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Smart Survey Implementation Informational Meeting Q4 2023

Friday, 20 October 2023, 10:00 – 11:00

Purpose of SSI informational meeting

To keep everybody informed on what happens in the project and the work packages.

- Chaired and organized by Remco
- Attendees: all project members, partners and advisory board will be invited. Attendance is optional
- Frequency quarterly (intention)
- Meeting minutes are optional

Agenda

1. SSI project – background information
 - Project goals
 - Project structure
 - Project timelines
 - Project deliverables
2. Achieved so far
3. Demo of the receipt scanning service

What does smart mean?

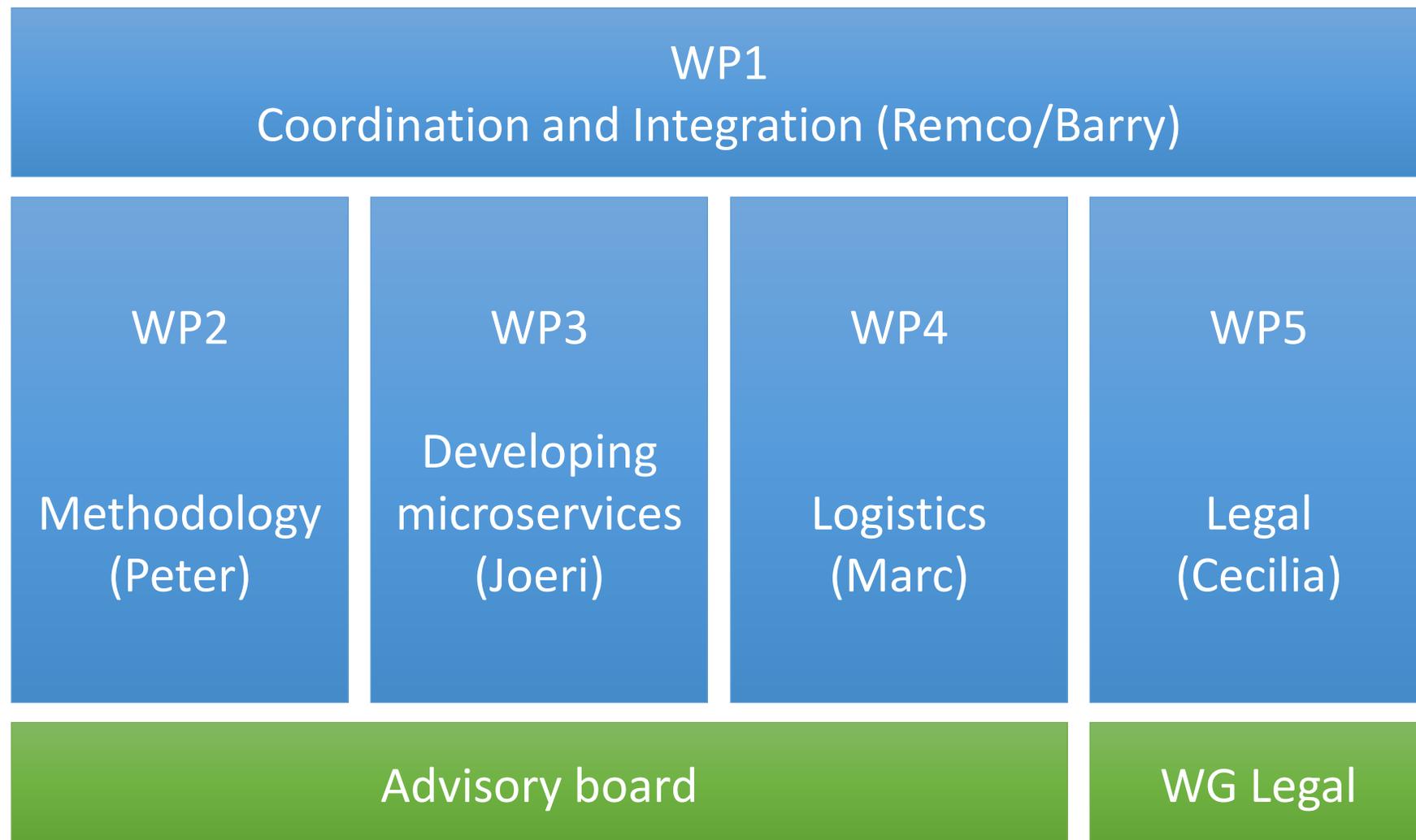
- *Smart feature*: A smart feature is a data collection action through a smart device from one of the following options:
 - In-device storage and/or computing
 - Employment of in device-sensors
 - Linkage to external sensor systems
 - Linkage to public online data
 - Data donation through the respondent
 - Data donation through the statistical institute, i.e. requiring identification keys to link data already in possession
- *Smart data*: Smart data are data collected through one or more smart features
- *Smart task*: A smart task is a processing action applied to smart data.
- *Smart service (solution)*: A smart service (solution) is a combined and implemented series of smart tasks (i.e. with a single input and a single output).

