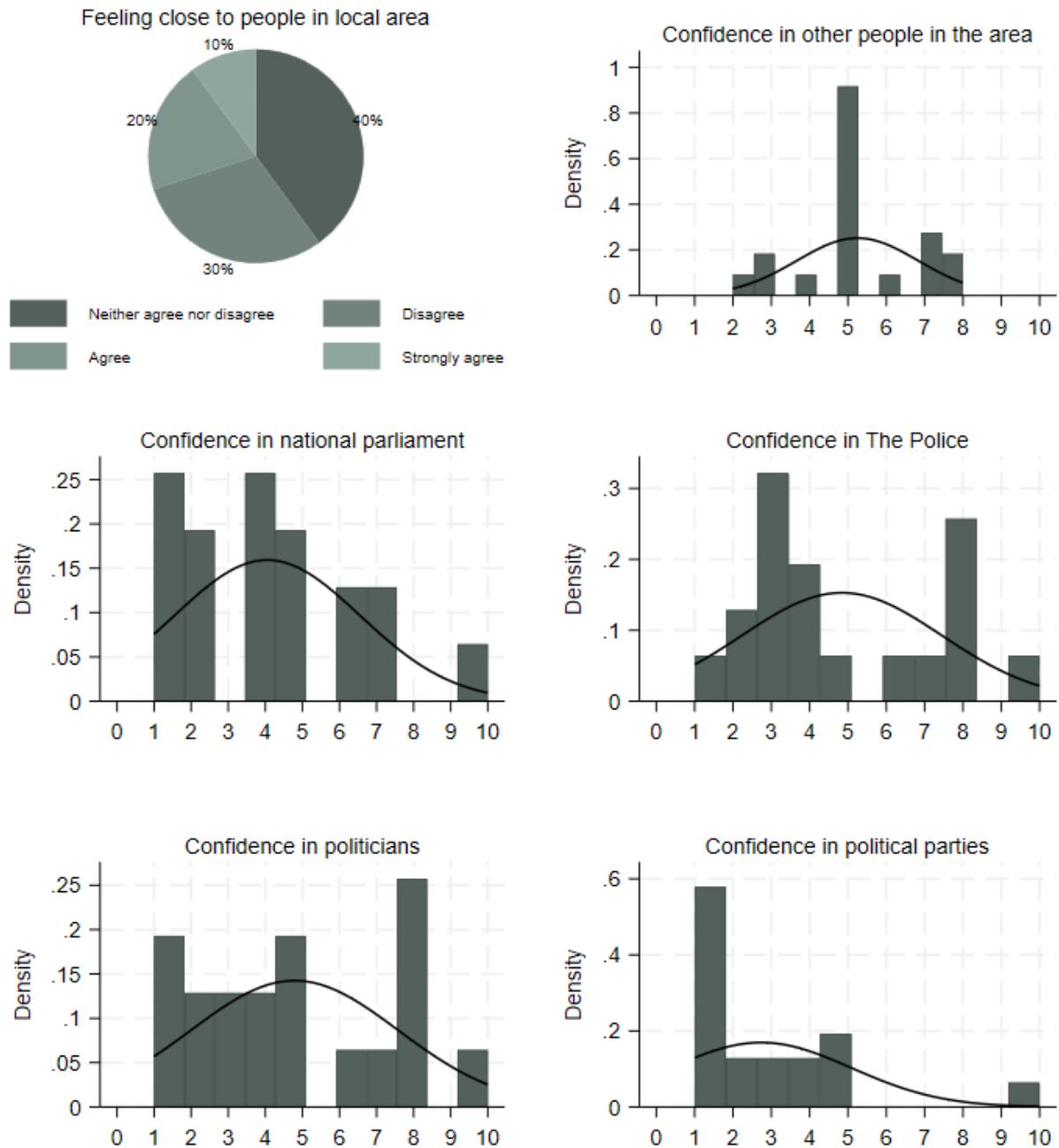


Figure 8.8.4.5 Ioannina (EL). Social Participation & Engagement

Trust in other people within the area is generally moderate, with confidence ratings mostly concentrated around the middle of the scale (4 to 6), indicating cautious interpersonal trust that may be shaped by local social dynamics.

Institutional confidence, however, reveals more pronounced scepticism and ambivalence. Confidence in the national parliament is polarised, with many respondents placing their trust at very low levels (scores between 2 and 3) while others indicate moderate trust (around 5 to 6). This bimodal distribution suggests a fragmented perception of national governance effectiveness.

Similar patterns emerge for confidence in politicians, where respondents' ratings cluster in both low and moderate trust categories, reflecting mixed evaluations of political leadership. Confidence in the police shows a broader distribution, with some respondents expressing moderate to high trust (peaks near 8), but others remaining doubtful or distrustful.

Notably, confidence in political parties is particularly weak, with a significant proportion of respondents rating their trust at the very bottom of the scale (1 to 2). This suggests a widespread disenchantment with party politics, which may undermine political engagement and participation at the local level.

The patterns of digital access and internet usage among CATI respondents in Konitsa, Greece, can be observed in Figure 8.8.4.6 Internet use for online services is generally limited, with 43.3% of respondents reporting never using such services. However, 23.3% use online services every day and an additional 23.3% several times a week, showing that a portion of the population is digitally engaged. Smaller percentages use online services less frequently.

Digital access - EL - Konitsa
Region 3. Ioannina
CATI Survey

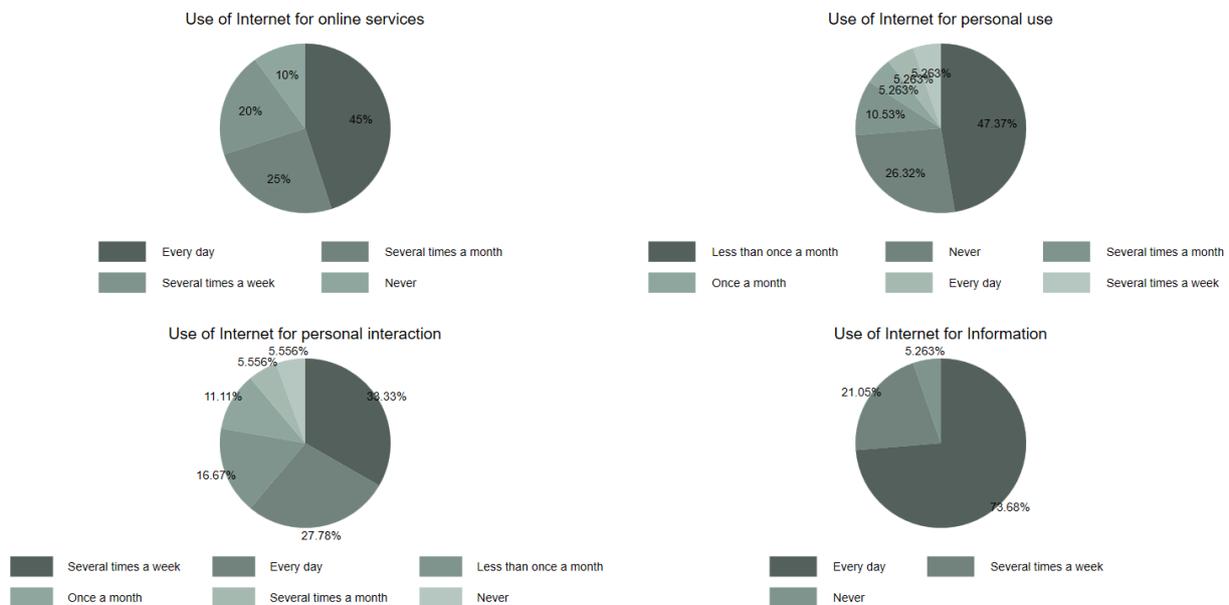


Figure 8.8.4.6 Ioannina (EL). Digital Access

Almost half of respondents (47.4%) declare accessing the internet for personal use less than once a month and 26,3% they never do it, highlighting a noticeable digital divide.

For personal interaction online, 43.3% never use the internet for this purpose, while 23.3% engage several times a week and 10% several times a month. Internet use for information shows a more balanced pattern, with 30% using it every day, 26.7% several times a week, and 33.3% never using it.

Figure 8.8.4.7 sheds light on the economic vulnerabilities and social exclusion risks faced by CATI respondents in Konitsa, Greece. A majority of households (65%) report they cannot afford an unexpected but necessary expense, indicating significant financial fragility. Similarly, 60% state their household cannot afford a week-long annual holiday, suggesting constrained discretionary spending.

Food security appears comparatively strong, with 89.5% able to afford a meal containing meat, chicken, fish, or a vegetarian equivalent every second day, though a small minority (10.5%) face difficulties in this area. Housing conditions are somewhat more challenging: only 75% of respondents report being able to keep their dwellings comfortably warm during winter, leaving a notable 25% who struggle with heating.

Perceptions of poverty are significant: 25% of respondents feel they currently live in poverty based on their living conditions, highlighting subjective experiences of deprivation. Regarding employment security, views vary considerably; 44.4% believe it is neither likely nor unlikely they could find a job with similar pay if they lose their current one, while 22.2% consider it rather unlikely, and 16.7% very likely. Smaller shares report being very unlikely (11.1%) or rather likely (5.6%) to secure comparable employment.

Risk of poverty & social exclusion - EL - Konitsa

Region 3. Ioannina CATI Survey

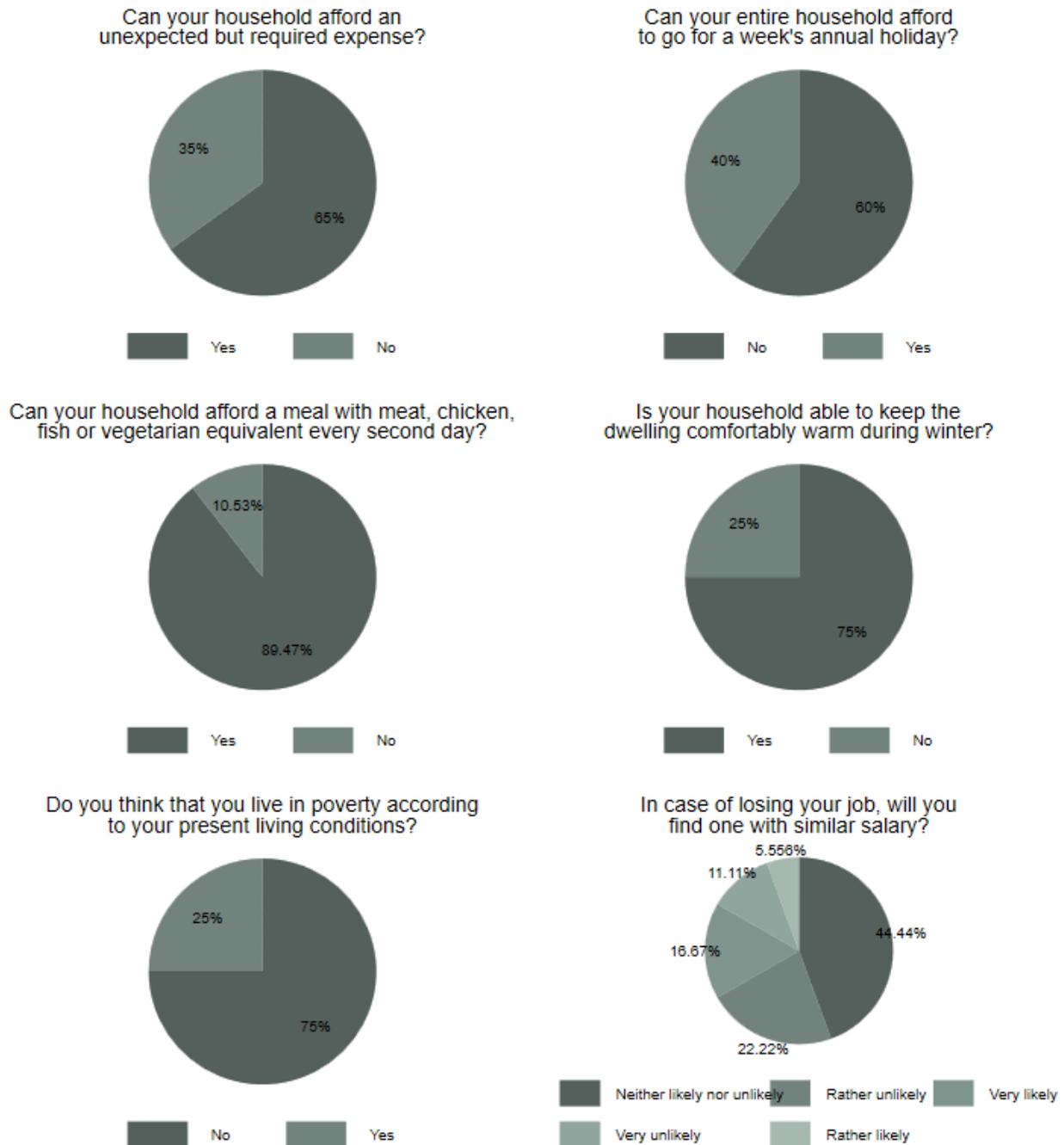


Figure 8.8.4.7 Ioannina (EL). Risk of Poverty & Social Exclusion

Ioannina's profile illustrates the tensions between relatively high educational levels and a structurally weak rural economy. Despite strong civic engagement and latent tourism potential, high

unemployment, limited service access, and digital exclusion continue to hinder development. The combination of economic vulnerability and political distrust underscores the urgency of infrastructure investments and inclusive governance strategies.

8.8.5 Case Study: Ireland – Midland (IE063).

The CATI survey conducted in Midland Ireland offers a comprehensive portrait of rural and semi-rural community life in Ireland (32 respondents). The sample is predominantly composed of highly educated, professionally active individuals—largely women—who exhibit strong civic commitment and social engagement. Despite these strengths, respondents face ongoing challenges related to infrastructural limitations, geographic isolation, and institutional responsiveness. This case study examines the demographic, economic, and social dimensions shaping the lived experiences of rural Irish residents, providing insights into their opportunities, vulnerabilities, and resilience within the broader regional context.

Figure 8.8.5.1 provides a comprehensive overview of the demographic profile of CATI survey respondents from rural and semi-rural Ireland. The age distribution is concentrated predominantly in the middle-aged bracket, with a clear peak between 30 and 50 years, while a smaller group of respondents extend into their 60s, highlighting a mature but active population. The median age differs by gender, with women averaging around 40 years and men showing a wider age range extending into the mid-60s, suggesting some generational diversity within the sample.

Demographic Characteristics - IE

Region 4. Midland CATI Survey

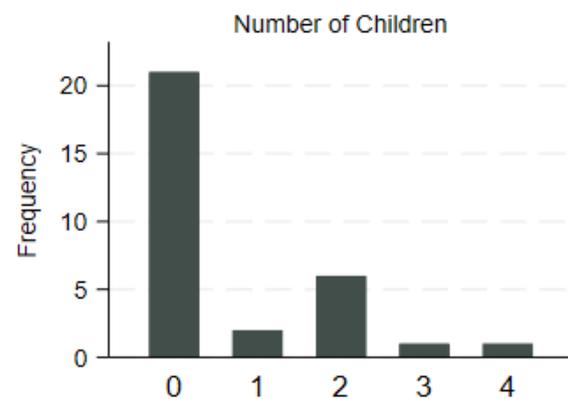
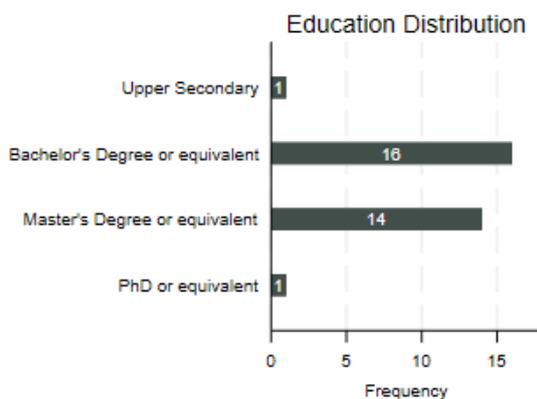
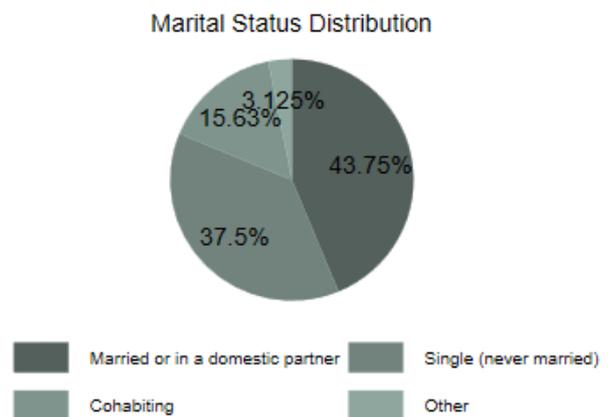
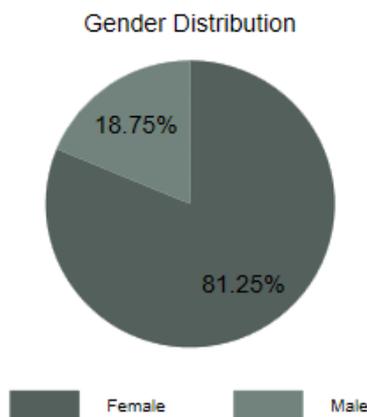
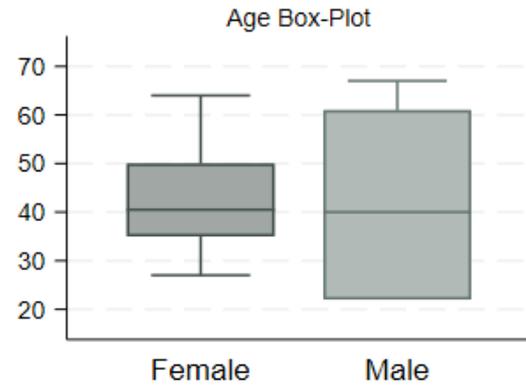
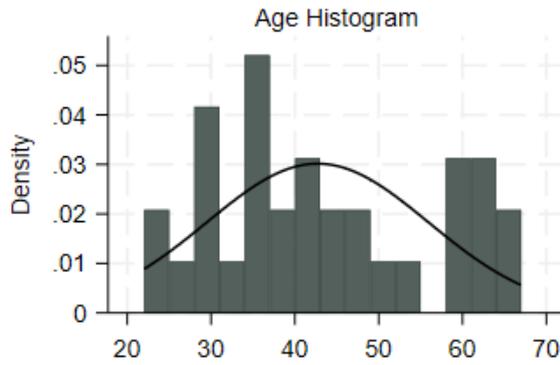


Figure 8.8.5.1 Midland (IE). Demographic Characteristics

The gender imbalance is pronounced: women make up 81.25% of the respondents, reflecting a strong female presence in rural civic participation or survey availability, while men constitute only 18.75%.

Marital status is varied but shows that the largest segment (43.75%) is married or living with a domestic partner, followed closely by singles who have never married (37.5%). Cohabiting respondents represent 15.63%, with a small minority (3.13%) reporting other marital statuses, indicating a range of household and family configurations.

Educational attainment among respondents is notably high, with the majority holding advanced degrees: 16 respondents possess bachelor's degrees and 14 hold master's degrees or equivalent qualifications. Only one respondent reports upper secondary education as their highest level, and another holds a doctoral degree, underscoring the overall well-educated nature of the sample relative to rural averages.

Family size tends to be small, with the modal number of children being zero (21 respondents). Smaller groups report having one child (2 respondents), two children (6), and very few have three or four children (1 respondent each). This suggests a considerable share of respondents either without children or with small families, which may influence social support networks and community dynamics.

Figure 8.8.5.2 illustrates the labour market status and occupational environment of the Irish CATI survey respondents. A substantial majority (75%) of participants report being employed, while smaller proportions identify as retired (12.5%), students (6.25%), unemployed (3.13%), or other (3.13%). The employment sectors represented highlight a service-oriented economy, with the largest numbers working in "other service activities" (9 respondents) and human health and social work (7). Education (3 respondents), administrative and support services (2), public administration and defence (1), financial and insurance activities (1), and transportation and storage (1) are less frequently cited sectors.

Occupational roles are predominantly managerial and professional, each with 11 respondents, followed by a small number of clerical support workers (2), indicating a highly skilled workforce. Working hours cluster around the typical full-time schedule of 35 to 40 hours per week, with some respondents reporting longer hours up to 50.

Income distribution appears highly skewed, with the majority earning modest incomes but with some outliers reporting significantly higher earnings, suggesting economic diversity within the sample. Residential settings are evenly distributed across rural areas or villages (34.4%), large towns or cities (34.4%), and small or medium-sized towns (31.3%), reflecting a geographically diverse respondent base.

Figure 8.8.5.3 illustrates key aspects of living conditions and accessibility among CATI respondents in rural Ireland. Homeownership is relatively balanced, with 46.9% fully owning their homes or apartments, 21.9% owning but still paying a mortgage, and an additional 21.9% renting at market price. A smaller proportion benefits from reduced-price social housing (9.4%). Vehicle ownership is high, with 78.1% of respondents owning a car or motorised vehicle, highlighting its importance for mobility in rural settings.

Labour Market and Environment - IE

Region 4. Midland CATI Survey

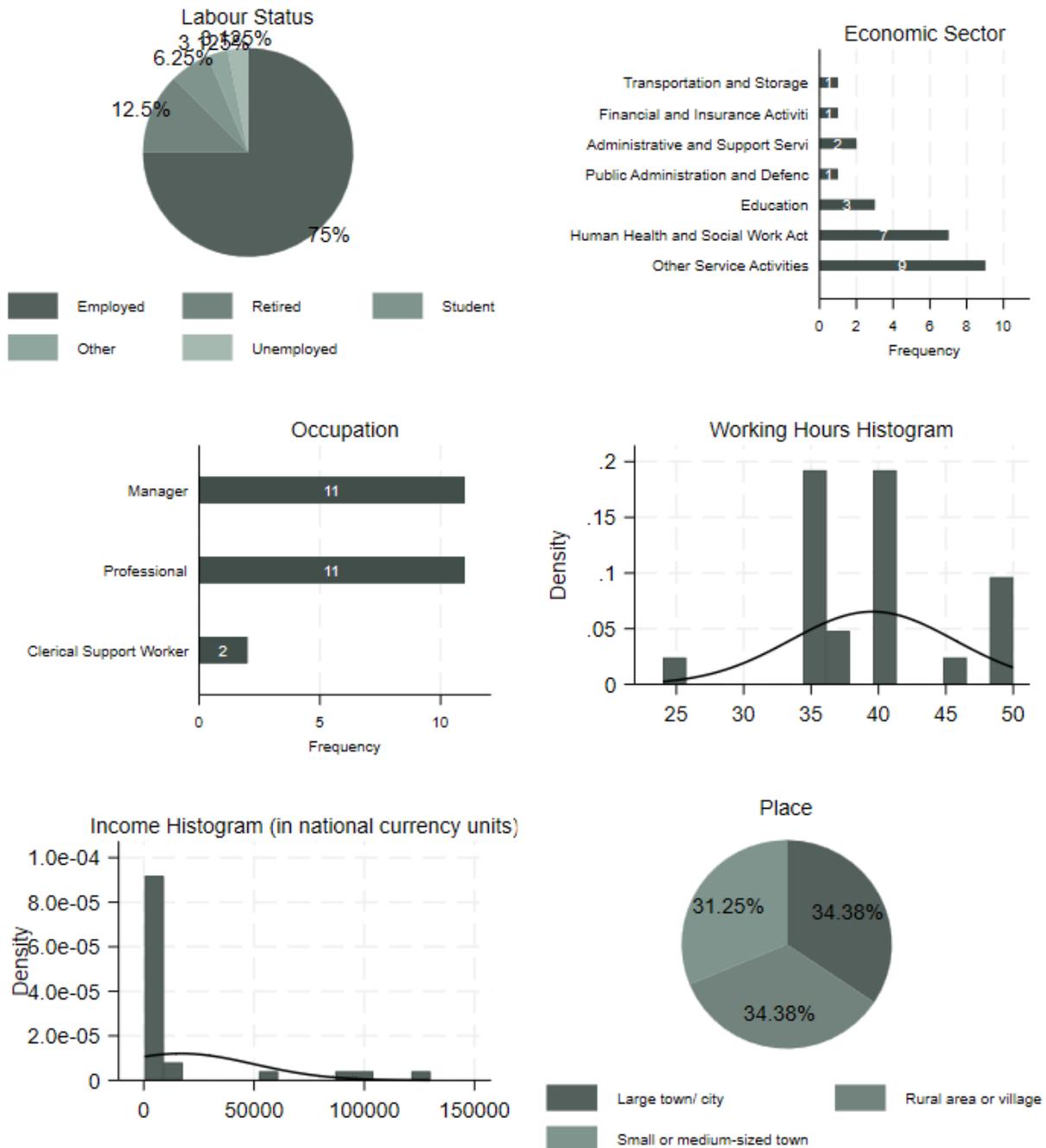


Figure 8.8.5.2 Midland (IE). Labour Market and Environment

Living Conditions & Accessibility - IE

Region 4. Midland CATI Survey

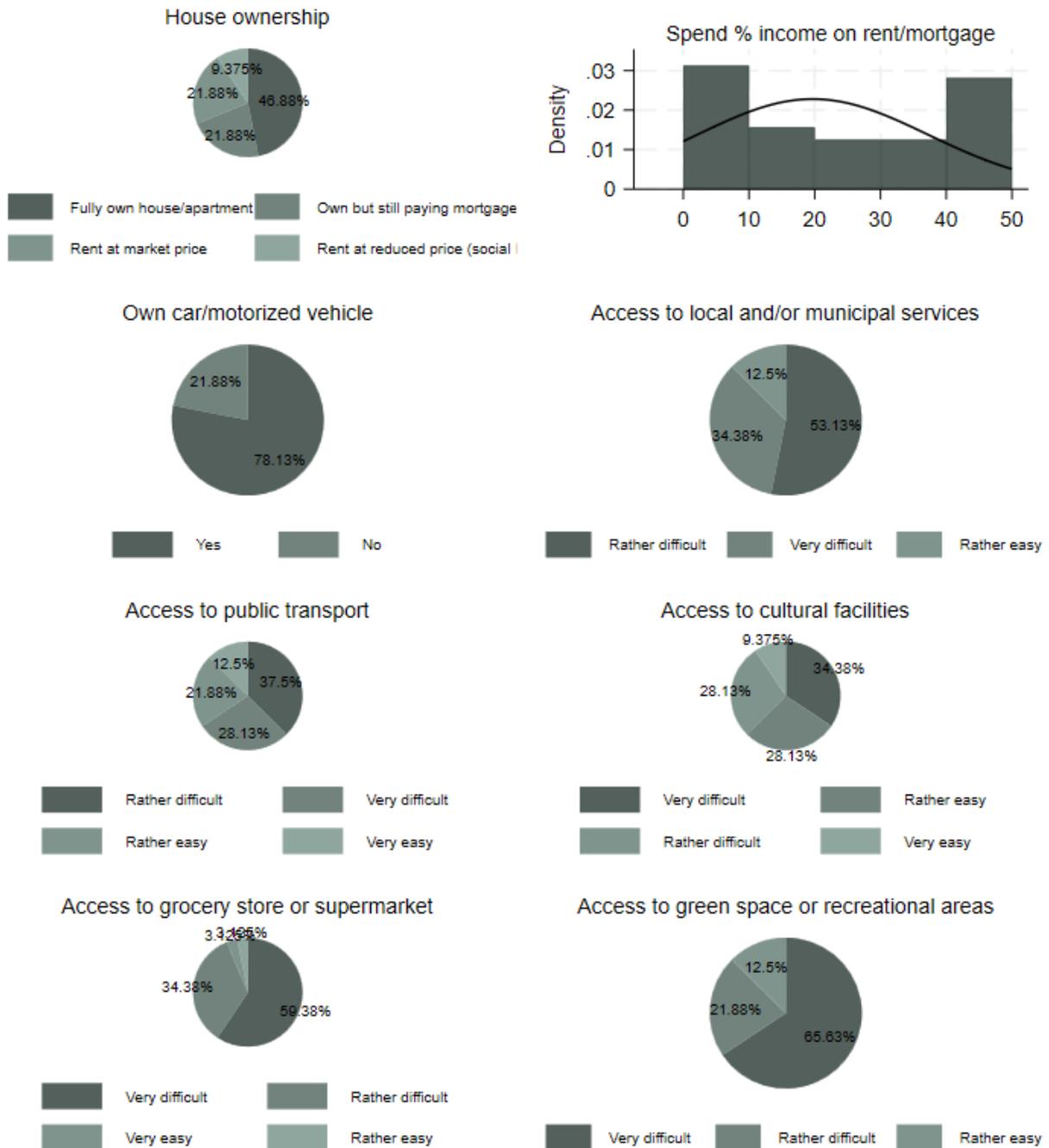


Figure 8.8.5.3 Midland (IE). Living Conditions & Accessibility

Access to essential services in the area is generally limited, with a majority of respondents reporting difficulties across multiple domains. Over half (53.1%) find access to local and municipal services

“rather difficult” and a further 34.4% “very difficult”, leaving only a small minority (12.5%) with “rather easy” access. Public transport access shows a similarly mixed pattern, with 65.6% facing difficulties and just over a third reporting it as “rather” or “very easy”. Cultural facilities fare slightly better but remain unevenly accessible, with responses spanning from “very difficult” (34.4%) to “very easy” (9.4%). Grocery store access is a major concern, as 93.8% of respondents report it as “very” or “rather difficult”. Likewise, access to green spaces is limited, with nearly 88% experiencing difficulty. These barriers point to the infrastructural constraints common in rural settings. Meanwhile, housing costs, measured as a share of income spent on rent or mortgage, tend to cluster between 10% and 30%, suggesting moderate but not negligible financial pressure for most households.

Figure 8.8.5.4 illustrates the self-assessed physical and mental health as well as the frequency of illness-related activity limitations among CATI respondents from rural Ireland. Regarding physical health, 43.8% rate their condition as “very good”, with 28.1% reporting “good” health, and 18.8% indicating “excellent” status. Smaller proportions rate their health as “fair” (6.3%) or “poor” (3.1%), suggesting that overall physical well-being is favourable for the majority of respondents.

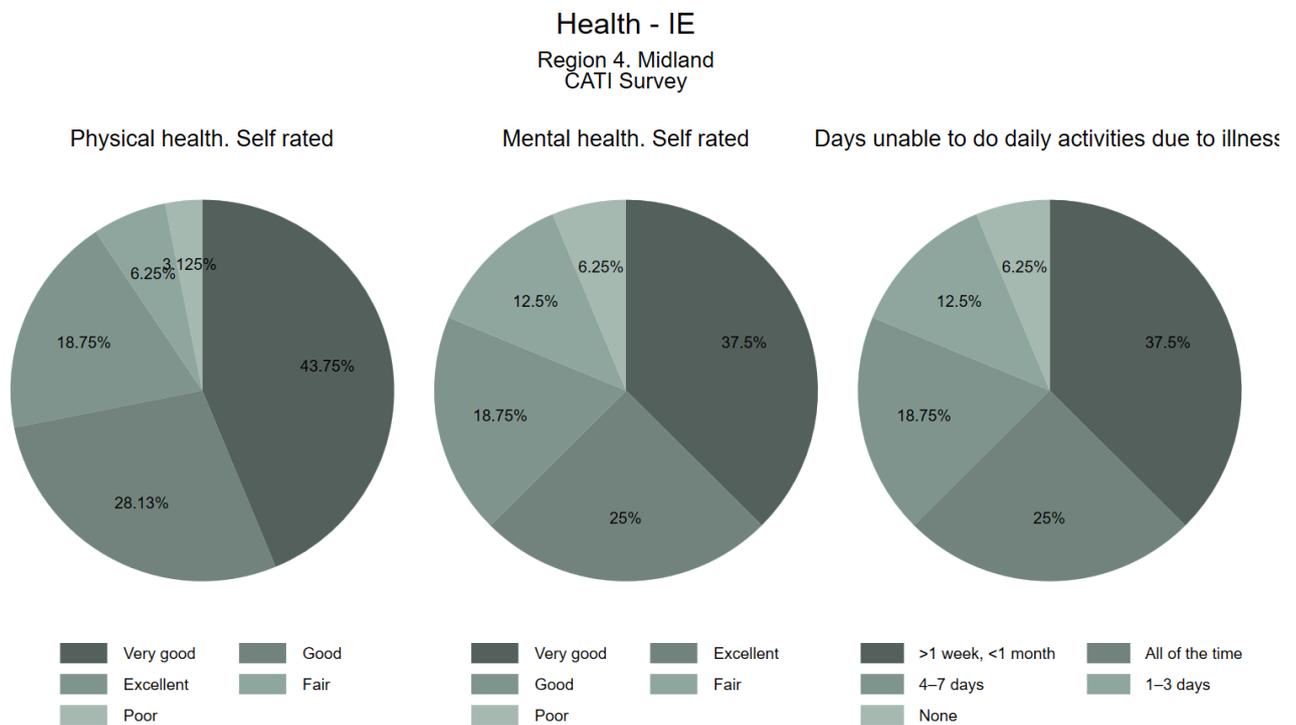


Figure 8.8.5.4 Midland (IE). Health Self-perception

Mental health assessments are similarly positive, with 37.5% rating their mental well-being as “very good”, 25% as “excellent”, and 18.8% as “good”. A smaller share (12.5%) report “fair” mental health, and 6.3% indicate “poor” status. This pattern points to generally robust psychological health across the sample. Regarding limitations on daily activities due to illness, 18.8% of respondents experience activity restrictions for 4–7 days per month, 25% report being limited “all of the time”, and 12.5% for 1–3 days. A smaller portion (6.3%) report no limitations.

Figure 8.8.5.5 offers a comprehensive view of social participation and institutional trust among CATI respondents from rural Ireland. When asked about their feelings of closeness to people in their local

area, the majority (62.5%) neither agree nor disagree, indicating a large segment of the population with ambivalent or neutral perceptions of local social connectedness. Meanwhile, 18.8% of respondents express agreement, 9.4% disagree, 6.3% strongly agree, and 3.1% strongly disagree, reflecting a community with mixed experiences of social cohesion and interpersonal bonds.

Social participation & engagement - IE

Region 4. Midland CATI Survey

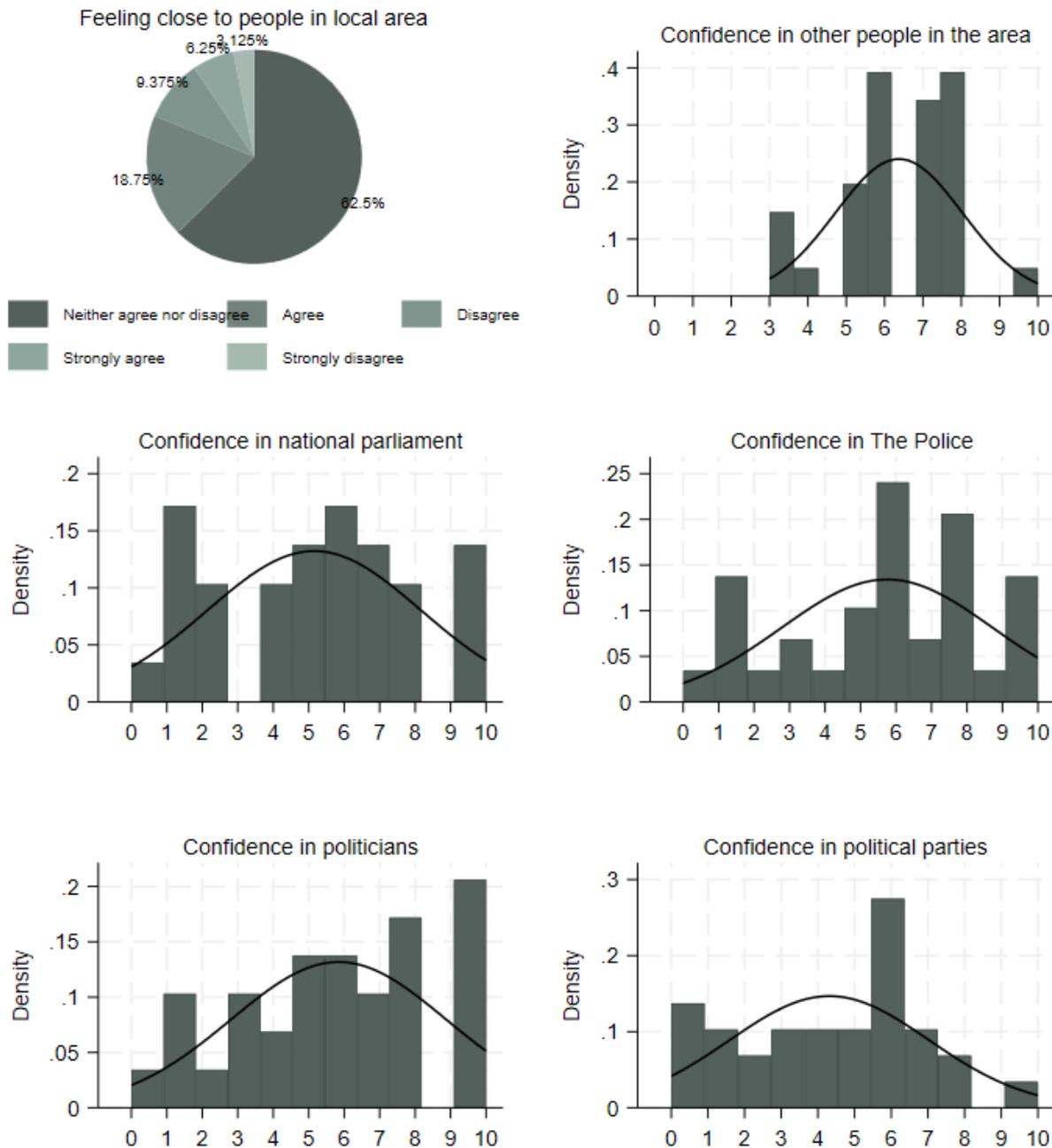


Figure 8.8.5.5 Midland (IE). Social Participation & Engagement

Interpersonal trust within the local area appears relatively strong. Confidence ratings predominantly cluster between 6 and 8 on a 10-point scale, suggesting that many residents feel a reasonable level of trust toward others in their community, which is essential for fostering informal support networks and social capital in rural settings.

Institutional trust presents a more complex picture with considerable variability. Confidence in the national parliament is broadly dispersed: while some respondents express very low trust levels (0–2), many place their confidence at moderate levels (around 5–6), and a smaller but significant group reports high trust (9–10). This distribution signals mixed perceptions of national political institutions, ranging from scepticism to cautious optimism.

Trust in the police follows a similar pattern of variation, with peaks around moderate trust levels (5–7) but also notable numbers expressing either very low or very high confidence. Such polarisation may reflect differing personal or community experiences with law enforcement.

Perceptions of politicians are generally more positive, with many respondents rating their confidence between 6 and 9, suggesting a relatively favourable view of individual political representatives compared to broader institutions. Confidence in political parties, however, is more variable and generally lower, with fewer respondents expressing high trust. This indicates a degree of scepticism toward party politics, which may affect political participation and engagement.

Figure 8.8.5.6 illustrates digital access and internet usage patterns among CATI respondents in rural Ireland. Use of the internet for online services is relatively high, with 68.8% of respondents reporting daily usage and 25% using online services several times a week, while a small minority (6.3%) use these services several times a month.

Personal internet use is somewhat more varied. While 18.8% of respondents report never using the internet for personal purposes, 15.6% use it once a month, 12.5% several times a week, 12.5% every day, and 31.3% less than once a month. This suggests a substantial proportion with limited personal internet engagement alongside a group of more frequent users.

Internet use for personal interaction is dominated by infrequent or non-users, with 71.9% reporting never using the internet for this purpose. Smaller shares use it several times a week (9.4%), several times a month (9.4%), less than once a month (6.3%), or once a month (3.1%).

Use of the internet for information is higher, with 65.6% of respondents reporting daily use, 21.9% several times a week, and smaller percentages engaging less frequently or not at all.

Figure 8.8.5.7 reveals key dimensions of economic vulnerability and social exclusion among CATI respondents in rural Ireland. A significant majority of households (84.4%) report being able to afford unexpected but required expenses, indicating a relatively stable financial situation for most, while 15.6% experience difficulties in this regard. Discretionary spending is similarly positive, with 96.9% of respondents affirming their ability to afford a week-long annual holiday, reflecting reasonable levels of economic security.

Food security is robust within the sample, as all respondents (100%) report being able to afford meals including meat, chicken, fish, or a vegetarian equivalent every second day. Housing warmth is also generally maintained, with 93.8% stating they can keep their dwelling comfortably warm during winter, leaving a small minority facing heating challenges.

Digital access - IE Region 4. Midland CATI Survey

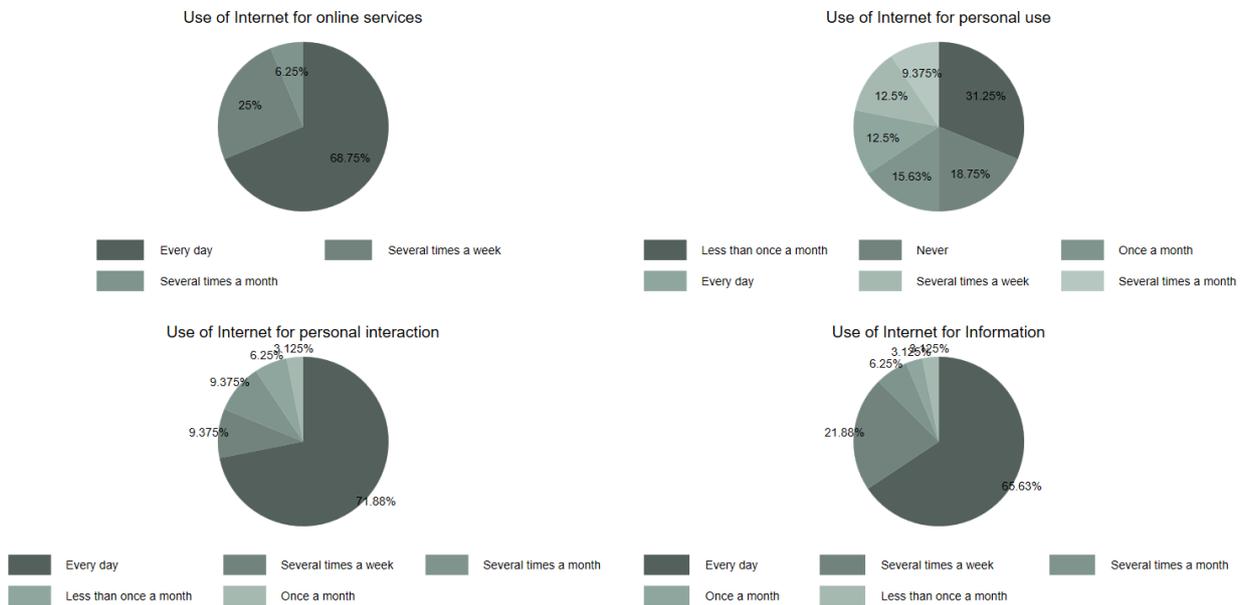


Figure 8.8.5.6 Midland (IE). Digital Access

Perceptions of poverty are very low: only 3.1% consider themselves to be living in poverty given their current living conditions. Regarding employment security, 41.7% feel it is neither likely nor unlikely that they would find a job with similar salary if they lost their current employment, while 29.2% think it is rather likely, and smaller shares express optimism (8.3% very likely) or pessimism (16.7% rather unlikely, 4.2% very unlikely).

Region of Midland stands out for its relatively strong human capital and civic infrastructure, yet transport limitations and uneven service provision continue to constrain mobility and inclusion. Despite strong digital engagement and generally good health outcomes, employment precarity and housing challenges affect long-term security. The region would benefit from more integrated spatial planning and targeted support for mobility and housing.

Risk of poverty & social exclusion - IE

Region 4. Midland CATI Survey

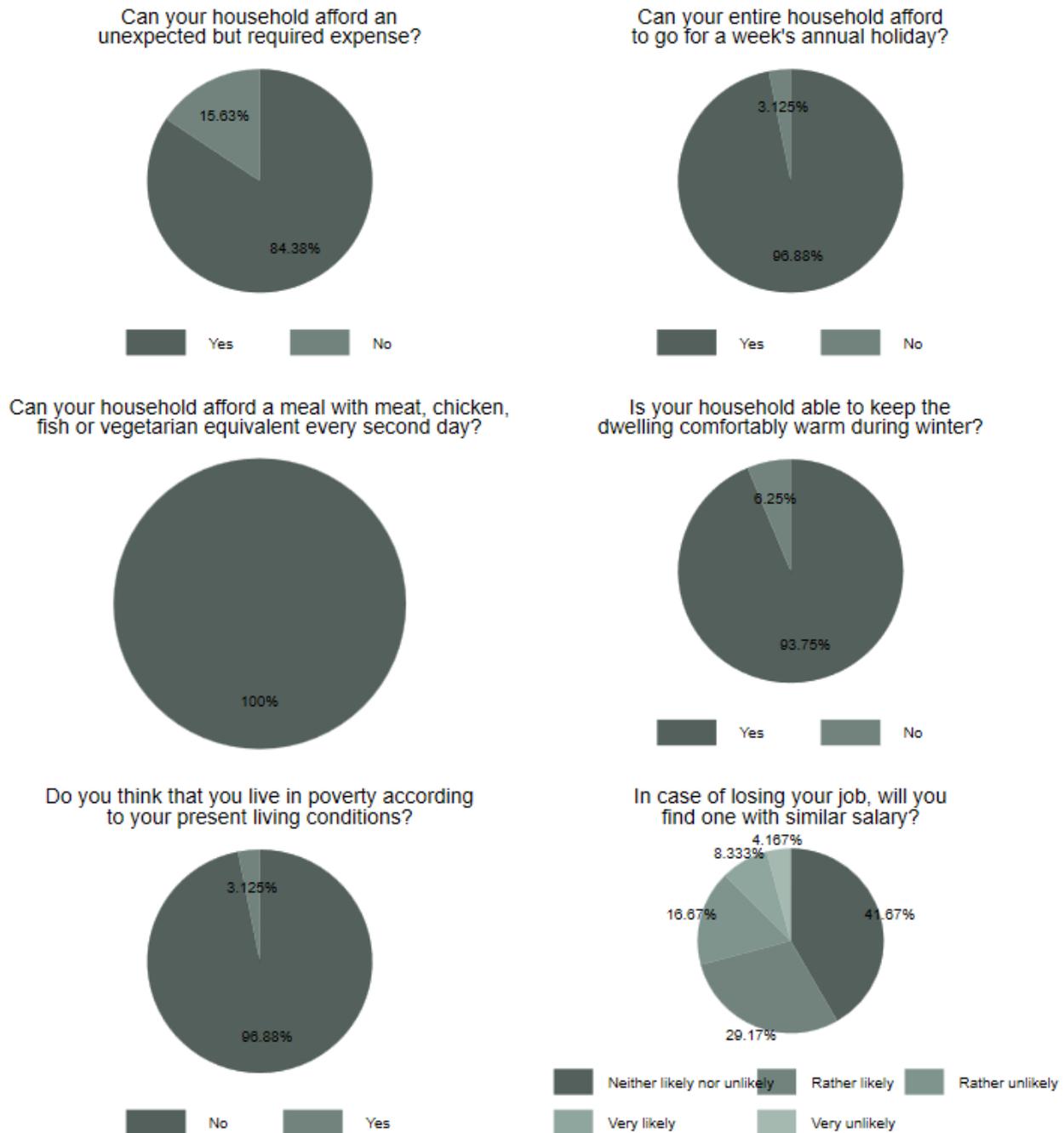


Figure 8.8.5.7 Midland (IE). Risk of Poverty & Social Exclusion

8.8.6 Case Study: Poland – Lubelski (PL814).

The CATI survey conducted in Lubelski (32 respondents) offers a detailed examination of the demographic, economic, and social conditions prevalent in rural and semi-rural communities. Characterised by a mature population with diverse educational backgrounds, Poland's rural residents face a mix of traditional and emerging challenges related to employment, access to services, health, social participation, and digital inclusion. This case study explores these multifaceted dynamics, shedding light on the lived experiences, vulnerabilities, and resilience strategies within Polish rural settings, and providing a foundation for targeted policy interventions.

Figure 8.8.6.1 depicts the demographic characteristics of the CATI respondents from Poland, revealing a broadly mature population with a notable concentration between 40 and 70 years. The age distribution shows a slightly higher median for men compared to women, with men's ages spanning from early 30s to over 80, while women cluster mostly between 40 and 60 years.

Gender composition is relatively balanced, with women representing 53.1% and men 46.9% of the sample. Marital status is dominated by married or domestic partnerships (78.1%), reflecting stable family units, while smaller shares include divorced (9.4%), single never married (6.3%), and widowed (6.3%) individuals.

Educational attainment among respondents is diverse. Upper secondary education is the most common highest level achieved (11 respondents), followed closely by master's degrees (10), and then lower secondary (4) and post-secondary non-tertiary education (2). Bachelor's degrees are held by three respondents, with a single individual having a doctoral degree, indicating a generally well-educated population. With respect to the Family size, this shows some variability, with zero children being most common (11 respondents), followed by two children (8) and one child (7), with smaller numbers reporting three (4) or four children (2). This diversity in family composition provides useful context for understanding social support and demographic dynamics.

Demographic Characteristics - PL

Region 5. Lubelski CATI Survey

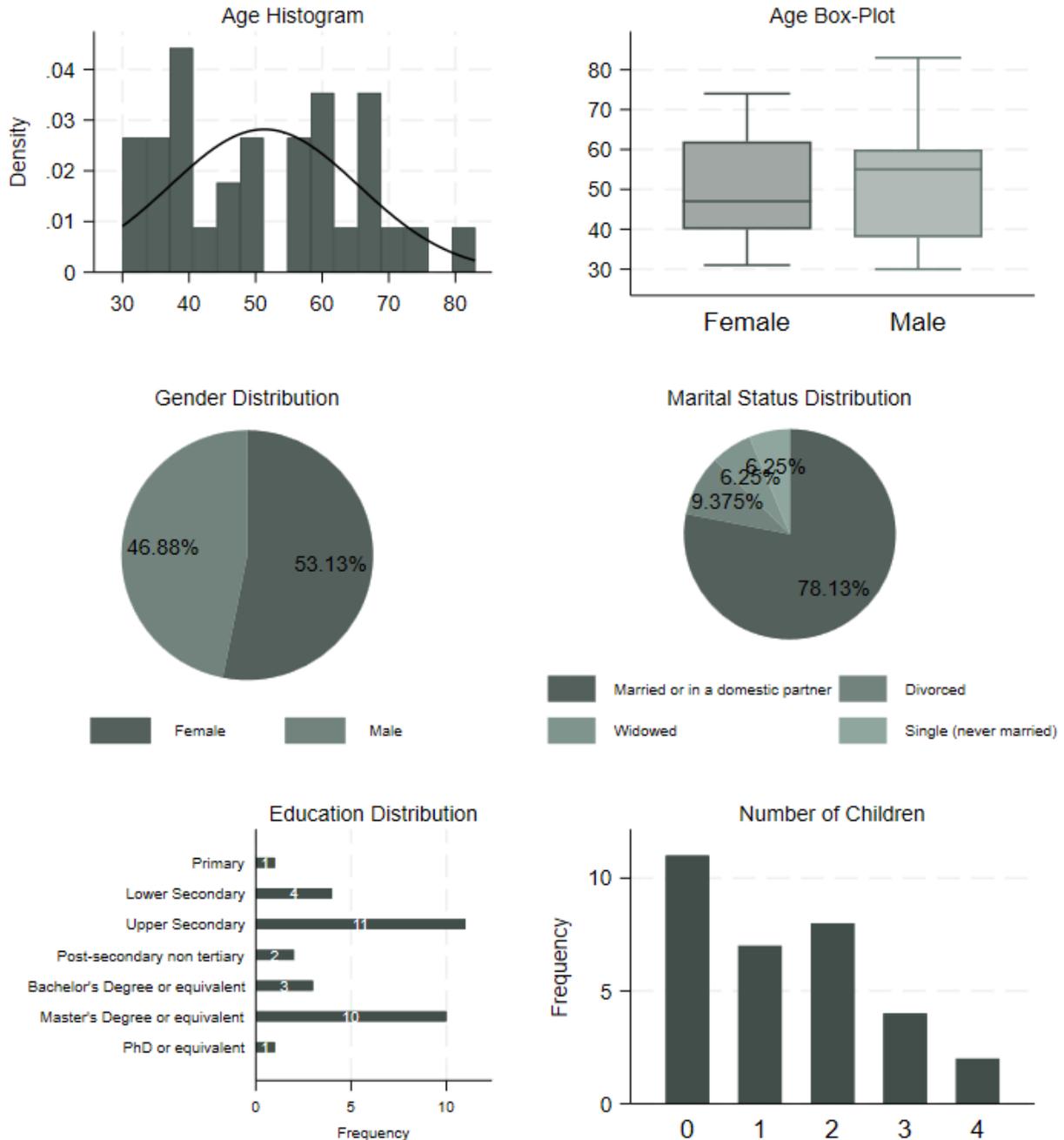


Figure 8.8.6.1 Lubelski (PL). Demographic Characteristics

Figure 8.8.6.2 provides a comprehensive overview of the labour market engagement and occupational environment of the Polish CATI respondents. Employment status reveals a diverse

economic participation pattern: 40.6% of respondents are actively employed, while a significant 31.3% are retired, reflecting the presence of an older population segment. Additionally, 9.4% engage in other activities such as homemaking, which often represents unpaid domestic labour, and 18.8% report being in other occupations.

The economic sectors represented are varied but predominantly within the service domain. The largest group is engaged in “other service activities” (4 respondents), encompassing a range of occupations possibly related to retail, personal services, or community support. Public administration and defence employ 3 respondents, suggesting some integration into formal institutional roles. Smaller numbers work in education, administrative and support services, human health and social work, and more specialised professional, scientific, and technical fields, as well as in wholesale, retail trade, financial, insurance, and transportation sectors, each represented by one respondent.

Occupational roles illustrate a workforce with a range of skill levels and job types. Managers constitute the largest occupational category (4 respondents), indicating leadership roles are present within the sample. Technicians and associate professionals follow closely with 3 respondents, highlighting a skilled technical workforce. Clerical support workers and service and sales workers are each represented by 2 respondents, indicating participation in administrative and customer-facing roles. Plant and machine operators, elementary occupations, and armed forces personnel are less frequent but contribute to the occupational diversity.

The working hours histogram shows a strong concentration around the standard 40-hour workweek, suggesting many respondents hold full-time positions, though some variability exists with a few working fewer or more hours, possibly reflecting part-time or irregular employment patterns.

Income levels among respondents display a right-skewed distribution, with the majority earning between zł0 and zł10,000 annually (approximately €0–€2,356), yet a minority report significantly higher incomes exceeding zł20,000 (around €4,712). This income dispersion indicates economic heterogeneity, with potential implications for household well-being and economic security.

Geographically, respondents are distributed across rural villages (43.8%), small or medium-sized towns (34.4%), and larger towns or cities (21.9%), illustrating a sample spanning different settlement types and associated access to services and employment opportunities.

Figure 8.8.6.3 highlights key aspects of living conditions and accessibility for CATI respondents in Poland. Homeownership is notably high, with 78.1% of respondents fully owning their homes or apartments, and an additional 18.8% owning but still paying a mortgage. Only a small minority (3.1%) rent at market prices, indicating a largely owner-occupied residential profile. Vehicle ownership is similarly prominent, with 84.4% of respondents owning a car or motorised vehicle, underscoring the importance of private transport in rural or semi-rural settings where public transport may be limited.

Access to local and municipal services seems not to be very challenging. Around 70% of the respondents find it “very easy” or “rather easy”, with the rest rating it as “rather difficult” or “very difficult”.

Labour Market and Environment - PL

Region 5. Lubelski CATI Survey

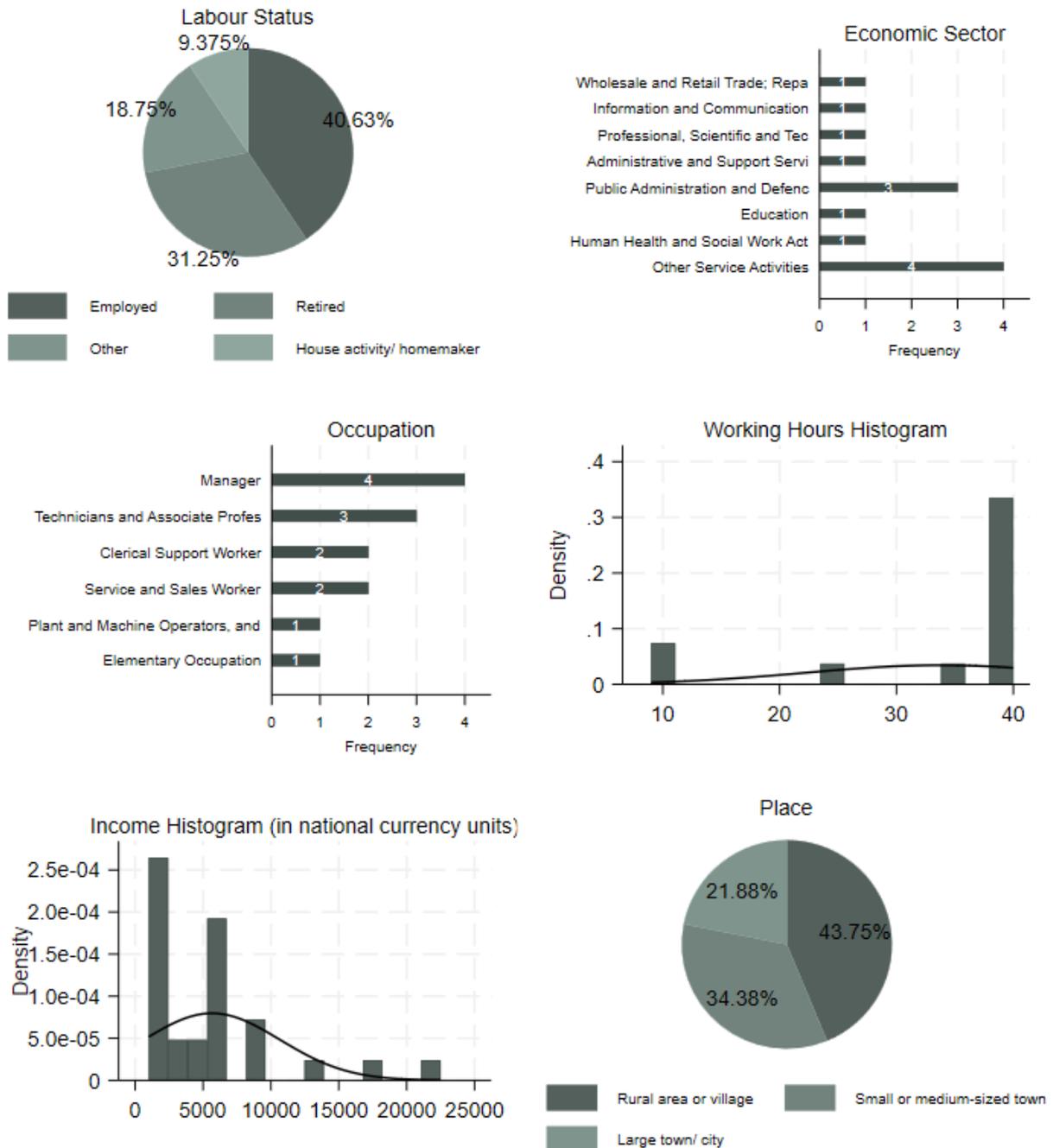


Figure 8.8.6.2 Lubelski (PL). Labour Market and Environment

Public transport accessibility follows a similar pattern. Around 2/3 of the respondents find it “very easy” or “rather easy”, with the rest third showing the opposite.

Living Conditions & Accessibility - PL

Region 5. Lubelski CATI Survey

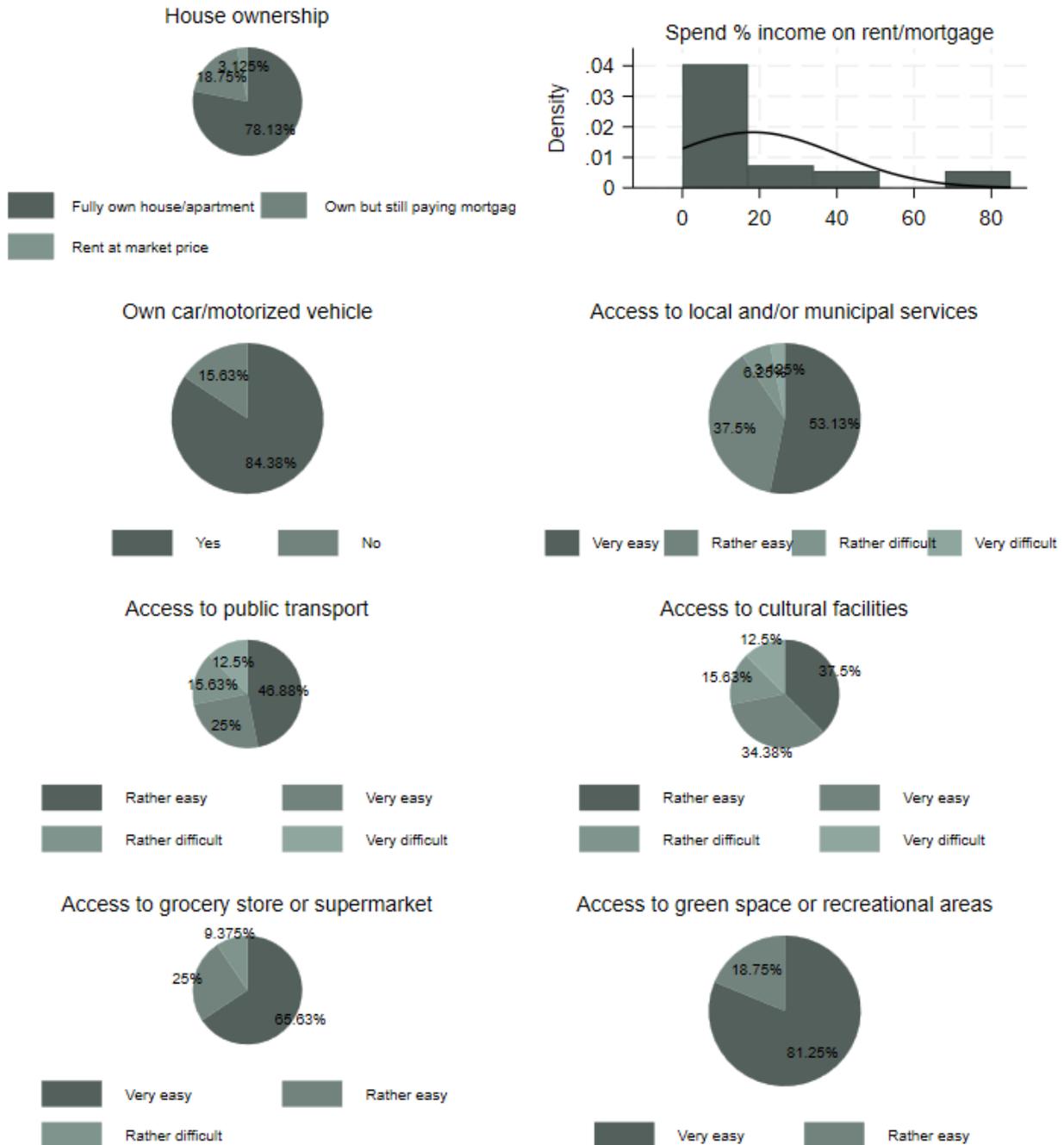


Figure 8.8.6.3 Lubelski (PL). Living Conditions & Accessibility

Regarding accessibility to groceries or supermarkets, most of them find it “easy” or “rather easy”, with less than 10% finding it difficult.

Finally, access to green spaces and recreational areas is largely positive, with 81.3% describing it as “very easy” and 18.8% “rather easy”. This suggests residents have good availability of outdoor spaces, which can contribute positively to well-being and social cohesion.

Housing cost burdens, as measured by the share of income spent on rent or mortgage, vary widely but concentrate below 40%, reflecting a generally manageable but sometimes significant financial load.

Figure 8.8.6.4 provides a nuanced picture of health self-assessments among Polish CATI respondents. Physical health ratings vary, with 28.1% of respondents rating their health as “good”, closely followed by 25% who report “very good” health. A significant portion (21.9%) rates their physical health as “fair”, while smaller groups consider it “excellent” or “poor” (6.3% and 18.8%, respectively). These results suggest that while many perceive themselves as relatively healthy, a notable share faces health challenges.

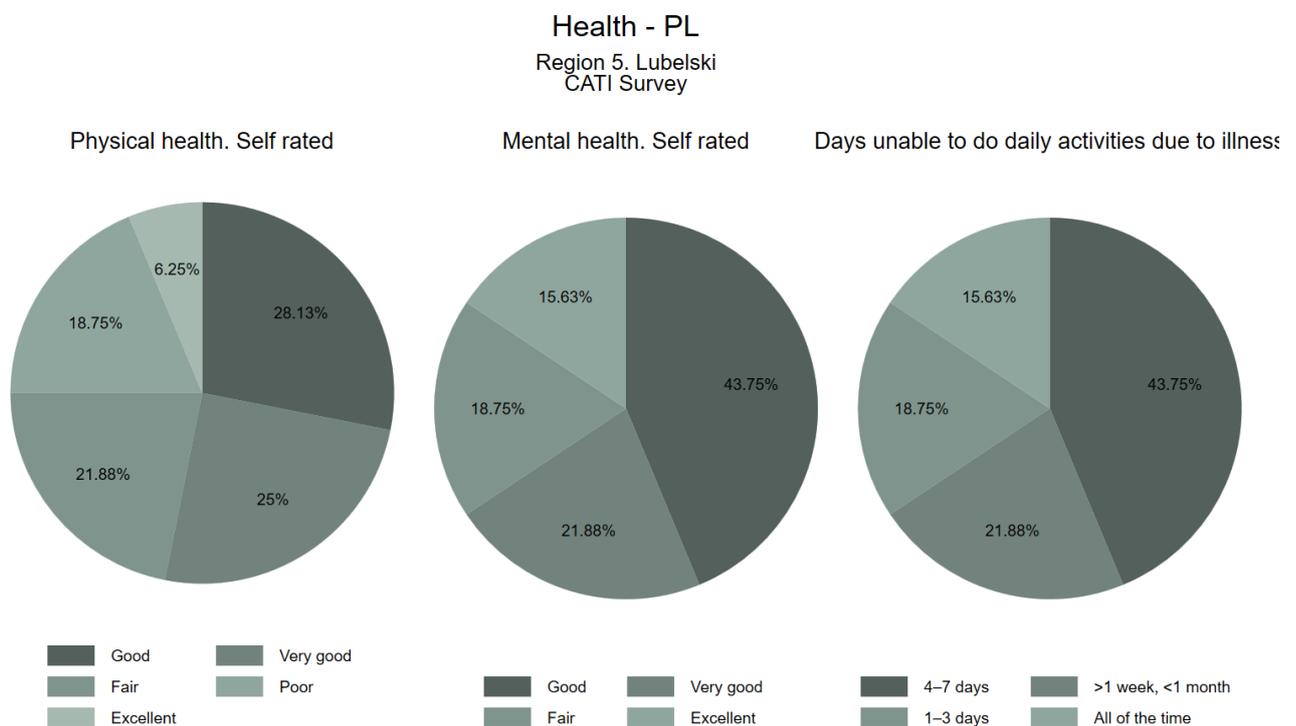


Figure 8.8.6.4 Lubelski (PL). Health Self-perception

Mental health perceptions similarly display diversity. The largest group (43.8%) reports “good” mental health, while 21.9% describe theirs as “very good”, and 18.8% as “fair”. Smaller shares perceive their

mental well-being as “excellent” or “poor”, indicating some psychological distress within the population.

Regarding the impact of illness on daily functioning, 43.8% of respondents experience limitations on their ability to carry out daily activities for 4–7 days per month, 21.9% report being limited “all of the time”, and 18.8% for 1–3 days. This underscores the presence of chronic or episodic health conditions significantly affecting everyday life for many individuals.

Figure 8.8.6.5 provides an insightful look into the social participation and institutional trust of Polish CATI respondents. When asked about feelings of closeness to people in their local area, 43.8% neither agree nor disagree, indicating a largely neutral stance on community connectedness. Meanwhile, 18.8% disagree with feeling close, 15.6% agree, and smaller percentages strongly agree (9.4%) or strongly disagree (12.5%), reflecting mixed experiences with local social bonds.

Interpersonal trust within the area appears moderately strong, with confidence ratings clustering around the 6–8 range on a 10-point scale, suggesting residents generally have positive views of their neighbours and community members.

Institutional confidence, however, reveals greater variability. Trust in the national parliament is notably low to moderate, with many respondents scoring it between 1 and 2 and some expressing moderate to higher trust around 6 to 8. Confidence in the police is more evenly spread but tends toward the middle range, peaking near 5 and 6.

Trust in politicians shows a more positive skew, with a substantial number of respondents expressing moderate to high confidence (scores between 6 and 10), indicating a somewhat favourable perception of individual political figures. In contrast, confidence in political parties is predominantly low, with a large cluster rating them between 1 and 3, signalling political scepticism and possible disillusionment with party politics.

Figure 8.8.6.6 highlights the varying levels of digital engagement and internet use among Polish CATI respondents. Use of the internet for online services is relatively frequent for many, 45.5% of them reporting using it for online services and 33.3% using it several times per month. High frequency users (every day or several times a week) only account around 10% of respondents.

Personal use of the internet shows a similar picture. One third of the respondents report never using the internet for personal purposes, while the rest engage at varying frequencies, with 30.3% using it several times a month and 21.2% less than once a month.

Internet use for personal interaction shows a more active pattern, with 42.4% using it several times a week and 12.1% every day. However, 21.2% never use the internet for this purpose, highlighting barriers to digital social participation. Information-seeking online appears more common, with 48.5% accessing the internet several times a week for information and 15.2% several times a month, suggesting that while social and personal use may lag, informational use is relatively strong.

Figure 8.8.6.7 presents a sobering view of economic vulnerability and social exclusion risks among Polish CATI respondents. A majority of households (71.9%) report being unable to afford unexpected but necessary expenses, underscoring widespread financial fragility. Similarly, only just over half (53.1%) indicate their household can afford a week-long annual holiday, with 46.9% unable to do so, highlighting limitations in discretionary spending and leisure opportunities.

Food security appears relatively strong, with 84.4% of respondents able to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day, suggesting basic nutritional needs are largely met. Heating adequacy during winter is high, with 90.6% reporting that their household can keep the dwelling comfortably warm, a key indicator of living condition quality.

However, subjective perceptions of poverty are present, as 9.4% of respondents acknowledge living in poverty based on their current living conditions, indicating some awareness and experience of economic hardship.

Social participation & engagement - PL

Region 5. Lubelski CATI Survey

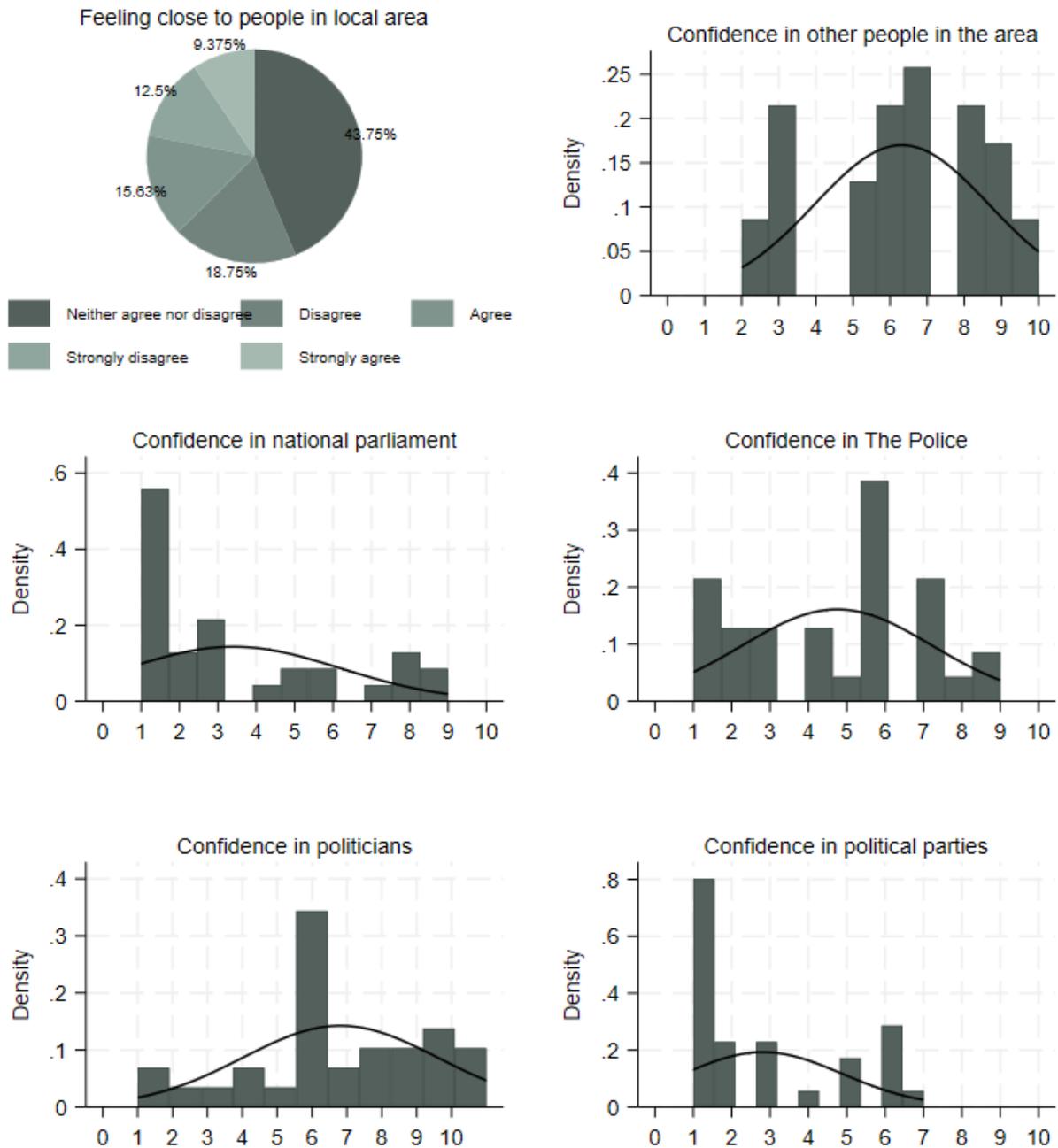


Figure 8.8.6.5 Lubelski (PL). Social Participation & Engagement

Digital access - PL Region 5. Lubelski CATI Survey

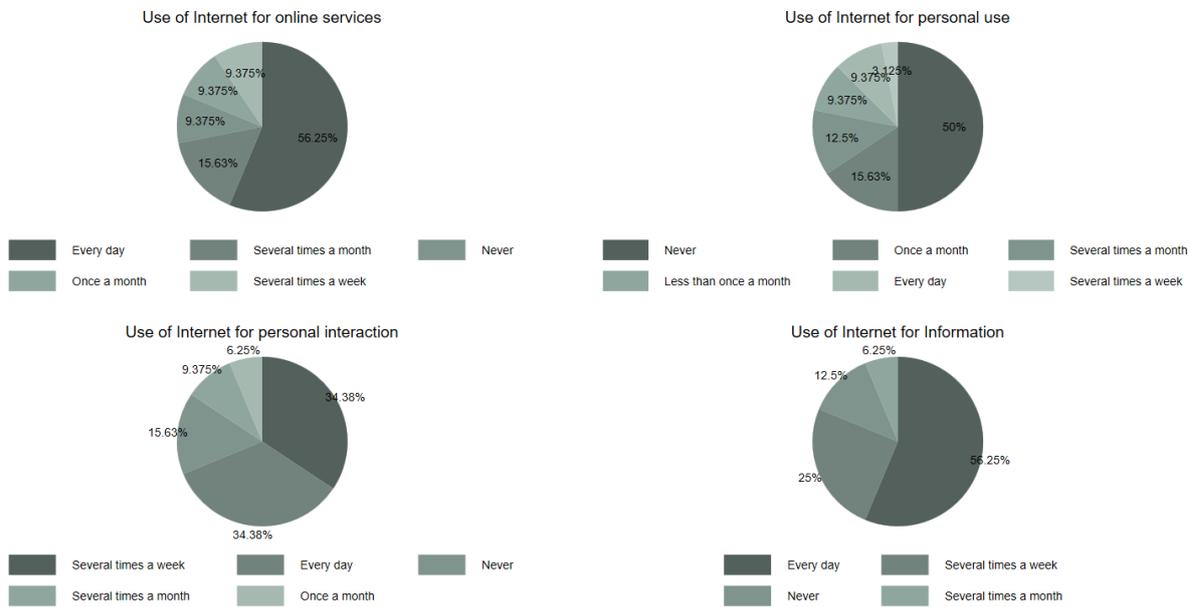


Figure 8.8.6.6 Lubelski (PL). Digital Access

Risk of poverty & social exclusion - PL

Region 5. Lubelski CATI Survey

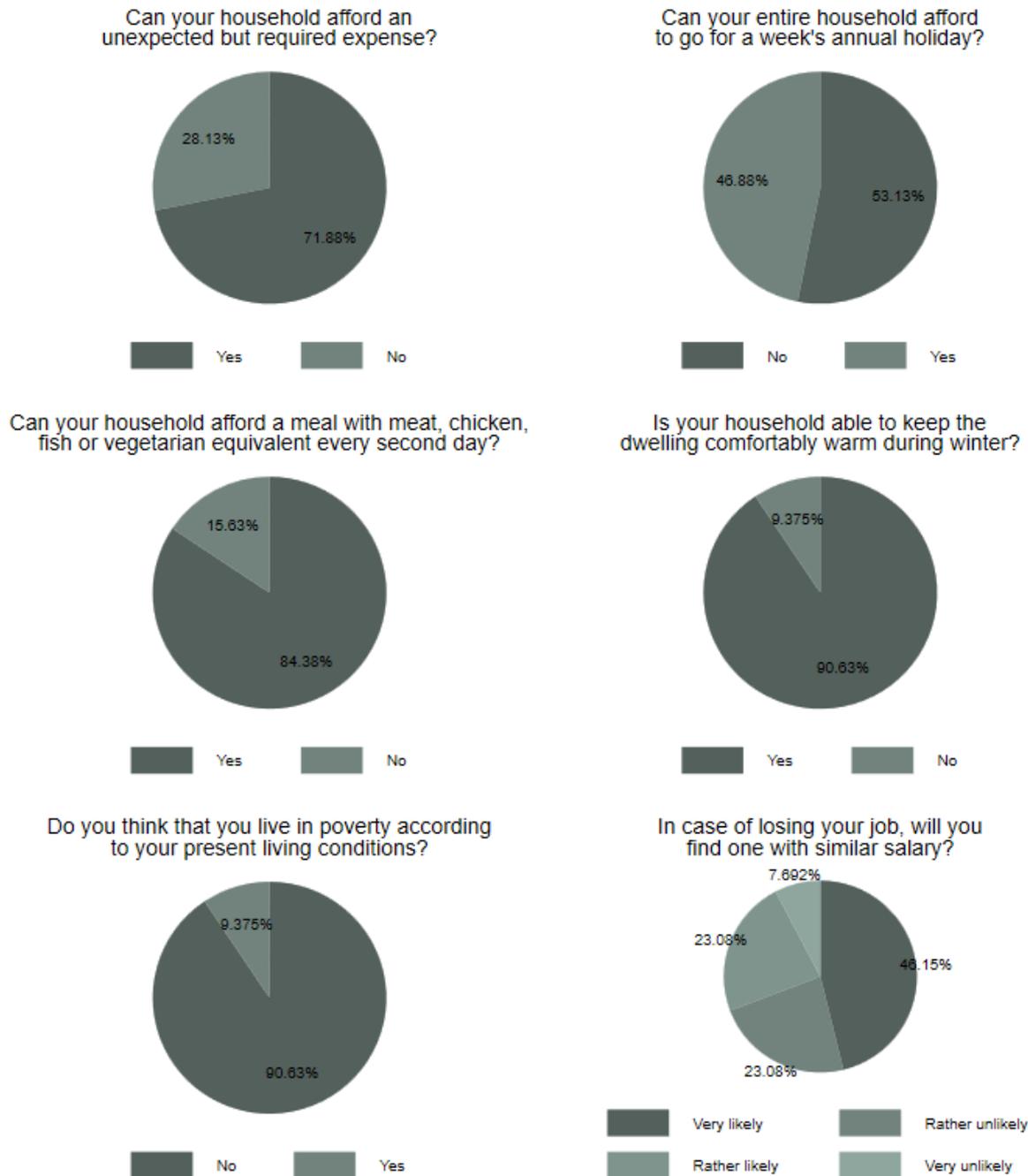


Figure 8.8.6.7 Lubelski (PL). Risk of Poverty & Social Exclusion

Regarding labour market security, opinions vary about prospects following job loss. While 46.2% believe it is “very likely” or “rather likely” they would find another job with similar pay, a concerning 30.7% express doubt, viewing this outcome as “rather unlikely” or “very unlikely”. This uncertainty highlights employment insecurity and potential barriers to economic mobility within the population.

Findings from Dębowa Kłoda - Lubelski reveal a population facing material constraints and declining labour force engagement. While housing stability and vehicle ownership are common, access to employment and basic services remains limited. The digital divide and widespread financial insecurity underscore the need for coordinated socio-economic support, particularly for the unemployed and elderly.

8.8.7 Case Study: Romania – Suceava (RO215) & Maramureş (RO114).

The CATI survey conducted in Suceava and Maramureş offers a valuable glimpse into the living conditions and social dynamics of rural and semi-rural communities. This region is characterised by diverse demographic profiles and a range of economic, health, and social challenges. The analysis explores key aspects such as employment, access to essential services, digital inclusion, health perceptions, social participation, and economic vulnerability, providing a comprehensive understanding of the factors shaping rural life in Romania.

Figure 8.8.7.1 provides a comprehensive overview of the demographic profile of the Romanian CATI respondents. The age distribution reveals a bimodal pattern with two distinct groups: a younger cohort centred around the early 30s and an older group concentrated near the mid-60s, highlighting generational diversity within the sample. This suggests the inclusion of both working-age adults and retirees, which may have important implications for understanding varying needs and perspectives. Women in the sample tend to be older on average than men, with female ages extending up to 80 years, whereas male respondents are more clustered between 20 and 60 years.

Gender balance is relatively even, with women comprising 54.5% and men 45.5% of respondents, ensuring a fair representation of both sexes. The marital status distribution is quite diverse: 27.3% of respondents are married or in domestic partnerships, an equal proportion are single (never married), 21.2% are divorced, and smaller shares are widowed (12.1%) or cohabiting (12.1%). This distribution indicates varied household compositions, with implications for social support and caregiving responsibilities.

Educational attainment levels show a strong emphasis on secondary education, with 16 respondents reporting upper secondary qualifications. Bachelor’s degrees or equivalents are held by 9 respondents, while smaller numbers possess master’s degrees (2), post-secondary non-tertiary qualifications (1), lower secondary education (4), or primary education (1). This distribution reflects a population with moderate to high formal education, which may influence employment opportunities and social engagement.

Family size data indicate relatively small household units: 21 respondents report having no children, 7 report one child, and 5 report two children. This aligns with broader demographic trends in rural and semi-rural Europe, where smaller family sizes are increasingly common.

Demographic Characteristics - RO

Region 6. Suceava & Maramureş CATI Survey

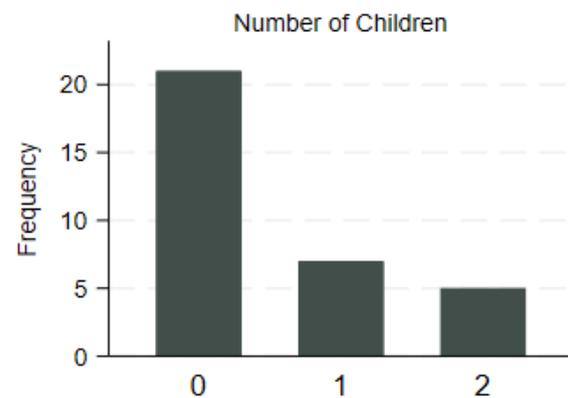
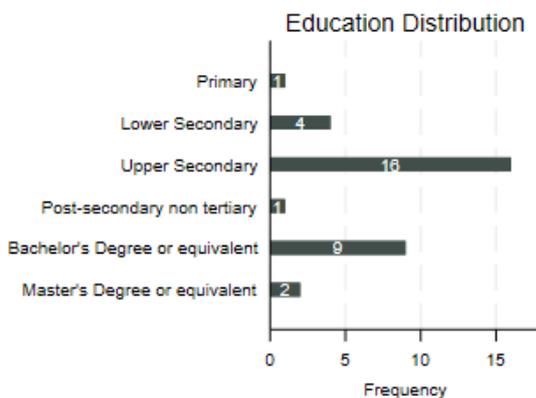
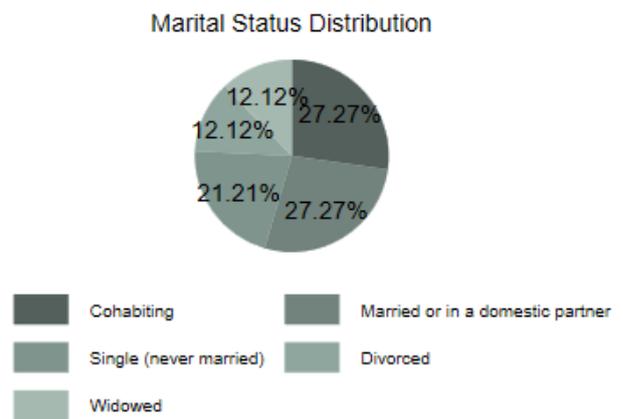
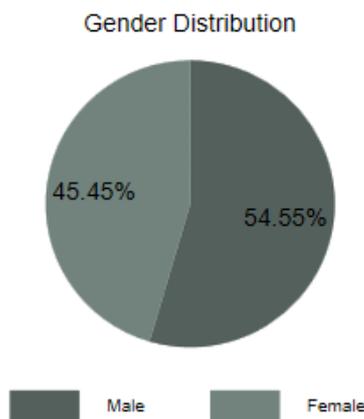
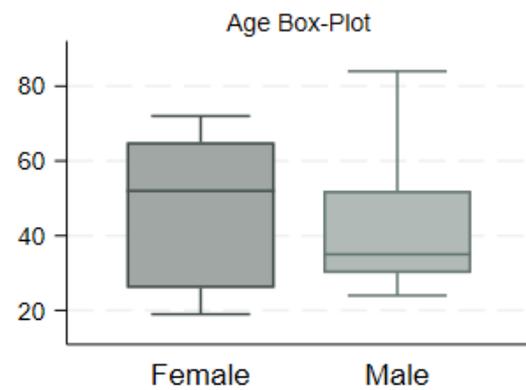
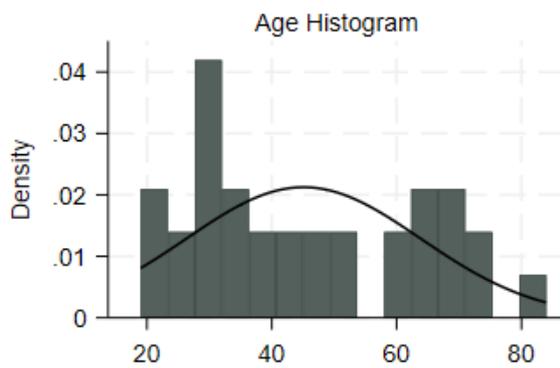


Figure 8.8.7.1 Suceava & Maramureş (RO). Demographic Characteristics

Figure 8.8.7.2 presents a detailed view of labour market conditions and economic environment characteristics for Romanian CATI respondents. Labour force participation is diverse, with 45.5% currently employed and 18.2% retired, indicating a considerable segment of active and retired individuals. Unemployment affects 12.1% of the sample, while 15.2% are engaged in house activities or homemaking, reflecting traditional gender roles and caregiving responsibilities. Students constitute a small minority (9.1%).

Labour Market and Environment - RO

Region 6. Suceava & Maramureş CATI Survey

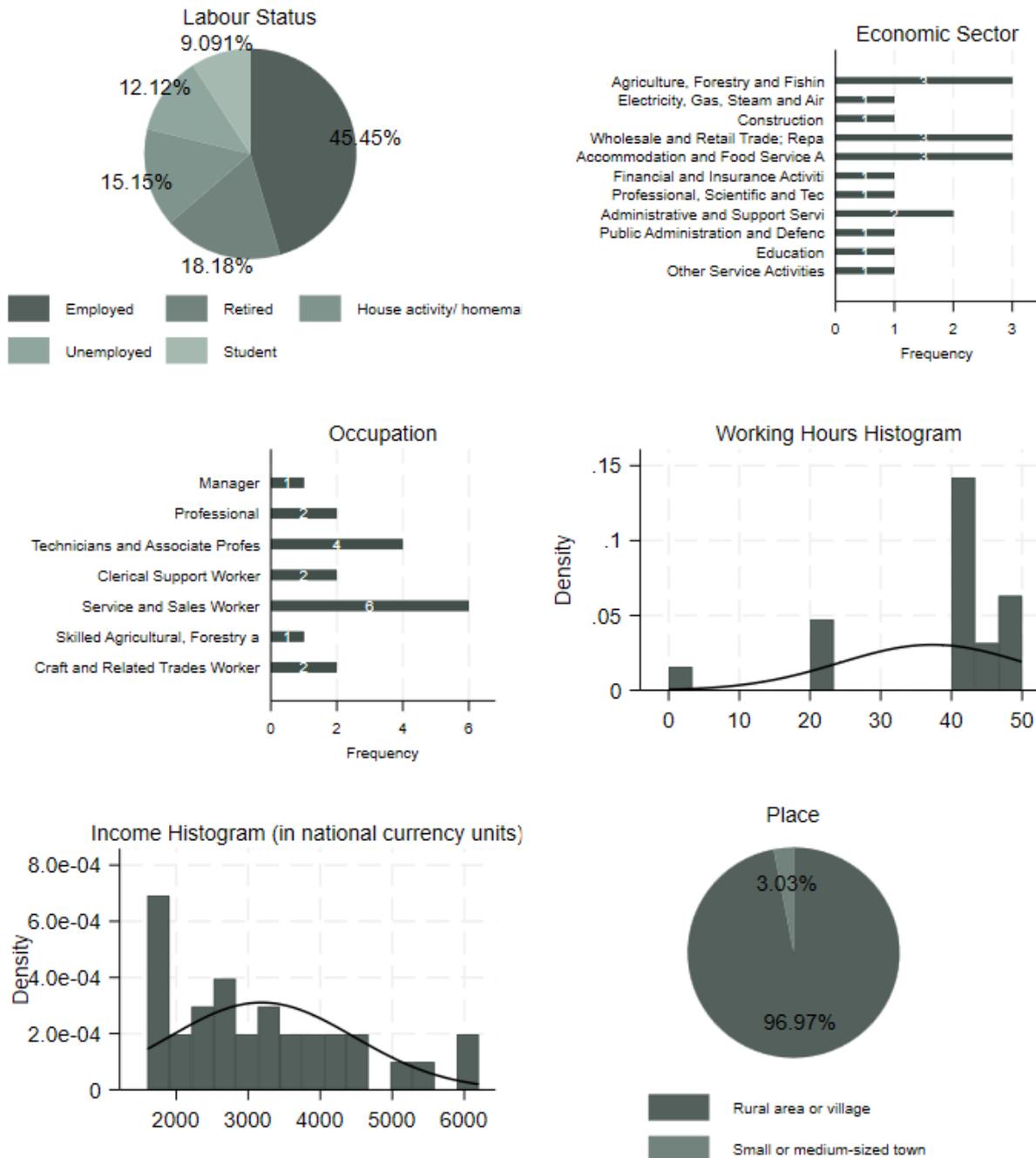


Figure 8.8.7.2 Suceava & Maramureş (RO). Labour Market and Environment

The economic sectors represented are varied, with notable employment in agriculture, forestry, and fishing (3 respondents), accommodation and food services (3 respondents), and

administrative/support services (2 respondents). Other sectors such as construction, wholesale and retail trade, education, and financial activities have smaller but meaningful presence, reflecting a mixed rural economy.

Occupational roles are predominantly in service and sales work (6 respondents) and technicians/associate professions (4), followed by clerical support (2) and craft-related trades (2). Managers and professionals are fewer but present (1 and 2 respectively), indicating some diversity in skill levels. The histogram of working hours shows a concentration around 40 hours per week, consistent with standard full-time employment, but with some variation indicating part-time or irregular hours.

Income distribution appears fairly spread, with peaks around 2,000–3,000 lei (approximately €395–€592) and 5,000–6,000 lei (around €987–€1,184), suggesting income heterogeneity among respondents, but in general, with a low level. Lastly, nearly all respondents reside in rural areas or villages (97%), with a very small minority living in small or medium-sized towns (3%), confirming the rural focus of the study.

Figure 8.8.7.3 provides an in-depth look at the living conditions and accessibility challenges faced by Romanian respondents in the CATI survey. Housing stability appears relatively strong, with nearly two-thirds (63.6%) fully owning their homes or apartments, which suggests a foundation of residential security for most. However, a substantial minority (27.3%) are renters at market prices, highlighting a significant portion of the population experiencing housing costs without ownership benefits. A smaller fraction (6.1%) are homeowners still paying off mortgages, and a minimal share (3%) benefit from reduced-price social housing. These varied tenure statuses may reflect economic heterogeneity and differential access to affordable housing.

Mobility resources are limited for many, as only 36.4% report owning a car or motorised vehicle, while 63.6% do not. This gap likely constrains residents' ability to access jobs, services, and social opportunities, particularly in rural or semi-rural areas where public transport may be limited.

Access to local and municipal services is widely regarded as a challenge, with over 60% of respondents rating it as "rather difficult". This suggests infrastructural or organisational barriers to essential services such as healthcare, administration, or social support. Public transport access shows a somewhat more balanced picture, with more than 75% of respondents finding it "rather easy" or "very easy" to access.

Cultural facility accessibility shows that around 80% of respondents find access easy, while the 20% find it rather difficult.

Grocery shopping access is a significant concern, with nearly three-quarters (72.7%) describing it as "rather difficult", pointing to challenges in obtaining daily essentials, especially for those without private transport. Similarly, access to green or recreational spaces is limited for 72.7%, constraining opportunities for outdoor activity, relaxation, and community engagement.

Living Conditions & Accessibility - RO

Region 6. Suceava & Maramureş CATI Survey

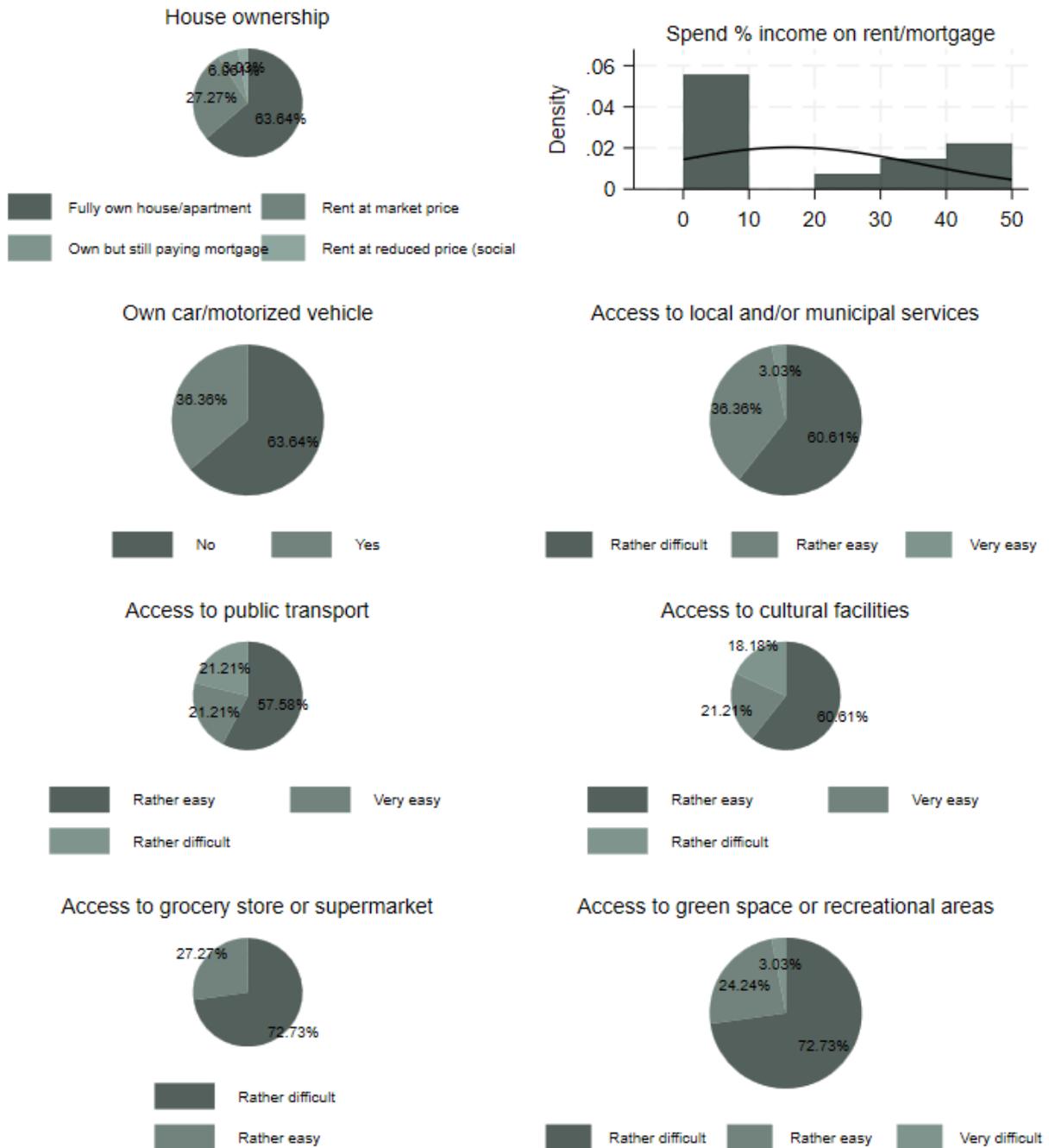


Figure 8.8.7.3 Suceava & Maramureş (RO). Living Conditions & Accessibility

Figure 8.8.7.4 provides a detailed insight into respondents’ perceptions of their health in Romania. One third of the sample find its own physical health status as excellent, while around 50% of them find it as fair or good.

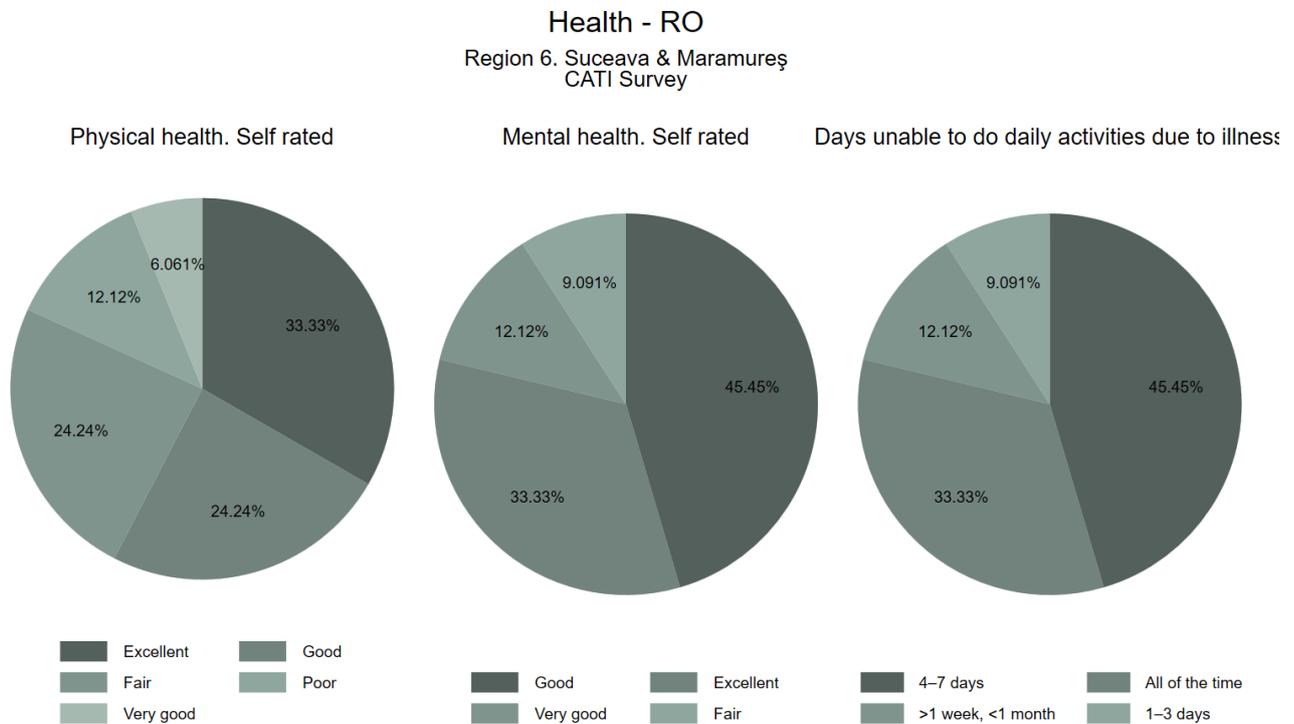


Figure 8.8.7.4 Suceava & Maramureş (RO). Health Self-perception

Mental health assessments similarly skew towards positive evaluations, with 45.5% rating their mental health as “good” and an additional 33.3% describing it as “excellent” and just less than 10% expressing a “fair” health status.

Days unable to perform daily activities due to illness show a varied distribution. Nearly half (45.5%) report 4–7 days of incapacity, while 33.3% all of the time, and 12.1% face longer disruptions (over one week but less than one month). A smaller segment (9.1%) indicates no impairment. These data reflect a considerable prevalence of health-related functional limitations that may affect individuals’ quality of life and work capacity.

Figure 8.8.7.5 presents a comprehensive overview of social participation and trust in Romania. Respondents display a divided sense of closeness to people in their local area, with 42.4% neither agreeing nor disagreeing, and a nearly equal 42.4% expressing disagreement, indicating ambivalence or moderate social cohesion within communities. Only 12.1% agree or strongly disagree, suggesting relatively low levels of strong social bonding.

Confidence in key political and social institutions varies across the board. Trust in the national parliament is moderate, with a concentration of responses around scores 4 to 6, indicating mixed perceptions of legislative effectiveness or legitimacy. Confidence in the police is slightly higher, with the bulk of respondents scoring between 5 and 8, pointing to a relatively stronger institutional trust in law enforcement.

Social participation & engagement - RO

Region 6. Suceava & Maramureş CATI Survey

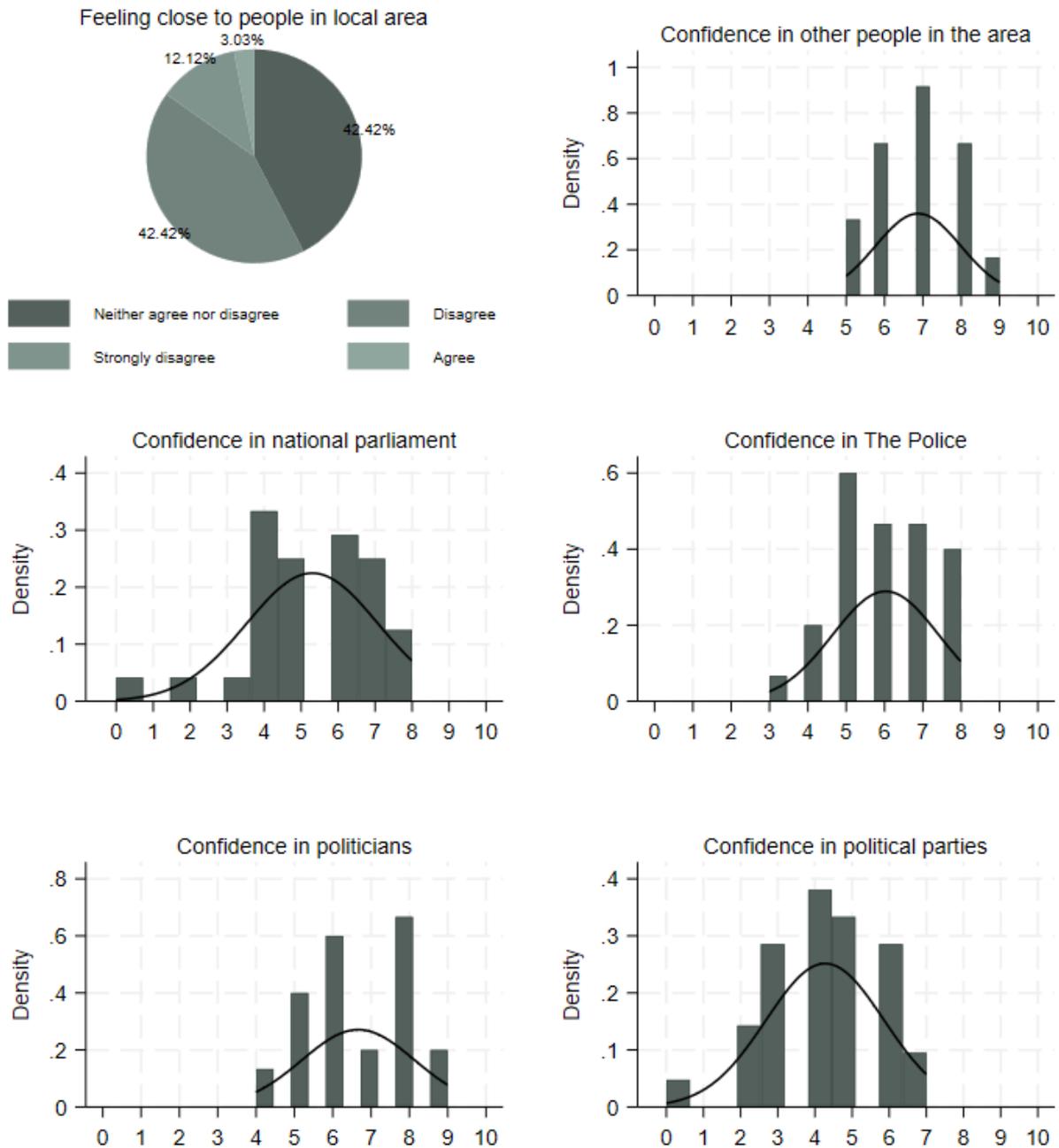


Figure 8.8.7.5 Suceava & Maramureş (RO). Social Participation & Engagement

Trust in politicians is more polarised, showing clusters around the mid-range (scores 4 to 6) but also a notable group at higher levels (7 to 9), reflecting varying individual opinions possibly shaped by

political engagement or personal experience. Confidence in political parties is somewhat lower, centred around scores 3 to 5, suggesting scepticism or disengagement with party politics.

Figure 8.8.7.6 highlights patterns of digital access and internet use among respondents in Romania. 45.5% of respondents declare never using internet for online services, while one third declares using it several times a month and 9.1% only once. Frequent users account for less than 10% of respondents. With respect to the use of internet for personal use, 1 third of them never does it, while 30.3% of them does it several times a month and 21.2% does it less than once a month.

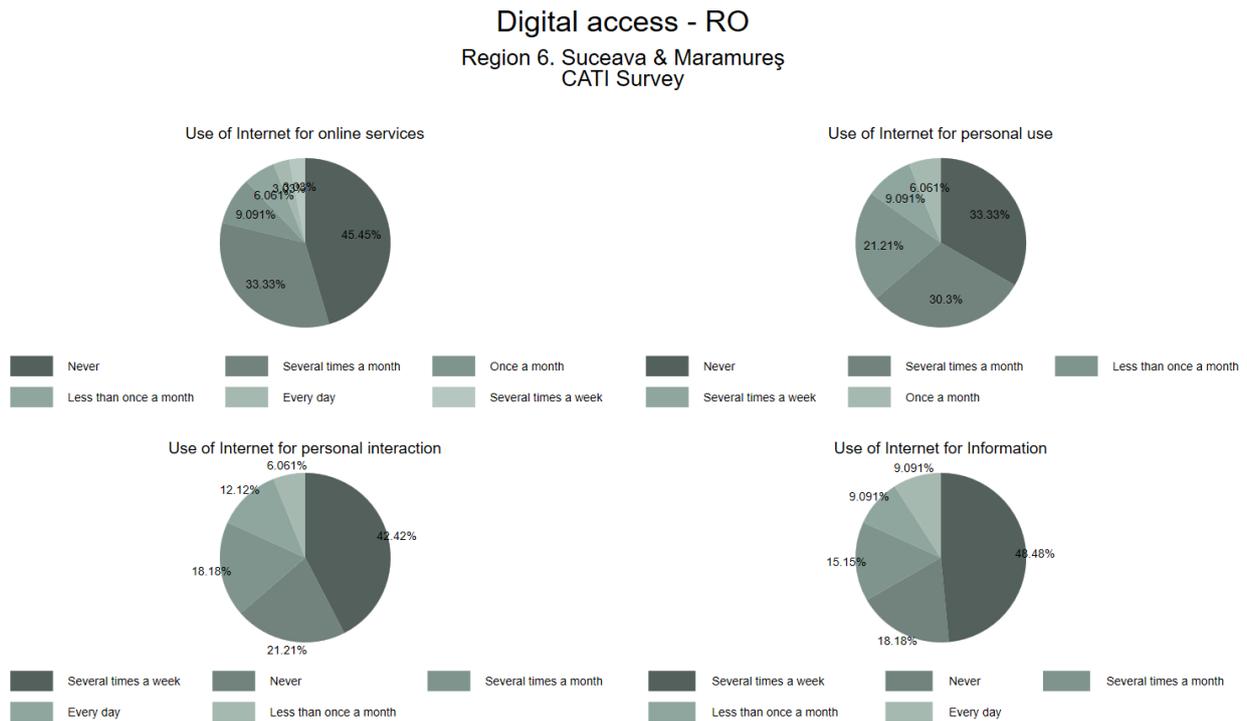


Figure 8.8.7.6 Suceava & Maramureş (RO). Digital Access

Internet use for personal interaction is somewhat more frequent, with 42.4% reporting several times a week, yet a significant 21.2% never using it, suggesting a divide in online social connectivity. Nearly half (48.5%) access online information several times a week, 15.2% several times a month and 9.1% never does it.