Project goals

The main project goals are to provide:

- Insight in customer perception (willingness) of smart services
- Methodology guidelines on respondent recruitment and motivation (based on demo), ML, HCI, smart mode-effects and data collection strategies
- IT architecture and generic (new) services/libraries, provided as open source, including receipt scanning and geo-location
- Framework to determine current maturity and required steps
- Generic logistic process to support smart services (GSBPM and PDCA)
- Guidelines to perform data protection impact assessment (data minimization, ethics and PET)
- Demonstrate maturity of smart services for receipt scanning and geotracking

Project structure



Project stages

The project consists of three stages:

- Review stage

Revisits ESSnet Smart Surveys, inspects developments in and outside of the ESS and identifies gaps in the four main pillars of smart surveys: Methodology, IT architecture, Logistics/operations and Legal-ethical. It bridges the time gap to the ESSnet finished in 2022

- Smart baseline stage

First intermediate stage in which smart surveys may be considered sufficiently mature for production but open for further smartification

- Smart advanced stage

Involves new smart features and in particular types of smart features that have not yet been studied

Project timeline

Project duration is from May 1st, 2023 thru April 30th, 2025

Only 5 milestones defined:

- Kick-off M1 = 22-23 May 2023
- Review stage M6 = 31 October 2023
- Smart baseline stage M14 = 30 June 2024
- Smart advanced stage M24 = 30 April 2025
- Final closing workshop M24 = 30 April 2025

Milestone	Milestone Name	Work Package No	Lead Beneficiary	Means of Verification	Delivery Date	Delivery Date (actual)	Achieved	Comments
1	Kick-off	WP2,WP1,WP4,WP3,WP5	CBS	Project leader	31 May 2023	23 May 2023	<input type="checkbox"/>	The kick-off meeting was held on 22-23 May in B...
2	Coordination and integration - Review stage	WP1	CBS	Deliverable 1.1	31 Oct 2023		<input type="checkbox"/>	
6	Methodology - Review stage	WP2	UU	Deliverable 2.1	31 Oct 2023		<input type="checkbox"/>	
9	Developing Smart Data Microservices - Review stage	WP3	Hbits	Deliverable 3.1	31 Oct 2023		<input type="checkbox"/>	
12	Logistics - Review stage	WP4	CBS	Deliverable 4.1	31 Oct 2023		<input type="checkbox"/>	
15	Legal - Review stage	WP5	ISTAT	Deliverable 5.1	31 Oct 2023		<input type="checkbox"/>	
3	Coordination and integration -Smart baseline stage	WP1	CBS	Deliverable 1.2	30 Jun 2024		<input type="checkbox"/>	
7	Methodology - Smart baseline stage	WP2	UU	Deliverable 2.2	30 Jun 2024		<input type="checkbox"/>	
10	Developing Smart Data Microservices - Smart baseline stage	WP3	Hbits	Deliverable 3.2	30 Jun 2024		<input type="checkbox"/>	
13	Logistics - Smart baseline stage	WP4	CBS	Deliverable 4.2	30 Jun 2024		<input type="checkbox"/>	

Project deliverables

There are 16 deliverables defined:

- Each WP has 3 deliverables, one per stage (M6, M14 and M24)
- WP3 also has Demo as a deliverable (M24)

Deliverables and Other Reports

 For each Deliverable, a single file (max 52MB) can be uploaded

 [Show Filters](#)  [Clear Filters](#)

 [Deliverables](#)