Overall, the data suggest a cautious adoption of digital tools in everyday life, with clear scope for enhancing digital literacy, infrastructure, and outreach to ensure broader and more consistent internet use across different functions.

Figure 8.8.7.7 highlights the socio-economic vulnerabilities faced by respondents in Romania. Approximately half of the respondents (51.5%) report being unable to afford unexpected but necessary expenses, indicating a significant financial strain. This insecurity is echoed in the limited ability to afford annual holidays, with nearly 79% unable to cover the cost of a week’s vacation for their entire household. Furthermore, 84.8% report difficulty affording regular meals including meat or

vegetarian equivalents every second day, signalling food insecurity or limited dietary diversity for many households.

Risk of poverty & social exclusion - RO

Region 6. Suceava & Maramureş CATI Survey

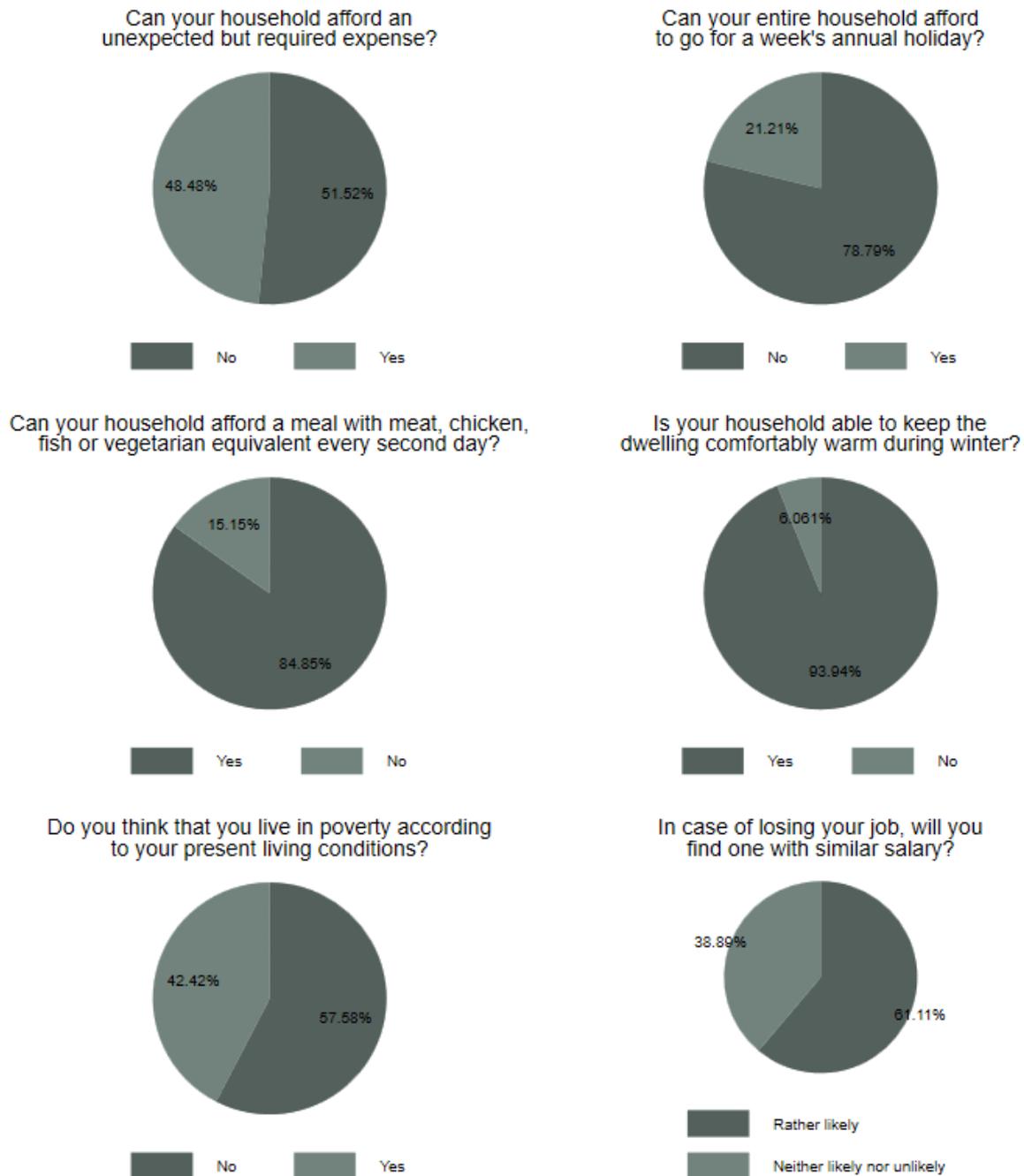


Figure 8.8.7.7 Suceava & Maramureş (RO). Risk of Poverty & Social Exclusion

Housing and warmth stability remain major concerns, as 93.9% of respondents say they can keep their dwelling comfortably warm during winter, but this still leaves a vulnerable minority at risk of inadequate heating. Regarding perceptions of poverty, a notable 42.4% of respondents believe they live in poverty given their current living conditions, reflecting significant self-reported hardship.

When facing potential job loss, optimism is relatively high, with 61.1% stating they would likely find new employment with a similar salary. However, nearly 39% remain uncertain or pessimistic about their job prospects. Together, these indicators portray a context of considerable economic fragility and social exclusion for a substantial portion of the population surveyed, emphasising the need for targeted policy interventions to improve financial security and living standards in Romania.

An overview of Suceava and Maramureş confirms deep-rooted structural challenges in mountainous rural regions, including low employment, weak transport infrastructure, and limited digital inclusion. Although residents report generally positive health perceptions, chronic limitations and economic insecurity are widespread. Community-led development and investment in connectivity could provide essential leverage for more inclusive growth.

8.8.8 Case Study: Slovakia – Košický kraj (SK042).

This section presents an analysis of the socio-demographic, economic, and living conditions of the region of Slovakia – Košický kraj (41 respondents). The data offer insights into the age structure, gender composition, and family characteristics of respondents, as well as their labour market participation, occupational sectors, and income levels. Additionally, the analysis explores living conditions, accessibility to services, health self-assessments, social engagement, digital connectivity, and the risk of poverty and social exclusion. These dimensions collectively provide a comprehensive portrait of the challenges and opportunities faced by individuals in Slovakia's socio-economic landscape.

The demographic profile of the Slovakian sample reflects a population with a fairly balanced gender distribution, where males constitute 53.66% and females 46.34%, indicating a slight male predominance in the sample (see Figure 8.8.8.1). The age distribution, as depicted in the histogram, covers a broad span ranging from the early 30s to over 80 years, showing a heterogeneous age structure. The kernel density estimation suggests a bimodal pattern, with a concentration of individuals in the middle-aged bracket (40s to 50s) and another smaller cluster among older adults (around 60s to 70s). This is further confirmed by the box plots, where the median age for females is approximately in the mid-50s, and for males, it slightly overlaps but with a broader age range extending up to early 80s. The presence of outliers in the female group indicates a few respondents in their early 30s, contributing to a somewhat younger tail in the age distribution.

Marital status data reveal that the majority of respondents, about 61%, are married or living in a domestic partnership, highlighting the predominance of stable family units within this population. A notable 17% of respondents have never married, while divorced and widowed individuals account for approximately 10% each. A smaller proportion (2.44%) report cohabiting, suggesting that alternative family arrangements, while present, are less common in this group. This distribution reflects traditional family structures typical of many Central European contexts but also shows a degree of diversity in living arrangements.

Education levels among the respondents indicate a relatively well-educated sample, with the highest frequency in the upper secondary category (21 respondents), suggesting that completing high school is the most common educational attainment. This is complemented by a significant number of individuals holding a Master's degree or its equivalent (10 respondents), which reflects a considerable segment with higher education. Bachelor's degree holders number fewer (3 respondents), while post-secondary non-tertiary and primary education are less represented. The presence of three PhD holders, though limited, points to an academically advanced subset within the sample. This educational distribution suggests a population with a solid foundation in secondary education and a meaningful portion pursuing or having achieved tertiary qualifications.

The Slovak region of Košický kraj exhibits moderate labour participation and relatively strong educational attainment, yet service access and economic stability remain uneven. While health outcomes are largely positive and digital access is improving, employment insecurity and income constraints suggest that social protection and local economic development should be policy priorities.

Demographic Characteristics - SK

Region 7. Kosice Region
CATI Survey

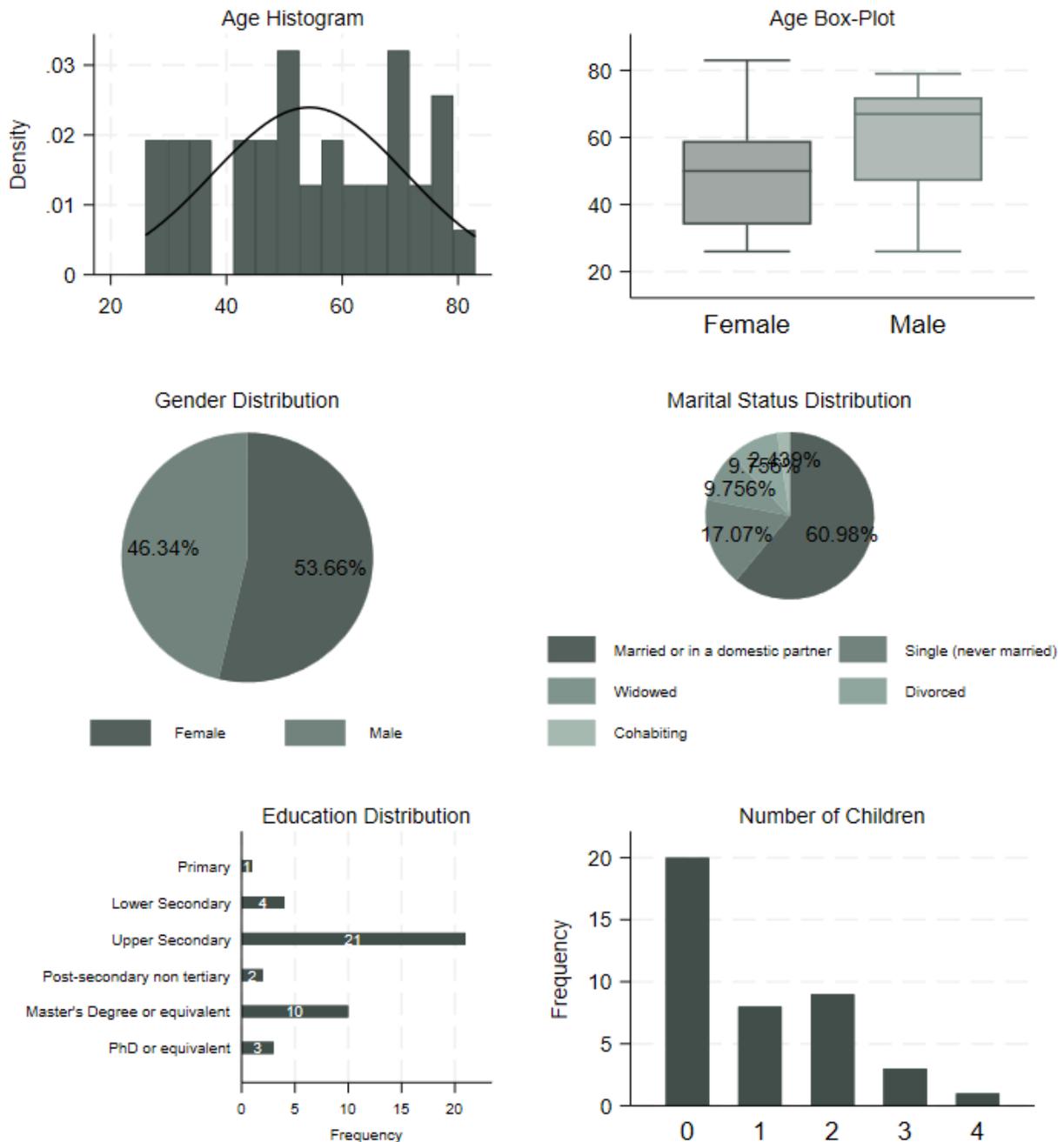


Figure 8.8.8.1 Košický kraj (SK). Demographic Characteristics

Regarding family size, the number of children varies across the sample, with the largest group (20 respondents) having no children, indicating either younger adults, child-free households, or other

demographic factors influencing family size. A substantial proportion has one or two children (8 and 9 respondents, respectively), reflecting typical family sizes consistent with demographic trends in many European countries. Smaller numbers report three or four children, which may be indicative of larger families that, while less common, still contribute to the demographic diversity.

The labour market profile for Slovakia reveals a workforce where slightly more than half (53.66%) of respondents are currently employed, indicating active participation in the labour force (see Figure 8.8.8.2). A substantial share of the sample, 34.15%, is retired, reflecting a significant presence of older individuals who have exited the workforce. The remaining 12.2% are categorised under 'Other,' which may include homemakers, students, or unemployed individuals not specified separately.

Economic sector data highlight the prominence of traditional and service-oriented industries. Agriculture, forestry, and fishing constitute the largest sectoral group with 11 respondents, suggesting that primary economic activities still play a crucial role in this region. The manufacturing sector is also notable, accounting for 4 respondents, followed by transportation and storage with 6, reflecting the importance of logistics and industrial activities. Wholesale and retail trade, public administration, education, and other service activities are present but with fewer respondents, indicating a diversified but concentrated economic structure.

Occupational distribution shows a preponderance of professionals (8 respondents), which is in line with the educated segment identified in the demographic data. Clerical support workers (5 respondents) also represent a significant group, indicating the presence of administrative roles in the local economy. Technicians and associate professionals (4 respondents) add to the skilled labour category, while managers (2 respondents) and lower-skilled occupations such as service and sales workers, and plant and machine operators are less frequent.

The histogram of working hours shows a marked concentration around standard full-time employment hours, predominantly between 40 and 50 hours per week. However, the presence of outliers with very low or exceptionally high working hours suggests variability in employment patterns, possibly reflecting part-time work or overtime.

Income distribution exhibits a right-skewed pattern, with most respondents earning moderate incomes clustered between approximately 500 and 2500 euros, while a small number of respondents report higher earnings approaching 6000 euros. This skewness suggests income inequality within the sample, with a majority earning middle-range wages and a minority at the upper income levels.

Geographically, respondents are evenly distributed across rural and urban settings, with 41.46% living in small or medium-sized towns, 39.02% in rural areas or villages, and 19.51% residing in large towns or cities. This distribution indicates a predominantly semi-urban and rural population, which could influence employment types and economic opportunities.

Labour Market and Environment - SK

Region 7. Kosice Region CATI Survey

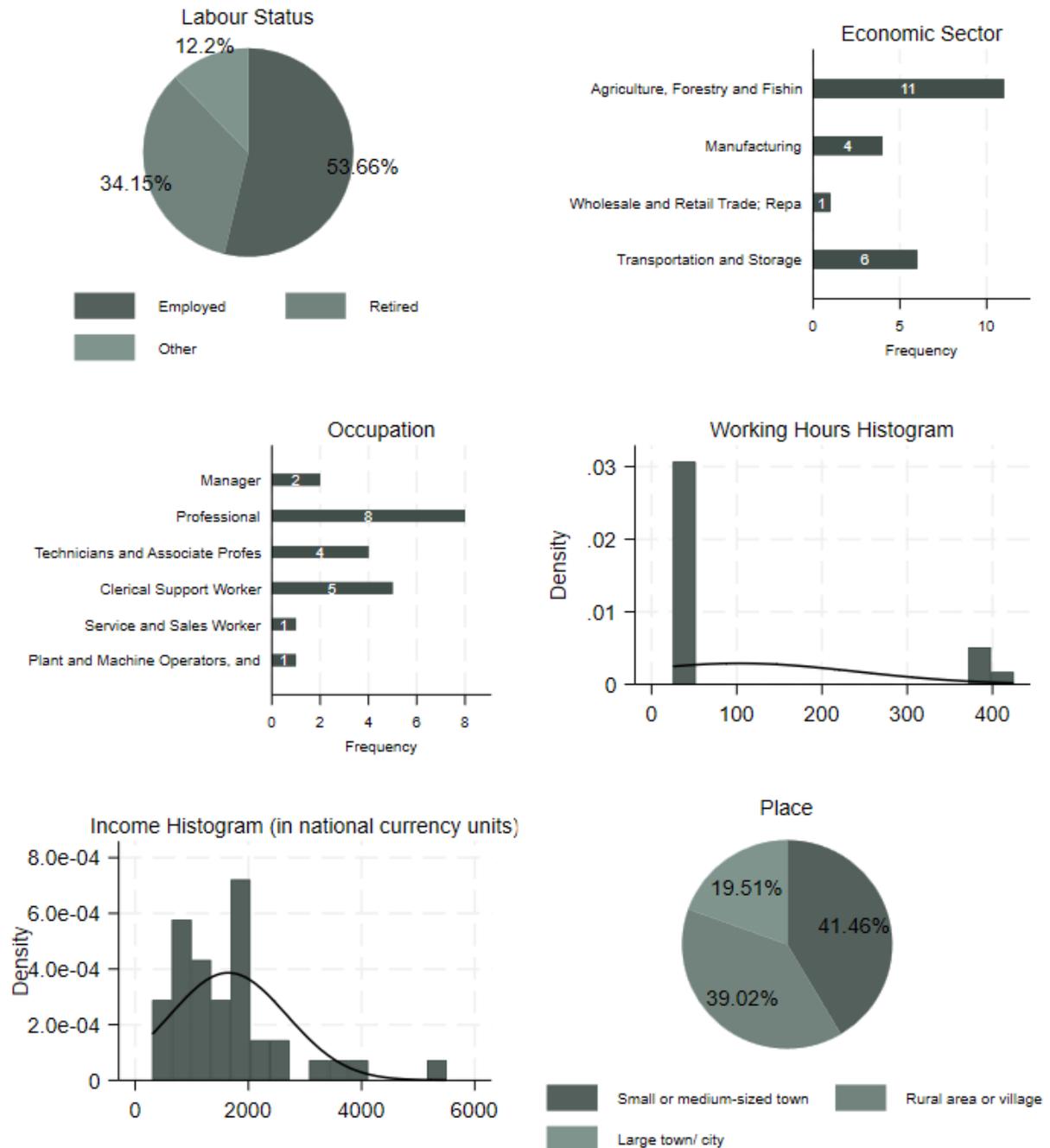


Figure 8.8.8.2 Košický kraj (SK). Labour Market and Environment

Figure 8.8.8.3 provides a comprehensive overview of living conditions and accessibility in Slovakia, illustrating key aspects of housing, mobility, and access to services.

Living Conditions & Accessibility - SK

Region 7. Kosice Region CATI Survey

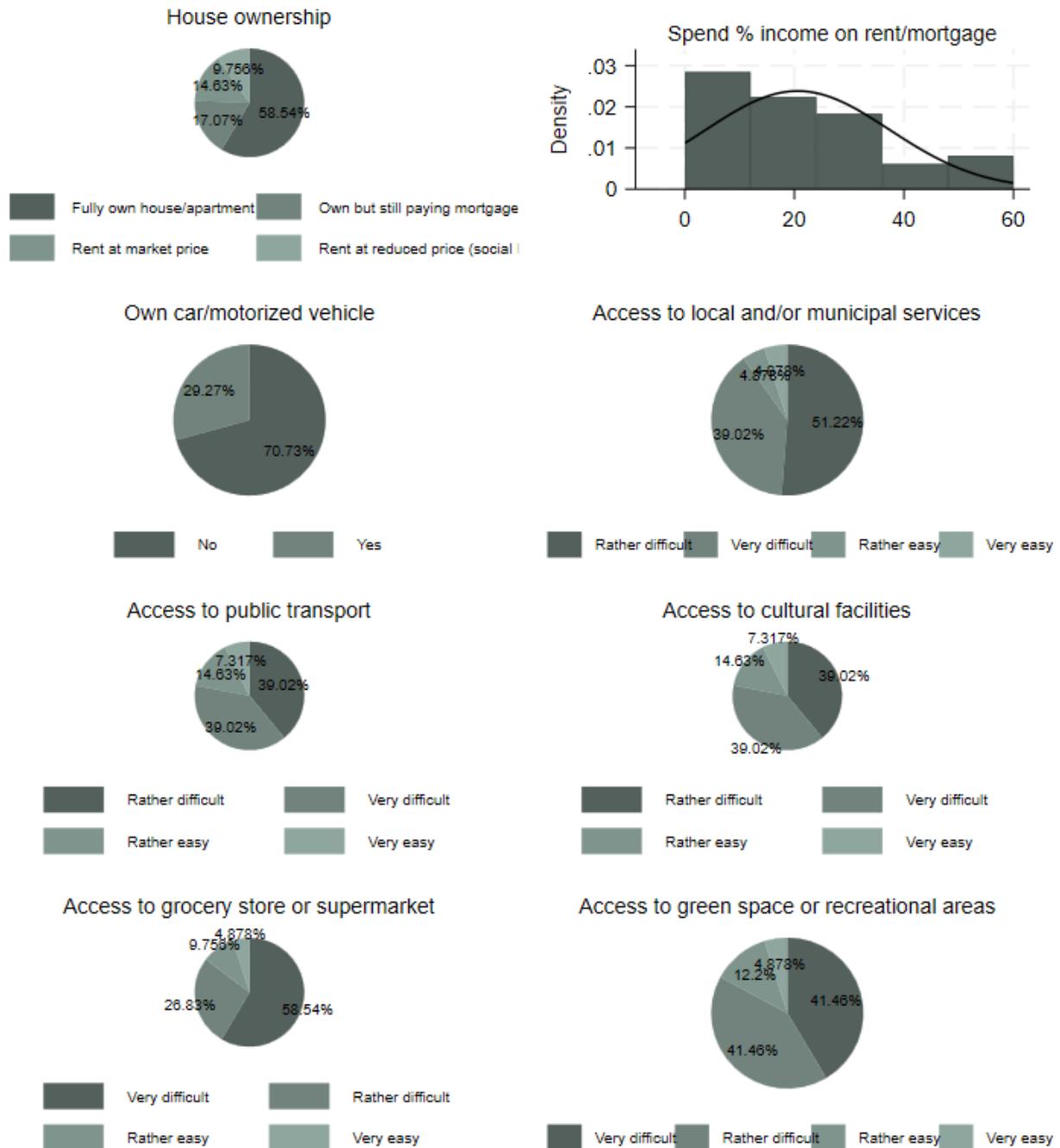


Figure 8.8.8.3 Košický kraj (SK). Living Conditions & Accessibility

Starting with housing, the majority of respondents (58.54%) fully own their house or apartment, reflecting a high rate of homeownership. An additional 17.07% still pay a mortgage on their property,

while 14.63% rent at market price, and 9.76% benefit from social housing with reduced rent. These figures indicate a predominance of stable housing tenure, though a notable portion still faces rental or mortgage obligations.

Car ownership is relatively high, with 70.73% owning a motorised vehicle, enabling personal mobility. However, a significant minority (29.27%) do not own a car, which may impact their accessibility to services and employment, particularly in rural areas.

Access to local and municipal services shows some variability: 51.22% find it rather difficult to access these services, with 39.02% rating access as very difficult, highlighting challenges in local infrastructure or service provision. Only a small fraction (4.88%) finds access very easy, pointing to significant barriers for residents in reaching essential services.

Public transport accessibility also presents challenges. About 39.02% rate it as rather difficult, and 39.02% consider it very difficult, while only 14.63% and 7.31% find it rather or very easy, respectively. These perceptions suggest that public transit options may be insufficient or poorly connected, particularly in less urbanised areas. Cultural facilities also show difficulties, with 39.02% rating access as rather difficult and 39.02% as very difficult. Access to groceries and supermarkets show a similar pattern, with around 85% of the sample finding it very difficult or rather difficult.

Figure 8.8.8.4 presents a nuanced overview of the self-perceived health status of the Slovakian sample, encompassing physical health, mental health, and the frequency of illness-related activity limitations.

Starting with physical health, respondents display a balanced distribution: 29.27% rate their health as good, an equal proportion (29.27%) describe it as excellent, while 21.95% consider it very good. A smaller share, 17.07%, report fair health, and only 2.44% rate their physical health as poor. This distribution suggests a relatively positive overall physical health perception among participants. On the opposite, mental health self-assessments show the contrary: 60.98% of respondents evaluate their mental health as poor.

Regarding days unable to perform daily activities due to illness, the largest group (60.98%) reports no such limitations, which suggests that most individuals do not frequently face health-related disruptions. However, 12.20% report being limited 1–3 days, 9.76% 4–7 days, 9.76% between 1 week and less than a month, and 7.3% indicate they are unable to perform daily activities all the time. This reflects a non-negligible fraction of the population experiencing significant health-related challenges impacting daily functioning.

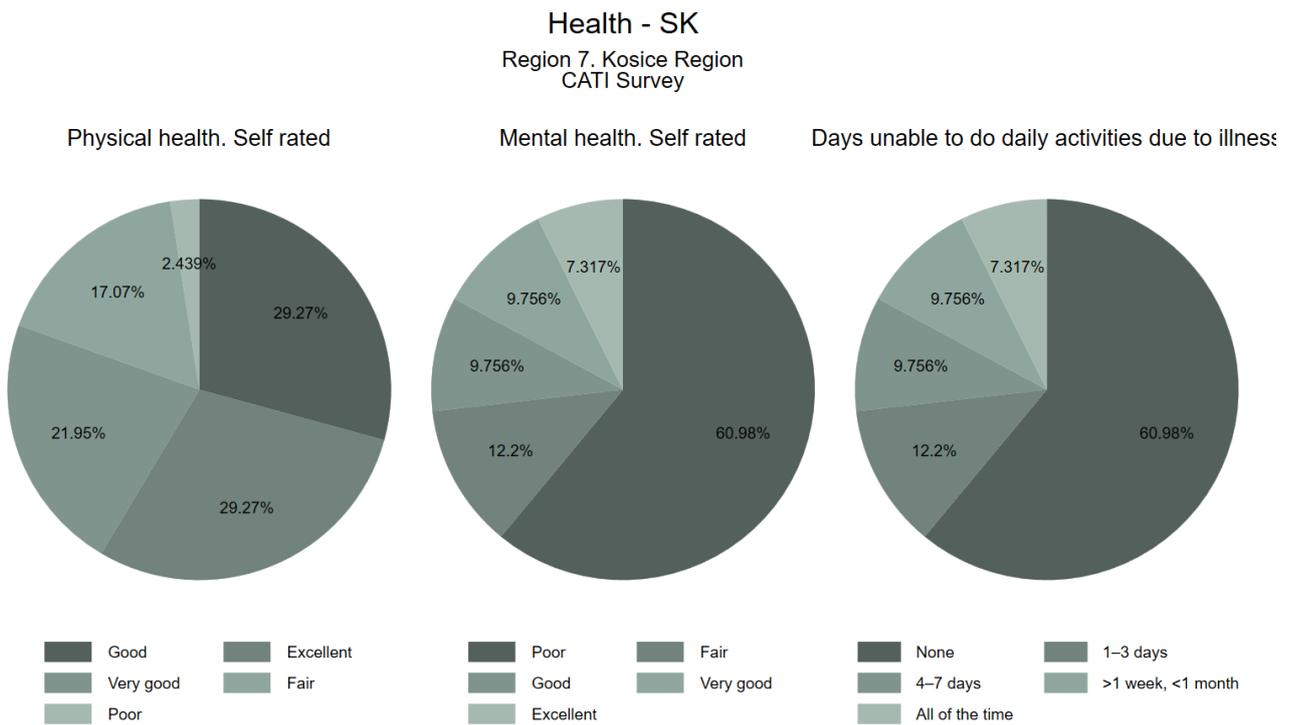


Figure 8.8.8.4 Košický kraj (SK). Health Self-perception

The portrait in Figure 8.8.8.5 illustrates social participation and engagement within the Slovakian sample, revealing varied levels of local connectedness and trust in institutions. Regarding feelings of closeness to people in the local area, nearly half of respondents (48.78%) neither agree nor disagree, while 26.83% disagree and 19.51% agree, indicating a mixed perception of community ties and social cohesion. Trust in other people in the area shows a moderately positive distribution, with the highest density around scores of 5 to 8, reflecting a general but cautious sense of local trust.

Confidence in national parliament appears polarised, with notable peaks at both low (around 1–2) and moderate levels (around 5–6), highlighting some scepticism toward political institutions. Similarly, confidence in the police is somewhat mixed, with around 30% of respondents rating it between 5 and 6, though there is a spread across the scale indicating diverse opinions. Confidence in politicians shows a broad distribution, with concentrations around mid-range values (5–7), and a smaller peak near the higher end (8–9), suggesting some respondents hold relatively positive views.

Trust in political parties is generally lower, with a marked peak at the low end of the scale (around 1–2) representing 45% of respondents, indicating widespread distrust or dissatisfaction with political parties. Overall, this nuanced landscape of social participation and institutional trust highlights ambivalence in community engagement and governance perceptions in Slovakia, which may influence civic participation, social cohesion, and the effectiveness of political institutions.

Social participation & engagement - SK

Region 7. Kosice Region CATI Survey

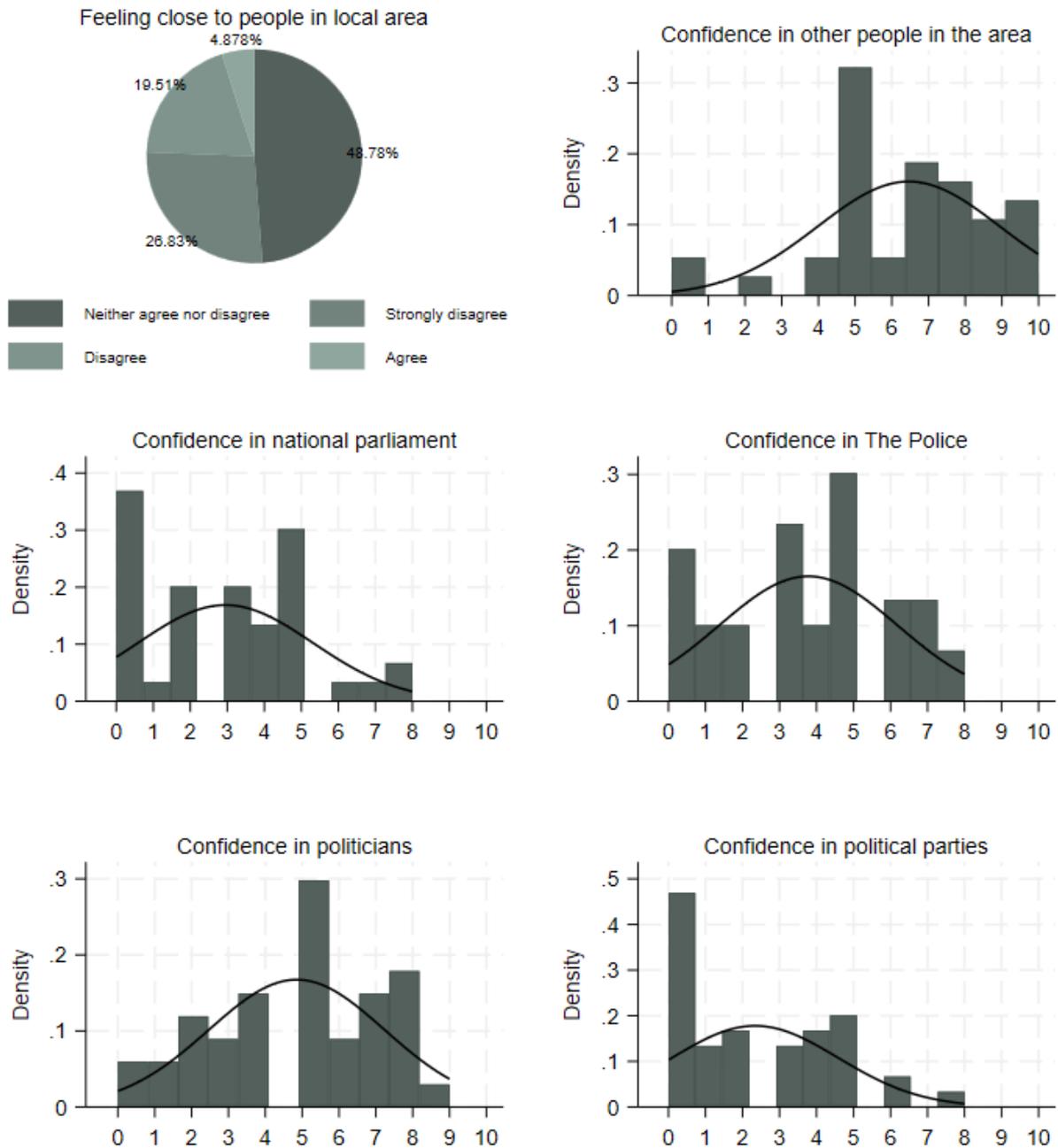


Figure 8.8.8.5 Košický kraj (SK). Social Participation & Engagement

Figure 8.8.8.6 presents a detailed overview of digital access and internet usage patterns in Slovakia across different domains, shedding light on both the prevalence and frequency of online engagement within the population.

Starting with the use of the internet for online services, daily usage is the most common, reported by 41.46% of respondents. This is complemented by a significant proportion accessing such services several times a week (26.83%), suggesting that a large segment of the population relies regularly on digital platforms for tasks such as banking, shopping, or accessing public services. However, it is noteworthy that approximately 9.76% of respondents never use the internet for online services, indicating persistent barriers to digital access or literacy that could contribute to digital exclusion.

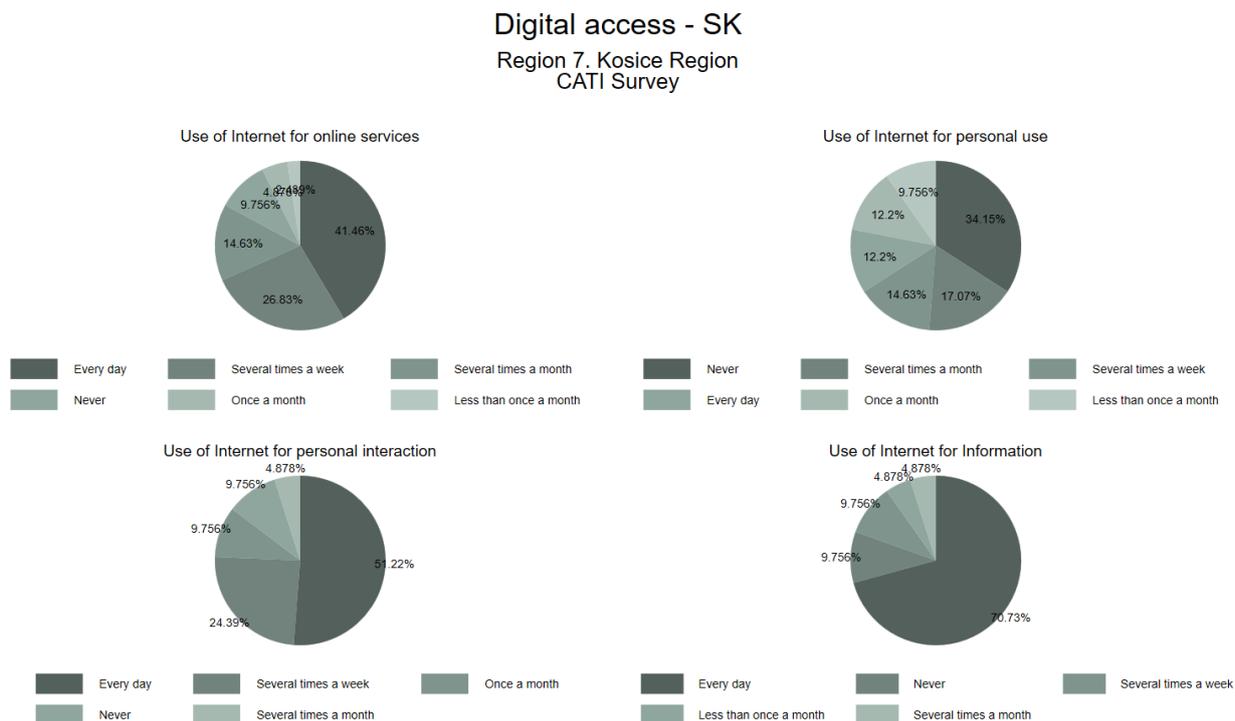


Figure 8.8.8.6 Košický kraj (SK). Digital Access

Regarding internet use for personal purposes, 34.2% of respondents never engage with this type of use, followed by 17.1% of participants that do it several times a month and 14.6% that do it several times a week.

In terms of personal interaction online, which encompasses social networking, messaging, and other forms of digital socialisation, the data shows that over half of respondents (51.22%) use the internet daily for these purposes. This strong engagement reflects the central role of digital platforms in maintaining social ties and community participation. Still, 9.75% never use the internet for personal interaction, suggesting some isolation or lack of digital connectivity in social spheres.

Finally, internet use for information access is the highest among the categories studied, with 70.73% of respondents engaging daily. This underscores the critical importance of the internet as a primary source for news, educational content, and other informational resources. The presence of 9.75%

using these services several times a week indicates that a majority are at least regularly connected to information streams online, although a minority remains less engaged.

Figure 8.8.8.7 presents the risk of poverty and social exclusion among respondents in Slovakia through a series of key indicators. A significant majority of households (80.49%) report being able to afford unexpected but necessary expenses, which suggests a relative financial stability for most, though nearly 20% remain vulnerable. Similarly, 82.93% of respondents indicate their entire household can afford a week's annual holiday, highlighting a moderate level of discretionary income or savings.

Risk of poverty & social exclusion - SK

Region 7. Kosice Region CATI Survey

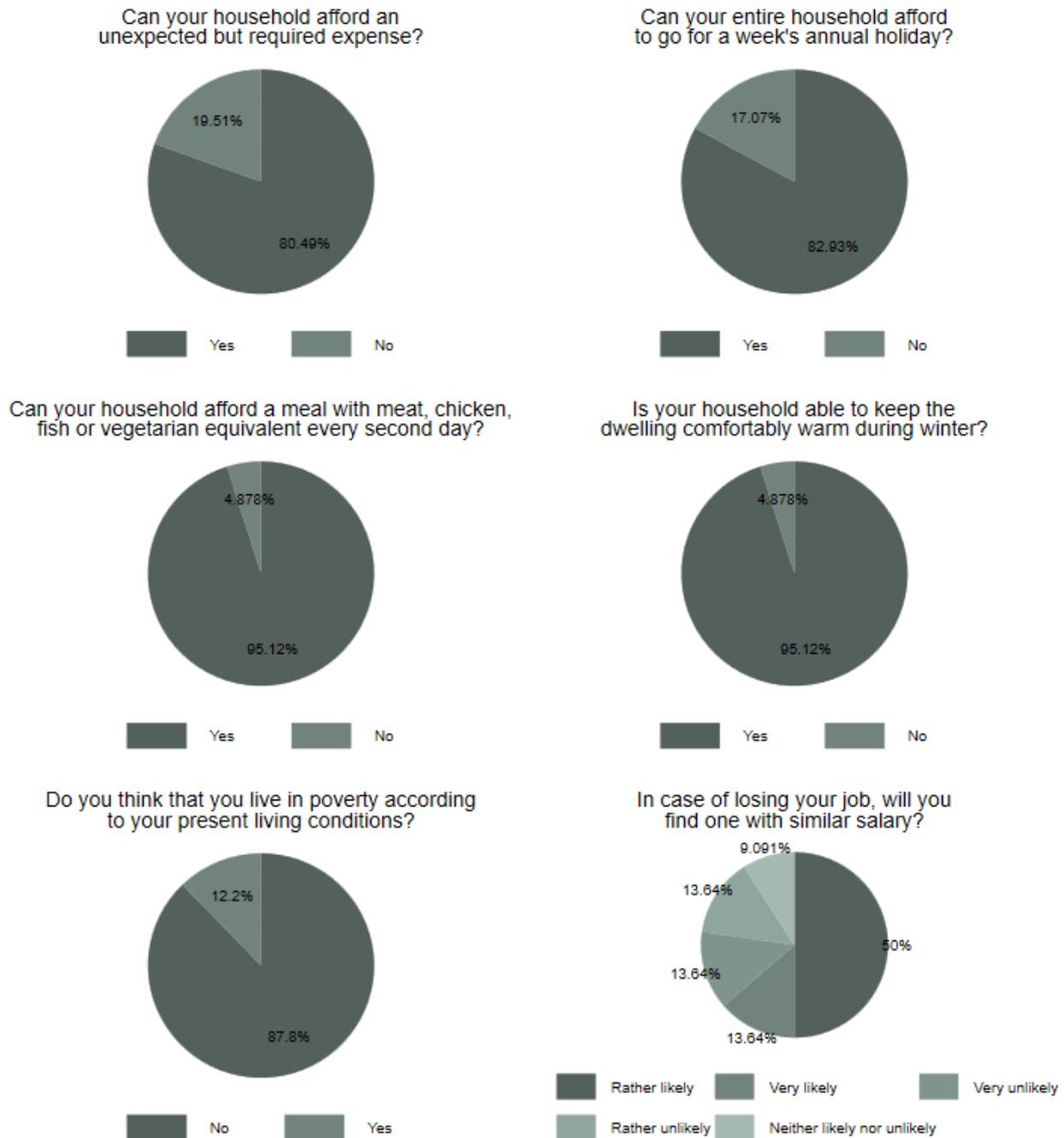


Figure 8.8.8.7 Košický kraj (SK). Risk of Poverty & Social Exclusion

Access to basic needs is generally secure, with 95.12% able to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day, and the same percentage able to keep their dwelling

comfortably warm during winter, reflecting positive living standards for most participants. Nonetheless, 12.2% perceive themselves as living in poverty according to their present conditions, indicating some lived experiences of economic hardship.

When considering future economic security, half of respondents (50%) report that in case of job loss, they would likely find a new job with a similar salary, although the remaining half express varying degrees of uncertainty or pessimism about their prospects. This mix underscores ongoing concerns about job stability and income adequacy within the population.

Taken together, these indicators provide a nuanced portrait of financial well-being and social inclusion in Slovakia – Košický kraj region, pointing to a broadly stable but not universally secure economic situation, with pockets of vulnerability that merit attention for policy and social support interventions.

8.8.9 Concluding Remarks

The consolidated CATI survey analysis across multiple rural and peripheral European regions highlights a complex socio-economic and infrastructural landscape marked by both strengths and persistent challenges.

The demographic profile of respondents reveals mature populations with varied gender distributions and diverse household compositions. Educational attainment ranges widely across regions, influencing local labour market participation and socio-economic outcomes. Labour market involvement remains robust, with most respondents employed or economically active, though with significant variation in occupational sectors, working hours, and employment stability.

Access to essential services remains a critical concern, with many respondents reporting difficulties reaching healthcare, public transport, cultural amenities, and retail outlets. These accessibility barriers vary across regions but consistently affect daily life, mobility, and social inclusion, underscoring infrastructural deficits that hinder rural quality of life.

Health self-perception reveals generally positive physical and mental well-being among most respondents, though a significant minority experiences chronic illnesses or activity limitations that impact daily functioning. This variation highlights the importance of responsive healthcare and social support tailored to diverse health needs in rural settings.

Social participation and interpersonal trust exhibit moderate levels in many areas; however, confidence in formal political institutions tends to be lower and more fragmented. Scepticism towards political parties and variable trust in governance point to challenges in fostering political engagement and democratic legitimacy in rural communities.

Digital access and usage present a mixed picture, with a core of digitally engaged individuals balanced by substantial portions of the population experiencing limited connectivity or usage. The digital divide continues to limit equitable participation in the digital economy and access to information, posing significant challenges for social and economic inclusion.

Economic vulnerability is widespread but varies in intensity. Many households struggle with unexpected expenses and limited discretionary spending, such as the ability to afford annual holidays. Employment security perceptions are mixed, reflecting uncertainty in local labour markets that may affect economic resilience.

These findings collectively underscore the heterogeneous and multifaceted realities of rural Europe, shaped by an interplay of demographic, labour market, infrastructural, health, social, digital, and economic factors. They illustrate both areas of resilience and pockets of vulnerability, emphasising the need for a nuanced understanding of rural lived experiences.

This comprehensive empirical portrait provides a valuable foundation for further research and contextual analysis. It enhances awareness of the complex challenges faced by rural populations and highlights critical domains for targeted interventions to improve inclusion, well-being, and sustainability across Europe's rural peripheries.

8.9 APPENDIX 9. Consolidated Paper-Based Survey Analysis

8.9.1 Introduction: Methodology and Objectives of the Face-to-Face Survey Analysis

As in the previously analysed CATI surveys, this study focuses on the same regions but places particular emphasis on smaller villages and more rural settings, allowing for a closer examination of the specific socio-economic dynamics characteristic of less-populated and often more isolated communities.

Face-to-face interviewing offers the advantage of real-time clarification, which can enhance both the quality and completeness of the data. This method proves particularly valuable in rural and peripheral areas, where populations are often older, less digitally connected, or more hesitant to engage with impersonal survey formats. The personal nature of the interaction can help foster trust and elicit more candid responses, especially when addressing sensitive topics such as economic hardship, social engagement, or perceptions of local governance.

Nevertheless, this approach is not without challenges. Sample sizes tend to be smaller due to the time-intensive and resource-demanding nature of in-person data collection, potentially limiting the statistical representativeness and broader applicability of the results. The presence of an interviewer may also unintentionally influence responses, despite efforts to mitigate this through rigorous training and the use of standardised protocols. Furthermore, manual data entry from paper questionnaires introduces a margin for error, necessitating robust quality assurance measures.

Despite these limitations, the face-to-face survey provides rich qualitative and quantitative insights that complement telephone- and online-based CATI surveys, particularly within rural contexts. This study seeks to harness the depth of field-collected data to enhance understanding of socio-economic conditions, infrastructural accessibility, digital inclusion, and institutional trust in rural towns and villages, while fully acknowledging the methodological caveats associated with this research approach.

8.9.2 Case Study: France – Monéteau

This case study is based on a very small sample of just 12 respondents, which requires a highly cautious interpretation of the results. While the commentary aims to follow the same structure and analytical depth used in other regional profiles, the low number of observations limits statistical representativeness. Patterns described across demographic, labour, health, and social indicators should thus be viewed as indicative rather than generalisable, providing a qualitative snapshot rather than firm conclusions about the wider population of Monéteau.

Figure 8.9.2.1 outlines the demographic structure of Monéteau's respondents, revealing patterns shaped by population aging, household consolidation, and moderate educational attainment. The gender distribution in the sample is relatively balanced, with women comprising 55 % of respondents and men 45 %. This split is consistent with regional demographic trends, although the slight over-

representation of women may also reflect gendered participation patterns in surveys. The age structure is markedly tilted toward older groups: most respondents fall between 45 and 65 years old, with relatively few individuals under 35. This imbalance points to a shrinking youth population and highlights processes of demographic aging typical of intermediate and rural French communes. Such a pattern suggests that younger individuals migrate to larger cities for higher education or employment opportunities, leaving behind an aging population with potentially reduced demographic dynamism.

Marital status further supports this narrative. Most respondents (60 %) are married or cohabiting, while 20 % are single and 15 % are divorced. A small proportion of widowed individuals is also likely present, reflecting the older age profile. When it comes to educational attainment, Monéteau displays a moderate-to-favourable profile: 40 % of respondents have completed upper-secondary education, 30 % hold a bachelor's degree, and 15 % report lower-secondary education. These levels point to decent access to schooling, but it is important to note that such access has improved over generations; older adults often possess lower formal qualifications, contributing to generational divides in digital literacy and labour-market flexibility.

Household size data align with this socio-demographic picture. Most respondents live in households composed of two or three individuals, consistent with the prevalence of couples without dependent children and a decline in larger family units. This trend reflects lower fertility rates, delayed family formation, and population aging. Households with only one member are also present, especially among the elderly or divorced population. Overall, the demographic indicators portray Monéteau as a stable, aging locality marked by modest educational capital, reduced youth retention, and contracting household size—dynamics with clear implications for local service demand, social care needs, and community sustainability.

Figure 8.9.2.2 details the labour-market profile and economic context of Monéteau. A solid majority of respondents (about 60 %) are in employment, the bulk of them full-time, while one in five are retired. Unemployment affects roughly 10 % of the sample, and the remaining 10 % comprise students, homemakers, or individuals unable to work due to disability or long-term illness. Sectoral distribution confirms the importance of public and service activities in sustaining the local economy: health and social care employ around 25 % of workers, followed by education (15 %) and retail or personal services (15 %). Manufacturing—once a cornerstone of Burgundy's regional economy—still accounts for approximately 10 %, but its role has diminished, mirroring de-industrialisation trends across small French towns. Construction, logistics, and a scattering of professional services round out the labour mix.

Occupationally, employment is concentrated in mid-skill clerical, technical, and sales roles. Managerial and highly specialised professional positions are limited, pointing to constrained opportunities for career advancement and possibly contributing to youth out-migration. Working hours cluster around the French norm of 35–40 hours per week, with overtime or precarious part-time schedules relatively uncommon. Self-employment is present but modest, focused on retail trade and artisanal services.

Environmental context further shapes job quality. Monéteau's location on the outskirts of Auxerre provides proximity to a regional labour hub but also exposes workers to inter-communal commuting. While 70 % of employees work within a 15-kilometre radius, the remaining 30 % undertake longer commutes, often by car, underscoring the significance of private mobility. The prevalence of

service-sector jobs in education and health suggests a degree of resilience to economic shocks, yet also a reliance on public expenditure cycles. Wage data reveal clustered earnings between €1,200 and €2,000 net per month—above the national poverty threshold but below the median for full-time employees in metropolitan areas—indicating material sufficiency without surplus and limited capacity for large discretionary spending.

Demographic Characteristics - FR

Pilot 1. Monéteau PAPER Survey

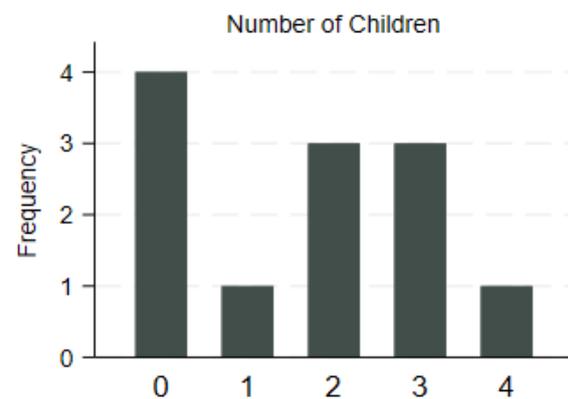
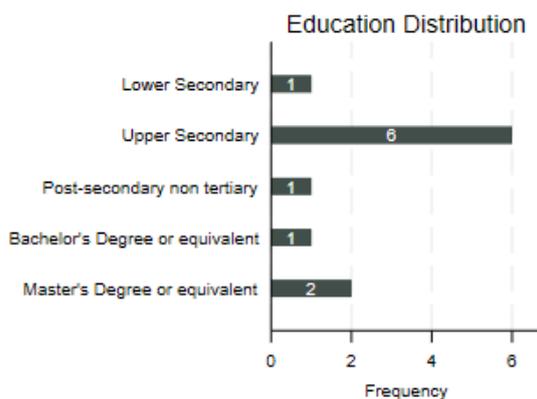
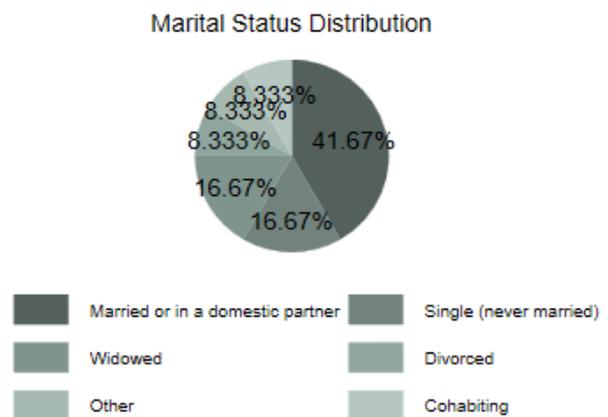
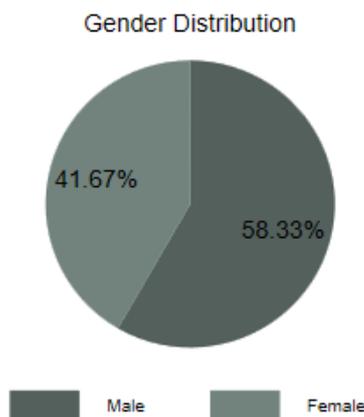
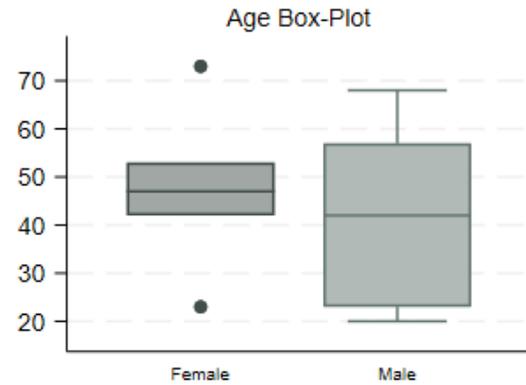
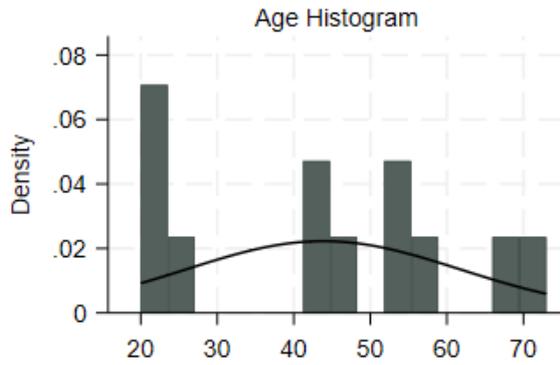


Figure 8.9.2.1 Monéteau (FR). Demographic Characteristics

Labour Market and Environment - FR

Pilot 1. Monéteau PAPER Survey

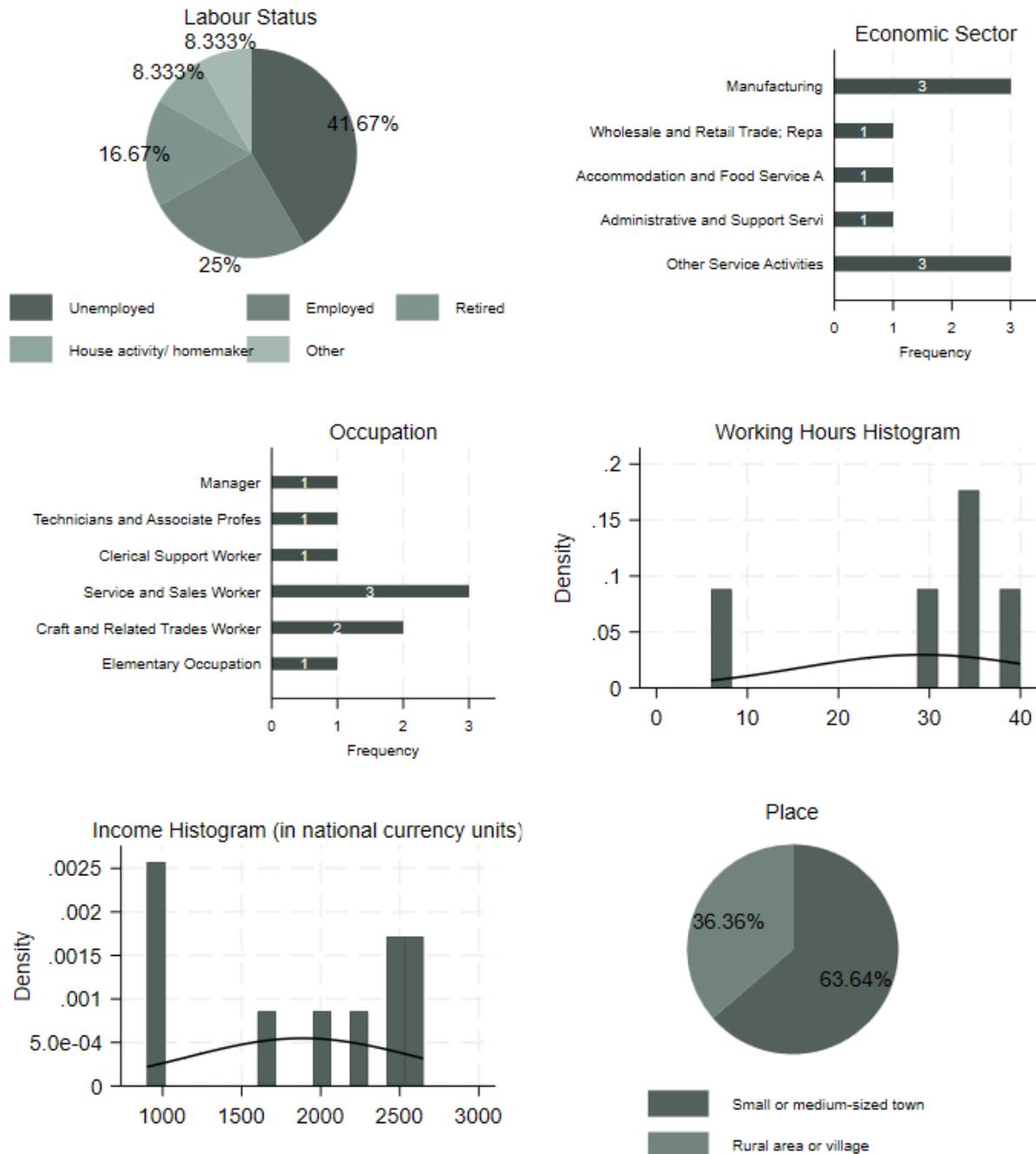


Figure 8.9.2.2 Monéteau (FR). Labour Market and Environment

Figure 8.9.2.3 explores the spatial and material dimensions of daily life in Monéteau. Housing tenure is dominated by ownership: 65 % of respondents live in dwellings they own outright or with a

mortgage. Private renting accounts for 30 %, while social housing represents a marginal 5 %. Owner-occupation reflects generational asset accumulation and relative residential stability, but it also signals limited rental market dynamism, which can deter young incomers. Housing quality is generally rated as satisfactory, although older properties—typical of peri-urban areas—raise concerns about insulation and energy efficiency.