Work f	Delive	Delivr	Deliverable Name	Description	Lead Beneficiary	Type	Dissemi	Due Date	New Due	Delivery	Approval D	Status
WP2	D2.1	D4	Methodology - Review stage report	English report in PDF format	UU	R	PU	31 Oct 2023				Pending 
WP5	D5.1	D14	Legal - Review stage report	English report in PDF format	ISTAT	R	PU	31 Oct 2023				Pending 
WP3	D3.1	D7	Developing Smart Data Microservices - Review stage report	English report in PDF format	Hbits	R	PU	31 Oct 2023				Pending 
WP4	D4.1	D11	Logistics - Review stage report	English report in PDF format	CBS	R	PU	31 Oct 2023				Pending 
WP1	D1.1	D1	Coordination and integration - Review stage report	English report in PDF format	CBS	R	PU	31 Oct 2023				Pending 
WP2	D2.2	D5	Methodology - Smart baseline stage report	English report in PDF format	UU	R	PU	30 Jun 2024				Pending 
WP5	D5.2	D15	Legal - Smart baseline stage report	English report in PDF format	ISTAT	R	PU	30 Jun 2024				Pending 
WP3	D3.3	D9	Developing Smart Data Microservices - Demo	Demonstration on the tests :	Hbits	DEM	PU	30 Jun 2024				Pending 
WP4	D4.2	D12	Logistics - Smart baseline stage report	English report in PDF format	CBS	R	PU	30 Jun 2024				Pending 
WP1	D1.2	D2	Coordination and integration - Smart baseline stage report	English report in PDF format	CBS	R	PU	30 Jun 2024				Pending 
WP2	D2.3	D6	Methodology - Smart advanced stage report	English report in PDF format	UU	R	PU	30 Apr 2025				Pending 
WP5	D5.3	D16	Legal - Smart advanced stage report	English report in PDF format	ISTAT	R	PU	30 Apr 2025				Pending 
WP3	D3.4	D10	Developing Smart Data Microservices - Smart advanced stage report	English report in PDF format	Hbits	R	PU	30 Apr 2025				Pending 
WP3	D3.2	D8	Developing Smart Data Microservices - Smart baseline stage report	English report in PDF format	Hbits	R	PU	30 Apr 2025				Pending 

Achieved so far

Short update (pitch) on the main results so far

- WP1 (Barry)
- WP2 (Peter)
- WP3 (Joeri) - Demo
- WP4 (Marc)
- WP5 (Cecilia)

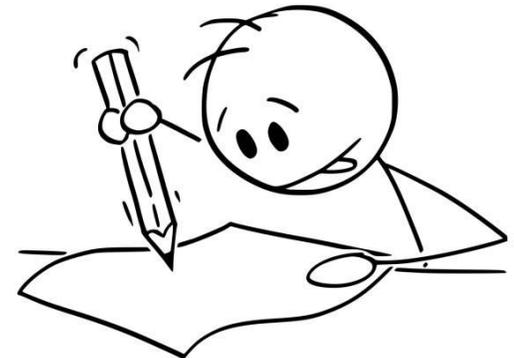
WP1

Overarching:

- Smart survey terminology and conceptual framework for smart tasks
- Overview of current smart solutions for HBS and TUS (CBS, Hbits, INSEE, SSB)

SSI smart perceptions survey:

- Objectives: Learn about objections/hesitations to smart features in general population and inform methodology and legal procedures
- Design: General paper questionnaire followed by a smart online survey in IT (n=4000), NL (n=4000) and SI (n=2000)
- Status: NL 750 paper responses and 650 smart responses, SI 200 paper response and 130 smart responses, IT starts end of November
- Q&D analyses and advanced analyses. NL Q&D report mid-December
- DPIA's established in all three countries



WP2

1. Review stage deliverable draft. Finalised Oct. 31st
 - Interested before Oct 31? E-mail p.lugtig@uu.nl
2. Designs for large field experiments are agreed on with the countries (M14 deliverable)
 - Details still to be spelled out
 - Fieldwork in Period Feb 2024 (Belgium) until September 2024 (Netherlands)
 - Focused on developing recruitment protocols (task 2.1) and mode effects (task 2.4)
3. Analysis plans are being drafted for (M24 deliverable)
 - Small-scale tests (usability) in 2024
 - Analysis of large experiments (incl. DPIAs) from June 2024