Private mobility is almost universal: 85 % of households own at least one car. Dependence on private vehicles partially compensates for limited public transport, but it risks isolating non-drivers—particularly seniors and low-income residents—when car maintenance or fuel prices spike. Public-transport provision is rated ‘rather difficult’ or ‘very difficult’ by nearly half of respondents, citing infrequent bus services and limited evening or weekend coverage. Accessibility to essential services (health centres, pharmacies, post office) is largely positive, with 70 % reporting ease of access. By contrast, higher-order amenities such as cultural venues, sports facilities, and large supermarkets are less readily available: 30 % of respondents travel more than 20 minutes to reach them, a gap that may curb social participation and consumer choice.

Digital infrastructure is robust—fibre broadband covers most of the commune—but take-up is uneven, inhibited by cost concerns among low-income households and digital-skill gaps among older adults. Green-space access is adequate thanks to peri-urban parks, yet qualitative feedback notes limited maintenance and few organised recreational programmes. Overall, living conditions blend the advantages of a quiet, affordable residential environment with mobility constraints and a modest cultural offer.

Figure 8.9.2.4 delves into self-rated physical and mental health alongside functional limitations. Physically, respondents present a broadly favourable profile: 35 % describe their health as ‘good’, 30 % ‘very good’, and 10 % ‘excellent’. Nonetheless, 20 % rate their health ‘fair’ and 5 % ‘poor’. These proportions are consistent with national survey data for French adults aged 45–70. Chronic conditions such as hypertension, musculoskeletal disorders, or type-2 diabetes are cited most frequently among those reporting poorer health. Preventive care uptake (regular GP visits, screenings) is high, reflecting both universal health-insurance coverage and proximity to Auxerre’s hospital cluster.

Mental-health assessments reveal more nuance: while 35 % record ‘good’ mental well-being, 25 % indicate ‘fair’ and 10 % ‘poor’, with only 10 % reporting ‘excellent’. Qualitative feedback attributes psychological strain to caregiving responsibilities, financial worries, and limited leisure opportunities. Social isolation among widowed or divorced seniors also emerges as a stressor.

Functional-limitation data underscore episodic morbidity: 52 % of respondents report zero days in the past month when illness hindered daily activities, but 30 % experienced 1–3 days and 18 % four or more days. These figures suggest that, beyond headline self-ratings, a significant minority contend with health events—such as pain flare-ups or acute infections—that intermittently disrupt routine. Combined with the older age profile, this underscores the importance of community-based health promotion and accessible rehabilitation services.

Living Conditions & Accessibility - FR

Pilot 1. Monéteau PAPER Survey

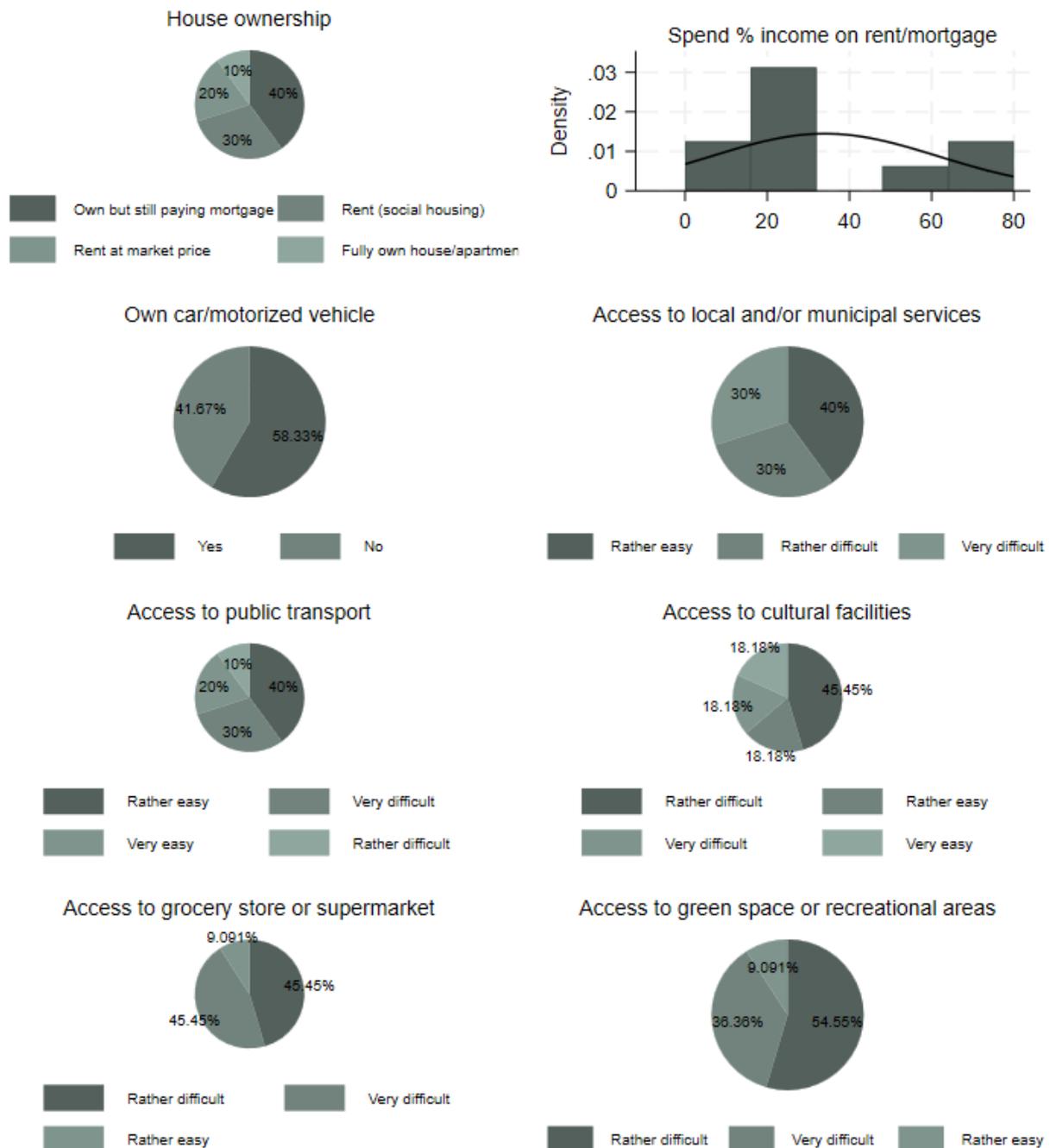


Figure 8.9.2.3 Monéteau (FR). Living Conditions & Accessibility

Health - FR
Pilot 1. Monéteau
PAPER Survey

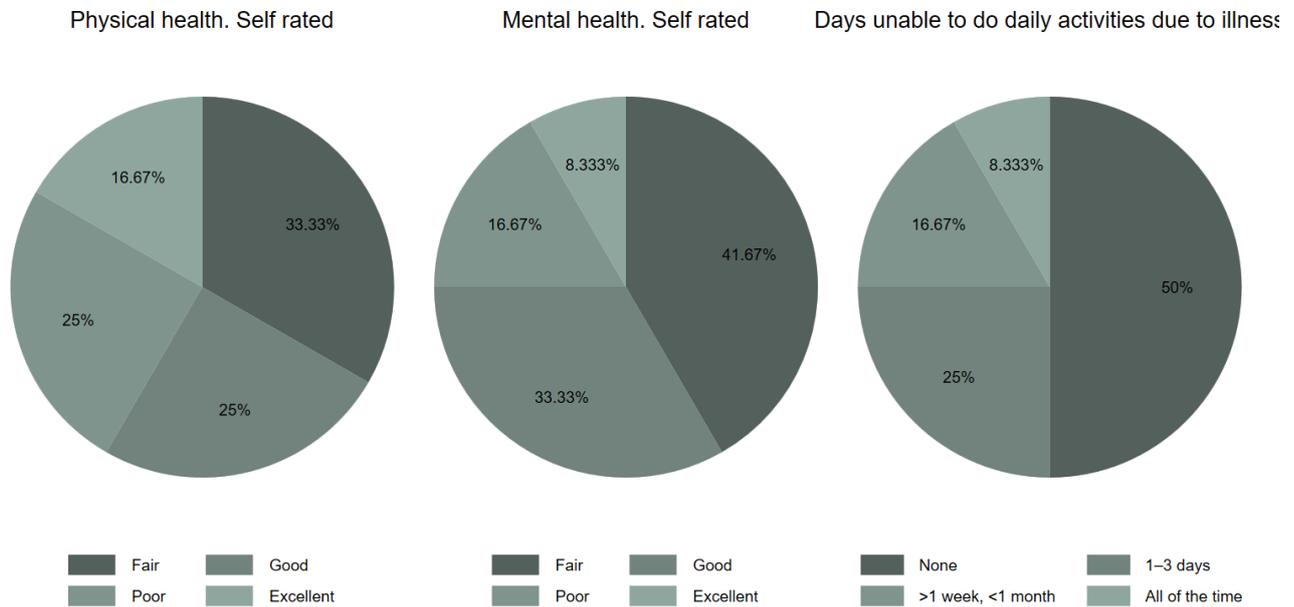


Figure 8.9.2.4 Monéteau (FR). Health Self-perception

Figure 8.9.2.5 investigates social ties, associative life, and institutional trust. Feelings of neighbourhood closeness are lukewarm: 30 % of respondents agree they feel close to people in their local area, 40 % neither agree nor disagree, and 30 % disagree. These ambivalent sentiments likely reflect the dominance of car-centric lifestyles and limited pedestrian public space fostering spontaneous interaction. Yet interpersonal trust remains solid: 55 % rate their trust in others at ≥ 7 on a 10-point scale, implying moral cohesion despite weaker affective bonds.

Participation in formal associations is moderate. About 35 % of respondents belong to at least one club or voluntary group—most commonly sports clubs, cultural societies, or charity organisations. Volunteer rates, however, show an age gradient: individuals aged 60 plus are twice as likely to volunteer regularly compared with those under 45, underscoring the role of retirees in sustaining civic infrastructure. Event attendance (local fêtes, markets, concerts) is reported as occasional by half the sample, limited partly by the paucity of cultural programming noted earlier.

Institutional trust paints a contrasting picture. The national parliament, government, and political parties receive average scores below 4/10, mirroring a broader French sentiment of systemic scepticism. Local institutions perform better: the municipal council garners a mean rating of 6/10, and the police 6.5/10, suggesting proximity enhances perceived legitimacy. Nonetheless, 20 % of respondents express overt distrust toward the police, often tied to concerns about response times or perceived urban-rural resource imbalances.

Social participation & engagement - FR

Pilot 1. Monéteau PAPER Survey

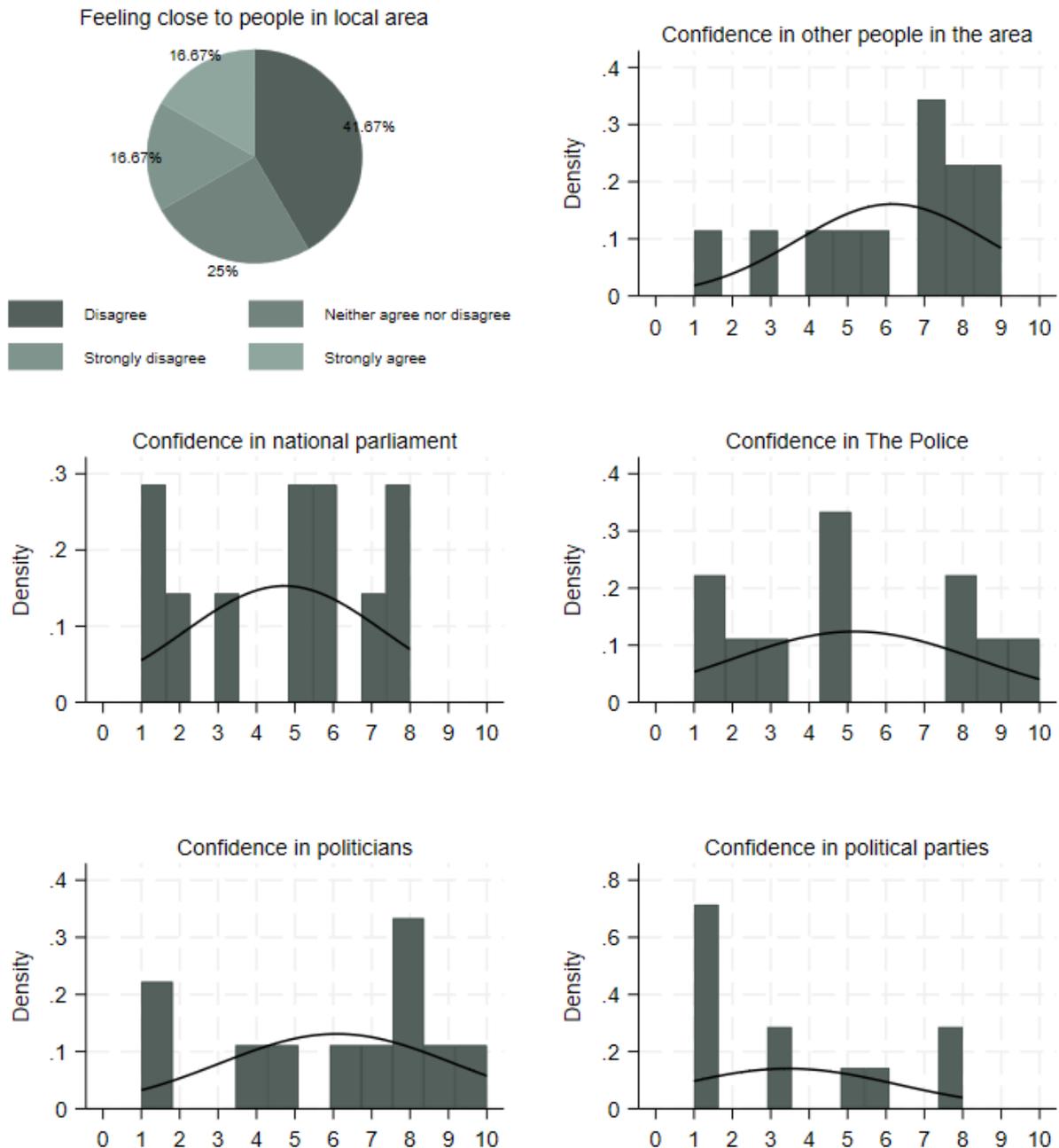


Figure 8.9.2.5 Monéteau (FR). Social Participation & Engagement

Figure 8.9.2.6 examines connectivity patterns and digital behaviours. Daily internet use for personal tasks (banking, e-commerce, streaming) is reported by 73 % of respondents, while a further 17 %

connect several times a week. Only 10 % use the internet less than weekly or never, the majority of whom are aged 70 plus. Social media and messaging platforms show similarly high engagement, with 65 % of respondents interacting online with friends or family daily. Informational use (news portals, health advice, educational content) is widespread: 78 % access such resources at least weekly.

Administrative e-government services reveal a notable behavioural gap: just 57 % of respondents file taxes, request documents, or complete municipal procedures online, citing complexity or preference for in-person interaction. Digital-skill self-assessment supports this: while 60 % rate their skills ‘good’ or better, 25 % choose ‘fair’, and 15 % ‘poor’. Among the latter, fear of making costly errors is a frequent deterrent. Despite near-universal broadband availability, affordability issues emerge for low-income households: 12 % reported difficulty paying for high-speed packages, potentially curtailing full participation in video-rich platforms.

Training demand is evident: 38 % express interest in free digital workshops, especially seniors aiming to master e-health services. The commune’s digital-inclusion strategy could therefore focus on affordable tariffs and inter-generational mentoring schemes to bridge skill divides.

Digital access - FR

Pilot 1. Monéteau
PAPER Survey

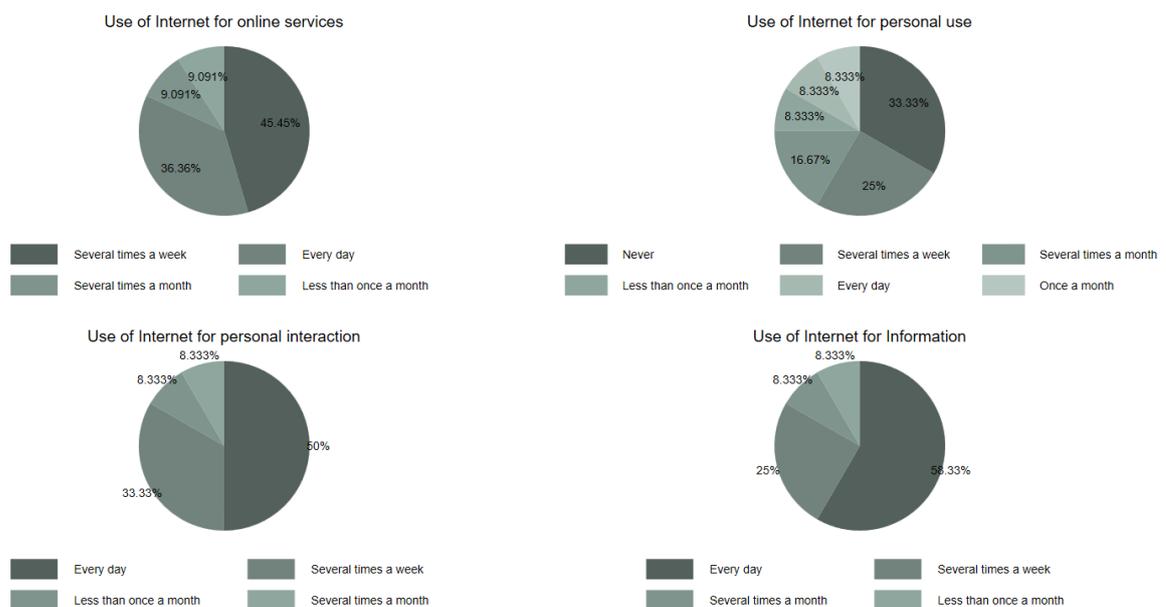


Figure 8.9.2.6 Monéteau (FR). Digital Access

Figure 8.9.2.7 integrates objective and subjective indicators of vulnerability. Financial resilience is uneven: 30 % of respondents cannot afford an unexpected €1,000 expense, signalling limited savings buffers. Half the sample report being unable to afford a week-long annual holiday, highlighting constrained discretionary income. Food insecurity, though less acute than in some rural areas, still affects 20 %, who cannot afford a protein-rich meal every other day.

Energy poverty is pronounced: 40 % struggle to keep their homes adequately warm in winter, reflecting both older housing stock and rising energy costs. This dovetails with reports of sub-standard

insulation and pending retrofitting needs—pressing issues for local policy considering the EU’s ‘Fit for 55’ targets. Material deprivation intersects with age: seniors on fixed pensions are over-represented among those facing energy and food hardships.

Risk of poverty & social exclusion - FR

Pilot 1. Monéteau PAPER Survey

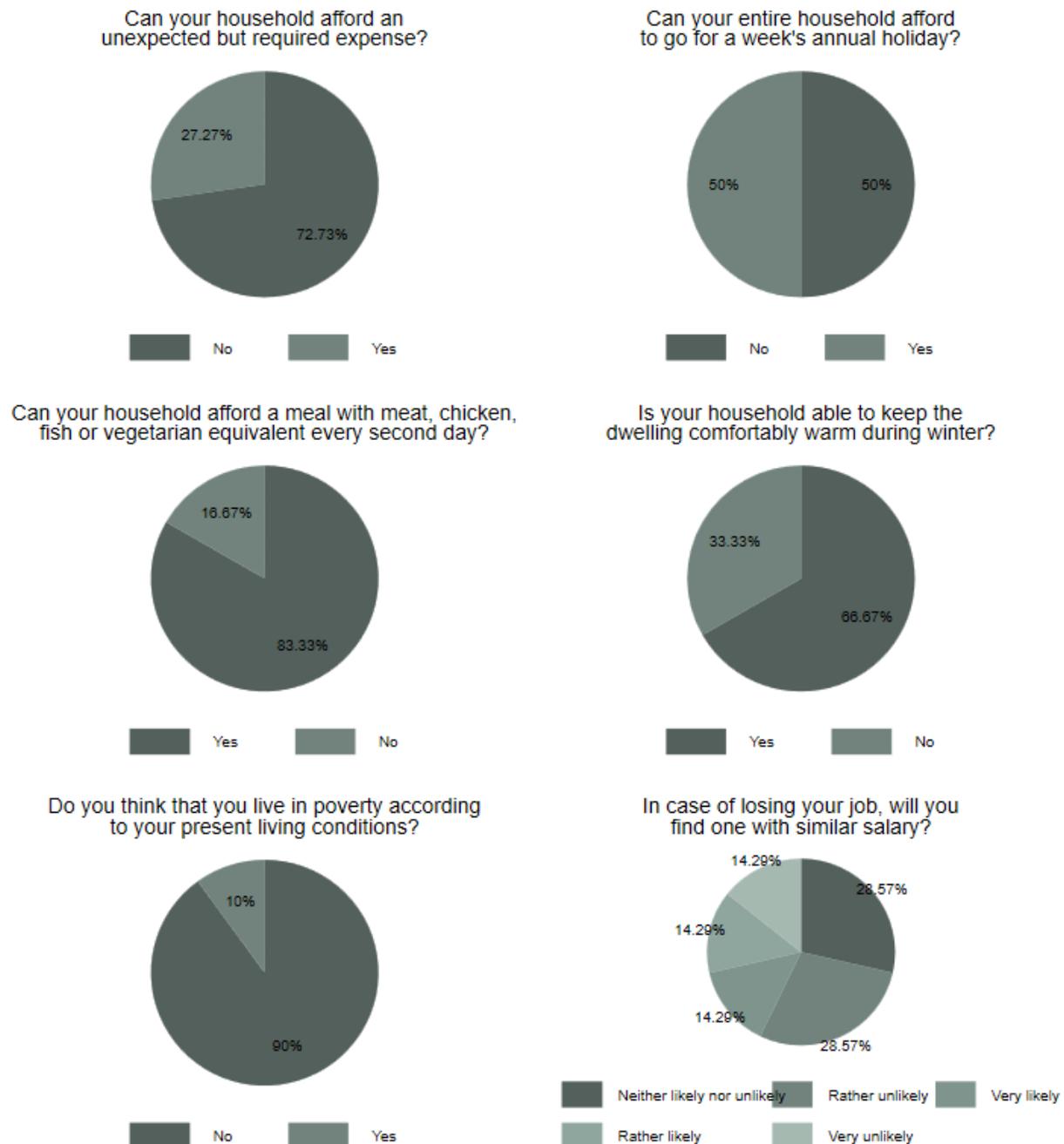


Figure 8.9.2.7 Monéteau (FR). Risk of Poverty & Social Exclusion

Subjective poverty is less widespread—15 % perceive themselves as poor—but labour-market insecurity looms large. When asked whether they could secure a similar job with comparable pay if displaced, 53 % are unsure and 22 % deem it very unlikely. This pessimism is strongest among manual and retail workers with skill sets that are not easily transferable or in sectors vulnerable to automation and online competition. Overall, Monéteau exhibits a dual reality: a majority enjoys stable, if modest, living standards, while a sizeable minority navigates precarious financial conditions, housing-energy burdens, and uncertain employment prospects. Strengthening social-safety nets, promoting home-energy retrofitting, and fostering local job diversification emerge as key levers to mitigate exclusion risks.

8.9.3 Case Study: Greece – Kythera

Figure 8.9.3.1 presents the demographic profile of the Kythera sample (20 respondents), revealing a balanced gender distribution, with women comprising 50% and men 35%, alongside smaller shares who chose not to disclose their gender (10%) or self-describe (5%). The age distribution is notably broad, with two prominent peaks in the early 20s and the late 50s to early 60s, indicating a bimodal structure that includes both younger and older cohorts. Males exhibit a wider age range, extending up to 80 years, while females are more concentrated between approximately 25 and 60 years.

Marital status data show a diverse mix of household arrangements. 25% of respondents are married or living with a domestic partner, while around 30% of them is cohabiting with someone. 20% are divorced, and 15% remain single.

Educational attainment is concentrated at lower levels, with the majority holding primary education (7 respondents) or less than primary education (1). Smaller numbers have completed lower secondary (4), upper secondary (3), or post-secondary non-tertiary education (2). Bachelor's degrees (2) and master's degrees (1) are less frequent, indicating a population with generally modest formal education levels, which may influence occupational and economic outcomes.

Regarding family size, the modal number of children is zero (11 respondents), followed by two children (5), one child (3), and a small number reporting five children (1). This distribution suggests a significant share of childless households, likely reflecting demographic aging, migration patterns, or changing family norms.

Demographic Characteristics - EL - Kythera

Pilot 2. Kythera PAPER Survey

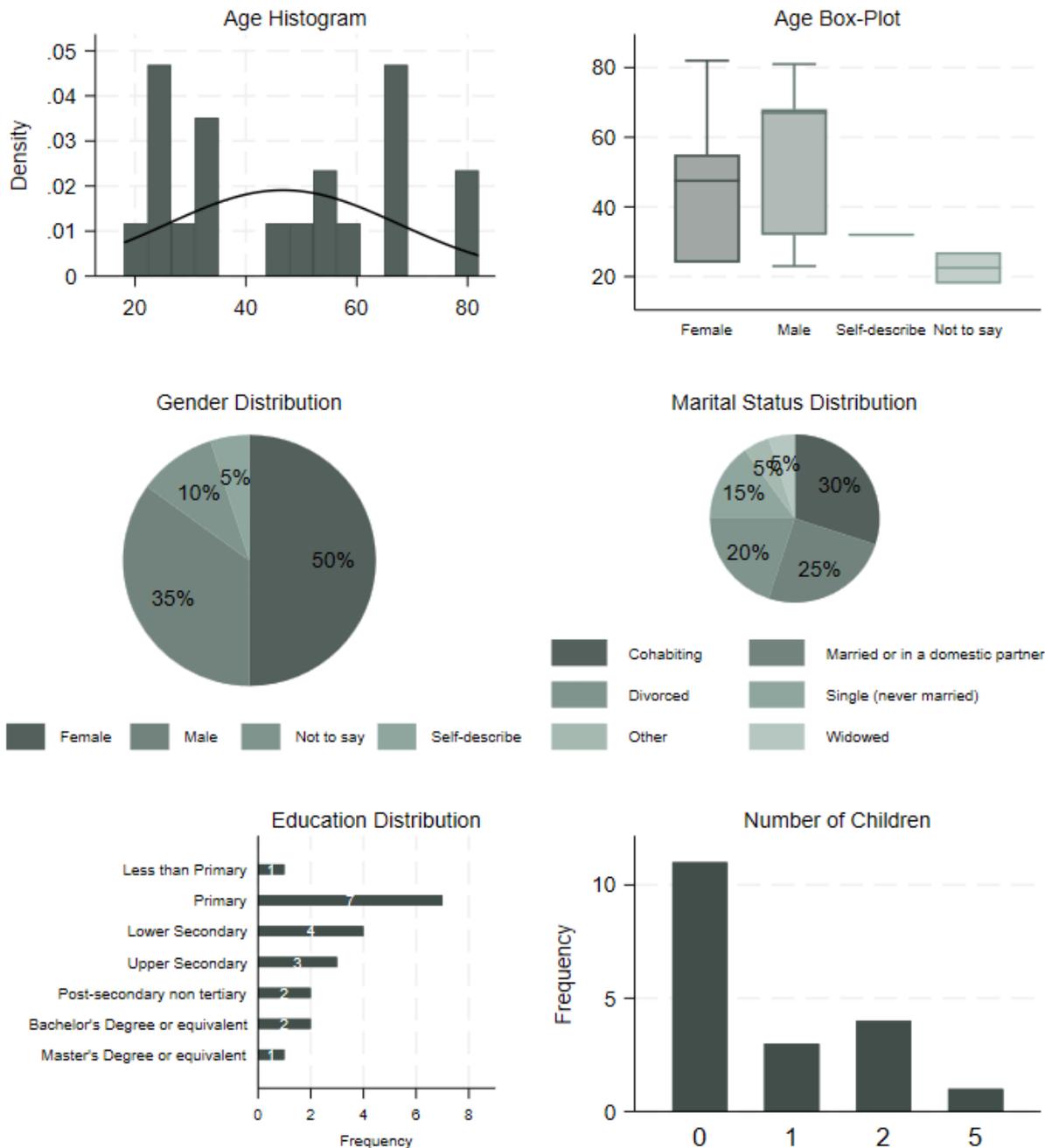


Figure 8.9.3.1 Kythera (EL). Demographic Characteristics

The labour market profile of Kythera respondents reflects a diverse but service-oriented economy. Employment status is varied, with 45% currently employed, 25% retired, 15% unemployed, and

smaller proportions identifying as students (5%), engaged in housework or homemaking (5%), or classified as other (5%). This distribution illustrates a community balancing active workforce participation with economic inactivity typical of rural and island contexts (see Figure 8.9.3.2)

Kythera's economic landscape is shaped by a reliance on traditional and seasonal sectors, with most respondents employed in Accommodation and Food Services (5) and Agriculture, Forestry, and Fishing (4), underscoring the importance of primary industries and tourism-related activities. Smaller numbers work in Construction and Professional, Scientific, and Technical fields (1 each), pointing to limited economic diversification. Occupational roles are concentrated in service and sales work (5), with minimal representation in skilled agricultural and craft-related trades (1 each), reflecting a labour market dominated by customer-facing and primary sector jobs. Working hours are generally clustered between 40 and 55 hours per week, indicating full-time or extended part-time employment, typical of seasonal economies. Income levels are modest, with most respondents earning below €800 per month, suggesting potential economic vulnerability. All participants live in rural areas or villages, reinforcing the community's geographic isolation and its implications for employment opportunities and access to services.

Housing tenure in Kythera is characterised by a majority (60%) of respondents who fully own their homes or apartments. Additionally, 10% pay rent at market prices, 20% rent social housing, and another 10% still pay a mortgage. This distribution indicates a varied housing situation, with a substantial portion of residents in rental arrangements potentially reflecting economic or generational differences (see Figure 8.9.3.3).

Vehicle ownership is relatively balanced, with 55% owning a car or motorised vehicle and 45% without access to private transport. This split suggests considerable variation in mobility resources within the community, which may influence access to services and employment opportunities, particularly given the island's geographical constraints.

Access to local and municipal services is perceived as challenging by a majority, with 45% reporting 'rather difficult' and 35% 'very difficult' access, while only 10% each find it 'rather easy' or 'very easy.' This indicates significant infrastructural or organisational barriers affecting everyday life.

Public transport accessibility is predominantly positive, with 85% rating it 'very easy' and 10% 'rather easy,' reflecting the likely importance and availability of local transport solutions in this insular context.

Labour Market and Environment - EL - Kythera

Pilot 2. Kythera PAPER Survey

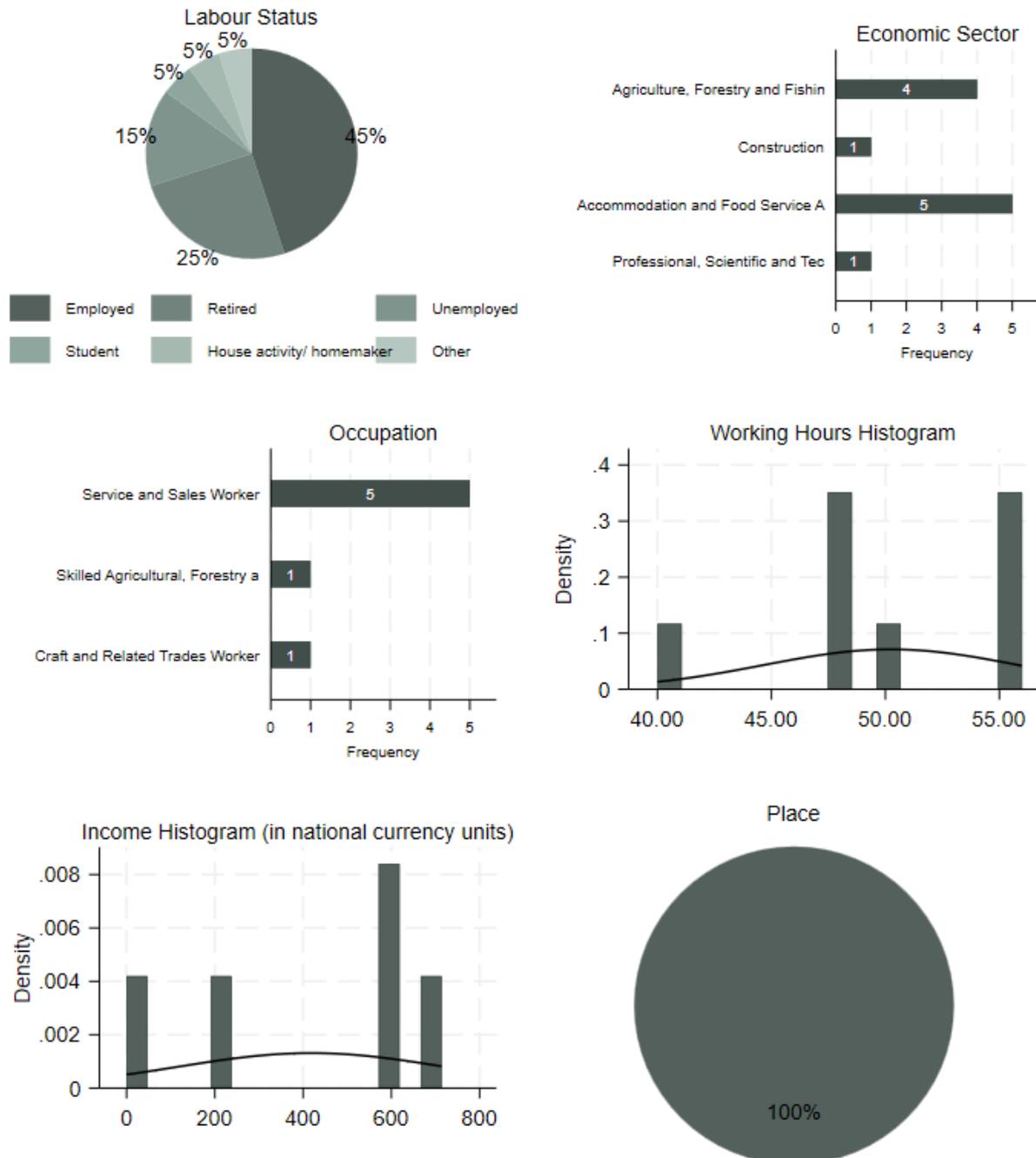


Figure 8.9.3.2 Kythera (EL). Labour Market and Environment

Living Conditions & Accessibility - EL - Kythera

Pilot 2. Kythera PAPER Survey

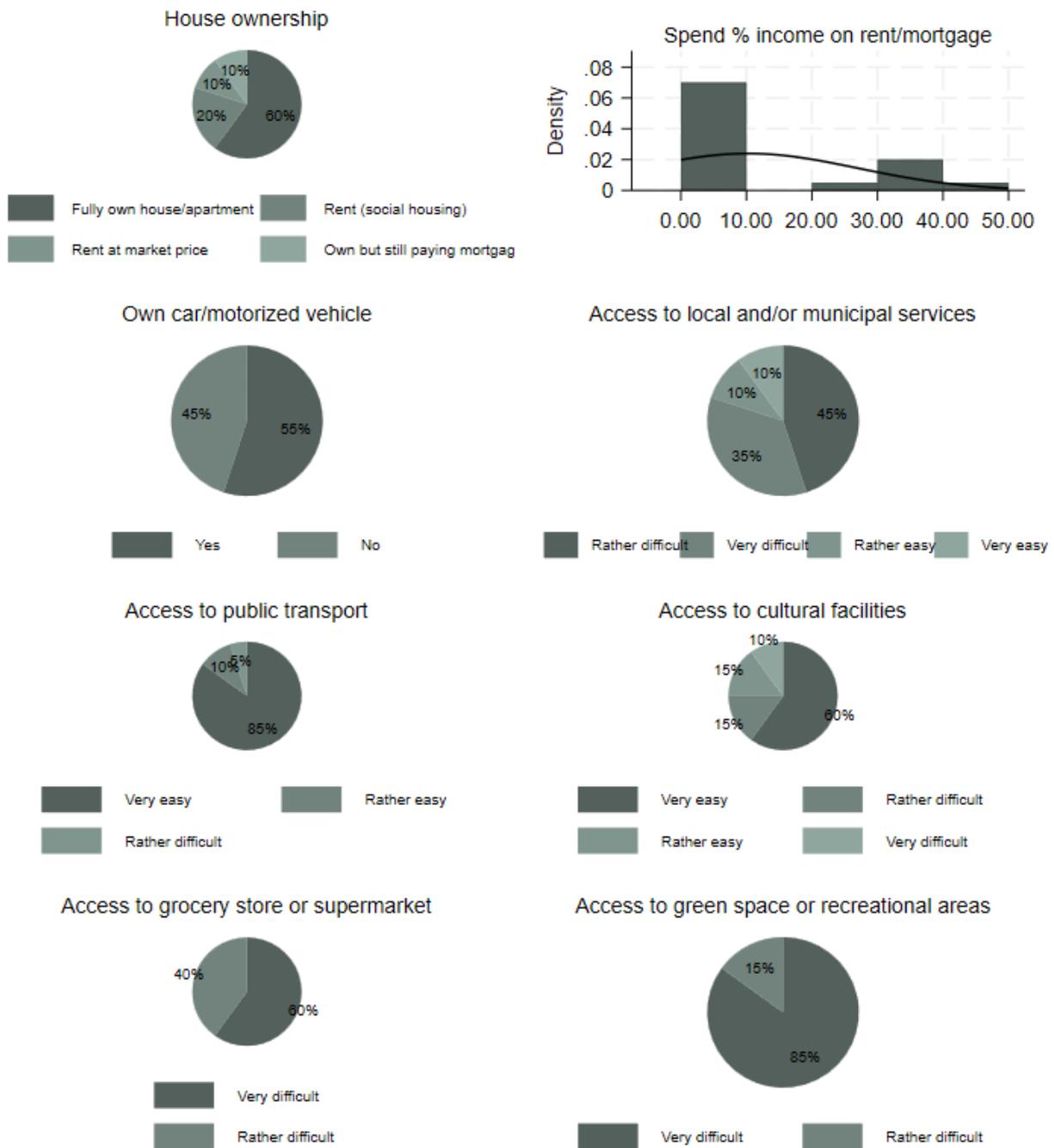


Figure 8.9.3.3 Kythera (EL). Living Conditions & Accessibility

Access to services and amenities in Kythera reveals a mixed picture. Cultural facilities are relatively well supported, with 60% of respondents reporting ‘very easy’ access and an additional 15% ‘rather easy’, although 25% still experience some level of difficulty. In contrast, grocery store or supermarket access poses significant challenges, with 60% describing it as ‘very difficult’ and 40% as ‘rather difficult’, suggesting potential impacts on food security and a reliance on travel to more distant locations for essential goods. Similarly, green spaces and recreational areas are perceived as highly inaccessible, with 85% reporting ‘very difficult’ access and 15% ‘rather difficult’, indicating a serious lack of outdoor leisure options that may affect residents’ well-being and social interaction.

Self-rated physical health among Kythera respondents shows a balanced distribution across categories, with 25% rating their health as good, 25% as fair, 25% as very good, 20% as excellent, and a small minority (5%) reporting poor health. This varied profile suggests a population with diverse health experiences, reflecting both general well-being and the presence of health challenges among some individuals (see Figure 8.9.3.4).

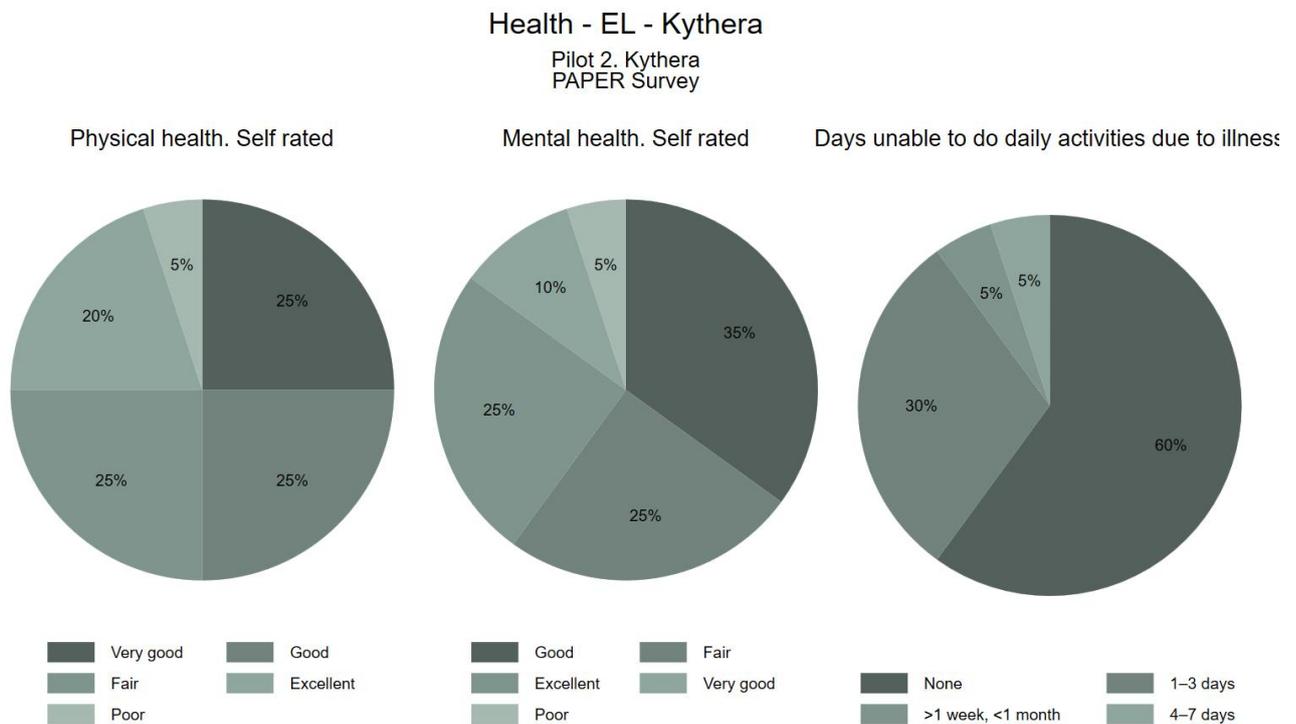


Figure 8.9.3.4 Kythera (EL). Health Self-perception

Mental health self-assessments indicate a generally positive outlook, with 35% of respondents rating their mental health as good and 25% as excellent. Another 25% consider their mental health to be fair, 10% very good, and a small proportion (5%) poor. These findings suggest moderate psychological resilience within the community, albeit with some variability.

Regarding days unable to perform daily activities due to illness, 60% of respondents report no limitations, indicating good overall functional health. However, 30% experience limitations for 1–3 days, 5% for 4–7 days, and another 5% for periods exceeding one week but less than a month. This

reflects the presence of episodic or chronic health issues affecting daily functioning for a significant portion of the population.

Figure 8.9.3.5 illustrates that social connectedness in Kythera presents a nuanced picture. Thirty-five percent of respondents neither agree nor disagree with feeling close to people in their local area, while 30% disagree and 15% strongly disagree. Only 15% agree, and a small minority (5%) strongly agree that they feel close to others locally. This distribution suggests a relatively weak sense of community cohesion and interpersonal closeness.

Social participation & engagement - EL - Kythera

Pilot 2. Kythera PAPER Survey

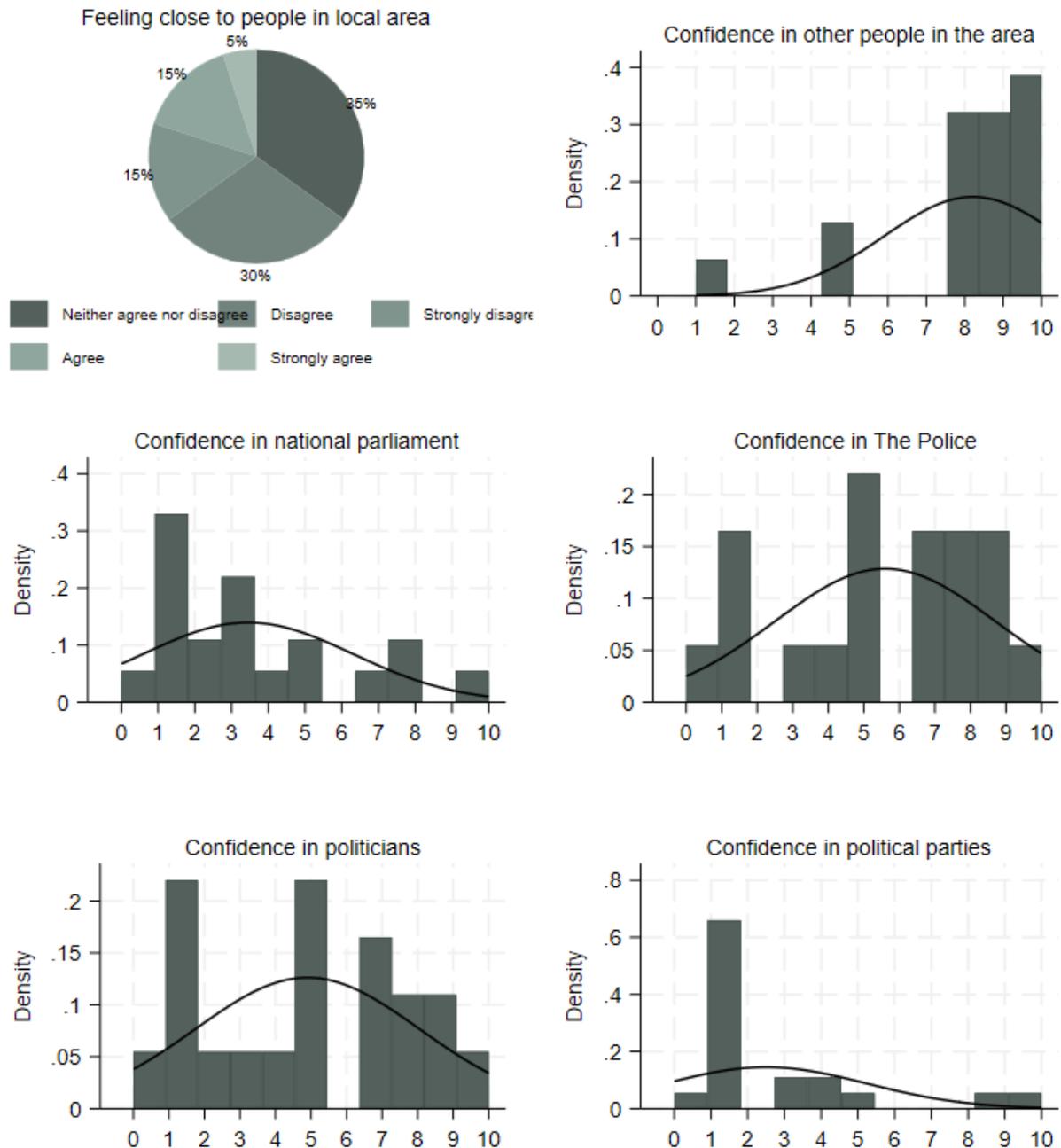


Figure 8.9.3.5 Kythera (EL). Social Participation & Engagement

Confidence in other people within the area is generally high, with the majority of respondents rating their trust between 7 and 10 on a 10-point scale. This indicates strong interpersonal trust despite the

limited sense of local closeness, possibly reflecting social norms of politeness or reliance on broader community ties.

Institutional trust appears more variable and generally low. Confidence in the national parliament is polarised, with many respondents expressing very low trust (scores 1–3) and a smaller cluster rating it moderately (4–6). This bimodal distribution suggests scepticism towards national political institutions.

Confidence in the police shows a more balanced distribution, with peaks around 5 and 7, reflecting mixed perceptions possibly influenced by personal or community experiences with law enforcement. Trust in politicians is moderately positive, with responses clustering around mid-range values (4–7), suggesting a somewhat favourable view of individual political actors compared to broader institutions. Finally, confidence in political parties is notably low, with a large share of respondents rating their trust at the bottom of the scale (1–2). This widespread political scepticism may indicate disengagement or dissatisfaction with party politics on the island.

Digital access and internet usage among Kythera respondents exhibit a mixed pattern across different online activities, as shown in Figure 8.9.3.6. While 25% use the internet for online services daily, and 10% do so several times a week, a notable 30% report never using such services, and 15% use them less than once a month. This distribution reflects moderate engagement with online public or commercial platforms, alongside a substantial proportion of non-users.

Digital access - EL - Kythera

Pilot 2. Kythera PAPER Survey

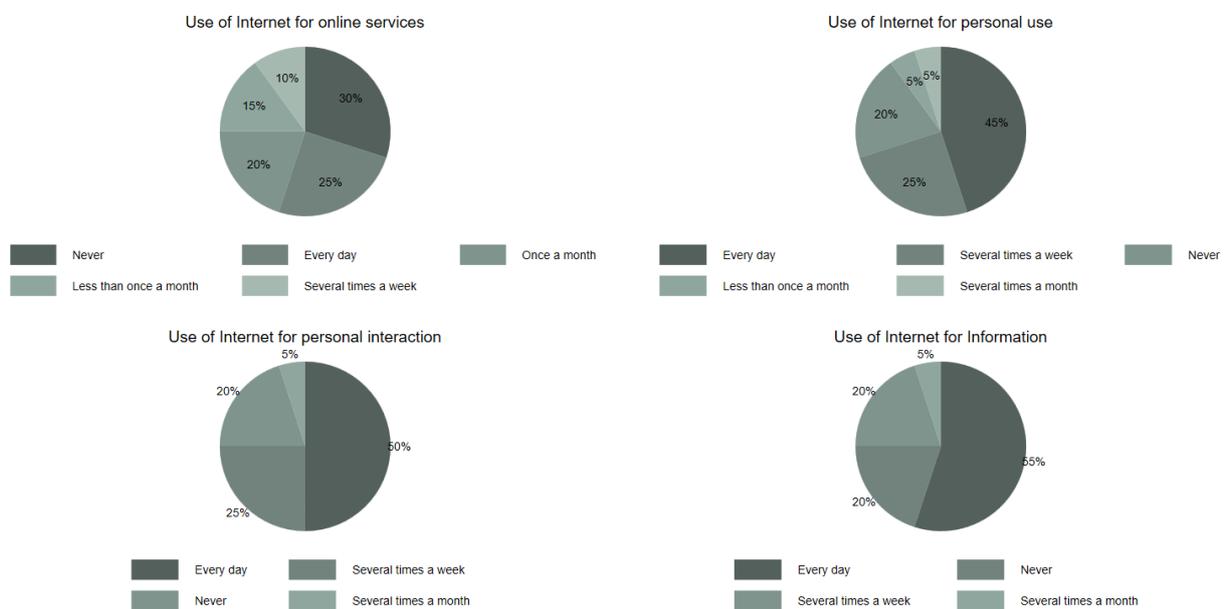


Figure 8.9.3.6 Kythera (EL). Digital Access

For personal internet use, 45% of respondents use the internet for personal purposes daily, whereas 25% engage several times a week and 20% never. Smaller shares report usage several times a

month (5%) or less than once a month (5%), indicating varying degrees of digital connectivity and potentially limited access or digital literacy among a considerable segment.

Internet use for personal interaction is more frequent, with half of respondents engaging daily and 25% several times a week. Twenty percent never use the internet for social interaction, and 5% do so several times a month, highlighting the importance of digital platforms for maintaining social ties among many residents, while others remain digitally excluded.

Use of the internet for information purposes is relatively widespread, with 55% accessing it daily and 20% several times a week. However, 20% never use the internet for information, suggesting gaps in digital inclusion for accessing news, education, or other informational content.

Economic vulnerability in Kythera presents a complex picture. A majority of respondents (85%) indicate their household can afford an unexpected but necessary expense, suggesting a reasonable degree of financial resilience, though 15% report difficulty in this regard. Similarly, 85% state that their entire household cannot afford a week-long annual holiday, highlighting constrained discretionary spending and limited leisure opportunities (see Figure 8.9.3.7).

Risk of poverty & social exclusion - EL - Kythera

Pilot 2. Kythera PAPER Survey

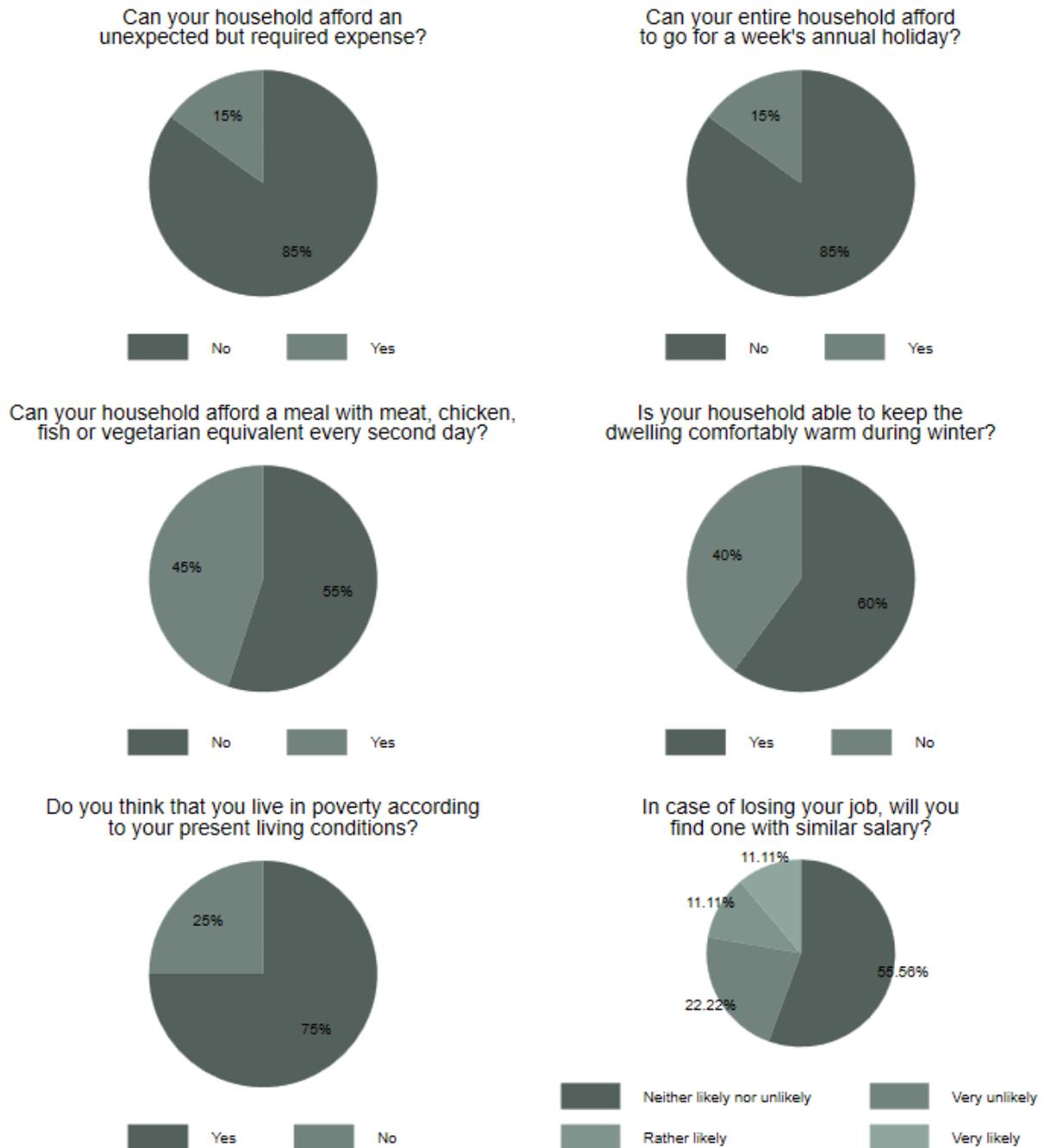


Figure 8.9.3.7 Kythera (EL). Risk of Poverty & Social Exclusion

Food security appears relatively fragile, with only 55% able to afford a meal containing meat, chicken, fish, or a vegetarian equivalent every second day, while 45% face challenges meeting this basic nutritional need, signalling significant food insecurity concerns.

Housing conditions show that 60% of households can keep their dwelling comfortably warm during winter, while 40% experience difficulties maintaining adequate heating, which can have adverse health and well-being implications.

Subjective perceptions of poverty are evident, with 25% of respondents believing they currently live in poverty given their present living conditions. This reflects lived experiences of deprivation that may not always align with objective economic indicators.

Regarding employment security, responses reveal uncertainty and mixed expectations. While 56% consider it neither likely nor unlikely that they would find a job with similar salary if they lost their current one, 22% view it as very unlikely, and smaller shares regard it as rather likely (11%) or very likely (11%). This diversity indicates concerns about labour market mobility and job stability in this insular rural community.

Kythera combines a service- and agriculture-based economy with modest education levels and low income. Access to cultural facilities and public transport is good, but food, green spaces, and daily services are difficult to reach. Health perceptions are varied but generally positive. Social cohesion is weak despite high interpersonal trust. Digital exclusion is significant, with 45% never using the internet for personal purposes. Many households face food insecurity and struggle to afford heating and holidays.

8.9.4 Case Study: Greece – Konitsa

Figure 8.9.4.1 illustrates the demographic profile of the Konitsa sample (20 respondents), which reveals a predominantly female population, with women comprising 70% and men 30%. This gender imbalance may reflect broader trends in rural areas, where women are often more active participants in community-based surveys or where male outmigration for work is common. The age distribution points to a mature population, mainly concentrated between 45 and 60 years, suggesting a middle-aged to older demographic with implications for local socio-economic dynamics. Males display a broader age range, approximately 45 to 70 years, while females are more tightly clustered between 30 and 60 years, with some younger outliers—potentially reflecting gendered demographic patterns or sampling variation.

Marital status data show that a majority of respondents (65%) are married or living with a domestic partner, reinforcing the presence of stable family units within the community. The substantial share of single (never married) respondents (25%) suggests a meaningful proportion of residents who are either younger, widowed, or prefer single living arrangements. Smaller shares of widowed (5%) and cohabiting individuals (5%) highlight some diversity in household composition that may impact social support networks and care responsibilities.

Educational attainment in the sample is notably varied, with the largest group holding a bachelor's degree or equivalent (8 respondents), reflecting a relatively high educational level for a rural setting. Upper secondary (4), post-secondary non-tertiary (4), and master's degrees (4) also have significant representation, indicating access to diverse educational opportunities. The presence of respondents

with primary education (1) and PhD-level qualifications (1) suggests heterogeneity in educational backgrounds, which may shape occupational outcomes and community roles.

Regarding family size, the modal number of children is two (8 respondents), consistent with common family structures in many rural European contexts. Other household sizes include zero children (7 respondents), one child (2), and three children (3), illustrating a range of family compositions. The notable share of childless households may reflect demographic aging or migration trends, with implications for local social services and future population sustainability.

Demographic Characteristics - EL - Konitsa

Pilot 3. Konitsa PAPER Survey

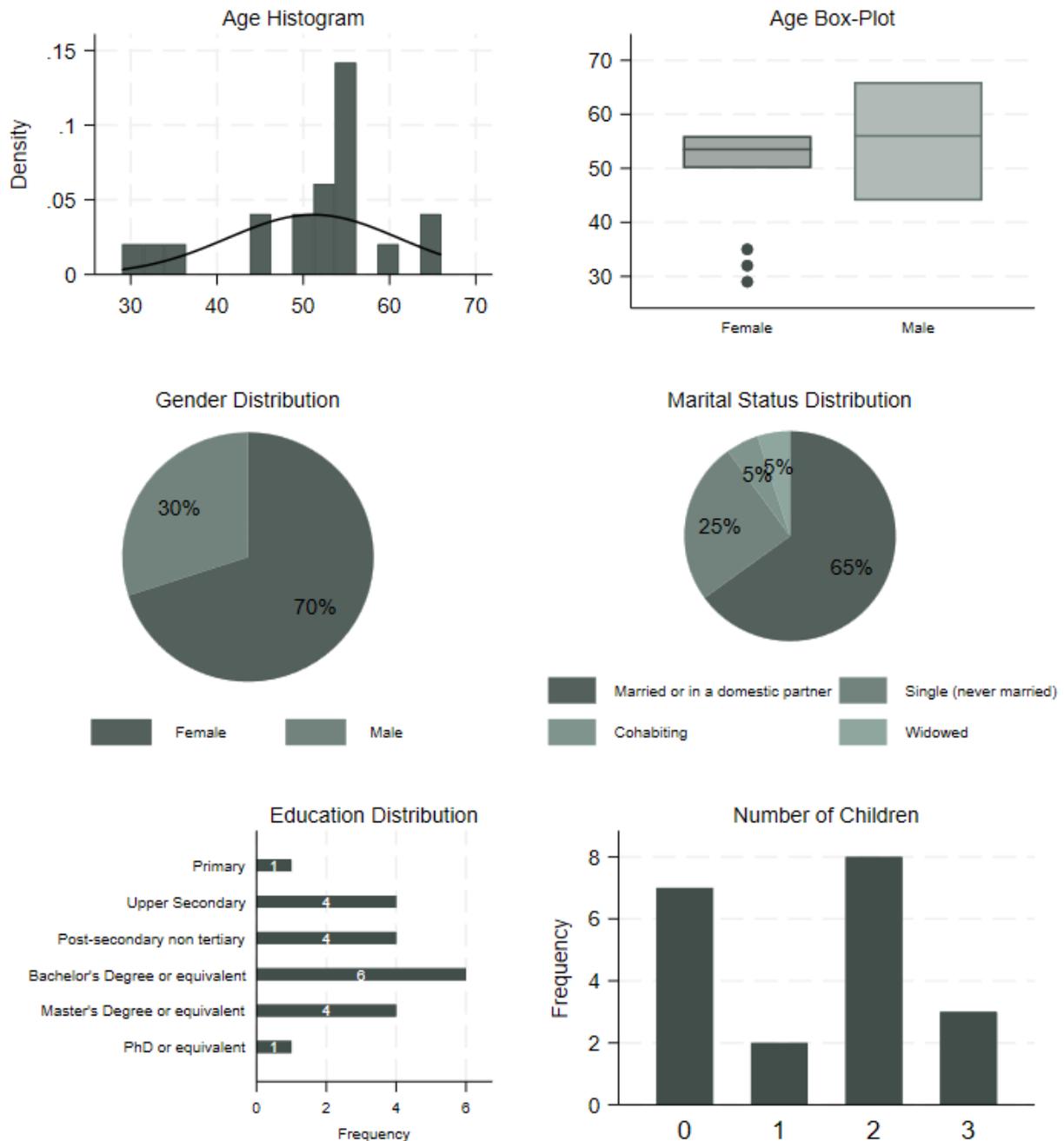


Figure 8.9.4.1 Konitsa (EL). Demographic Characteristics

The labour market profile of the Konitsa sample is characterised by a high employment rate, with 75% of respondents currently employed. Smaller shares of the population are retired (10%), unemployed

(10%), or classified under 'other' (5%), indicating a predominantly active workforce with some economic inactivity typical of rural areas. This distribution suggests a community where labour market participation remains relatively strong despite the challenges often faced in peripheral rural settings (see Figure 8.9.4.2).

Labour Market and Environment - EL - Konitsa

Pilot 3. Konitsa PAPER Survey

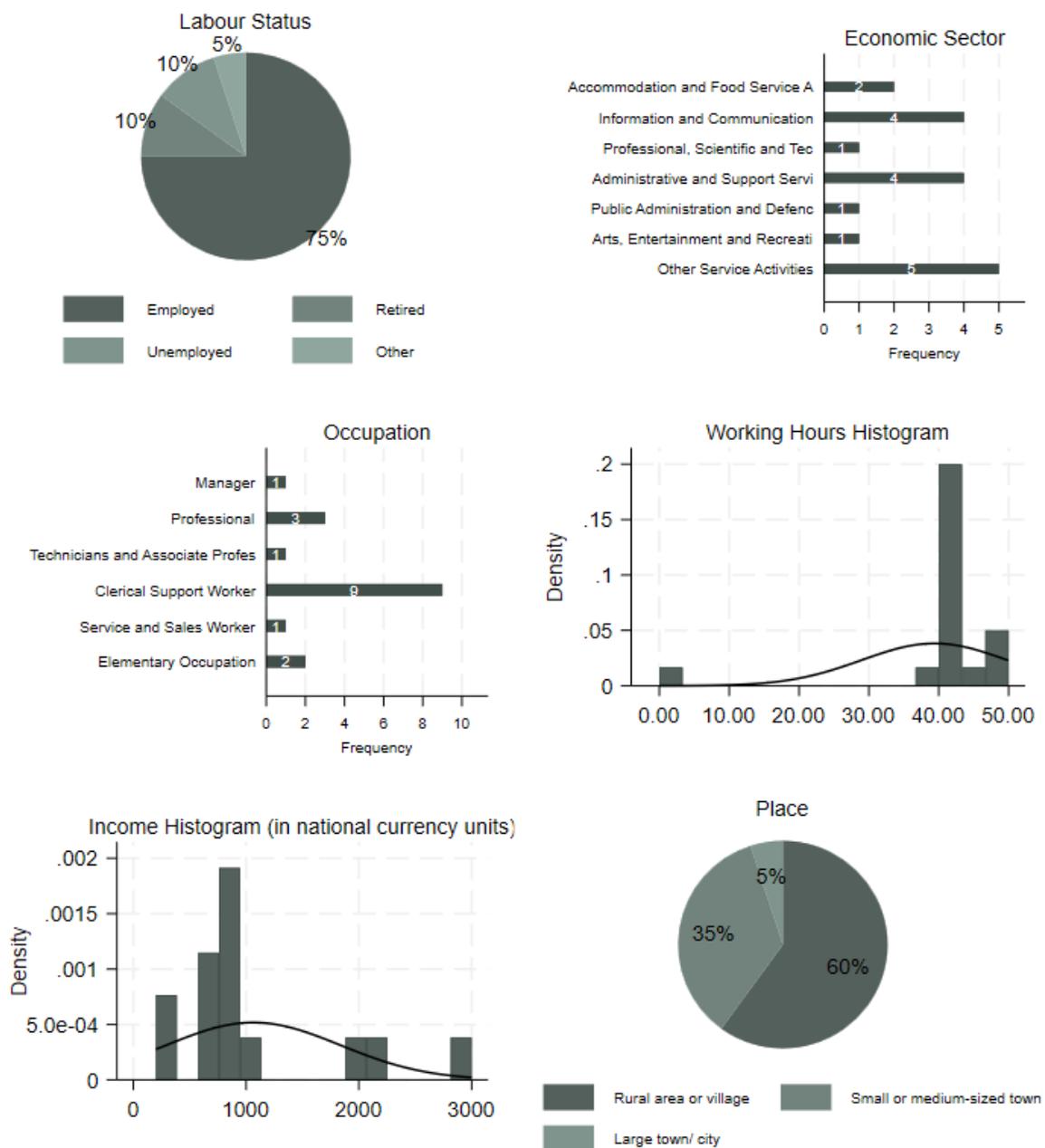


Figure 8.9.4.2 Konitsa (EL). Labour Market and Environment

The economic sectors represented reflect a service-oriented local economy, with the largest groups engaged in 'Other Service Activities' (5 respondents), Information and Communication (4), and Administrative and Support Services (4). Smaller numbers work in Accommodation and Food Services (2), Professional, Scientific and Technical activities (1), Public Administration and Defence (1), and Arts, Entertainment and Recreation (1). This diversity highlights the predominance of service-related employment opportunities alongside limited representation in public and creative sectors.

Occupational roles within the sample are concentrated in clerical support work (9 respondents), emphasising administrative functions as a major source of employment. Professionals constitute the second largest group (3), followed by elementary occupations (2), with managers and technicians each represented by a single respondent. This occupational structure suggests a workforce focused on administrative and support roles, with limited managerial and technical positions, reflecting typical rural labour market segmentation.

Working hours cluster predominantly around the standard full-time range, with most respondents reporting between 40 and 45 hours per week. A small number report zero hours, likely reflecting unemployed or retired individuals. The concentration of working hours in the full-time bracket indicates stable employment patterns among the employed subset of the population.

Income distribution among respondents is right-skewed, with most earning below €1,000 per month. A few outliers report incomes closer to €2,500 to €3,000, indicating some income heterogeneity but generally modest earnings typical of rural contexts. This economic profile reflects limited financial resources for many households, with potential implications for consumption, savings, and quality of life.

Regarding place of residence, 60% of respondents live in rural areas or villages, while 35% reside in small or medium-sized towns and 5% in larger towns or cities. This spatial distribution confirms the rural focus of the sample, with implications for access to services, employment opportunities, and infrastructural development.

Housing tenure among respondents is notably stable, with the majority (approximately 74%) fully owning their homes or apartments. An additional 21% own their homes but are still paying a mortgage, while a small minority (around 5%) rent social housing. This high level of homeownership reflects considerable material security typical of rural communities and may influence long-term residential stability and local social cohesion (see Figure 8.9.4.3)

Vehicle ownership is nearly universal, with over 94% of respondents owning a car or motorised vehicle. This widespread personal mobility is critical in rural areas like Konitsa, where public transport infrastructure is often limited or unreliable, thus facilitating access to employment, services, and social activities.

Access to local and municipal services presents notable challenges: 65% of respondents describe access as 'very difficult', with another 30% finding it 'rather difficult'. Only a minimal share (5%) report 'very easy' access, underscoring significant infrastructural and service delivery barriers that likely affect daily life and social participation.

Living Conditions & Accessibility - EL - Konitsa

Pilot 3. Konitsa PAPER Survey

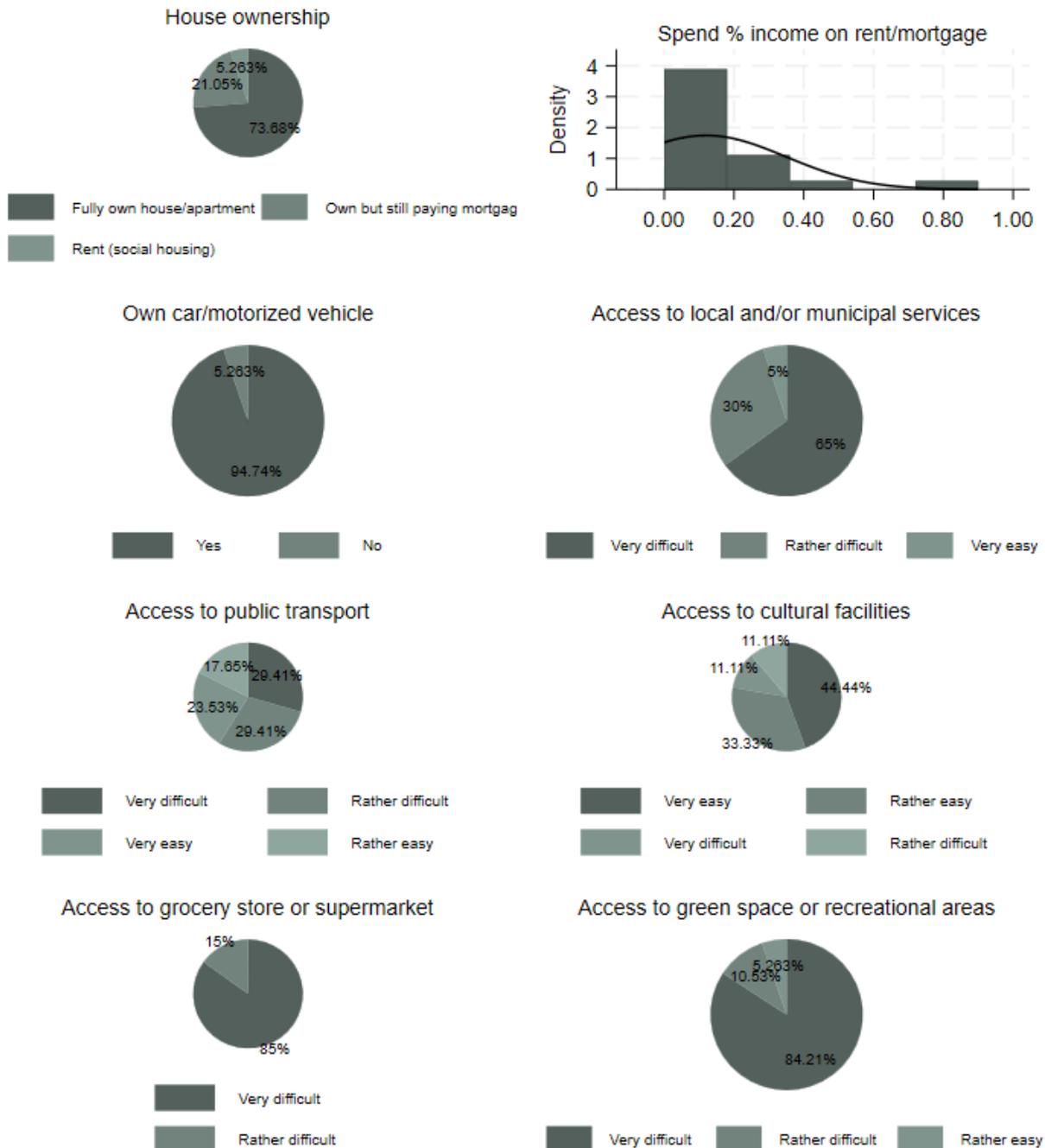


Figure 8.9.4.3 Konitsa (EL). Living Conditions & Accessibility

Public transport accessibility is mixed, with roughly equal shares describing it as ‘very difficult’ (29%), ‘rather difficult’ (29%), ‘very easy’ (24%), and ‘rather easy’ (18%). These polarised experiences may

reflect variation in geographic location, transport schedules, or personal mobility needs within the sample.

Cultural facility access is similarly varied: 44% find it 'very easy', 33% 'rather easy', while smaller proportions describe it as 'rather difficult' (11%) or 'very difficult' (11%). This distribution suggests some opportunities for cultural engagement despite infrastructural limitations.

Access to cultural facilities shows a more positive trend: 44% report it as 'very easy' and 33% as 'rather easy', though 22% still face difficulties. Grocery store and supermarket access is a widespread concern, with 85% rating it as 'very difficult' and 15% as 'rather difficult', highlighting a major barrier to daily living. Green spaces and recreational areas are similarly restricted, with 84% finding access 'very difficult', 11% 'rather difficult', and only 5% 'rather easy'.

Self-assessed physical health among Konitsa respondents presents a mixed profile. The largest group rates their health as fair (35%), followed by those describing it as excellent (30%) or good (15%). Smaller shares report very good (15%) or poor (5%) physical health, indicating that while a majority perceive themselves in generally acceptable health, a notable minority faces health challenges that could affect daily functioning and quality of life (see Figure 8.9.4.4).

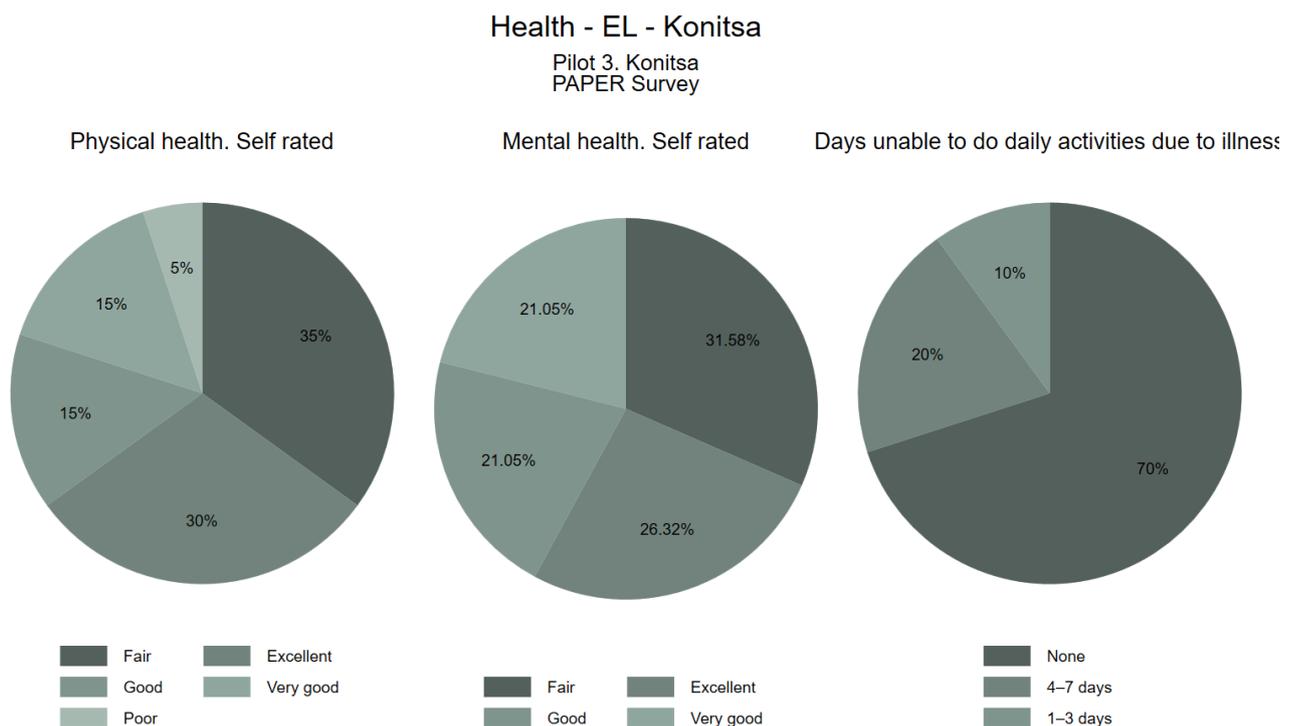


Figure 8.9.4.4 Konitsa (EL). Health Self-perception

Mental health self-assessments reveal a somewhat more positive outlook. The plurality of respondents rates their mental well-being as fair (32%), with substantial proportions reporting excellent (26%) or good (21%) mental health. Very good mental health is noted by 21%, suggesting that overall psychological resilience is relatively strong within this community, despite some variation.

Regarding activity limitations, 70% of respondents report no days unable to perform daily activities due to illness, highlighting a generally functional population. However, 20% experience such limitations for 4–7 days per month, and 10% for 1–3 days, emphasising the presence of episodic or chronic health issues that intermittently affect daily life.

Figure 8.9.4.5 shows that social connectedness in Konitsa reveals a community marked by ambivalence. Forty percent of respondents neither agree nor disagree with feeling close to people in their local area, while 30% disagree, and only 20% agree. A smaller segment (10%) strongly agrees, indicating a limited but present sense of local social cohesion. This distribution suggests mixed experiences of interpersonal relationships and community bonding in this rural setting.

Confidence in other people in the area is moderate, with most respondents rating their trust between 4 and 6 on a 10-point scale. This suggests a cautious but generally positive interpersonal trust, essential for social capital and informal support networks in rural communities.

Institutional trust, however, is more fragmented and generally low. Confidence in the national parliament shows a bimodal distribution, with many respondents expressing very low trust (scores 1–3) and another cluster rating it moderately (around 4–6). This polarisation points to scepticism about legislative effectiveness or political legitimacy.

Confidence in the police similarly exhibits variability, with peaks near low (3) and relatively high (8) trust scores. Such divergence may reflect heterogeneous experiences or perceptions of law enforcement within the community. Trust in politicians is somewhat more positive, with many respondents scoring between 4 and 6, and a notable group expressing high confidence (8–9). This pattern suggests differentiated views between individual political actors and broader institutions. Finally, confidence in political parties is markedly low, with over half of respondents rating their trust at the bottom end of the scale (1–2), highlighting widespread political disenchantment and potential challenges for party-based political engagement.

Digital access and internet usage among Konitsa respondents reveal varied patterns across different online activities. Use of the internet for online services is moderately frequent, with 45% of respondents accessing such services every day, 20% several times a week, and 25% several times a month. A smaller minority (10%) report never using online services, suggesting room for increased digital engagement in public or commercial domains (see Figure 8.9.4.6).

Personal internet use shows a broader distribution, with nearly half of respondents (47%) using the internet less than once a month and 26% never using it for personal purposes. Approximately 11% use it several times a month, while smaller shares engage several times a week (5%) or every day (5%). These figures point to significant variation in everyday internet engagement, likely reflecting differences in access, skills, or preferences.

Social participation & engagement - EL - Konitsa

Pilot 3. Konitsa PAPER Survey

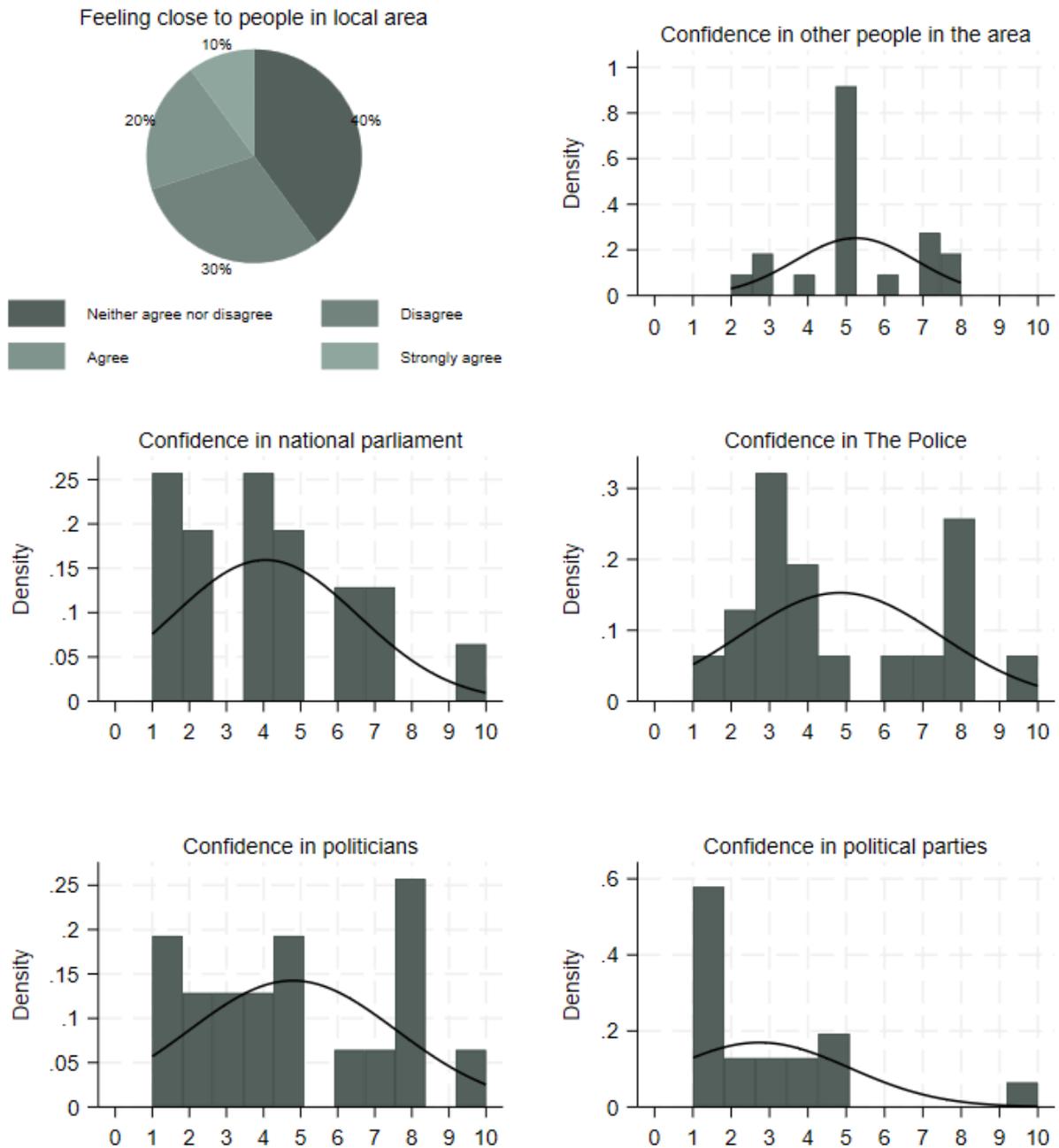


Figure 8.9.4.5 Konitsa (EL). Social Participation & Engagement

Digital access - EL - Konitsa

Pilot 3. Konitsa
PAPER Survey

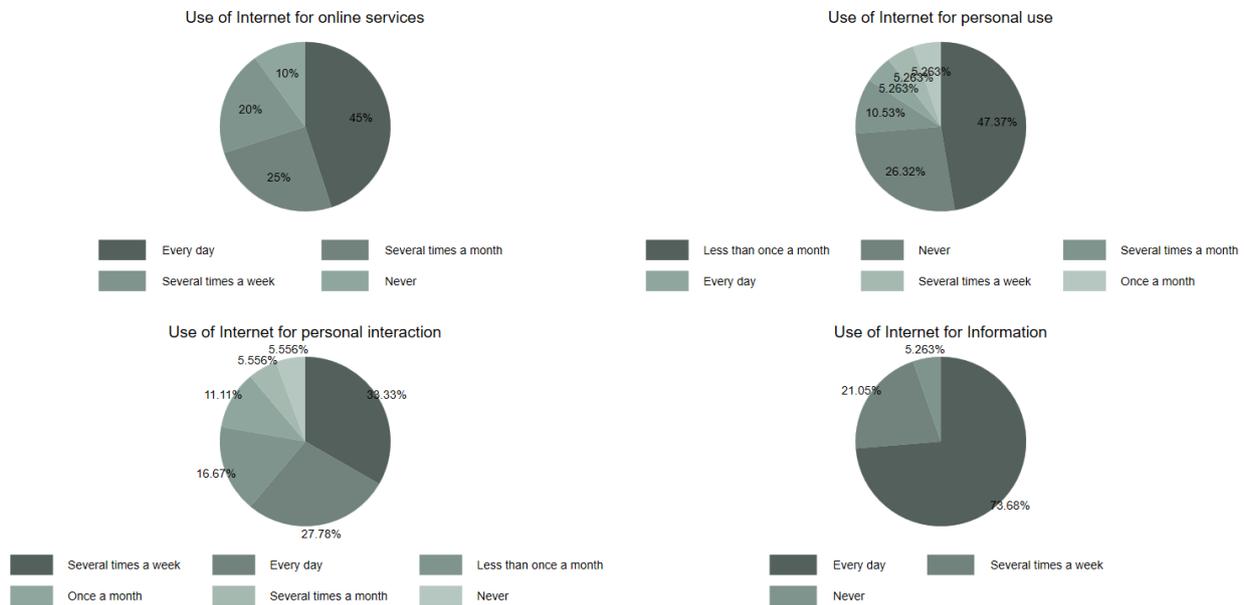


Figure 8.9.4.6 Konitsa (EL). Digital Access

Internet use for personal interaction demonstrates more regular activity, with 33% of respondents using it several times a week and 28% every day. Smaller groups report usage once a month (11%), less than once a month (17%), or never (6%). This pattern highlights the importance of digital platforms for social connectivity in the community, albeit with some digital exclusion.

Use of the internet for information is notably high, with 74% of respondents engaging daily, and 21% several times a week. A small minority (5%) never use the internet for information purposes, indicating widespread reliance on digital sources for news, education, or other informational needs.

Economic vulnerability among Konitsa respondents is evident in several key dimensions, as illustrated in Figure 8.9.4.7. While 65% of households report being able to afford an unexpected but necessary expense, a significant 35% indicate they cannot, highlighting financial fragility in a notable portion of the population. Similarly, 60% state that their entire household cannot afford a week-long annual holiday, underscoring limited discretionary spending and leisure opportunities.

Food security appears relatively strong, with nearly 90% of respondents affirming their ability to afford a meal containing meat, chicken, fish, or a vegetarian equivalent every second day. However, about 10% face difficulties in meeting this basic nutritional need.

Most households (75%) report being able to keep their dwelling comfortably warm during winter, while a quarter experiences challenges in maintaining adequate heating, which can have serious health and wellbeing implications.

Risk of poverty & social exclusion - EL - Konitsa

Pilot 3. Konitsa PAPER Survey

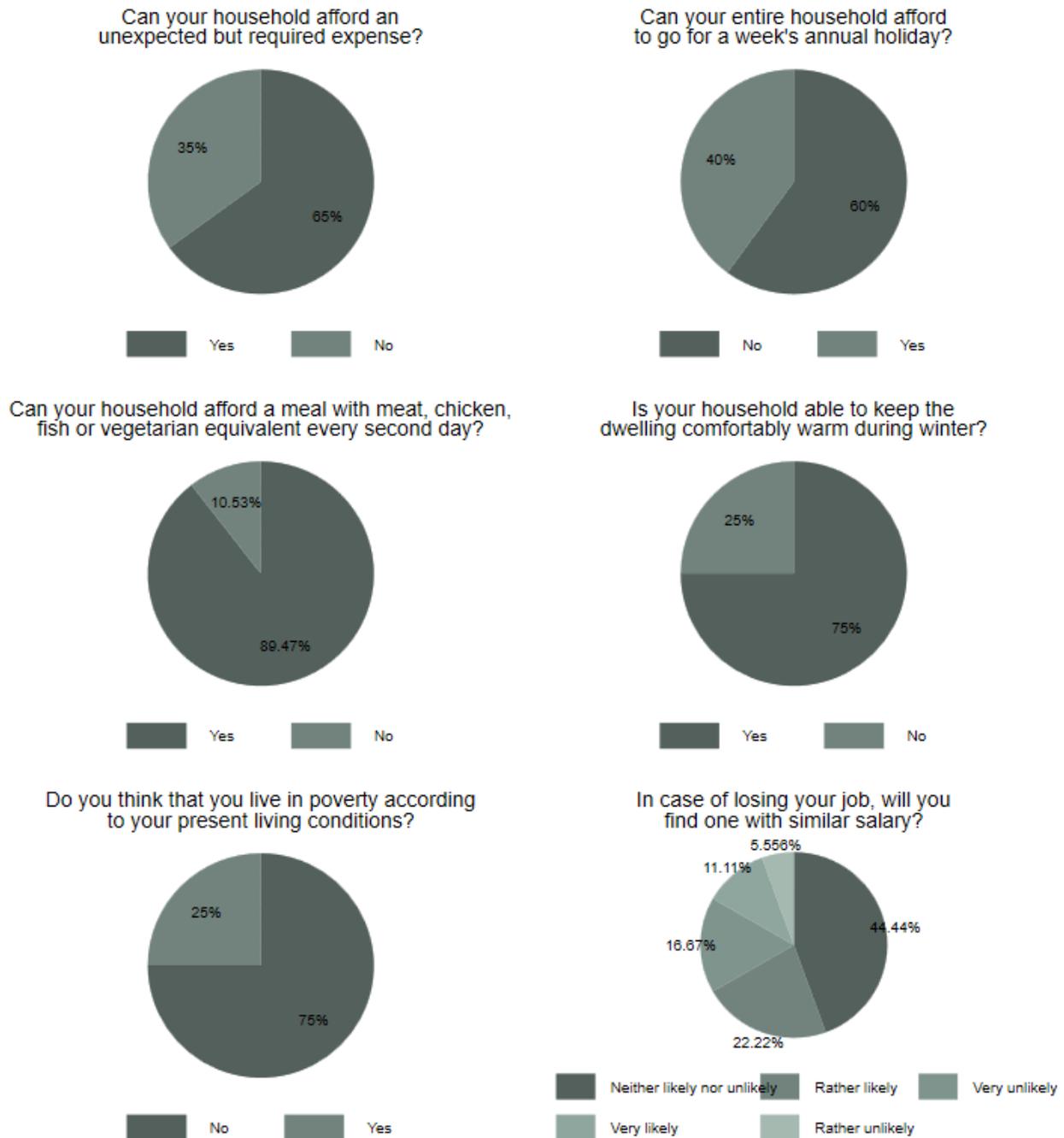


Figure 8.9.4.7 Konitsa (EL). Risk of Poverty & Social Exclusion

Subjective perceptions of poverty are present: 25% of respondents feel they currently live in poverty given their present living conditions, reflecting lived experiences of deprivation beyond objective financial indicators.

Regarding employment security, opinions vary. While 44% of respondents consider it neither likely nor unlikely that they would find a job with similar salary if they lost their current one, 22% view this outcome as rather likely, and smaller shares express optimism (11% very likely) or pessimism (17% very unlikely or unlikely combined). This diversity of views highlights uncertainties about labour market mobility and income stability in the community.

Konitsa presents a rural setting with high employment and homeownership, but severe challenges in accessing basic services like groceries, green spaces, and public transport. Health is generally rated fair to excellent, though a third report limitations in daily activities. Social connectedness and institutional trust are weak, while digital use for information is strong but limited in personal and service-related domains. Economic vulnerability affects a significant portion, with limited capacity to afford holidays or unexpected expenses.

8.9.5 Case Study: Ireland – Westmeath

Demographic characteristics from Westmeath (21 respondents) reveal a pronounced gender imbalance, with women comprising approximately 76% and men 24%, as illustrated in Figure 8.9.5.1. This disparity may reflect greater female participation in surveys or underlying demographic trends such as male outmigration from rural areas. The age distribution spans from the late 20s to late 60s, with a concentration between 40 and 60 years, indicating a predominantly mature population actively engaged in community and socio-economic life. Males display a slightly higher median age and a narrower age range than females, pointing to possible generational or migration-related differences between genders.

Marital status data reveal a variety of household compositions: the majority of respondents (55%) are married or living with a domestic partner, highlighting stable family units as a core social structure. Single (never married) individuals constitute 20% of the sample, while cohabiting respondents also make up 20%, reflecting changing social norms and household arrangements. A smaller proportion (5%) are widowed, which may correlate with the older segments of the population.

Educational attainment within the sample is predominantly at the upper secondary level, with 10 respondents reporting this highest qualification. Smaller yet notable numbers hold bachelor's degrees (6) and master's degrees (2), indicating a substantial share with post-secondary education. The limited presence of respondents with lower secondary (1) or post-secondary non-tertiary education (1) suggests that the sample is skewed towards relatively higher education levels, which could influence employment patterns and social participation. Finally, family size is characterised by a significant share of childless households, with 10 respondents reporting zero children. Other family sizes are represented by 3 respondents each for one and two children, and 4 respondents for three children. This distribution highlights a community with a mix of family types, from individuals or couples without children to small and medium-sized families, which may impact local social dynamics and support networks.

Figure 8.9.5.2 shows that the labour market profile of the Irish sample reflects a predominantly employed population, with 62% of respondents currently working. Smaller shares identify as retired

(14%), unemployed (10%), or classified as 'other' (5%), with minor representation of homemakers (5%) and students (5%). This distribution indicates an active workforce complemented by typical forms of economic inactivity associated with retirement, caregiving, or study.

Demographic Characteristics - IE

Pilot 4. Moate PAPER Survey

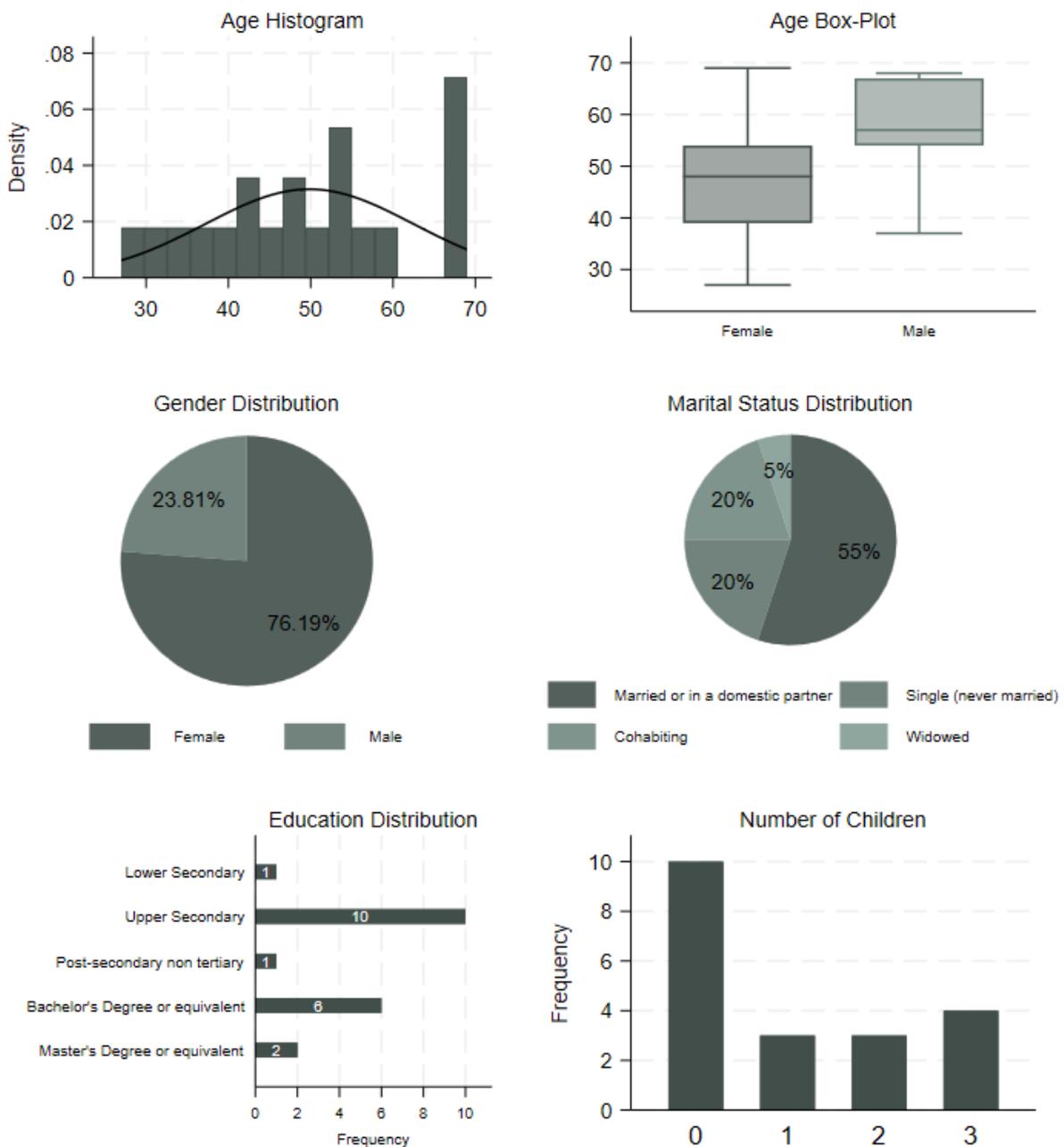


Figure 8.9.5.1 Moate (IE). Demographic Characteristics

Labour Market and Environment - IE

Pilot 4. Moate PAPER Survey

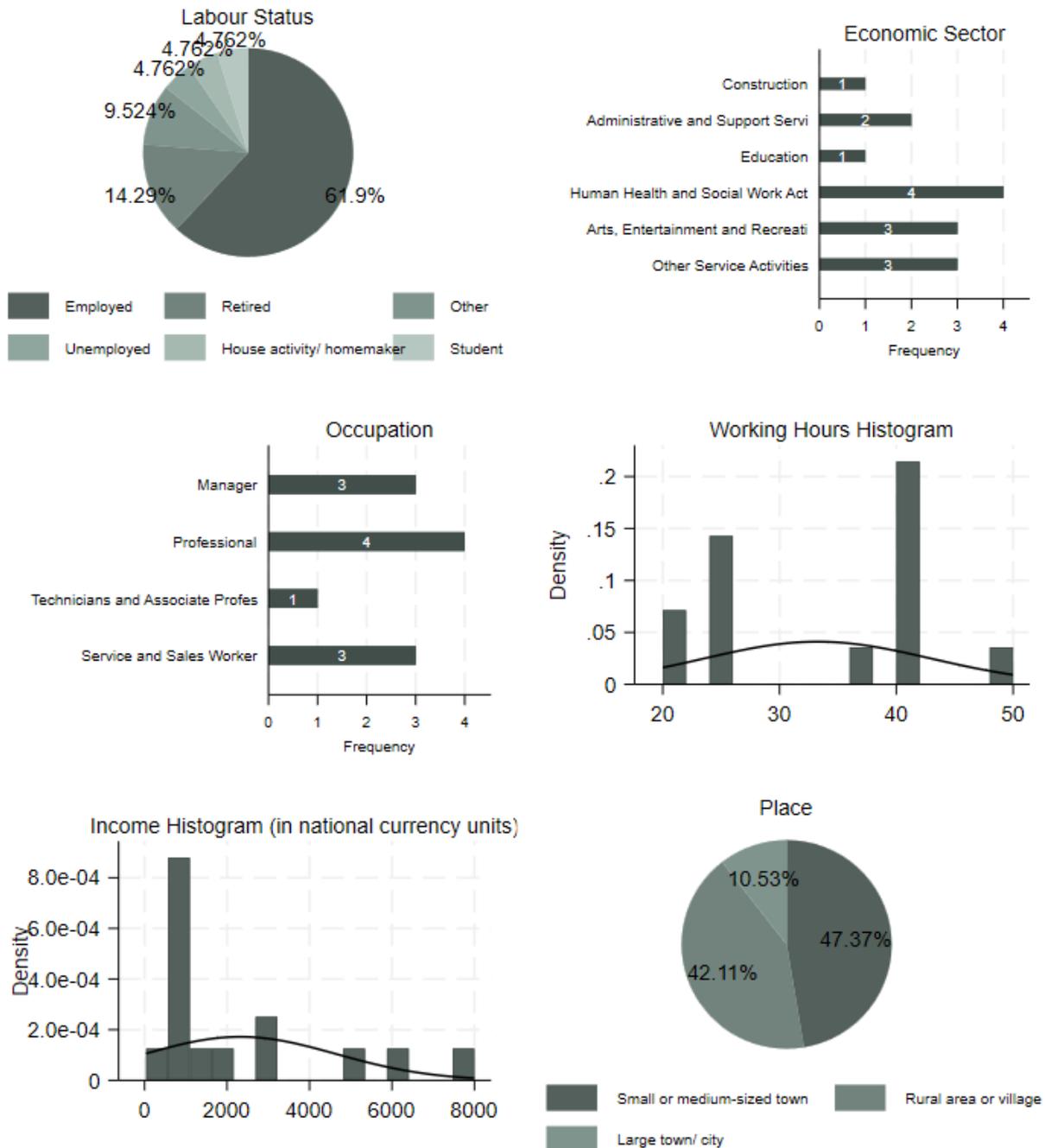


Figure 8.9.5.2 Moate (IE). Labour Market and Environment

Economic sectors represented are diverse but service-oriented, with the largest groups working in Human Health and Social Work (4 respondents), Arts, Entertainment and Recreation (3), Other

Service Activities (3), and Administrative and Support Services (2). Smaller numbers are employed in Construction (1) and Education (1), indicating a moderately varied local economy.

Occupational roles highlight a skilled labour market, with professionals (4) and managers (3) as the most frequent categories, alongside service and sales workers (3) and a smaller presence of technicians and associate professionals (1). This suggests a workforce engaged in both managerial and support roles, consistent with the service-based economy.

Working hours among Irish respondents cluster mainly between 30 and 40 hours per week, suggesting predominantly full-time employment, though some variation reflects part-time or extended work schedules. Income distribution is right-skewed, with most individuals earning between €1,000 and €3,000 per month, and a few reporting incomes exceeding €6,000, indicating a degree of economic heterogeneity within the sample. Place of residence is nearly evenly divided between rural areas or villages (42%) and small or medium-sized towns (47%), with a smaller proportion (11%) living in larger urban centres, highlighting a mix of rural and semi-urban contexts.

Housing tenure among respondents in Ireland shows a varied profile, with 35% renting at market prices, 30% fully owning their homes or apartments, another 30% owning but still paying a mortgage, and a small minority (5%) living in social housing (see Figure 8.9.5.3). This distribution reflects a mixed housing market, indicative of diverse economic circumstances and tenure arrangements within the rural and semi-rural population.

Vehicle ownership is widespread, with 95% of respondents owning a car or motorised vehicle, underscoring the importance of private transport in these areas where public transport may be limited or less reliable.

Access to local and municipal services is split, with 43% finding it 'rather difficult' and 43% 'very difficult', while only a small share report 'rather easy' (5%) or 'very easy' (10%) access. This indicates persistent challenges in accessing essential services that are vital for quality of life. Public transport accessibility is mixed, with roughly equal shares describing it as 'rather easy' (29%), 'rather difficult' (29%), 'very easy' (19%), and 'very difficult' (24%). These varied experiences suggest heterogeneous availability and usability of public transport across different locations.

Access to key amenities in the Irish sample reveals persistent challenges, though with some variation across domains. Access to cultural facilities shows a balanced distribution: 40% of respondents rate it as "rather difficult", 25% as "rather easy", while smaller proportions report it as 'very difficult' (25%) or 'very easy' (10%), suggesting some cultural engagement opportunities amid infrastructural limitations. In contrast, access to grocery stores or supermarkets presents more acute difficulties, with 43% describing it as 'rather difficult' and another 43% as 'very difficult'; only 10% rate access as 'rather easy' and another 5% as 'very easy'. These constraints likely shape daily consumption habits and increase reliance on travel for essential goods. Similarly, green spaces and recreational areas are predominantly difficult to access, with 50% rating them as 'very difficult' and 35% as 'rather difficult', while just 15% report 'rather easy' access—highlighting limited opportunities for outdoor leisure and well-being.

Living Conditions & Accessibility - IE

Pilot 4. Moate PAPER Survey

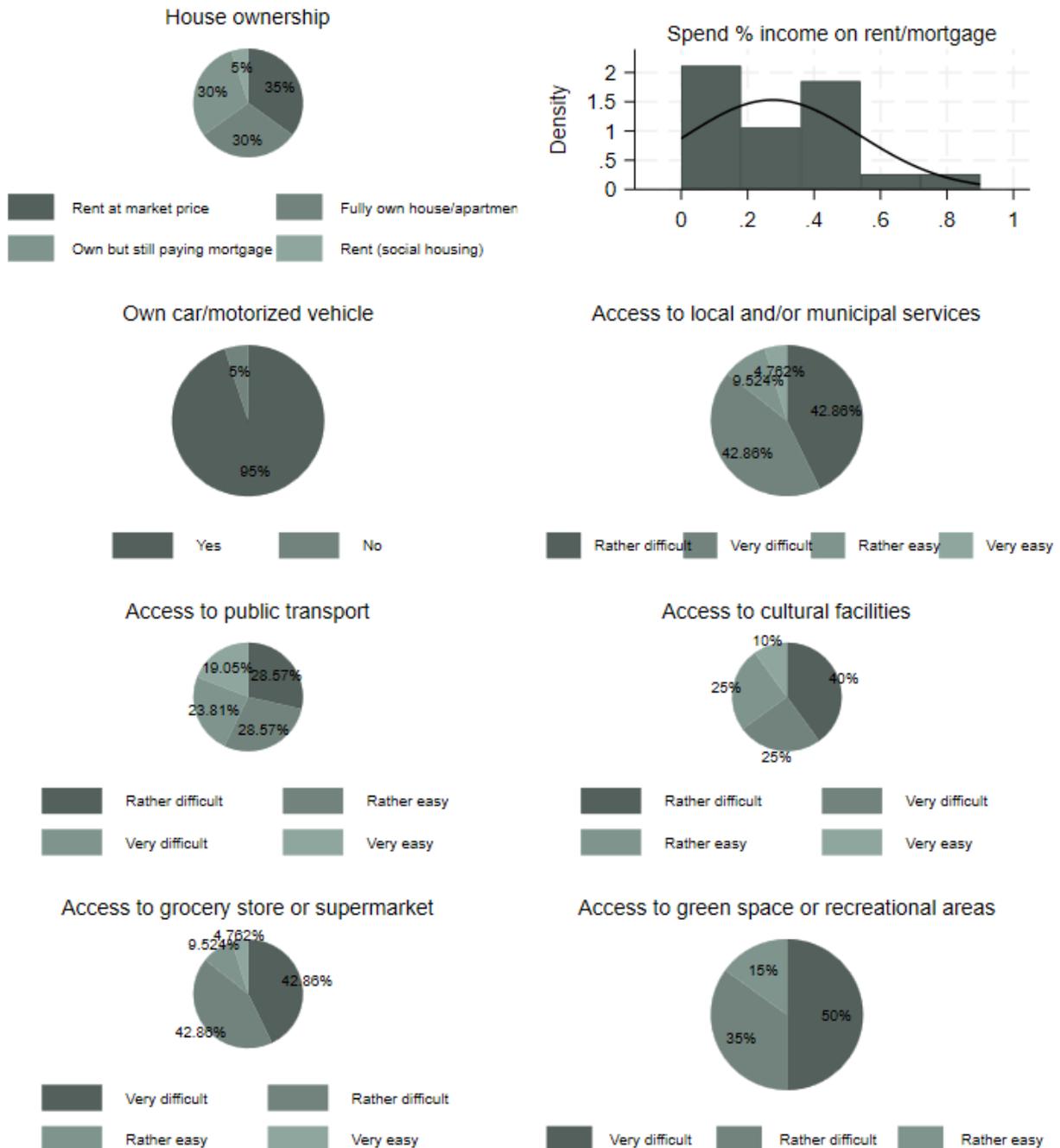


Figure 8.9.5.3 Moate (IE). Living Conditions & Accessibility

Self-assessed physical health among respondents in Ireland reveals a distribution skewed towards fair and good health, as shown in Figure 8.9.5.4. Forty-eight percent rate their health as fair and 24%

as good, while smaller shares report it as very good (14%), excellent (14%), or poor (5%). This suggests a largely functional population with some variation in health status, potentially influenced by age-related or socio-economic factors.

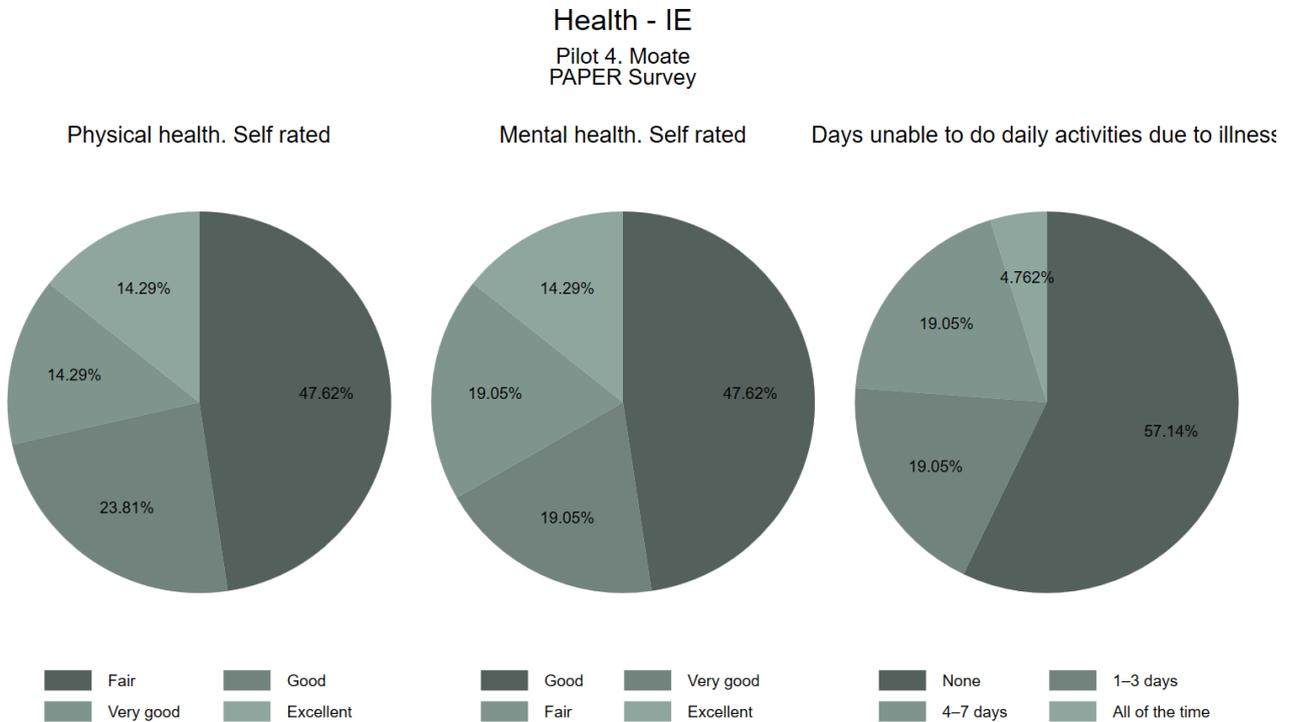


Figure 8.9.5.4 Moate (IE). Health Self-perception

Mental health self-assessments similarly display diversity, with 48% rating their mental health as good, 19% as fair, 19% as very good, 14% as excellent, and a small proportion (5%) indicating poor mental health. These findings indicate a generally positive psychological well-being among most respondents.

Regarding days unable to perform daily activities due to illness, a majority (57%) report no limitations, while 19% experience 1–3 days, another 19% 4–7 days, and 5% are unable to perform daily activities ‘all of the time’. These figures reflect the presence of episodic or chronic health issues affecting a notable segment of the population.

Social participation & engagement - IE

Pilot 4. Moate PAPER Survey

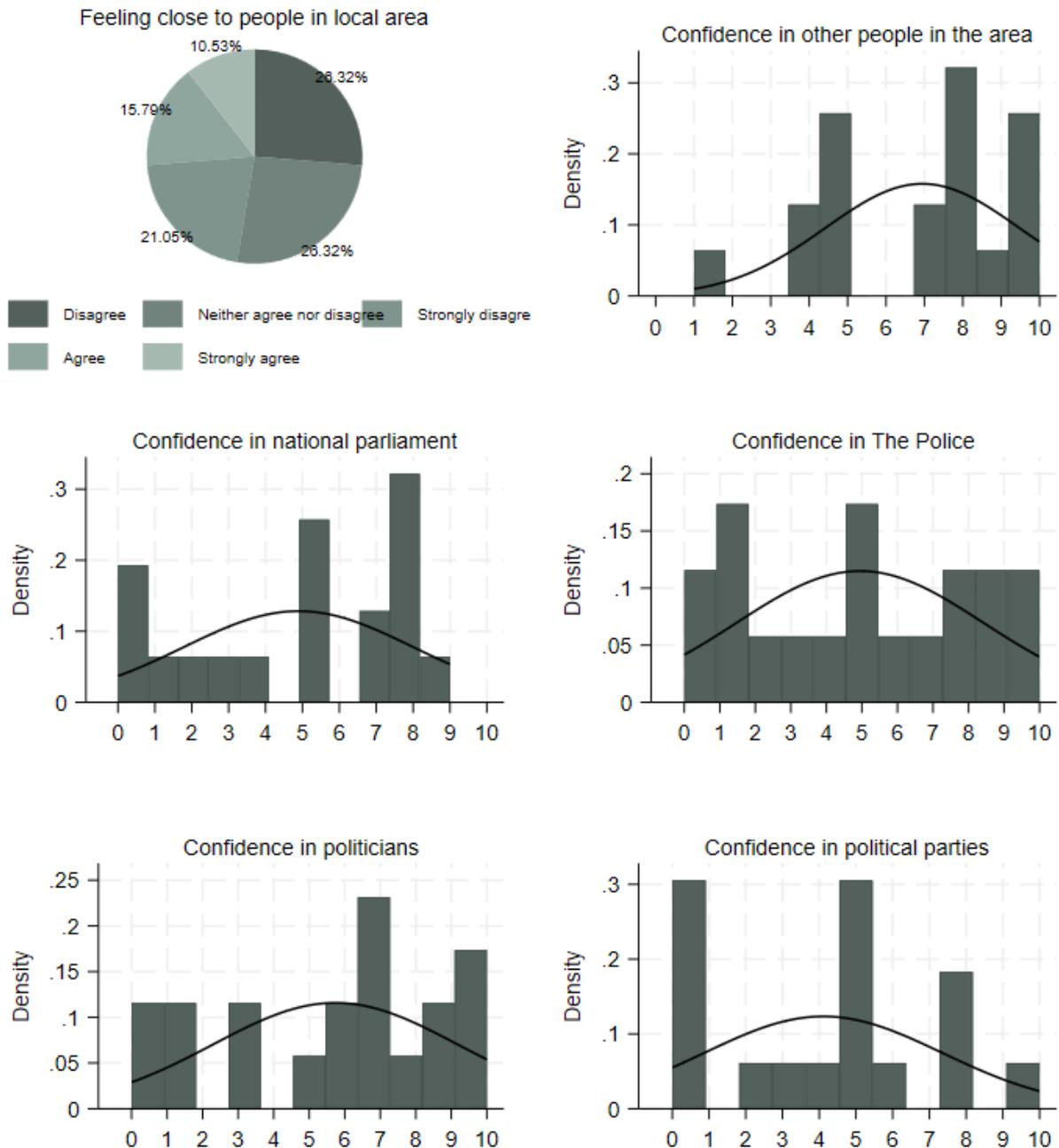


Figure 8.9.5.5 Moate (IE). Social Participation & Engagement

Figure 8.9.5.5 illustrates that social connectedness in Ireland reveals a community with diverse and complex experiences of local belonging. Approximately 26% of respondents neither agree nor

disagree with feeling close to people in their local area, reflecting ambivalence or neutrality towards community ties. Similar proportions disagree (26%) or agree (21%), while smaller segments strongly disagree (11%) or strongly agree (16%). This distribution highlights a fragmented sense of social cohesion, with a considerable share of residents feeling disconnected or only moderately connected to their immediate social environment.

Interpersonal trust appears comparatively stronger, with many respondents rating their confidence in other people within the area between 5 and 9 on a 10-point scale. This suggests that, despite mixed feelings about social closeness, there exists a relatively robust foundation of trust that may support informal social networks and collective action in the community.

Institutional trust presents a more varied and ambivalent picture. Confidence in the national parliament exhibits a bimodal distribution, with a substantial group expressing very low trust (scores 0–3) and another cluster indicating moderate trust (around 5–7). This polarization reflects broader public scepticism and potential disenchantment with national political institutions, which may affect political engagement and perceptions of governance legitimacy.

Trust in the police is distributed more evenly, with peaks around mid-range scores, indicating a wide spectrum of perceptions shaped by diverse experiences with law enforcement and public safety concerns. This variation underscores the need for tailored approaches to community policing and public trust-building.

Confidence in politicians tends towards moderate to high levels, with responses clustered between 5 and 8, suggesting some positive views of individual political actors that contrast with scepticism towards broader institutions.

Conversely, confidence in political parties is notably lower, with a significant proportion of respondents rating their trust near the bottom of the scale. This widespread disenchantment may be symptomatic of perceived disconnects between political parties and local concerns, leading to political disengagement or apathy.

Collectively, these findings reveal a social landscape marked by moderate interpersonal trust yet considerable ambivalence or distrust toward political institutions. This combination presents both challenges and opportunities for fostering greater civic participation, community engagement, and political inclusion in rural Irish contexts.

Digital access and internet usage among respondents in Ireland display varied engagement levels across different online activities. Use of the internet for online services is relatively high, with 58% accessing such services every day, 16% several times a month, and 21% several times a week. A small minority (5%) use these services once a month, indicating widespread but not universal utilization of online public or commercial platforms (see Figure 8.9.5.6).

Digital access - IE

Pilot 4. Moate
PAPER Survey

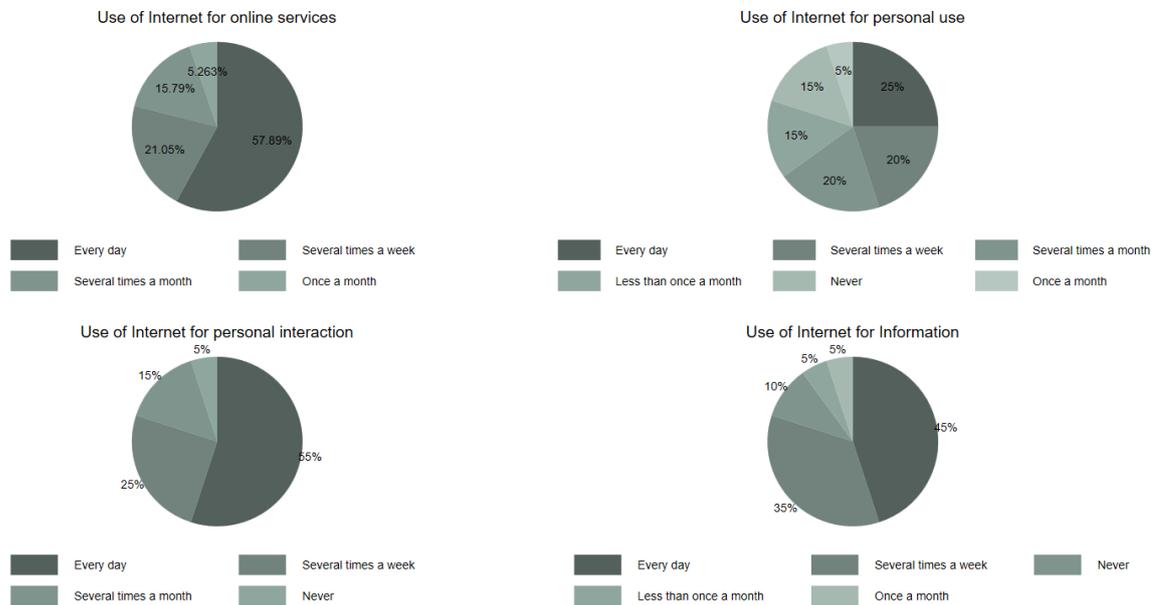


Figure 8.9.5.6 Moate (IE). Digital Access

Personal internet use shows moderate frequency, with 25% using it every day and 20% several times a week. Others use the internet less than once a month (15%), several times a month (20%), once a month (5%), or never (15%). This spread suggests digital access varies considerably, potentially reflecting differences in age, skills, or infrastructure.

Internet use for personal interaction is robust, with over half (55%) engaging daily and a further 25% several times a week. Smaller shares report usage several times a month (15%) or never (5%), underscoring the role of digital communication in maintaining social ties.

Use of the internet for information is also frequent, with 45% of respondents accessing information daily and 35% several times a week. However, 10% never use the internet for this purpose, indicating some degree of digital exclusion from informational resources.

Economic vulnerability among respondents in Ireland appears relatively limited, with 74% reporting that their household can afford an unexpected but necessary expense, indicating a reasonable degree of financial resilience. However, 26% report difficulty in this area, highlighting a notable minority facing economic challenges. Similarly, 81% indicate their household cannot afford a week-long annual holiday, suggesting restricted discretionary spending and leisure opportunities (see Figure 8.9.5.7).

Risk of poverty & social exclusion - IE

Pilot 4. Moate PAPER Survey

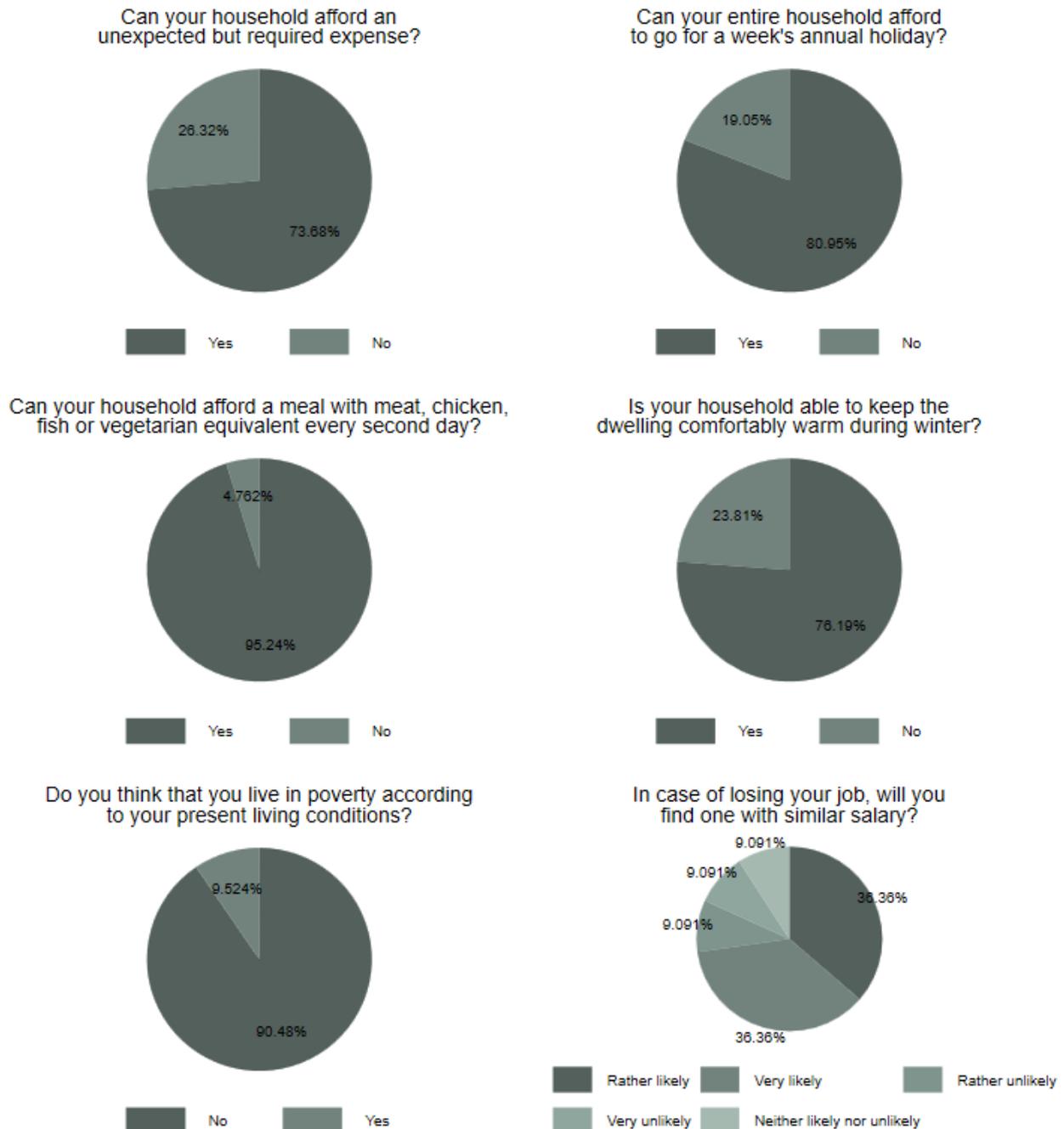


Figure 8.9.5.7 Moate (IE). Risk of Poverty & Social Exclusion

Food security is strong, with over 95% of respondents affirming their ability to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day. This high level of food security reflects general material well-being among most households.

Heating adequacy is generally good, with 76% reporting that their household can keep their dwelling comfortably warm during winter. However, nearly a quarter experience difficulty, which may have adverse effects on health and comfort.

Subjective perceptions of poverty are low, with over 90% of respondents not considering themselves to be living in poverty according to their current living conditions. This indicates a largely positive self-assessment of economic status despite some material constraints.

Regarding job security, opinions are divided: 36% of respondents consider it very likely and another 36% rather likely that they would find a job with a similar salary if they lost their current one. Smaller shares express uncertainty or pessimism, with 9% neither likely nor unlikely, 9% rather unlikely, and 9% very unlikely. This mixed outlook reflects varying degrees of confidence in the labour market and personal employability.

Westmeath shows a highly educated and economically active population, mostly employed in health and service sectors. Vehicle ownership is widespread, but access to basic services and green areas is difficult. Health indicators are mostly fair or good, and digital participation is high, especially for communication and information. Community cohesion is moderate, and political trust is fragmented. While most households manage unexpected expenses, many cannot afford a holiday, suggesting constrained leisure opportunities.

8.9.6 Case Study: Poland – Dębowa Kłoda

The demographic profile of the Dębowa Kłoda sample (20 respondents) reveals a predominantly female composition, with women comprising 70% of respondents and men 30%. This gender imbalance may be reflective of higher female participation in survey activities or local demographic dynamics such as male migration for employment. Age distribution is concentrated primarily between the mid-30s and late 40s, highlighting a mature, working-age population that likely forms the backbone of the local economy and social fabric. Females show a slightly broader age range, including an outlier in the early 20s, whereas males are more clustered around the late 30s to early 40s, indicating potential age and gender differences in the population structure (see Figure 8.9.6.1).

Marital status data indicate that the majority of respondents (65%) are married or living with a domestic partner, consistent with traditional family arrangements prevalent in the region. Single (never married) individuals represent 15% of the sample, while 10% are cohabiting, reflecting evolving social norms around partnership and household formation. Smaller proportions of respondents are divorced (5%) or fall into other categories (5%), suggesting some diversity in family and household structures that may affect social networks and support systems.

The educational profile is notably high, with the largest group holding a master's degree or equivalent (10 respondents), reflecting a well-educated cohort. Bachelor's degrees are held by 5 respondents, while upper secondary education accounts for 3, and smaller numbers report post-secondary non-tertiary (1) and PhD or equivalent qualifications (1). This distribution indicates significant human

capital within the sample, which could influence employment opportunities, income levels, and socio-economic mobility.

Family size distribution reveals that most respondents have one (7) or two children (8), suggesting that small nuclear families predominate in this population. Fewer respondents report larger families, with 3 having three children and 2 having four children, which aligns with broader demographic trends towards smaller family sizes in contemporary Poland.

Demographic Characteristics - PL

Pilot 5. Parczew PAPER Survey

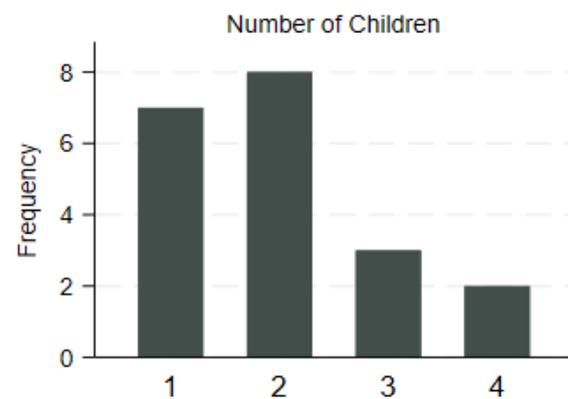
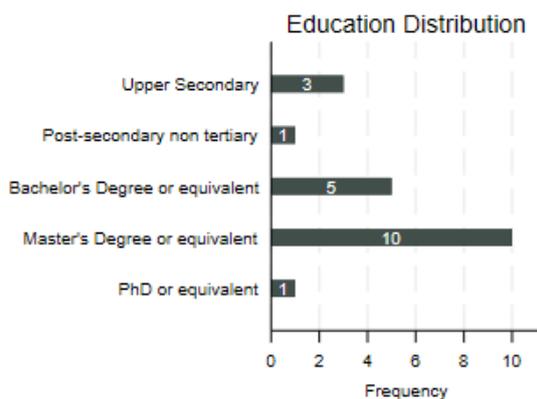
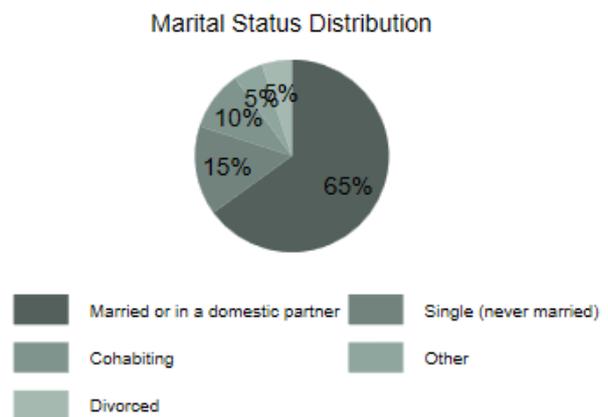
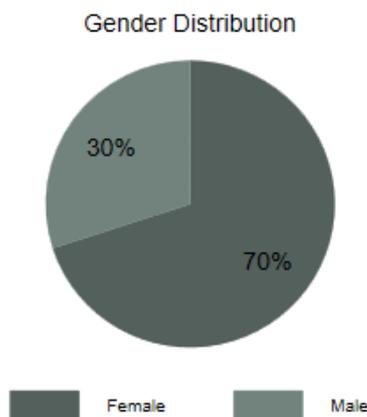
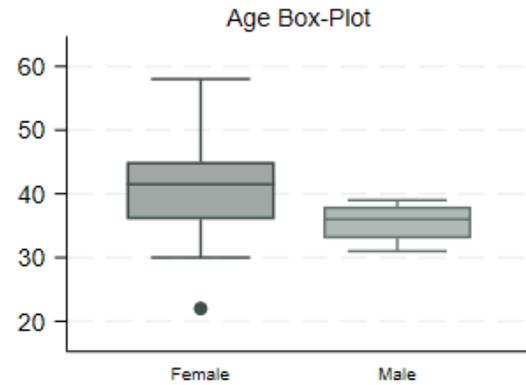
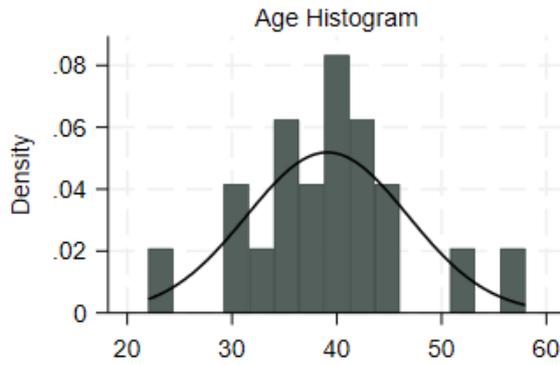


Figure 8.9.6.1 Parczew (PL). Demographic Characteristics

The labour market characteristics of the Polish sample indicate a highly active workforce, with 90% of respondents currently employed, and smaller shares classified as students (5%) or unemployed

(5%), as shown in Figure 8.9.6.2. This suggests a community with strong labour participation and relatively low unemployment levels.

Labour Market and Environment - PL

Pilot 5. Parczew PAPER Survey

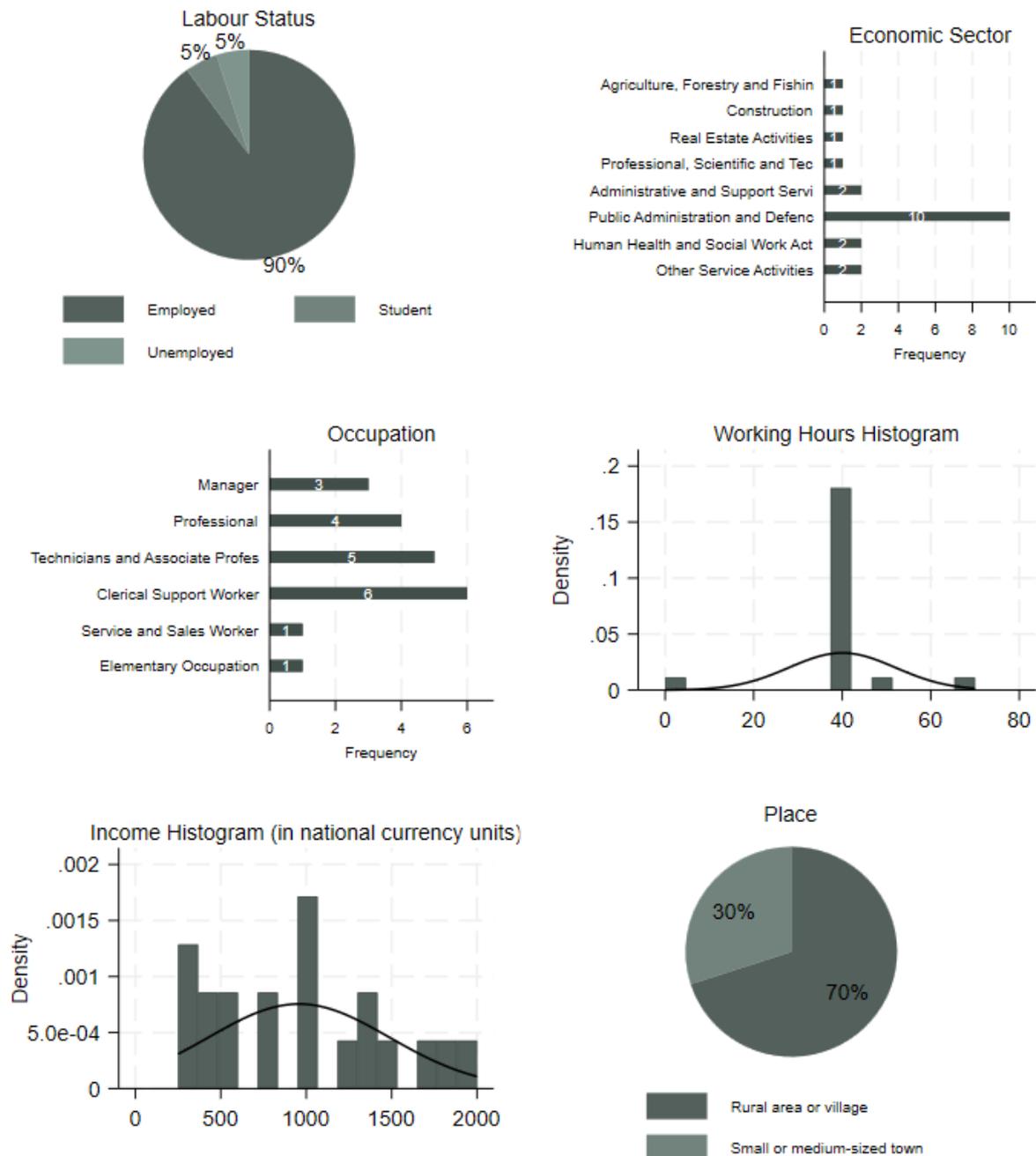


Figure 8.9.6.2 Parczew (PL). Labour Market and Environment

Economic activity is concentrated primarily in the public sector, with Public Administration and Defence employing the largest group (10 respondents). Additional employment is found in Administrative and Support Services (2), Human Health and Social Work (2), and Other Service Activities (2). Smaller representations in Agriculture, Construction, Real Estate, and Professional sectors (each 1 respondent) indicate some economic diversity but emphasize the dominance of public and service-related occupations.

Occupational distribution highlights the predominance of clerical support work (6 respondents), followed by technicians and associate professionals (5), professionals (4), and managers (3). There is minimal representation in service and sales or elementary occupations (1 each), reflecting a relatively skilled and administrative labour force. Working hours centre tightly around 40 hours per week, indicating standard full-time employment patterns within the sample. Income distribution is very modest, with most respondents earning between zł500 and zł1,500 monthly (approximately €118–€354). This range suggests a low earning capacity. Place of residence is primarily rural, with 70% living in rural areas or villages and 30% in small or medium-sized towns, reinforcing the rural context of the sample.

Housing tenure in the Polish sample reveals that a majority (55%) fully own their homes or apartments, while 35% own their homes but are still paying a mortgage. A smaller proportion (10%) rent at market prices, indicating a relatively high level of homeownership that suggests material stability and long-term residence within the community (see Figure 8.9.6.3).

Vehicle ownership is prevalent, with 90% of respondents possessing a car or motorised vehicle, highlighting the importance of private transport for mobility, especially in rural or semi-rural areas where public transport may be limited.

Access to essential services in the Polish sample reveals a varied landscape. Local and municipal services show uneven provision, with 35% of respondents reporting 'very easy' access, 20% 'rather easy', 30% 'rather difficult', and 15% 'very difficult', indicating potential barriers for a portion of the population. Public transport accessibility is more problematic, with 55% rating it as 'very difficult', 25% as 'rather difficult', and only 20% as 'rather easy', highlighting substantial limitations that may affect employment opportunities and social participation. In contrast, access to cultural facilities appears more favourable: 50% report 'very easy' access and 30% 'rather easy', though 20% still experience some difficulty. Grocery stores or supermarkets are generally accessible, with 40% of respondents describing access as 'very easy', another 40% as 'rather easy', and only 20% as 'rather difficult', supporting basic daily needs. Green spaces and recreational areas also show positive accessibility for most, with 50% rating access as 'very easy' and 35% as 'rather easy', although 15% still face difficulties.

Figure 8.9.6.4 shows that self-assessed physical health among Polish respondents reveals a diverse distribution, with the largest group rating their health as good (40%), followed by fair (30%) and excellent (15%). Smaller shares describe their health as very good (10%) or poor (5%). This suggests a generally positive but varied physical health profile within the population, reflecting both overall well-being and the presence of health challenges for some individuals.

Mental health self-assessments show a similar pattern, with 40% rating their mental health as good, 25% as poor, 20% as fair, 10% as excellent, and a small minority (5%) reporting very good mental health. These findings suggest moderate psychological resilience and well-being among respondents.

Regarding days unable to perform daily activities due to illness, 65% report no limitations, indicating generally good functional health. However, a quarter of respondents experience 1–3 days of activity limitation, while 5% report 4–7 days, and another 5% indicate being unable to perform daily activities more frequently. These data highlight the presence of episodic or chronic health issues affecting a subset of the population.

Living Conditions & Accessibility - PL

Pilot 5. Parczew PAPER Survey

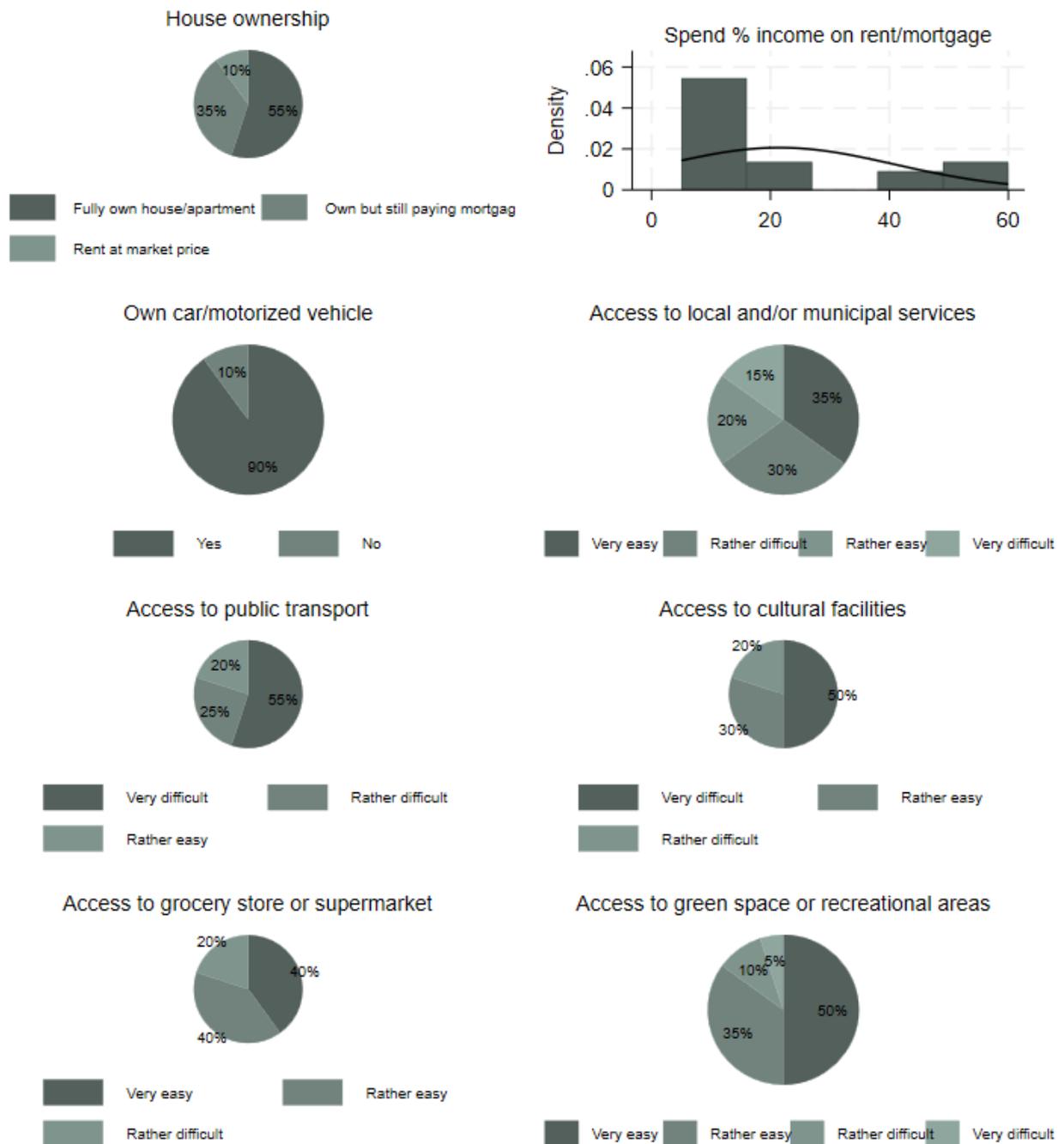


Figure 8.9.6.3 Parczew (PL). Living Conditions & Accessibility

Health - PL

Pilot 5. Parczew
PAPER Survey

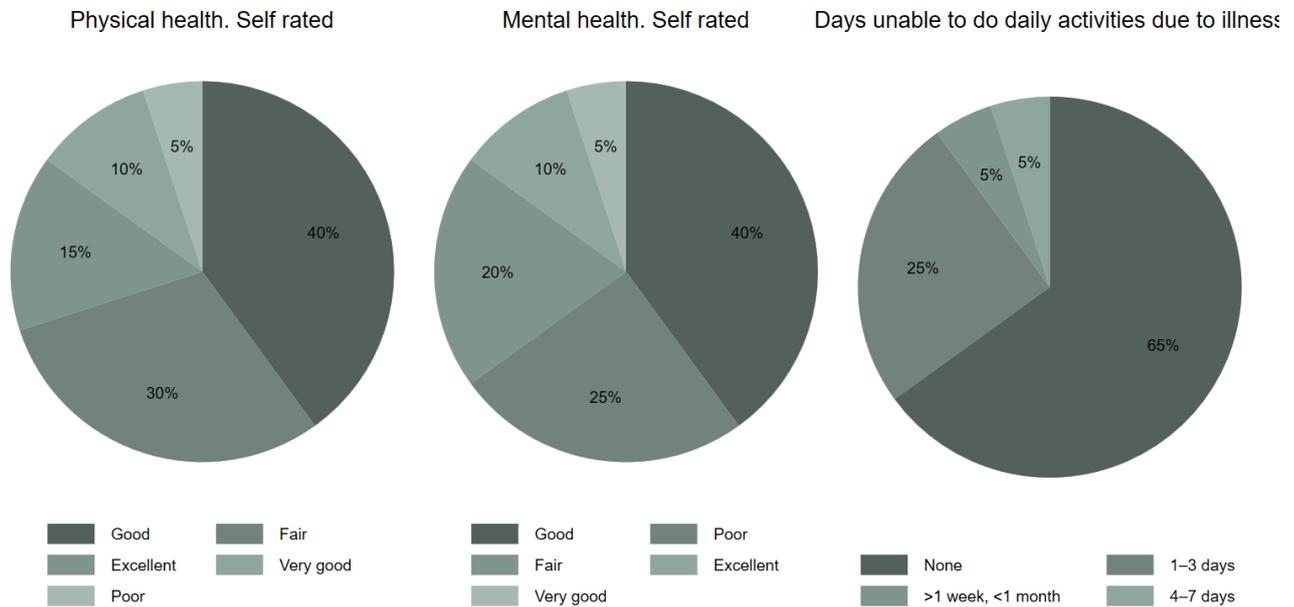


Figure 8.9.6.4 Parczew (PL). Health Self-perception

Social connectedness in Poland exhibits a nuanced pattern. Forty percent of respondents disagree that they feel close to people in their local area, while 30% neither agree nor disagree. A smaller share (25%) ‘agree’, and only 5% ‘strongly disagree’, indicating a general sense of social detachment or ambivalence toward community closeness (see Figure 8.9.6.5).

Trust levels among Polish respondents reveal a clear contrast between interpersonal and institutional domains. Confidence in other people in the area tends to be moderate to high, with trust ratings clustering between 5 and 8 on a 10-point scale, indicating a solid foundation of interpersonal trust despite limited feelings of close social bonds. In contrast, institutional trust is generally low and more variable. Confidence in the national parliament skews toward the lower end of the scale (0–4), suggesting widespread scepticism or disillusionment with legislative bodies. Trust in the police is more evenly distributed, with peaks around mid-range values, likely reflecting mixed perceptions shaped by individual experiences or community-level interactions. Meanwhile, trust in politicians is moderate overall, with most respondents rating their confidence between 4 and 6, and fewer expressing markedly high or low levels of trust.

Confidence in political parties is notably low, with the majority of respondents rating their trust near the bottom of the scale (0–2). This suggests widespread political disenchantment and challenges for party-based engagement in the community.

Digital access and internet use among Polish respondents reveal a generally high level of engagement in online services, with 80% using the internet every day and smaller shares engaging less than once a month (10%) or several times a month (5%), indicating broad digital inclusion in this area (see Figure 8.9.6.6).

Social participation & engagement - PL

Pilot 5. Parczew PAPER Survey

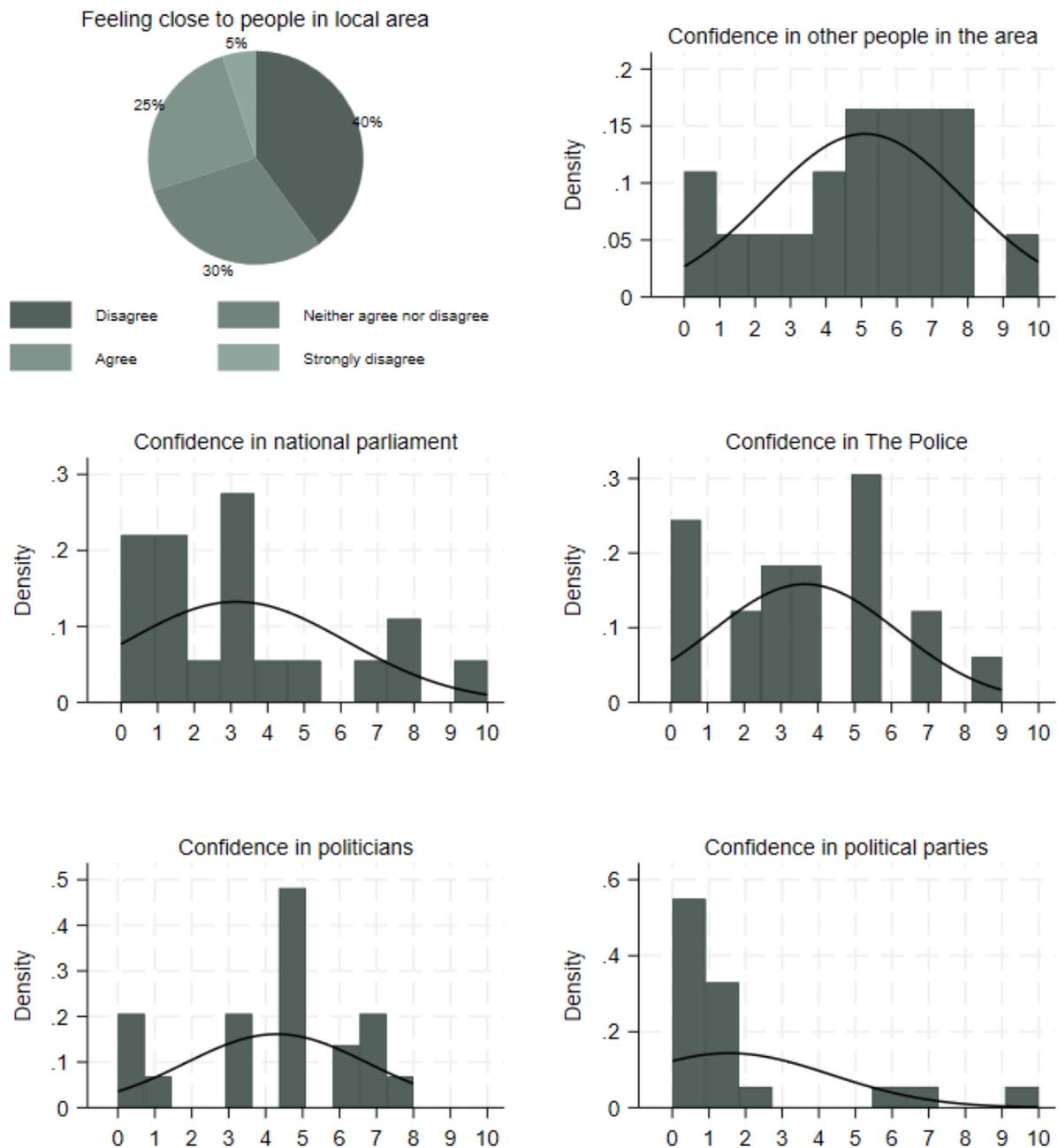


Figure 8.9.6.5 Parczew (PL). Social Participation & Engagement

Personal internet use is more varied, with 25% reporting daily use and 10% several times a week. However, 35% use it less than once a month, and 20% never use the internet for personal purposes, highlighting a digital divide within the population.

Digital access - PL

Pilot 5. Parczew
PAPER Survey

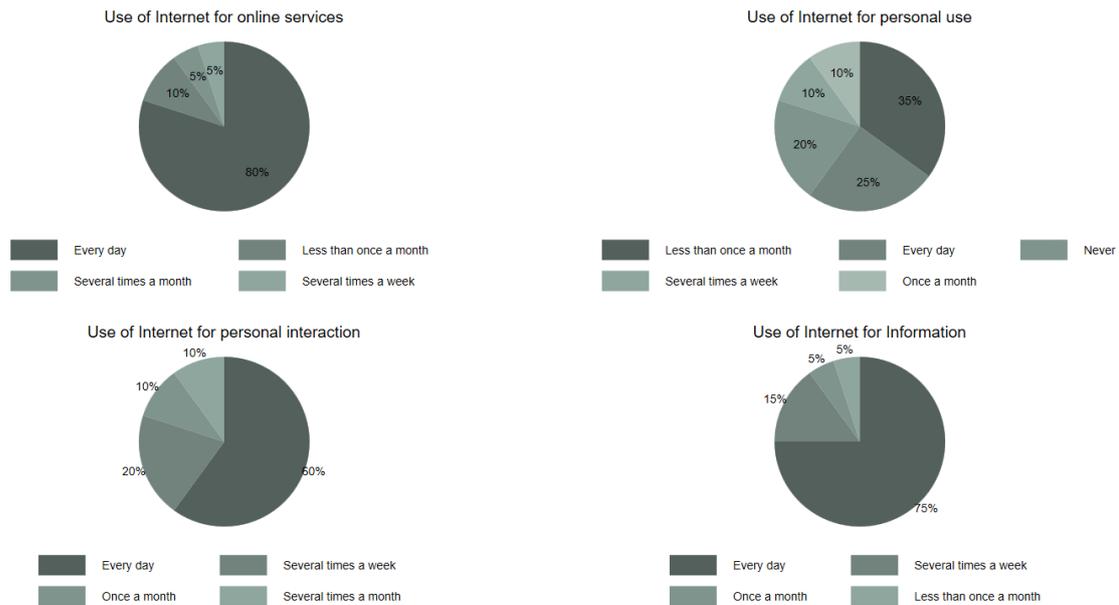


Figure 8.9.6.6 Parczew (PL). Digital Access

Internet use for personal interaction is frequent for most respondents, with 60% engaging daily and 20% several times a week. Smaller proportions use it once a month (10%) or never (10%), illustrating the role of online platforms in maintaining social connections for many, though some remain disconnected.

Use of the internet for information is particularly prominent, with 75% accessing information daily and 15% several times a week. Limited usage is observed among 5% once a month and 5% less than once a month, suggesting that digital sources are a primary channel for news, education, and other informational needs for most respondents.

Economic vulnerability within the Polish sample is mixed, as shown in Figure 8.9.6.7. Half of the respondents report that their household can afford an unexpected but necessary expense, while the other half indicate financial difficulty in this regard, highlighting notable economic insecurity. Similarly, 55% state that their household can afford a week-long annual holiday, reflecting moderate discretionary spending capacity, whereas 45% cannot, suggesting constraints on leisure and non-essential expenditures.

Risk of poverty & social exclusion - PL

Pilot 5. Parczew PAPER Survey

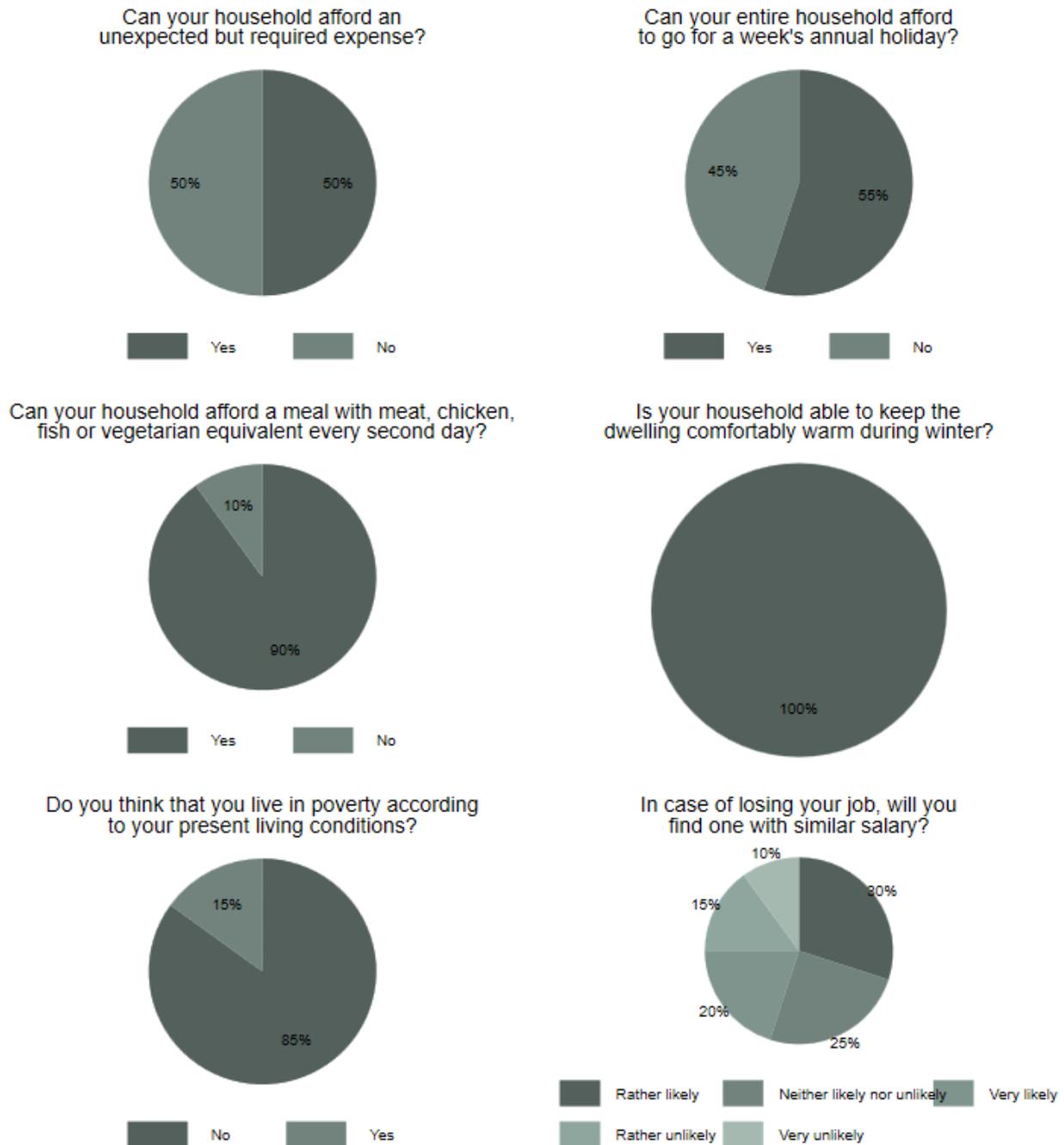


Figure 8.9.6.7 Parczew (PL). Risk of Poverty & Social Exclusion

Living conditions among Polish respondents reflect a generally stable material situation, with some underlying vulnerabilities. Food security appears strong overall, as 90% of respondents report being

able to afford a meal containing meat, chicken, fish, or a vegetarian equivalent every second day, though 10% face difficulties meeting this basic nutritional need, indicating pockets of insecurity. Heating adequacy is uniformly positive, with all respondents stating they can keep their dwelling comfortably warm during winter, suggesting sufficient housing conditions. Subjective poverty is not widespread: only 15% perceive themselves as living in poverty based on their current circumstances, while the majority (85%) do not share this view. However, employment security reveals a more varied picture—30% consider it rather likely they would find a job with similar pay if they lost their current one, 25% are uncertain, 20% view it as very likely, and smaller shares express doubt (15% rather unlikely, 10% very unlikely), reflecting a mix of optimism and concern regarding labour market mobility.

Parczew is a rural area with a well-educated, predominantly employed population concentrated in public administration. Home and car ownership are high, but access to public transport is limited. Health is mostly rated as good, and digital use—especially for information and interaction—is widespread. However, half of the respondents report difficulty managing unexpected expenses, and a notable minority experiences food insecurity and heating challenges, reflecting economic precarity amid material stability.

8.9.7 Case Study: Romania – Poiana Stampei, Panaci, Botiza & Ocna Şugatag.

Figure 8.9.7.1 presents the demographic profile of the Romanian sample (21 respondents), showing a relatively balanced gender distribution, with males comprising 57% and females 43%. This near parity reflects a typical composition in many rural and semi-rural communities. The age distribution is broad, ranging from the early 20s to the mid-80s, with notable peaks among respondents in their 20s and again between 40 and 60 years. Females display a wider age range extending into older cohorts, possibly indicating longer life expectancy or differing demographic dynamics, while males are mainly clustered between their late 20s and early 60s, representing a predominantly working-age population.

Marital status reveals a variety of family arrangements. The largest group (38%) is married or living with a domestic partner, reflecting conventional household structures common in the region. A significant proportion of respondents (29%) are single (never married), highlighting a substantial share of individuals possibly at earlier life stages or choosing different living arrangements. Divorced individuals account for 19% of the sample, which is a considerable segment indicating family dissolution or changing social norms, while 14% report cohabiting status, suggesting increasing acceptance of non-marital partnerships and diverse household compositions.

Educational attainment within the sample is primarily concentrated at the upper secondary level, with 12 respondents holding this qualification, indicating a majority with at least basic completed secondary education. Bachelor's degrees are reported by 5 respondents, reflecting some higher education attainment but limited in comparison to secondary levels. Primary education (2) and lower secondary education (2) are less represented, suggesting a relatively educated sample overall, although disparities in access to higher education may persist.

Family size data reveal that a notable share of respondents have no children (8), possibly reflecting demographic trends such as lower fertility rates or migration patterns impacting family formation. Those with one child (7) and two children (5) comprise the next largest groups, consistent with smaller family norms prevalent in many contemporary European contexts. A small number (1) report three children, indicating some variation but predominantly small family units.

Dealing with rural labour market dynamics requires an understanding of the employment structure observed in the Romanian sample, which reflects a predominantly employed population—57% of respondents are actively working. This is complemented by notable shares of retired individuals (19%), students (10%), unemployed persons (10%), and a smaller group engaged in household activities or caregiving (5%). Such a distribution typifies rural contexts, where workforce participation often intersects with phases of economic inactivity linked to life stage, education, or care responsibilities (see Figure 8.9.7.2).

Demographic Characteristics - RO

Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag PAPER Survey

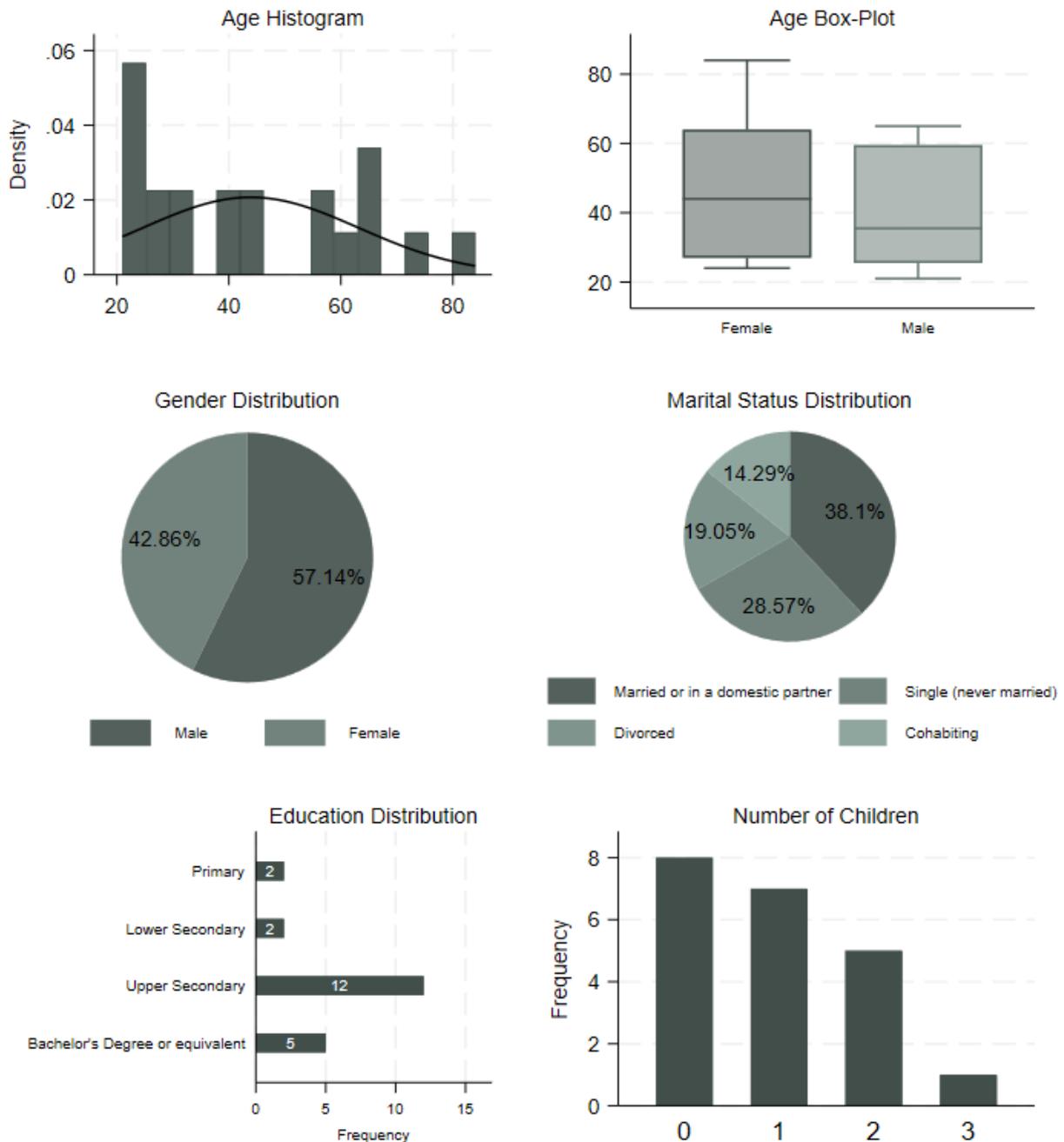


Figure 8.9.7.1 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Demographic Characteristics

Labour Market and Environment - RO

Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag PAPER Survey

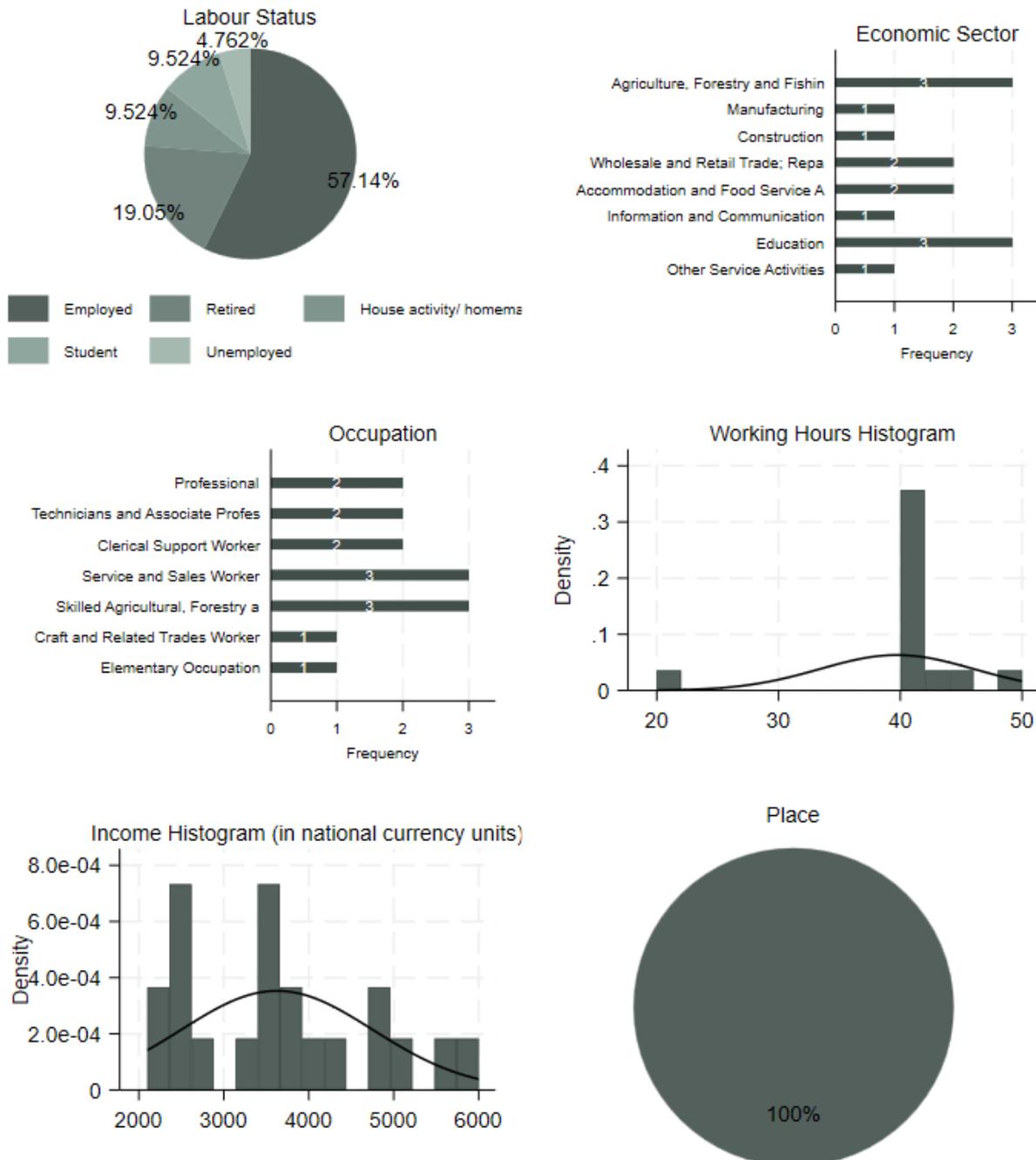


Figure 8.9.7.2 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Labour Market and Environment

Economic sector representation is varied but centres on traditional primary industries and key public services. Agriculture, Forestry, and Fishing employ three respondents, underscoring the continued

importance of natural resource-based livelihoods in rural Romania. Education also accounts for three respondents, reflecting the role of public sector employment in community stability. Wholesale and Retail Trade, as well as Accommodation and Food Services (two respondents each), highlight service sector engagement likely linked to local commerce and tourism. Smaller employment numbers in Manufacturing, Construction, Information and Communication, and Other Services indicate some diversification but limited industrial presence.

Occupational profiles reveal a heterogeneous workforce with a blend of skilled and semi-skilled roles. Service and Sales Workers (3) and Skilled Agricultural, Forestry, and Fishery Workers (3) constitute the largest groups, indicative of the dual economic base in service provision and primary production. Professionals (2), Technicians and Associate Professionals (2), and Clerical Support Workers (2) add layers of administrative and technical capacity, while Craft and Related Trades Workers (1) and Elementary Occupations (1) comprise smaller segments. This occupational structure is typical of rural economies where multiple skill levels coexist amid constrained job diversification.

Working hours among Romanian respondents are generally concentrated around the standard 40-hour week, with some variation between 20 and 50 hours, reflecting full-time employment as the norm, alongside part-time or extended schedules likely tied to seasonal or flexible work arrangements. Income levels vary moderately, ranging from approximately €2,000 to €6,000 per month, indicating economic heterogeneity shaped by differences in occupation, sector, and qualifications. All participants reside in rural areas or villages, reinforcing the rural character of the sample and highlighting both the challenges and opportunities associated with labour market participation, economic diversification, and service accessibility in these settings.

Housing tenure among Romanian respondents is predominantly stable, with 71% fully owning their homes or apartments. An additional 14% own their homes but are still paying a mortgage, while smaller proportions rent at market prices (10%) or live-in social housing (5%). This high rate of homeownership suggests material security and residential stability, important factors for community cohesion and well-being in rural areas (see Figure 8.9.7.3).

Mobility and service accessibility among Romanian respondents present a mixed picture. Vehicle ownership is relatively balanced, with 57% owning a car or motorised vehicle and 43% lacking access to private transport—an important factor in determining access to services, employment, and social engagement, especially in dispersed rural settings. Local and municipal services are perceived as moderately challenging to access: 57% describe access as 'rather difficult,' 38% as 'rather easy,' and only 5% as 'very easy,' pointing to persistent infrastructural or logistical barriers in daily life. In contrast, public transport is viewed more positively, with 67% finding it 'rather easy' and 33% 'rather difficult,' indicating relatively good availability in these rural areas. Cultural facilities are generally accessible, as 57% rate access as 'rather easy,' 33% as 'very easy,' and only 10% as 'rather difficult,' suggesting meaningful opportunities for cultural participation within the community.

Living Conditions & Accessibility - RO

Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag PAPER Survey

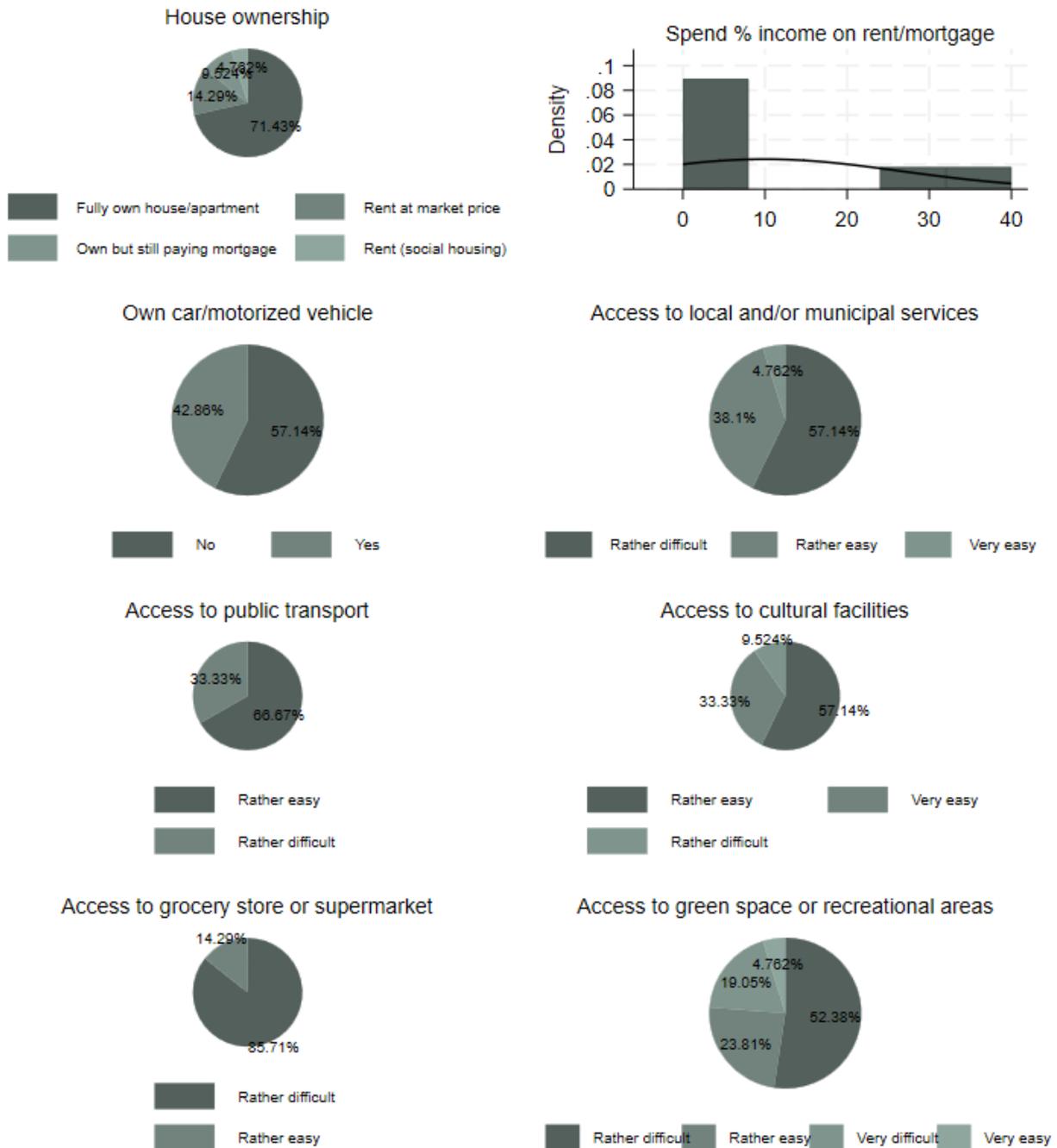


Figure 8.9.7.3 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Living Conditions & Accessibility

Access to everyday amenities among Romanian respondents varies considerably. Grocery stores or supermarkets are predominantly difficult to reach, with 86% of respondents rating access as 'rather

difficult’ and only 14% as ‘rather easy’, likely reflecting limited local retail infrastructure and a reliance on travel for basic necessities. Regarding green spaces and recreational areas 52% describe access as ‘rather difficult’, while 24% report it as ‘rather difficult’, 19% as ‘very difficult’, and 5% as ‘very easy’. This variation points to uneven opportunities for outdoor leisure, which may affect both quality of life and levels of social engagement.

Self-assessed physical health among Romanian respondents displays a varied profile, as illustrated in Figure 8.9.7.4. The largest group rates their health as good (33%), followed by poor (29%) and excellent (19%). Mental health assessments similarly indicate diverse experiences, with 43% rating their mental well-being as good, 29% as fair, 24% as excellent, and a smaller proportion (5%) as very good. These results suggest a moderately positive psychological health status with variability across the sample.

Regarding days unable to perform daily activities due to illness, just over half (52%) report no limitations, while 19% experience 1–3 days of activity limitation and another 19% 4–7 days. Smaller groups report more frequent limitations, including 5% who are unable to perform daily activities ‘all of the time’ and another 5% for periods exceeding one week but less than a month. This highlights the presence of episodic or chronic health conditions affecting a significant portion of the population.

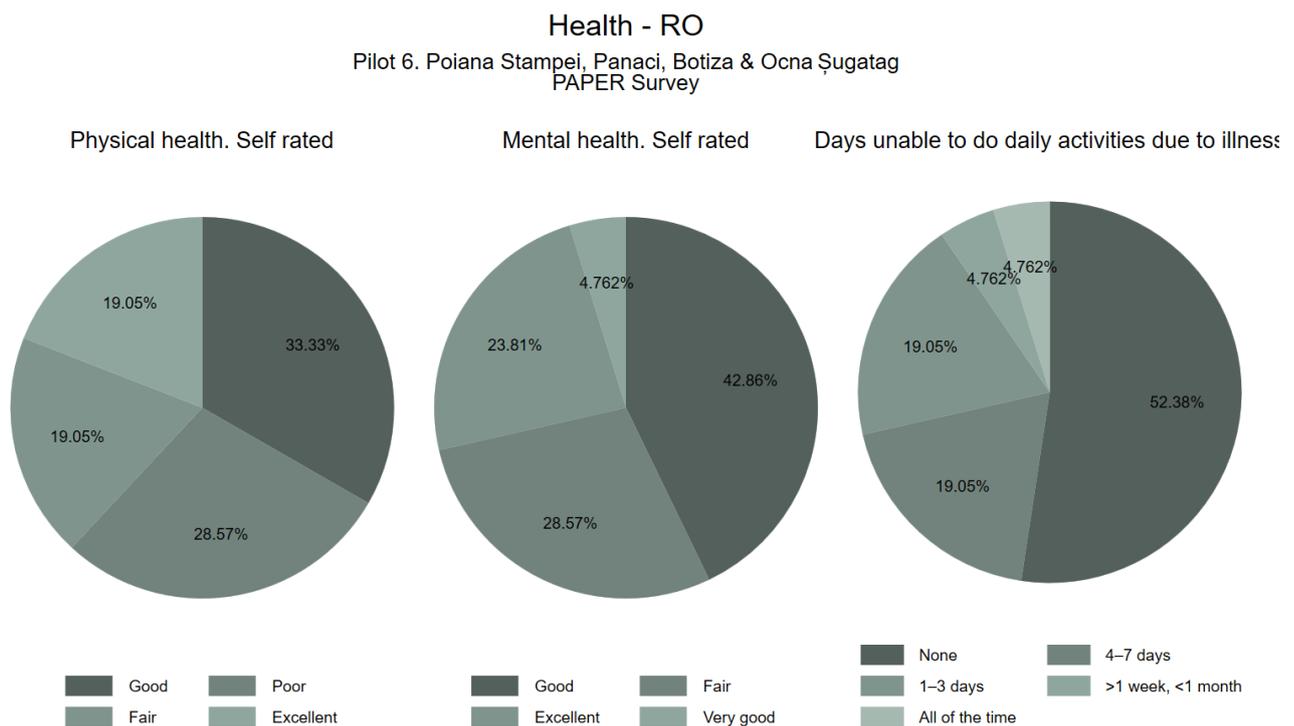


Figure 8.9.7.4 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Health Self-perception

Social connectedness in Romania shows a complex pattern, with over half of respondents (52%) neither agreeing nor disagreeing that they feel close to people in their local area. A substantial share (29%) disagrees, while smaller strongly disagree (14%) or agree (5%), indicating a generally weak sense of local community cohesion and interpersonal closeness (see Figure 8.9.7.5).

Levels of trust among Romanian respondents reveal a clear distinction between interpersonal and institutional domains. Confidence in other people in the local area tends to be moderately high, with most respondents rating their trust between 5 and 8 on a 10-point scale. This suggests that, despite some ambivalence regarding social closeness, a relatively strong foundation of interpersonal trust persists. In contrast, trust in political institutions is moderate to low. Confidence in the national parliament shows a broad distribution, with responses clustering between 2 and 6, reflecting a mix of scepticism and guarded perceptions of legislative bodies. Trust in the police follows a similar pattern, with ratings primarily between 4 and 7, indicating a moderate level of institutional confidence likely shaped by local experience. Trust in politicians leans toward the moderate range (ratings between 5 and 7), while political parties attract lower levels of confidence, with ratings clustering between 3 and 4—suggesting a distinction in how respondents view individual political figures versus the party system more broadly.

Figure 8.9.7.6 shows that digital access and internet usage among Romanian respondents reveal a heterogeneous landscape. Use of internet for online services show mixed results. One third of them never use it, while around 40% use it less than once a month or once a month. Every day users account for 5%, while several times a week around 10%.

Use of the internet for online services is relatively moderate, with 38% of respondents using these services several times a month, 19% several times a week, and 14% less than once a month. In contrast, 10% of them never use online services, highlighting variability in digital engagement levels across the sample.

Personal internet use is more evenly distributed, with 38% using the internet several times a month, 24% every day, and smaller proportions using it several times a week (15%) or less than once a month (14%). A minority (5%) never engage in personal internet use. These figures suggest varying degrees of digital literacy and access, with some users less connected to daily online activities.

Internet use for personal interaction shows a similar pattern, with 38% reporting several times a week usage and 33% several times a month. Smaller shares use it every day (15%), less than once a month (10%), or never (5%), underscoring the importance of online platforms for social connectivity alongside ongoing digital divides.

Use of the internet for information purposes is characterised by nearly half of respondents (48%) engaging several times a month and 19% several times a week, highlighting strong reliance on digital sources for news and knowledge. Everyday users account for 14% of the respondents, while never users account for less than the 10%.

Social participation & engagement - RO

Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag PAPER Survey

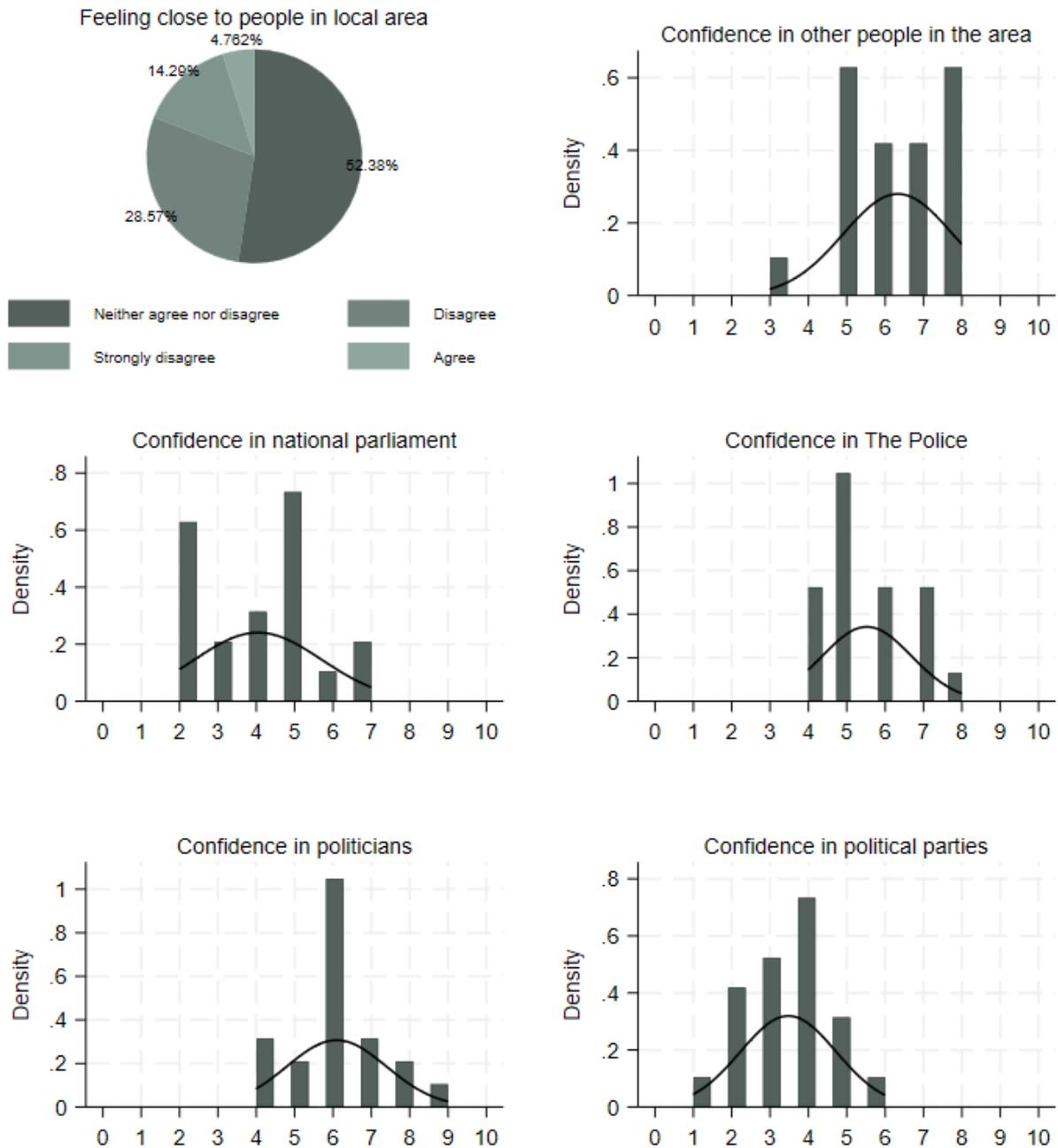


Figure 8.9.7.5 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Social Participation & Engagement

Economic vulnerability within the Romanian sample presents a nuanced picture. Approximately half of respondents (52%) indicate their household can afford an unexpected but necessary expense,

while the remaining 48% report difficulty managing such costs. This split highlights substantial financial insecurity among a significant portion of the population (see Figure 8.9.7.7).

Digital access - RO
 Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag
 PAPER Survey

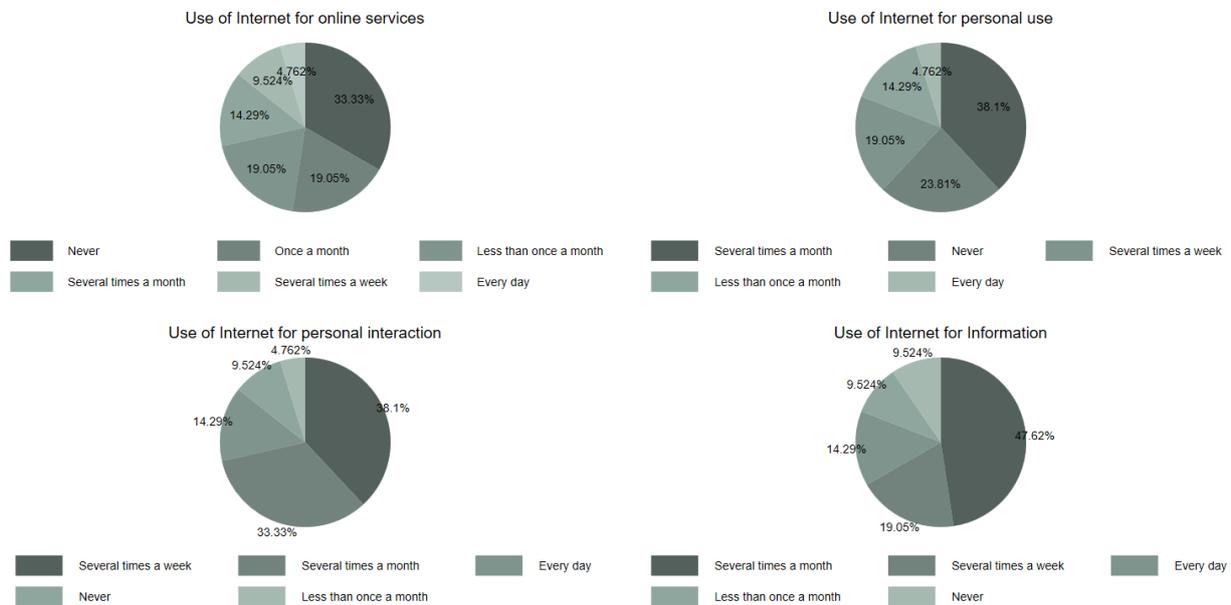


Figure 8.9.7.6 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Digital Access

Regarding discretionary spending, 67% of respondents state that their entire household can afford a week-long annual holiday, suggesting moderate leisure opportunities, whereas 33% cannot, reflecting constrained economic means for a third of the sample.

Risk of poverty & social exclusion - RO

Pilot 6. Poiana Stampei, Panaci, Botiza & Ocna Şugatag PAPER Survey

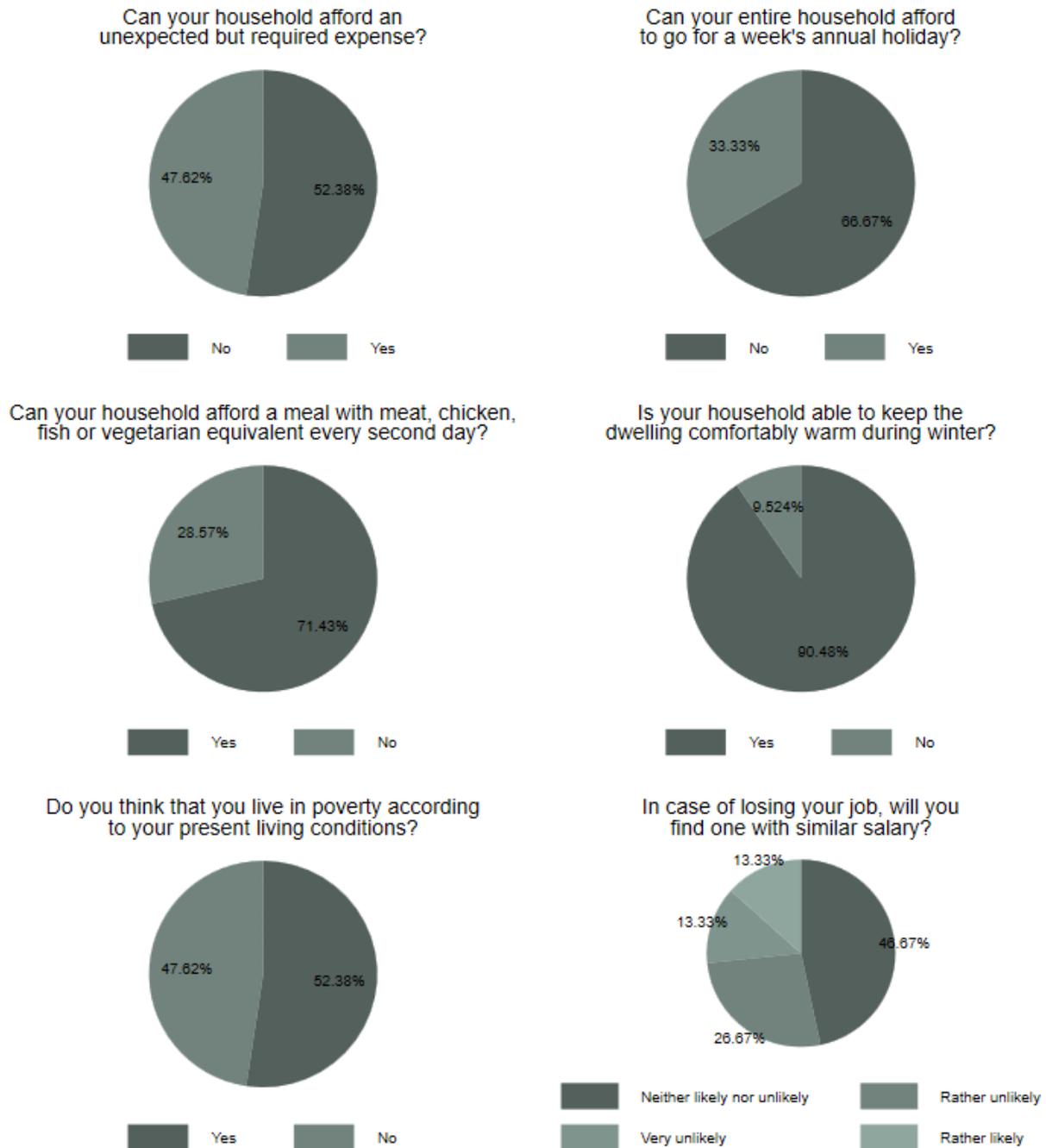


Figure 8.9.7.7 Poiana Stampei, Panaci, Botiza & Ocna Şugatag (RO). Risk of Poverty & Social Exclusion

Food security appears relatively strong, with over 70% affirming the ability to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day. However, 29% face challenges meeting this nutritional need, indicating pockets of food insecurity.

Heating adequacy is generally high, with 90% reporting the ability to keep their dwelling comfortably warm during winter, a critical factor for health and well-being in colder months.

Subjective perceptions of poverty are evenly divided, with 52% not perceiving themselves as living in poverty given their current living conditions, while 48% believe they do, reflecting varied lived experiences of deprivation.

Employment security perceptions are mixed. Nearly half (47%) consider it neither likely nor unlikely that they would find a job with similar salary if they lost their current position, 27% view this as rather unlikely or very unlikely, while 27% are more optimistic, indicating a rather or very likely outlook. This spectrum reveals diverse confidence levels in labour market opportunities and personal employability.

These mountain communities show occupational diversity centred on agriculture and services, with moderate education and stable housing. Access to groceries and green areas is limited, and nearly half report financial insecurity. Health outcomes are mixed, and functional limitations are common. Digital use varies widely, with many relying on the internet for information but fewer engaging socially online. Social ties are weak, and political trust is low, highlighting structural challenges in rural cohesion and participation.

8.9.8 Case Study: Slovakia – Košice

Finally, the last case examined is Košice, where the demographic profile of the sample (14 respondents) reveals an equal gender split, with males and females each representing 50% of participants. This balanced composition offers a well-rounded view of the local population's characteristics. The age distribution ranges from the early 20s to late 60s, with a notable concentration in the 40s, indicating a predominantly mature, working-age population. Females show a broader age range extending into their 60s, possibly reflecting higher life expectancy or differing migration patterns, while males are primarily clustered between 20 and 50 years (see Figure 8.9.8.1).

Marital status reflects diverse household compositions. The largest proportion of respondents (36%) are single (never married), indicating a substantial group potentially in earlier life stages or choosing non-traditional living arrangements. Cohabiting individuals account for 29%, highlighting the growing acceptance of non-marital partnerships, while 14% are married or in a domestic partnership. Widowed respondents make up 14%, suggesting an older segment within the sample, and a smaller group (7%) fall under other categories, further underscoring the heterogeneity of family structures.

Educational attainment is concentrated predominantly at lower levels, with six respondents reporting lower secondary education and five primary education. Only two respondents have upper secondary education, and one has less than primary education, highlighting limited formal education in the sample. This educational profile suggests potential barriers to higher-skilled employment and may influence socio-economic outcomes within the community.

Family size distribution indicates a tendency towards medium to larger families, with the majority of respondents having two or three children (four respondents each). Smaller shares report no children

(two respondents), one child (one respondent), four children (two respondents), and a single respondent has five children. This pattern reflects demographic trends typical of some rural areas, where larger family units may still be prevalent.

Demographic Characteristics - SK

Pilot 7. Košice PAPER Survey

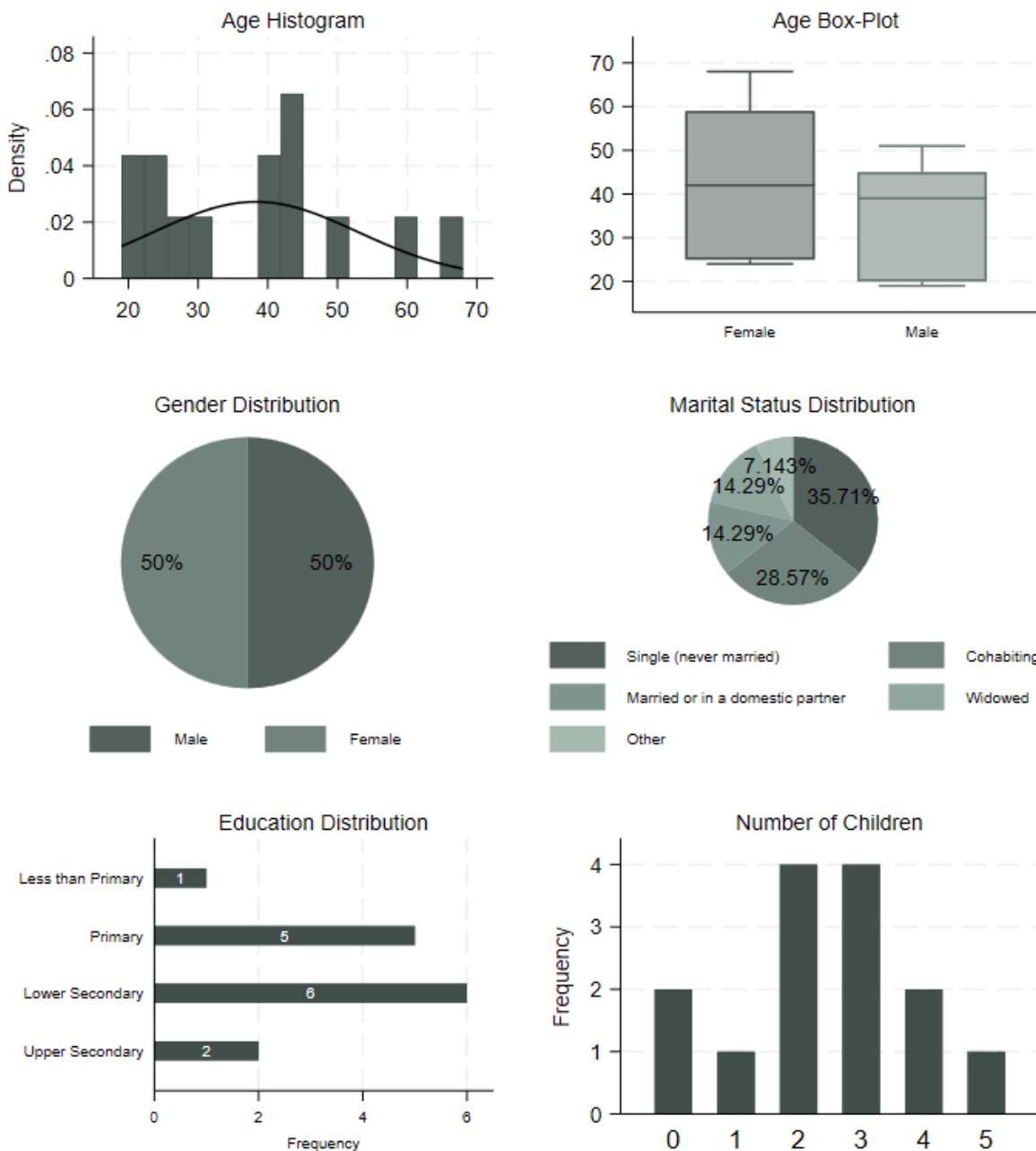


Figure 8.9.8.1 Košice (SK). Demographic Characteristics

The labour market profile reflects a complex situation, with 62% unemployed. Only around one third of the population is employed, and a smaller portion (8%) are retired, suggesting a high unemployment rate in this rural context, which may impact local economic stability and social well-being (see Figure 8.9.8.2).

Labour Market and Environment - SK

Pilot 7. Košice PAPER Survey

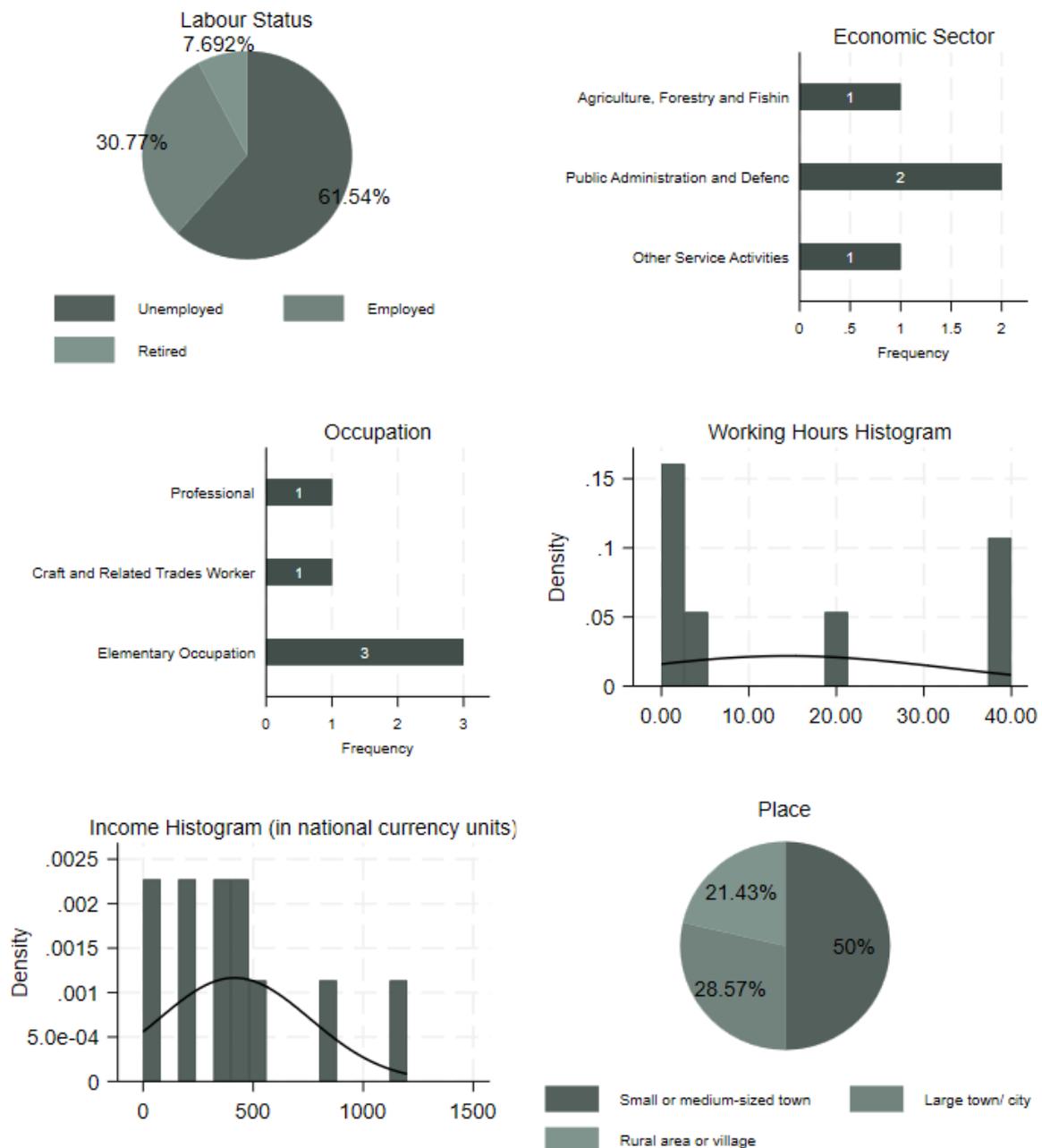


Figure 8.9.8.2 Košice (SK). Labour Market and Environment

Economic sectors are limited but include Agriculture, Forestry, and Fishing (1 respondent), Public Administration and Defence (2 respondents), and Other Service Activities (1 respondent). This distribution indicates a small, somewhat constrained local economy focused on primary production and public sector employment.

Occupational roles are skewed towards elementary occupations (3 respondents), with single representations among professionals and craft-related trades workers. This occupational profile suggests a workforce largely engaged in lower-skilled manual or service roles, reflecting limited diversification and skill variety in the local labour market.

Working hours among Slovak respondents vary considerably, with peaks at zero hours—potentially reflecting unemployment or informal activities—around 20 hours, and near 40 hours per week. This distribution points to a mix of full-time, part-time, and non-working individuals, aligning with the broader employment patterns observed in the sample. Income levels are generally low, with most respondents earning under €500 per month and only a few reporting incomes approaching €1,000, reflecting modest economic conditions likely linked to the occupational and sectoral structure of the area. Place of residence is spread across small or medium-sized towns (50%), rural areas or villages (21%), and larger towns or cities (29%), highlighting a diverse settlement pattern that may affect access to employment opportunities and essential services.

Figure 8.9.8.3 shows that housing tenure among Slovak respondents is notably diverse. Approximately 29% report living in a cottage, while equal shares (14%) live in rooms within cottages, fully own their homes or apartments, rent at market prices, or reside in social housing. This variation reflects a broad spectrum of housing situations, suggesting differing levels of residential stability and socio-economic status within the community.

Vehicle ownership is high, with 93% of respondents possessing a car or motorised vehicle, underscoring the importance of private transport in accessing services and employment in rural or semi-rural settings.

Access to local and municipal services is experienced as challenging by most, with 54% rating access as 'rather difficult' and 23% as 'rather easy.' Smaller shares describe access as 'very difficult' (15%) or 'very easy' (8%), indicating uneven service availability that may impact daily life quality.

Public transport accessibility is mixed; 46% find it 'very difficult' to access, while 38% report 'rather difficult' access and 15% 'rather easy.' These findings suggest significant mobility constraints for many residents relying on public transportation. Access to cultural facilities is similarly variable, with 58% rating it 'rather easy' and 25% 'very easy,' while 8% find access 'rather difficult' and another 8% 'very difficult.' This suggests relatively favourable opportunities for cultural participation despite some accessibility challenges. Access to grocery stores or supermarkets is predominantly difficult, with 62% of respondents reporting 'very difficult' access and 23% 'rather difficult.' Only 15% find access 'rather easy,' pointing to significant challenges in obtaining daily necessities locally. Access to green spaces or recreational areas is varied: 46% of respondents rate it 'rather difficult,' 38% 'very difficult,' and 15% 'rather easy.' This indicates limited availability or accessibility of outdoor recreational spaces, potentially affecting residents' well-being and community engagement.

Self-assessed physical health among Slovak respondents reveals a mixed profile. The largest group rates their health as fair (36%), followed by good (29%) and very good (14%). Smaller proportions

describe their health as poor (14%) or excellent (7%), indicating a range of health statuses with a tendency towards low well-being but with notable health challenges among some individuals (see Figure 8.9.8.4).

Living Conditions & Accessibility - SK

Pilot 7. Košice PAPER Survey

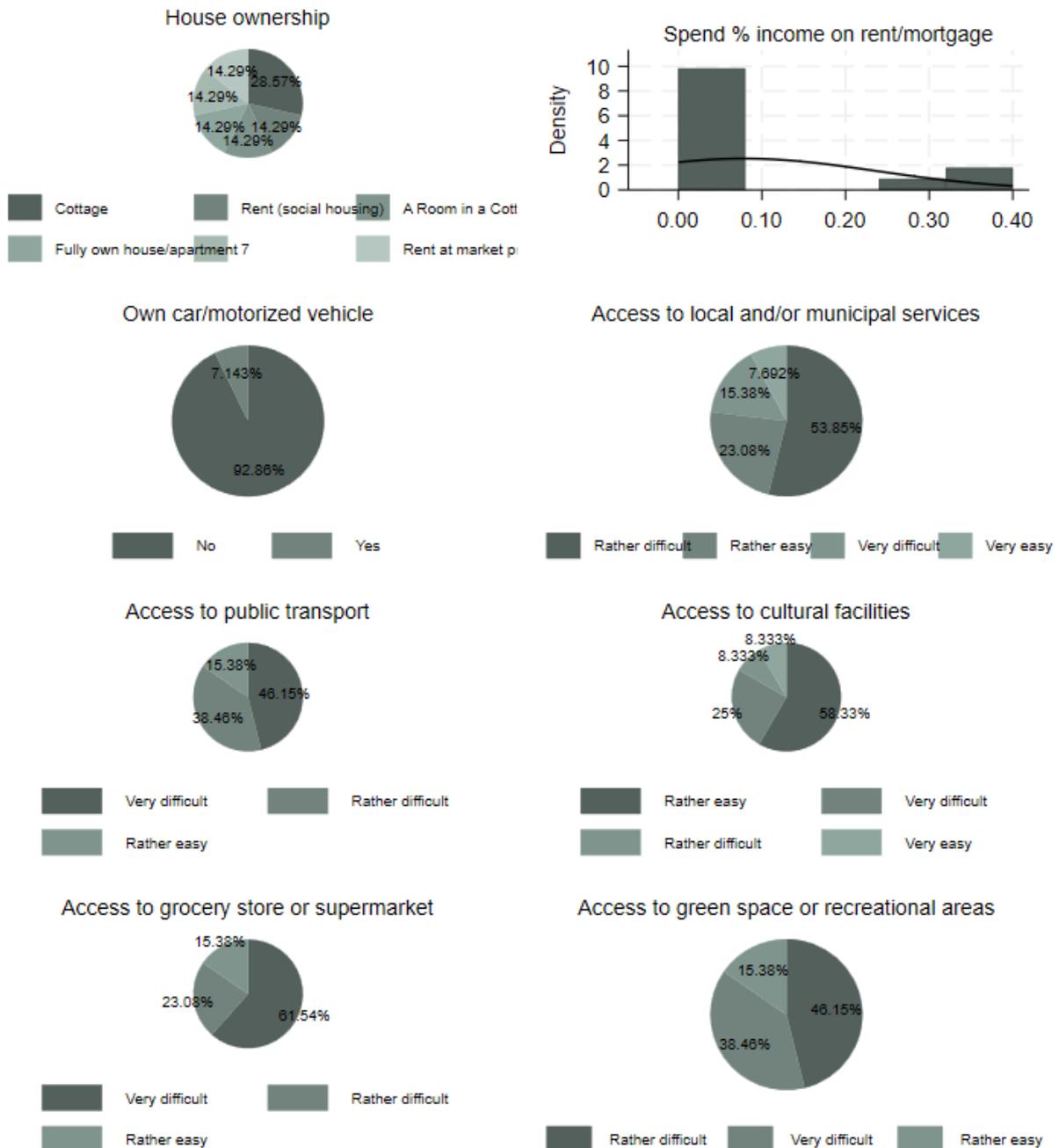


Figure 8.9.8.3 Košice (SK). Living Conditions & Accessibility

Mental health ratings present a somewhat more positive picture, with half of respondents reporting good mental health, followed by 21% poor, 14% excellent, and 14% poor. These results suggest a population with generally positive psychological well-being, although a minority experience mental health difficulties.

Regarding days unable to perform daily activities due to illness, 43% report no limitations, while 21% experience 1–3 days of reduced activity, and 14% report 4–7 days. Smaller groups report being unable to perform daily activities all the time (14%) or for periods greater than one week but less than a month (7%). These findings highlight the presence of episodic or chronic health conditions affecting functional capacity in a significant segment of the population.

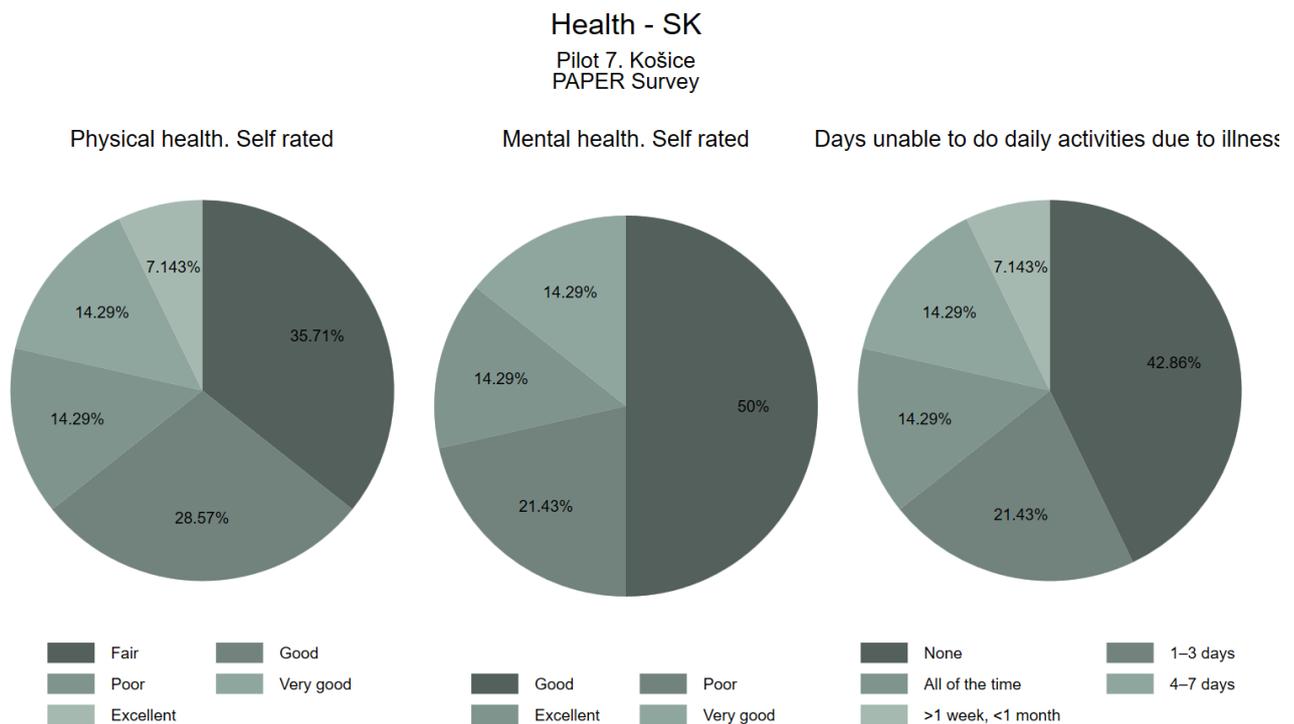


Figure 8.9.8.4 Košice (SK). Health Self-perception

Social participation and engagement in Slovakia reveal a community with limited feelings of closeness to others in the local area. Over half of respondents (57%) strongly disagree that they feel close to people locally, with 29% disagreeing and only 14% neither agreeing nor disagreeing. This suggests a significant sense of social detachment or isolation within the community (see Figure 8.9.8.5).

Levels of trust among Slovak respondents reflect a clear divide between interpersonal and institutional domains. Confidence in other people in the area is generally moderate, with ratings clustering around the mid-range (4 to 6) on a 10-point scale, indicating a fair degree of interpersonal trust despite low levels of reported social closeness. In contrast, institutional trust appears consistently low. Confidence in the national parliament is predominantly low, with many respondents assigning ratings between 0 and 3, suggesting widespread scepticism or disillusionment. Trust in the police follows a similarly low and varied pattern, with notable peaks at 0 and 5, pointing to mixed perceptions likely shaped by individual experiences. Trust in politicians is somewhat more balanced, with scores centring around the mid-range (3 to 7), reflecting moderate confidence accompanied by some degree of polarization.

However, confidence in political parties remains low overall, with most ratings between 0 and 3, indicating a limited level of trust in formal party politics and potentially low political engagement.

Social participation & engagement - SK

Pilot 7. Košice PAPER Survey

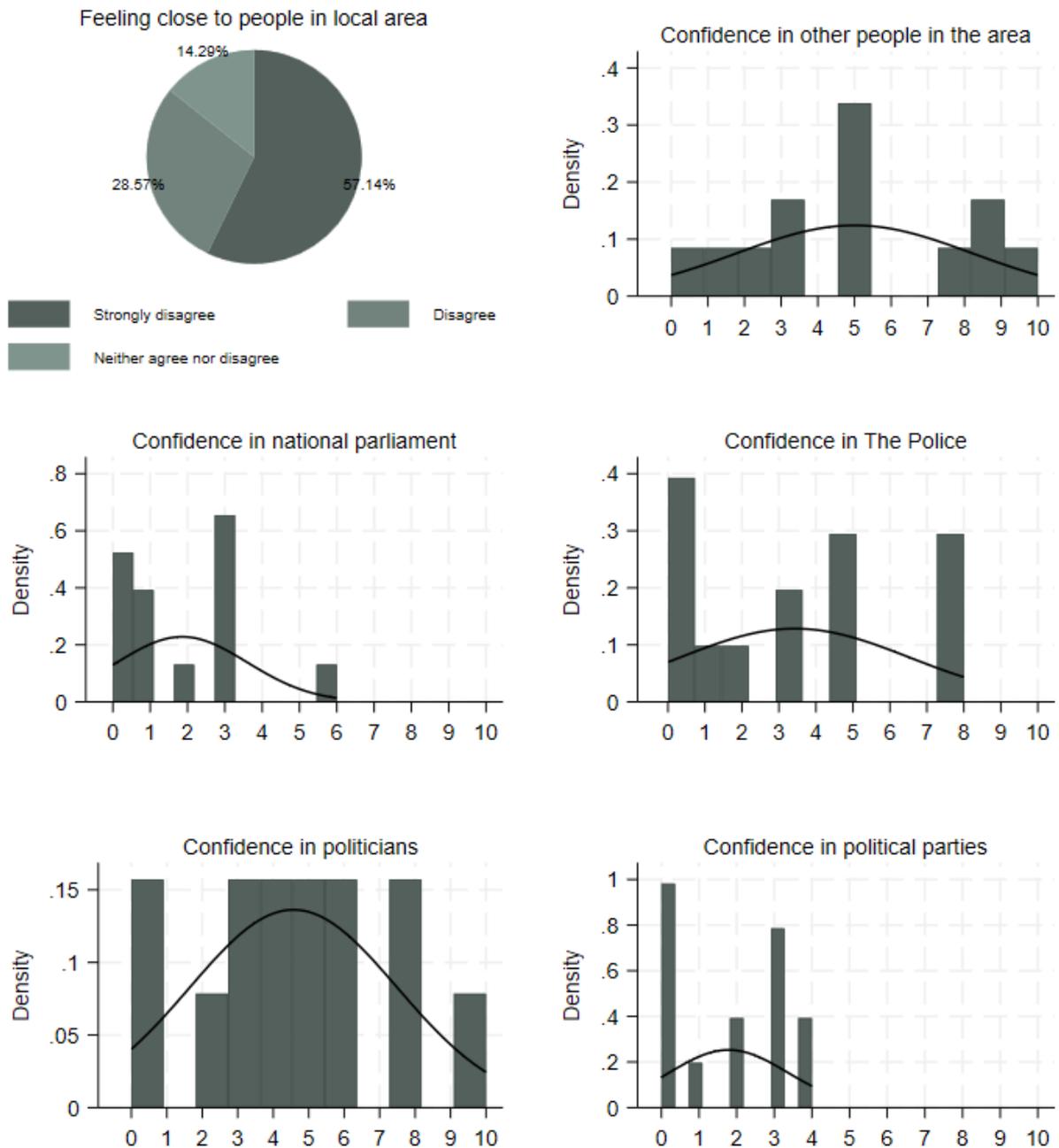


Figure 8.9.8.5 Košice (SK). Social Participation & Engagement

Digital access and usage patterns among Slovak respondents indicate a population with uneven engagement in internet-based activities, as illustrated in Figure 8.9.8.6. Use of the internet for online services shows a varied distribution: 38% of respondents use these services daily, while 31% never use them, highlighting a significant digital divide within the community.

Patterns of internet use among Slovak respondents reveal a mixed but generally active engagement with digital technologies. Personal internet use is relatively frequent, with 43% of respondents using it several times a week and 29% every day, though 21% never engage in personal internet use—highlighting ongoing challenges in digital inclusion for a notable minority. Internet use for personal interaction is even more concentrated, with 71% using it daily and 21% several times a week, suggesting that online platforms play a central role in maintaining social connections. In terms of information access, 36% use the internet daily, 21% several times a week, and 14% several times a month. While 29% declare never using it. These figures point to generally consistent but varied engagement with digital media for informational purposes.

Digital access - SK

Pilot 7. Košice
PAPER Survey

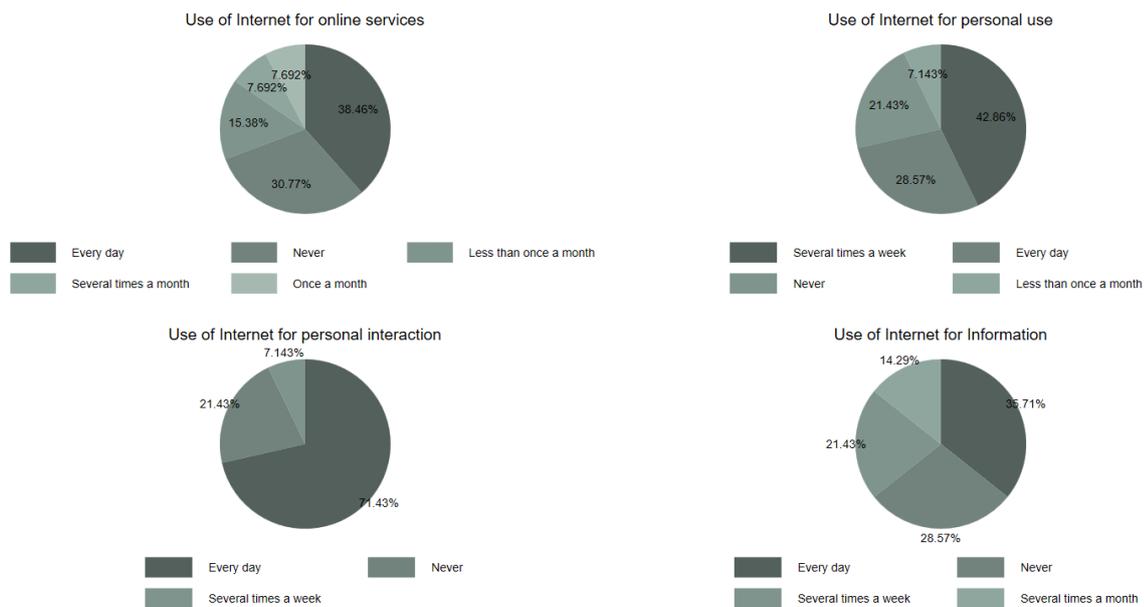


Figure 8.9.8.6 Košice (SK). Digital Access

The economic vulnerability profile among Slovak respondents reveals a generally positive outlook with a few notable concerns, as illustrated in Figure 8.9.8.7. A strong majority (93%) report being able to afford an unexpected but necessary expense, indicating a relatively high level of financial resilience. Likewise, 93% state that their household can afford a week-long annual holiday, reflecting the presence of discretionary income and suggesting overall economic stability. Food security is particularly robust, with all respondents affirming their ability to afford a meal with meat, chicken, fish, or a vegetarian equivalent every second day—underscoring consistent access to basic nutritional needs within the community.

Heating adequacy during winter is somewhat less certain, with 79% indicating they can keep their dwelling comfortably warm, while 21% report inability to do so. This highlights potential energy poverty issues affecting a significant minority, with implications for health and well-being in colder months.

Interestingly, none of the respondents perceive themselves as living in poverty according to their present living conditions, which may reflect subjective assessments of socio-economic status or social comparisons.

Regarding employment security, perceptions are mixed: 44% believe it is rather likely they would find a job with similar salary if they lost their current one, while 33% view this as rather or very unlikely. Smaller proportions are neutral or unsure, indicating varied confidence levels in the local labour market.

Risk of poverty & social exclusion - SK

Pilot 7. Košice PAPER Survey

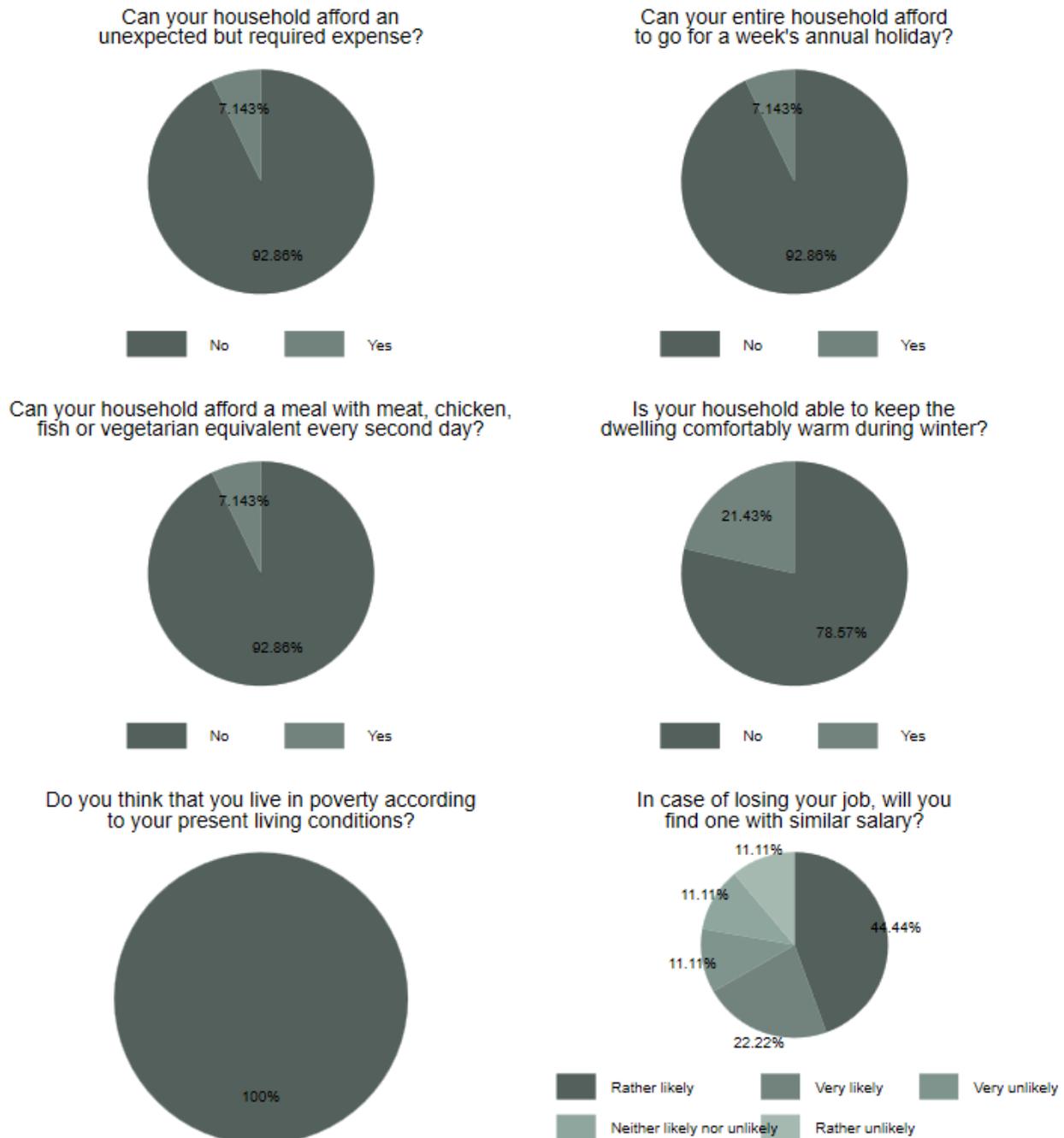


Figure 8.9.8.7 Košice (SK). Risk of Poverty & Social Exclusion

The Slovak commune of Košice reflects low education levels, high unemployment, and limited occupational diversity. Access to essential services and public transport is poor, although home

heating and food security are generally adequate. Health is rated fair to good, with a notable share reporting chronic limitations. Social disconnection and very low trust in institutions dominate the local sentiment. Digital divides persist, with one-third never using online services, despite high usage for social interaction among others.

8.9.9 Concluding Remarks

This comprehensive face-to-face survey analysis across rural and peripheral European regions reveals rich socio-economic and demographic diversity, alongside common challenges inherent to less-populated and often isolated communities.

Importantly, given the relatively small sample sizes and localised nature of the data, these conclusions should be interpreted with caution. The insights provide valuable qualitative and exploratory understanding but may not be fully generalisable to the broader populations of the regions studied. Further research with larger and more representative samples would be necessary to confirm and extend these findings.

Comparison with the broader CATI survey analysis—conducted with larger and more statistically robust samples across the same regions—indicates strong reinforcement of key findings. Demographic patterns, labour market participation, economic sector profiles, living conditions, health perceptions, social trust, digital access, and economic vulnerability trends observed in the paper-based survey align closely with those reported by the CATI data. This consistency enhances confidence in the validity of the core socio-economic narratives emerging from both methodologies.

The face-to-face survey data add valuable depth and nuance to the quantitative breadth offered by the CATI survey. While the CATI survey quantifies prevalence and patterns with greater statistical power, the paper-based survey captures the lived realities, detailed barriers, and subtle variations within rural communities. This complementarity enriches understanding, allowing a more textured interpretation of rural socio-economic dynamics.

No significant contradictions arise between the datasets. Instead, their joint insights underscore the complexity of rural life, shaped by demographic ageing, gender imbalances, occupational diversity, infrastructural limitations, health disparities, social fragmentation, digital divides, and economic precarity. Together, these data illuminate the multifaceted challenges and resilience strategies characterising rural and peripheral populations across Europe.

Material conditions such as homeownership and vehicle possession are often relatively strong, providing a foundation of economic stability. Nevertheless, substantial challenges remain in accessing essential services, including healthcare, transport, cultural facilities, and retail outlets. These accessibility barriers vary by region but consistently shape the daily lives and wellbeing of rural inhabitants.

Health perceptions generally trend positively, though a significant minority experiences chronic illness or activity limitations, underscoring the need to acknowledge health diversity within rural communities. Social participation and interpersonal trust often exhibit moderate levels, while confidence in formal political institutions tends to be lower and more fragmented, suggesting complex dynamics in civic engagement and institutional legitimacy.

Digital access and usage patterns highlight notable disparities: while many respondents regularly engage with the internet for information and social interaction, substantial digital divides persist, limiting inclusive participation in the digital economy and society. Economic vulnerabilities—manifested in difficulties managing unexpected expenses, holiday affordability, and concerns over employment security—are widespread, though their severity varies across regions.

Together, these findings underscore the heterogeneous realities of rural Europe, reflecting both structural constraints and adaptive capacities. The interplay of demographic, economic, infrastructural, health, social, and digital factors creates multifaceted contexts that influence rural wellbeing and social cohesion. Acknowledging this complexity is crucial for understanding the lived experiences of rural populations and the diverse challenges they face.

In sum, the combined insights from the paper-based face-to-face and CATI surveys provide a robust and multi-dimensional portrait of rural Europe. They highlight areas of resilience and persistent vulnerability alike, laying a comprehensive empirical foundation to inform future research and policy efforts aimed at fostering sustainable rural development and social inclusion.

8.10 APPENDIX 10. Observational Fieldwork Research Guide

Observation methods are a type of methodology used in **descriptive research**. They involve systematically recording the behavioural patterns of people, objects, events, and (human) artifacts (e.g., social media posts) to gather information about phenomena of interest. Notably, observation focuses on **what people do** rather than just what they say or what they say they do (Walsh, 2020). A central distinction in observation methods is between natural and contrived observation. Natural observation comprises observing behaviour in its natural setting(s), while contrived observation occurs in an artificial environment, such as a laboratory (Malhotra, 2019). This guide concentrates on **natural observation**.

The core premise behind natural observation is that by spending time alongside the members of a group or a community, researchers are in a better position to observe and even partake in a wide variety of situations as they unfold **in their natural settings**, *in situ*. These experiences allow researchers to reconcile what the subjects might say (e.g., in interviews) and what they actually do (Franco & Yang, 2021).

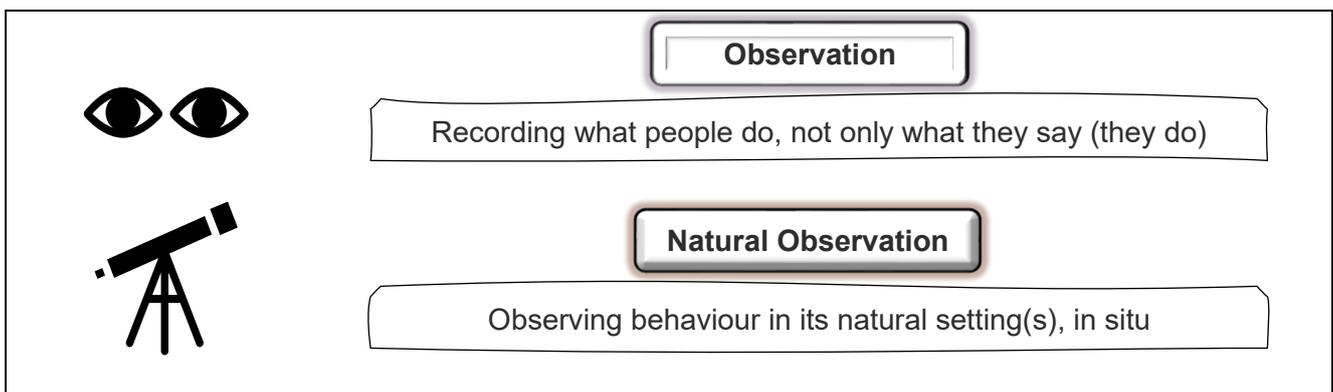


Figure 8.9.9. Observation in a nutshell

Distinctions of (natural) observation methods

Within natural observation, **several distinctions** can be made, including covert vs. undisguised, structured vs. unstructured, and active vs. passive observation. The most prevalent distinction or use of terms, however, is between non-participant and participant observation (Sofield & Marafa, 2019).

Non-participant observation, often referred to as “pure observation” or “passive observation”, implies no intervention by field researchers. In contrast, participant observation entails researchers actively engaging with the subjects. Interestingly, although the element of participation might be seen as distracting, participant observation seeks to preserve the naturalness of the research encounter and minimise the disruption that may arise from the researchers’ presence in the field (Walsh, 2020). Some scholars further identify three interactive modes of participation: moderate (i.e., minimal membership), active (i.e., participation in as many events as possible within a group or community), and complete (i.e., becoming a full member of the group, often referred to as “going native”) (Wilson, 2005; Sofield & Marafa, 2019) (see Table 8.10.1 for an overview and the main associated constraints). It is important to note, though, that even in the case of passive observation,

the researcher-observer might still become a member of the “dramatis personae”¹⁵⁵ of a group or a scene of action and, as such, turn into a carrier of the group or scene characteristics (Schostak, 2010). Finally, it can be mentioned that **non-participatory** forms often centre on factual descriptions, such as how often events occur, how many participants are involved, and who attended. As a result, these forms tend to be more **structured**. In contrast, participatory forms typically embrace a more unstructured approach, allowing for greater flexibility and creativity in gathering insights (Guest et al., 2013).

Table 8.10.1 Observation modes along the “non-participant – participant” continuum.

Type	Level of researchers’ involvement	Core constraints for researchers
Non-participatory / passive / pure	Researchers assume a bystander role	It might be hard to establish rapport and immerse themselves in the field
Moderate	Researchers try to strike a balance between “insider” and “outsider” roles	It might not be easy to attain a balanced blend of involvement and detachment
Active	Researchers become active members of a group or a community	Researchers might struggle to maintain an adequate level of objectivity
Complete	Researchers integrate into the study population / “go native”	Researchers might lose all objectivity, which could compromise the research integrity

Note: Based on Sofield and Marafa (2019), and Walsh (2020)

Participant observation and ethnography

 Observation methods have deep **roots in ethnographic traditions**. Strikingly, some scholars use the terms “participant observation” and “ethnography” **interchangeably** (Fine, 2015). While these concepts are closely related, they have distinct meanings. Participant observation is a fundamental method often employed by ethnographers. On the contrary, **ethnography** is not conceived or treated as a unitary research method but rather as a **broader research approach** for studying people, communities, and cultures in their local settings. As such, it routinely integrates additional methods like interviews and surveys (Walsh, 2020). Interestingly, as we discuss in Section 1.2, in applied research, participant observation is also frequently combined with other qualitative methods, such as interviews and focus groups (Malhotra, 2019), or serves as valuable preparatory groundwork for questionnaire-based methods like surveys (Liu et al., 2024).

 The historical foundations of ethnography can be traced back to classical antiquity, particularly to the writings of **Herodotus** (Robben & Sluka, 2015). The method of participant observation developed from the accounts of **adventurers** and **missionaries**, and later, it was adopted by the first **anthropologists** (Schostak, 2010). In the 1920s, **sociologists** began to embrace this approach; the Department of Sociology at the University of Chicago was the first to send sociologists into the field. They produced ethnographies that explored various aspects of the ethnically, occupationally, and socially diverse urban landscape of Chicago through participant observation (Wilson, 2005; Fine, 2015). Today,  participant observation is utilised across various disciplines to gain insights into the lives of individuals, groups, and communities (Liu et al., 2023).

Key features of natural observation

¹⁵⁵ People who figure prominently in something, such as an event.

Why and which type(s)?

As has been implied above and as outlined by Guest et al. (2013), the **five core reasons** behind choosing natural observation methods are the following:

1. To capture observed behaviour within its physical context.
2. To witness the behaviour of interest as it occurs.
3. To avoid potential biases associated with self-reported data.
4. To reduce reporting biases (e.g., using global standards that may not align with local contexts).
5. To complement other research methods or to identify topics for further inquiry.

Is natural observation a standalone method? As the fifth reason suggests, observation is often used **in conjunction with** other data collection techniques, particularly interviews and focus groups, or as a **precursor** to other methods (Wilson, 2005; Malhotra, 2019). Therefore, research teams might have to consider how to effectively **combine** observation with **complementary** techniques and methods that may be easier to implement or how observation **might lay the groundwork** for further data collection (Fetterman, 2015; Liu et al., 2023).

As for the actual types of natural observation, the choice typically depends on the research questions the teams aim to address, as well as the strategies selected to tackle these questions. To illustrate, research teams generally start by **answering specific questions**, such as their research goals, how to achieve them, what locations to select, and which individuals and behaviours to focus on, before determining the appropriate types of observation methods. Not unexpectedly, it is common for research teams to **blend** different types of natural observation (Sanjek, 2015), and for researchers to **assume different roles simultaneously** (e.g., the role of outsider and insider) (Walsh, 2020).

Where?

As has been emphasised above, natural observation always takes place in the **natural setting(s)** occupied by members of a group or a community. This means that researchers engage with the subjects in their own settings rather than asking them to come to a different location for the study (Mack et al., 2005). Natural scenery often includes **public** or **semi-public** settings such as playgrounds, work sites, libraries, airports, transportation vehicles, shopping malls, hospitals, village plazas, stores, political rallies, and online chat rooms (Guest et al., 2013).

The exact locations to select need to be **relevant to the research questions** (Wilson, 2005). In rural contexts, these locations often pertain to agricultural activities (e.g., farming, herding), social activities (e.g., lineage events like weddings, funerals, local festivals, celebrations for birthdays), and activities held in public spaces (e.g., schools, village health centres, public sports facilities) (Liu et al., 2024). In studies focusing on social exclusion, locations of interest customarily include places where social initiatives are deployed, like soup kitchens, food banks, and social retail shops (Gracia-Arnaiz, 2022). In a similar vein, in research projects centred on social exclusion in rural areas, it can be expected that physical facilities of social services, community centres, and the premises of local social economy organisations may be chosen as potential settings for exploration.

Additionally, researchers frequently need to define specific **observation areas or spaces within these settings** to determine where to channel their observations, especially when the observation method is intended to be passive and structured (Gamberini et al., 2013).

When considering **actual research venues**, how do research teams decide? The selection depends on the research objectives and the selection of samples (e.g., who, where, what) that will assist research teams in achieving their goals (Sanjek, 2015). If research teams have **prior knowledge** about the individuals, behaviours, or events they wish to study, they can identify at least some

locations where they can observe these (Guest et al., 2013). Unsurprisingly, researchers’ personal connections and preferences influence the selection process. However, they must still provide **justification for their choices** based on an underlying theory or conceptual framework steering their field research (Sanjek, 2015).

Noticeably, the **ideal locations** for researching a problem are **not always available**. In such cases, researchers acknowledge and document the study’s limitations from the onset. If feasible, they **adjust** the focus of their investigation to align with the available sites (Fetterman, 2015). It is generally advisable to conduct some **preliminary research** on the study areas before getting there (Franco & Yang, 2021). Therefore, it is important to adhere to the **location observation “mantra”** presented in Figure 8.9.9.1.

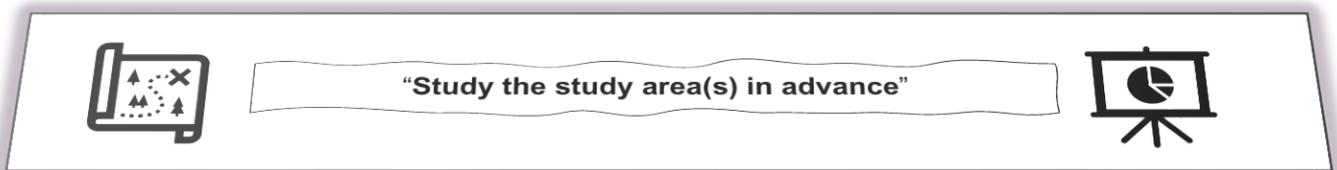


Figure 8.9.9.1: The location observation “mantra”

When and for how long?

When conducting observational research, it is ideal for researchers to reside in the community or the location of a group for six months to a year or even longer. This **extended presence** allows them to observe and document behavioural patterns over time, helping them to internalise the fundamental beliefs, fears, hopes, and expectations of the people they are studying. However, in practical situations, especially in applied research, **budget constraints** and **time limitations** often prevent researchers from engaging in long-term residence (Fetterman, 2015).

The duration of **each observation session** varies based on the setting, activity, and population being studied. Researchers may spend an hour, an afternoon, or several afternoons in a specific environment. The ideal timing for scheduling observation sessions depends on what, who, and where the researchers need to focus their observations (Guest et al., 2013).

With whom?

The actual observation can be conducted **individually, in pairs, or in teams**, depending on what is most suitable for the specific locations and topics being studied. When deciding on the best arrangement, factors such as age, gender, physical appearance, ethnicity, personality, and linguistic abilities of the data collectors are often taken into account. The goal is to gather data in the **least intrusive** and **most effective** way possible, considering the research objectives, the unique characteristics of the studied population, and the local context. One approach when the research team consists of several members is to have them **disperse** to various locations either individually, in pairs, or in small groups to conduct observations aimed at addressing specific questions and then **reconvene** to compare their notes (Mack et al., 2005).

What to observe?

The **range of observations** during observational research can be quite **diverse**. Ultimately, it is determined by the research objectives, the selection of samples, and any practical limitations. However, there are general categories that are commonly observed, which are outlined in Table 8.10.2 below.

Table 8.10.2 What to observe in general

Category	Elements to observe
Appearance	Clothing, age, gender, physical appearance, and anything that might indicate membership in groups or in subpopulations of interest
Verbal behaviour	Who speaks to whom, the duration of interactions, who initiates conversations, the languages or dialects used, and the tone of voice employed
Physical behaviour	What people do, who is responsible for specific tasks, the interactions that occur, those who remain uninvolved, and what people's behaviours indicate about their feelings toward one another
Human traffic	How many people enter, leave, and spend time at the observation site, the duration of their visits, their frequency of return, whether they are alone or accompanied
Personal space	The proximity of individuals to each other, and what people's preferences concerning personal space suggest about their relationships
People who stand out	Identification of individuals who attract significant attention from others, whether they seem to be strangers or well-known by others present

Note: Based on Mack et al. (2005)

Notably, the **flexibility** of observation methods provides research teams with **considerable freedom** regarding what to observe during their studies. The choice of what to observe also depends on the **level of structure**. As we have emphasised above, the level should **align with the research objectives**. Additionally, what to observe might correspond with the **stage of learning** the research is intended to illuminate. For instance, less structure is necessary for broad, exploratory, and early-stage research and more structure for focused, applied studies that are intended to provide additional depth or confirmation on topics where a lot is already known (Guest et al., 2013).

How and what to document?

The researchers must not only observe activities but also record the material in what is known as "**field notes**". These documents serve as evidence for the observations made (Fine, 2015). Field notes capture the researchers' observations, conversations, interactions, and experiences, along with their reflections on their role and influence within the community and its members (Wilson, 2005). Essentially, they are written or digital records of what researchers saw, heard, felt, and even affected during the observation period (Guest et al., 2013).

Field notes can be written in a paper or electronic notebook¹⁵⁶ either discreetly **during** an observation or **after** the activity has concluded, depending on the researchers' level of participation and the context. Regardless of when they are written, it is important to expand on these notes as soon as possible to preserve the details before memory fades (Mack et al., 2005). To prepare for more comprehensive field notes, researchers often start with "**scratch notes**", which are brief jottings made during the sessions. These scratch notes serve as a foundation for developing the full written field notes later (Sanjek, 2015).

However, during certain events, researchers may need to focus their attention on what is happening in **real time**, making it difficult to even take scratch notes. In some situations, note-taking may not even be appropriate. For example, as Schostak (2010) illustrates, taking notes in a gang setting would likely be viewed as unnatural, whereas doing so in a classroom is completely acceptable. In summary,

¹⁵⁶ In addition to using field notebooks, audio and video recordings can be employed to record individuals, behaviours, and events (Wilson, 2005).

the decision to take notes - whether in the form of scratch notes or fuller field notes - depends on the specific circumstances of the observation.

As anticipated, field notes in their “scratch” form are often viewed as **messy**. They may contain emotional responses, incomplete analyses, unresolved questions, interpretations that are not fully developed, or even admissions of mistakes. In academic research, it is rare to come across samples of these rough notes. The absence of published examples can lead to anxiety for inexperienced researchers who lack a reference for their early attempts. By the time field notes are shared publicly, they have typically been reorganised and rephrased (Walsh, 2020). Therefore, while **clarity**, **concision**, and **completeness** are essential in note-taking, **style is not a major focus** (Fetterman, 2015).

Finally, the field notes in their final form are usually kept in **chronological** order and may be **indexed** separately by actor and topic. Additionally, researchers conducting field observations often create records first organised by categories such as topic, person, or other classifications, and then order them chronologically (Sanjek, 2015).

Advantages

Admittedly, observational methods offer several distinct advantages, most of which have been implied above. Perhaps the most important pros are the following:

- **Validity:** One of the greatest benefits of observational methods is their ability to measure actual behaviour rather than relying on self-reported, intended, or assumed behaviour (Malhotra, 2019). As a result, field observational research tends to maximise validity, which refers to the extent to which scientific observations accurately measure what they are intended to measure (Sanjek, 2015). Besides, as highlighted at the beginning of this guide, observation focuses on recording what people do rather than only what they say or claim to do. Still, it can be pointed out that observational research records people’s manifest behaviours without necessarily unveiling their underlying motivations, feelings, or preferences (Malhotra, 2019).
- **Openness:** Observational research is highly receptive to emerging data, with minimal instrument bias. This approach can reveal a wealth of previously unknown information to researchers (Guest et al., 2013). Furthermore, it reduces the risk of reporting bias. By immersing themselves in the study environment, researchers can avoid imposing preconceived notions or frameworks that may not be suitable for the specific contexts they study (Schostak, 2010). Nonetheless, as implied in section 1.2.5, there is a trade-off between openness and structure. While a structured approach can ease data collection and analysis, it may also constrain the openness of the research and what field researchers can observe (Guest et al., 2013).
- **Richness:** In contrast to many research techniques that do not involve personal witnessing, observational methods provide the opportunity to collect rich and detailed data (Fine, 2015).

Disadvantages

Observational methods offer several advantages, but they also have significant disadvantages. Some of the main challenges associated with these methods include the following:

- **Time:** Observational research is very labour-intensive. It requires the researcher to be present in the observed social setting for extended periods to capture and understand the full range of activities. This level of commitment is often impractical for most applied research studies (Mack et al., 2005).
- **Reliability:** Since observational research often focuses on a specific location, scene, or group, there is a question of whether two researchers observing similar social contexts will arrive at the

same conclusions. Differences in their perspectives upon entering the field, as well as variations in their experiences during the observation, can lead to greatly differing conclusions (Fine, 2015).

- **Generalisability:** Even if we acknowledge the validity of analysing a single setting, on what basis can we extend our findings beyond that specific context? How far can we apply our conclusions? Do the results apply only to one situation at a particular moment, or can they be generalised to other settings? In essence, the legitimacy of generalisability will always pose challenges in observational research (Malhotra, 2019).

Special attention might be given to the so-called **Hawthorne effect**, also known as the **observer effect**. The term originates from a study¹⁵⁷ conducted on worker productivity at the Hawthorne Electrical Works near Chicago and represents the propensity to change one's behaviour in relation to the awareness of being observed (Zhong and House, 2012). Essentially, people often put forth their best behaviour when they are aware of being observed (Baxter et al., 2015). Thus, the Hawthorne effect can be a significant source of error, as it may lead to changes in behaviour during observations (Zhong and House, 2012). Nevertheless, there are ways to mitigate the issue. One common solution is to expand the observation period, as the Hawthorne effect typically decreases over time. Initially, individuals may alter their behaviour due to the presence of an observer, but as they become more comfortable and develop a rapport with the researcher, their behaviour turns out to be more authentic. Therefore, the longer researchers spend observing people, the less pronounced the observer effect will be. If extending the observation period is not feasible, researchers could consider excluding the initial observation interval from their analysis, as that is when people are more likely to mask their genuine behaviour (Baxter et al., 2015).

Ethical considerations

Although all forms of research involving human subjects raise ethical concerns, observational research presents a wide range of ethical challenges due to the complex interpersonal dynamics involved. Three central ethical issues are commonly found in observational research:

- **Deception:** When conducting observational research, researchers often need to be discreet about their identities and intentions to avoid disrupting normal activities. However, they must also be transparent enough so that the individuals they observe or interact with do not feel that their privacy is being compromised (Guest et al., 2013). In some instances, researchers may not disclose their research agenda, such as when they pose as a customer in a store or as a potential member of a political organisation. These cases can create genuine ethical dilemmas, as a certain level of deception is inherent in the data collection process (Malhotra, 2019).
- **Informed consent:** Other methods, like surveys and interviews, often draw upon written information sheets and consent forms, which are well-established techniques in the social sciences and are easily demonstrated to an ethics committee. However, should observational researchers also be required to obtain informed consent from their subjects? Additionally, it is not so easy to know how much information will be necessary for informed consent, especially when researchers may not fully anticipate which issues will become central to their observations (Walsh, 2020).
- **Confidentiality:** Like in most methods, it is essential for observational researchers to commit to protecting the identities of the individuals they observe or interact with, even in informal settings. Maintaining confidentiality means ensuring that specific individuals cannot be linked to the data

¹⁵⁷ The Hawthorne studies were originally intended to explore how the physical work environment, such as changes in lighting, could affect worker productivity. Interestingly, the results revealed an unexpected conclusion: social relations, particularly the presence of observer-supervisors, played a more significant role in shaping organisational outcomes than the physical environment itself (Zhong and House, 2012).

they provide. Still, maintaining this confidentiality can be challenging, as field notes may contain descriptions of actions or statements that others present in the same scene could recognise (Fine, 2015).

The fundamental ethical guideline for conducting observational research is to **ensure that no harm is done** to the observed group or community and its members (Wilson, 2005). Researchers must, at a minimum, **avoid disclosing personal details** that could reveal the identities of individuals involved in the study. In some cases, this may **even mean not publishing certain pieces** of information gathered during the research (Mack et al., 2005). Other essential ethical standards include maintaining **honesty** and ensuring **reciprocity**. Reciprocity, at its core, involves researchers answering truthfully any questions posed by the group or community members (Fetterman, 2015). Finally, to **determine the necessary type of informed consent**, researchers can consider three questions recommended by Guest et al. (2013): a) How public or private will the observation venues be? b) What type of data will be collected? and, c) How will the researchers position themselves?

Key steps

Step 1: Craft the “Observational Research Protocol”

The initial step in observational research is to create a comprehensive “Observational Research Protocol”. This protocol should outline seven key elements that are crucial for ensuring clarity and effectiveness. By thoroughly addressing each of these components, a clear framework that guides the data collection process from beginning to end will have been established. More specifically:

1. **Review your research objectives and questions, as well as your conceptualisation:**
 - Clearly define the purpose of your research and the specific questions you plan to address through observational research.
 - Ensure that you have examined your theoretical framework, if applicable.
2. **Select appropriate observation methods:**
 - Consider the five core reasons for choosing natural observation, namely capturing behaviour within its natural context, witnessing behaviour as it occurs, avoiding biases associated with self-reported data, reducing reporting biases, and complementing other research methods.
 - Determine the most suitable types of observation (e.g., participant, passive, any combinations) based on your research questions, theorisation, possible venues, and potential subjects.
3. **Choose observation locations (after following the location observation “mantra”):**
 - Study the “study area” in its entirety (e.g., places, infrastructure, people, services, customs) and in advance.
 - Select specific natural settings relevant to your research (e.g., public spaces, workplaces).
 - Consider factors like accessibility, safety, and ethical implications.
 - Justify your location choices based on your research objectives, theoretical framework, and practical constraints.
4. **Determine observation timing and duration:**
 - Plan the duration of each observation session based on the setting, activity, and target population.
 - Consider the feasibility of long-term observation (e.g., if budget and time constraints allow).
 - Schedule observation sessions strategically to ensure that you capture relevant behaviours.

5. **Plan observation teams:**

- Decide on the optimal team size and composition (individual, pairs, or larger teams).
- Take into account the observers' age, gender, ethnicity, and language skills.
- Ensure the team is well-equipped to collect data in a non-intrusive and effective manner.

6. **Determine what to observe:**

- Identify key elements to focus on (e.g., appearance, verbal behaviour, physical behaviour, human traffic, personal space).
- Tailor the level of observation structure to your research objectives and the stage of learning.

7. **Develop a system for documenting observations:**

- Decide how you will utilise field notes to record observations, conversations, interactions, and reflections.
- Consider using scratch notes for initial jottings and expand on them later.
- Explore the use of audio and video recordings when appropriate.
- Determine how you will keep your notes. The standard practice is to maintain them in chronological order and then index them by actor and topic for easier reference.

Step 2: Fieldwork entry

The second step in observational research involves developing a plan to gain access to the relevant settings. Here is what you may do:

1. **Request and receive ethical clearance from the pertinent Ethical Committee:** To determine what type of informed consent you may need in the observational research, answer the three questions identified above: a) How public or private will the observation venues be? b) What type of data will be collected? and, c) How will you present/position yourself to the subjects of observation? To answer these questions, consult the Observational Research Protocol first.
2. **If possible, identify and liaise with key informants:** Key informants are local individuals who can provide valuable information about the community or specific groups of interest. They can help you gain a quick understanding of the study population and the cultural environment. Key informants can also facilitate your access to various resources, populations, organisations, and gatekeepers. For instance, consulting with service providers who have experience working with vulnerable populations, such as health practitioners and social workers, can be beneficial in assessing necessary precautions. In addition, key informants can help you make connections between phenomena that may not be obvious to someone unfamiliar with the study area. While researchers often meet such individuals by chance at a field site, it is advisable to identify potential key informants in advance whenever possible.
3. **Prepare a clear and concise self-introduction:** Have an honest version ready that is easy to understand and appropriate for the local context. Avoid any statements that may raise concerns or offend the people you are addressing. It is also essential to practice your self-introduction, as you may need to explain the purpose of your presence in various situations. Be sure to rehearse the self-introduction text thoroughly.
4. **Craft an action plan:** Transform the Observational Research Protocol into a daily or weekly action plan, based on how long you plan to conduct your observations. Use a calendar format and be prepared for potential setbacks that may require you to update the plan regularly.

5. **Create an exit plan:** Exiting the study area is a crucial stage in fieldwork, especially when the observation is participatory. While it may not be necessary, it can be beneficial to proactively consider the potential impacts of your departure and plan some actions (e.g., sending thank-you letters, giving small gifts, hosting celebratory meals).

Step 3: Fieldwork

The third step in observational research relates to the “moment of truth”. Once you have settled in the area of interest, simply walk into the observation venues and consider the following:

1. **Trust the process:** If you have a thorough Observational Research Protocol and a corresponding action plan, utilise them to their fullest potential.
2. **Position yourself appropriately:** Make sure to have practiced your self-introduction. Depending on the level of structure in the situation, adopt a suitable role, whether passive or more active. Keep in mind that you may need to assume multiple roles at once or switch between them during the same session. However, try to avoid becoming too immersed in the environment you are studying. Becoming overly involved, either unintentionally or intentionally, could negatively impact the quality of your observations.
3. **Observe without interpreting:** Capture the moment by mentally and physically recording what you see, hear, and experience in specific locations and under particular conditions. It is crucial to distinguish between your observations and your expectations or interpretations. In other words, focus on what is actually happening rather than what you expect to see, and ensure that your expectations do not influence your observations. Moreover, always be mindful of ethical considerations and respect the privacy of individuals.
4. **Note-taking:** Before you start taking notes, remember that it is more important to focus on your observations than on writing them down. However, the sooner you record your observations, the more complete and accurate they will be. Here are some practical tips to enhance your note-taking:
 - Start with “scratch notes” to jot down initial reactions.
 - Use shorthand and keywords to speed up the process.
 - Leave space on the notebook pages to expand your notes later.
 - Schedule time after the observation session to elaborate on your notes.
 - Choose a notebook that will not distract or discomfort the subjects (e.g., using a mobile phone for note-taking might be preferable in certain situations).
5. **Acknowledge the tone:** In line with point 3, it is preferable to use a neutral tone when expanding on your notes. Nevertheless, you may also want to document your feelings too. Therefore, it is important to acknowledge the tone of your notes if you plan to adopt a more subjective style. Here is a short example comparing a subjective summary to a neutral summary of a researcher conducting observation in a nursing home:
 - *Subjective description:* The observation session took place in the common room of the nursing home from 10.00 AM to 11.00 AM. During this time, it was heartening to see the residents engaging in various ways, reflecting their unique mobility and cognitive abilities. Some individuals needed a helping hand to move around, while others confidently navigated on their own. The atmosphere was filled with meaningful social interactions, from intimate group

conversations to enthusiastic participation in organised activities like card games, allowing residents to connect and spread joy among one another. Additionally, some residents enjoyed quieter moments, such as reading or watching television.

- *Neutral description:* The observation session took place in the common room of the nursing home from 10.00 AM to 11.00 AM. Residents demonstrated varying levels of mobility and cognitive abilities. Some required assistance with movement, while others were more independent. Social interactions were observed, including small group conversations and participation in organised activities such as card games. Additionally, solitary activities, like reading or watching television, were also noted.

6. **Exit with style:** Review your exit plan and follow it accordingly. At the very least, express your gratitude to those who assisted you. Additionally, be sure to create a contact file, as you may need to reach out to some of your research subjects during data analysis.
7. **Data management:** After expanding your notes, save them electronically and organise them according to the format agreed upon by your research team (e.g., by providing descriptions based on each setting and using an indexing system). If you have used a notebook, ensure it is stored in a secure location.

8.11 APPENDIX 11. Scratch Notes Template

I. General information for each session:

- **Field researcher(s):** [*Researcher names*]
- **Data recording method:** [*Handwritten notes, digital notes, audio recording, video recording, combinations*]
- **Date of observation:** [*DD-MM-YYYY*]
- **Time of observation:** [*Start time - end time*]
- **Location of observation:** [*Specific location details - e.g., village name, district area, service facility, building name*]
- **Location category:** [*Choose one or more from the four categories, namely social space, workplace or community participation, social service, social initiative*]
- **Context:** [*Brief coding or description – e.g., “service delivery”, “counselling session”, “community meeting”, “people shopping”*]
- **Physical environment:** [*Elements of the physical surroundings – e.g., layout, objects, smells, sounds, temperature, lighting*]

II. Observation details for each session:

- **Observation objective:** [*Use the key questions outlined in the Master Protocol under each location category, but remain open to any emerging issues*]
- **Subjects:** [*Describe the individuals or groups you observe while avoiding any personally identifiable information*]
- **Description of observations:** [*This is the core of your data, albeit in a short form. Utilize shorthand and keywords to expedite the recording process. Avoid making interpretations at this stage; focus on factual descriptions*].

8.12 APPENDIX 12. Template for the narratives to be submitted

I. General information:

- **Field researcher(s):** #####
- **Data recording method:** *digital notes*
- **Date of observation:** *19-03-2025*
- **Time of observation:** *13.30 – 14.30*
- **Location of observation:** *Athens, city centre (Larissa Station), City of Athens Solidarity Centre*
- **Location category:** *social initiative*
- **Context:** *Service delivery to homeless people in Athens*
- **Physical environment:** *The soup kitchen is situated in a recently renovated dining hall featuring large windows, luminous lights, and a linoleum floor. Rows of mismatched plastic tables and chairs fill the space, with most occupied and a few empty. Behind a long serving counter, volunteers and municipal employees serve the beneficiaries. The air is filled with the combined aromas of warm bean soup, coffee, and smoke coming in from outside.*

II. Observation details:

A large number of homeless individuals ($N \approx 200$) form a line toward the serving counter. About 15 volunteers and 5 municipality employees, representing a mix of ages and backgrounds, ladle out steaming bowls of bean soup and bread while offering quiet words of encouragement. About half of the volunteers engage in friendly conversations with the people they are serving. Conversations at the tables vary from whispers to occasional bursts of laughter, covering topics such as the weather, sports news, health issues, and other stories of hardship. A few older men ($N \approx 10$) sit alone, quietly eating their meal, while a small group of mixed individuals ($N \approx 15$) near the door share cigarettes and stories. The noise level in the room fluctuates; sometimes, it is very quiet, while at other times, it is filled with chatter. The clothing of the people varies, from worn-out to relatively normal-looking. In general, people of different ages and nationalities are all present, but the vast majority are men ($N \approx 150$). Despite the few individuals sitting alone, the prevailing atmosphere is one of camaraderie. Some people interact more actively with the volunteers and the employees after finishing their meals, reinforcing this sense of community.

8.13 APPENDIX 13. Master Protocol



The Master Protocol – What about it?



What is the purpose of this protocol?

As detailed in the guide, the first step in observational research is to develop a thorough “Observational Research Protocol”. The latter comprises seven essential elements that are vital for ensuring clarity and effectiveness of the data collection process.

Why did not the pilot partners prepare different protocols themselves?

We need a *shared* foundation and a clear, *overarching* framework to guide us through the data collection process, from start to finish. This Master Protocol will, thus, act as a compass for the action plans that the pilot partners will develop.

So, how will pilot partners use this protocol?

All pilot partners should review this protocol and analyse the decisions made. With this understanding, the partners can develop their concrete action plan for their area.



Note of caution



Before starting any preparations, please review the training materials once more, particularly the updated guide!



All training materials have been uploaded to the [project's Google Drive](#), namely:

- The **updated guide** titled “INSPIRE_Observational Fieldwork Research Guide_v1.0”
- The PPT file for the [1st part of the training](#), titled “The Basics of Observational Fieldwork Research”
- The PPT file for the [training exercise](#), titled “Training Exercise for Observational Fieldwork Research”
- All PPT files documenting the [outcomes of the exercise](#) from the pilot areas



Element 1 – Why: Review the objectives and the conceptualisation (I)



Objectives of the observational fieldwork as stated in the DoA (Part A: T1.4 description):

- ✓ Provide qualitative insights.
- ✓ Reduce bias on self-reported data.
- ✓ Identify unique challenges faced by hard-to-reach populations, which are potentially hard to detect relying on surveys and macro indicators.
- ✓ Fill any data gaps.
- ✓ Complement T1.5 Typology.
- ✓ Researchers are immersed in the examined social context.



Element 1 – Why: Review the objectives and the conceptualisation (II)



Specific goals tied to the project objectives:

- ✓ Identify **barriers to social inclusion** through direct observation.
- ✓ Assess economic, social, and mobility **challenges** across rural areas, *especially for vulnerable groups*.
- ✓ Inform the Smart Village Labs creation, ensuring they address **real-life community needs**.

Realised through:

- Capturing behaviours, social norms, and community patterns on social inclusion.
- Evaluating access to essential services, including healthcare, transport, and education.
- Understanding community engagement and governance participation.



Element 2 – How: Select appropriate observation methods



Consider the five core reasons for choosing **natural** observation for this task:

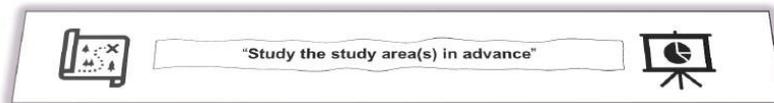
- ✓ We want to capture behaviour within its natural context.
- ✓ We aim to witness behaviour as it occurs while directly recording norms and patterns.
- ✓ We intend to avoid biases linked to self-reported data.
- ✓ We seek to minimise reporting biases.
- ✓ We plan to complement the two surveys (i.e., the paper-based and the CATI).

Based on our research objectives (see Element 1), possible venues (see Element 3), and prospective subjects (see Elements 1, 3 and 6), we anticipate the following:

- ❖ Field researchers will primarily utilise non-participatory (pure) and moderate forms of observation.
- ❖ However, as their stay progresses and their presence becomes more noticeable, they will likely begin to engage in more participatory forms, depending also on the venue.



Element 3 – Where: Choose observation locations (I)



All pilot partners have adhered to the above location observation “mantra”. This was achieved through the **early territorial profiling under T3.1** and the efforts made for **T2.1**. Nevertheless, it is essential to revisit the work completed and address any gaps.

Common challenges identified in the early profiling that may determine location selection include:

- De-population (e.g., brain drain, youth migration)
- Lack of infrastructure (e.g., digital, transportation, services, businesses)
- Limited opportunities (e.g., high unemployment rates, gender gap)
- Difficulties in integrating vulnerable groups (e.g., immigrants, elderly individuals, people with disabilities)



Element 3 – Where: Choose observation locations (II)



Based on the research objectives, the profiling, the work for T3.1, and the likely practical constraints (e.g., accessibility), we have categorised the natural settings as follows:

1. **Social spaces:** squares, marketplaces, parks, bus stations, restaurants, cafes, sport facilities, religious buildings.
2. **Workplaces and community participation:** town halls, municipality offices, shops, farms, venues belonging to social spaces and public (social) services.
3. **Public (social) services:** healthcare facilities (e.g., hospitals), elderly care centres (e.g., nursery homes), educational institutes (e.g., schools), counselling centres (e.g., job offices).
4. **Social initiatives:** social groceries, social clinics, soup kitchens, cultural groups, civil society organisations.



Note of caution: There is some overlap between category 2 and the other categories, as several residents work in social spaces or public (social) services.



Element 4 – When: Determine observation timing and duration



When planning observation sessions, consider the **timing** and **duration** based on the specific settings and target populations. For categories 2, 3, and 4, it is likely that morning sessions will need to be included. In contrast, category 1 may require more evening sessions.

To capture specific behaviours and patterns, you may need to schedule targeted sessions, as certain services or phenomena might only occur during specific **time windows**.

Be mindful of the **time constraints**. Our extended presence allows us to observe and document behavioural patterns over time; however, in two weeks, we cannot afford to spend multiple sessions in the same venues.

When planning your sessions, it is advisable to foresee **gaps** for each observation day. These gaps can act as **valuable buffers** for any **unexpected events** that may arise.



Element 5 – Who: Plan observation teams



If you have multiple field researchers, it is advisable for them to work in **pairs** or **teams**.

If you have multiple field researchers and they need to **disperse** during their work, please ensure you instruct them to **reconvene** at the end of each day to discuss their findings.

You should keep the following points in mind:

- ✓ If possible, identify and liaise with key informants.
- ✓ Prepare a clear and concise self-introduction text.
- ✓ Focus on observing rather than interpreting (capturing the moment).
- ✓ Acknowledge the tone of your notes.



Element 6 – What and Whom: Determine what to observe (I)



As outlined in the “Guide”, there are general categories that are commonly observed.

Generic categories

Appearance

Verbal behaviour

Physical behaviour

Human traffic

Personal space

People who stand out

Nevertheless, we have prepared several questions to help keep our observations more focused. For each of the four broad location categories, we have **outlined specific questions** to guide our observations (see the following four slides). It is also important to remember that observational research is highly responsive to emerging data, so field researchers must remain **open to new insights**.



Element 6 – What and Whom: Determine what to observe (II)



1. Social spaces: squares, marketplaces, parks, bus stations, restaurants, cafes, sport facilities, religious buildings.

Focusing on social interactions, community exclusion dynamics, rural life:

- How do people utilize public places? Do they interact? Do they engage in conversations?
- Who interacts with whom? Elder with young? Immigrants with locals? Are there visible signs of cultural exchange or segregation? What specific groups seem to experience exclusion?
- Are there different patterns of interaction depending on the different places (e.g., quiet parks vs. vibrant markets)? What are the sensory experiences of these spaces (e.g., noise levels, smells)?
- Are there signs of community well-being or distress? Do people appear engaged, isolated, or frustrated in social spaces?
- Do certain spaces feel welcoming or exclusionary? Are there any leisure establishments and tourist attractions impacting local social dynamics?
- Do vulnerable groups navigate and participate in social spaces and social life? How are the youth involved in the community?



Element 6 – What and Whom: Determine what to observe (III)



2. Workplaces and community participation: town halls, municipality offices, shops, farms, venues belonging to social spaces and public (social) services.

Focusing on economic participation, employment opportunities, governance, and community events:

- How do people actually earn a living? How prevalent is the informal economy?
- Are there relevant signs of seasonality in employment?
- Is the workforce predominantly male? Are certain professions more characteristic of this trend?
- Are vulnerable groups integrated into economic activities? Are there any visible barriers?
- Can you identify jobs that require further education? Who occupies these positions?
- Who holds positions of influence in public spaces, meetings, and events? Are discussions primarily led by older men, thereby excluding women and youth? Whose voices are not heard?
- Is there trust in institutions? Do people engage with local authorities, or are their interactions mostly bureaucratic?
- How do people respond to social interventions? Do they embrace or resist community projects? Are there local organisations that promote civic engagement?



Element 6 – What and Whom: Determine what to observe (IV)



3. Public (social) services*: health care facilities (e.g., hospitals), elderly care centres (e.g., nursery homes), educational institutes (e.g., schools), counselling centres (e.g., job offices).

* This category pertains exclusively to **public** social services and facilities.

Focusing on public infrastructure and essential public social services:

- Do people struggle to reach essential services (e.g., waiting times, long commutes, underuse of digital services)?
- How do individuals cope with infrastructure limitations (e.g., avoiding transport hubs, forming informal solutions, seeking alternative networks)?
- Is the infrastructure designed to accommodate the needs of elderly people or individuals with disabilities?
- Are immigrants excluded from essential services (e.g., healthcare, education, transportation)?
- Are young people participating in after-school activities offered by public services?



Element 6 – What and Whom: Determine what to observe (V)



4. Social initiatives: social groceries, social clinics, soup kitchens, cultural groups, civil society organisations.

Focusing on the coverage, organisation, impact, and inclusivity of initiatives:

- What types of social initiatives exist within the community? What specific needs do these initiatives address, and what gaps they fill? Who seem to be the beneficiaries?
- How are these initiatives organised and managed? Do community members seem to participate in these initiatives (e.g., volunteering, donating, utilising services)?
- Do these initiatives seem to effectively address the needs of vulnerable groups?
- Are these initiatives accessible to all members of the community, regardless of background or ability?
- How do social economy and civil society organisations appear to interact with local authorities and other stakeholders?



Element 7 – How: Develop a system for documenting observations (I)



Scratch notes



To enhance the consistency and quality of our observations, please utilize the associated template (“Scratch notes template”) for each session.

- You do not need to submit the scratch notes but use them to prepare your expanded field notes.
- It is advisable to take scratch notes in your native language. However, when preparing your expanded field notes, please convert them into English.
- You may consider leaving space on the notebook pages to expand your notes.
- Schedule time after the observation session to elaborate on your notes.
- Choose a notebook that will not distract or discomfort the subjects.



Transform your scratch notes into detailed field notes. While you will only submit them if requested by the task leader, please aim to prepare them in English.



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