SSI project – WP4

SSI INFORMATIONAL MEETING

20-10-2023

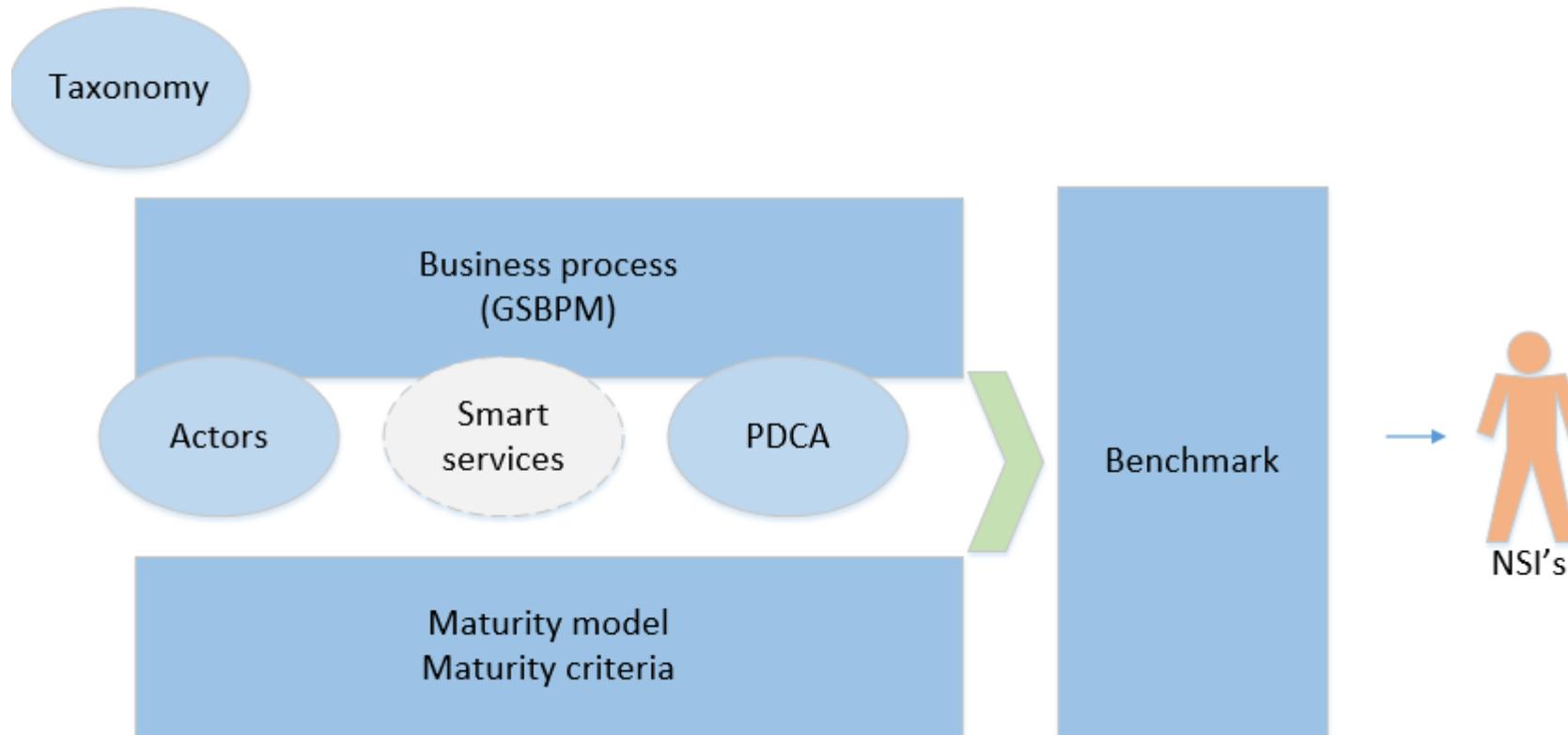
State of affairs

At the end of October we will deliver 1 deliverable consisting of:

- First draft of a **Taxonomy** of smart solutions
- First draft of an elaboration of **GSBPM**.
 - => What aspects in the statistical business process need special attention concerning smart solutions?
- First description of **actors** involved in statistical process.
- First draft of a **Maturity model** with maturity criteria.
- First ideas concerning a **benchmark** (what is it? what is added value?).
 - => with the benchmark together with the maturity model an NSI can assess its maturity concerning implementing smart solutions and get guidelines how to get more mature.

How subjects are related...

Smart surveys – 'Logistics'



20th October 2023

First informational meeting - WP5 Legal

Going back in May 2023...



Rough planning for period up to first deliverable (M6: October 31st) and outline for period afterwards (M14/M24)

M6 (October 31^o 2023) - Review/revisit stage, including the cross-national survey on respondent perceptions

M14 (June 30th 2024) - Guidelines on smart survey DPIA's with new smart features (baseline stage)

M24 (April 30th 2025) - Submit DPIA at the national data protection authority of at least two of the countries that performed the use case (advanced stage)

M24 (April 30th 2025) - Ethical guidelines on trusted smart surveys (advanced stage)

E2E maturity criteria for WP5 and what can be considered minimal maturity and more mature

1 example – Produce DPIA on perception survey and smart survey (minimal maturity)

2 example - Obtain opinion from Privacy Authorities about DPIA (more mature)

DPIA template and user guide

A general template and a user guide to fill it in were released.

Both (template and user guide) are based on EDPS guide line and the same is for the tool for the risk assessment.

DPIA on perception survey

We are going on the field with perception survey and we produced a DPIA accompanied by a formal opinion of Data Protection Officer (it is in italian but a english translation will be released soon).

At the moment this DPIA is shared only within Istat (and for sure the english version can be shared within you and this project) and not with the Italian Data Protection Authority (DPA).

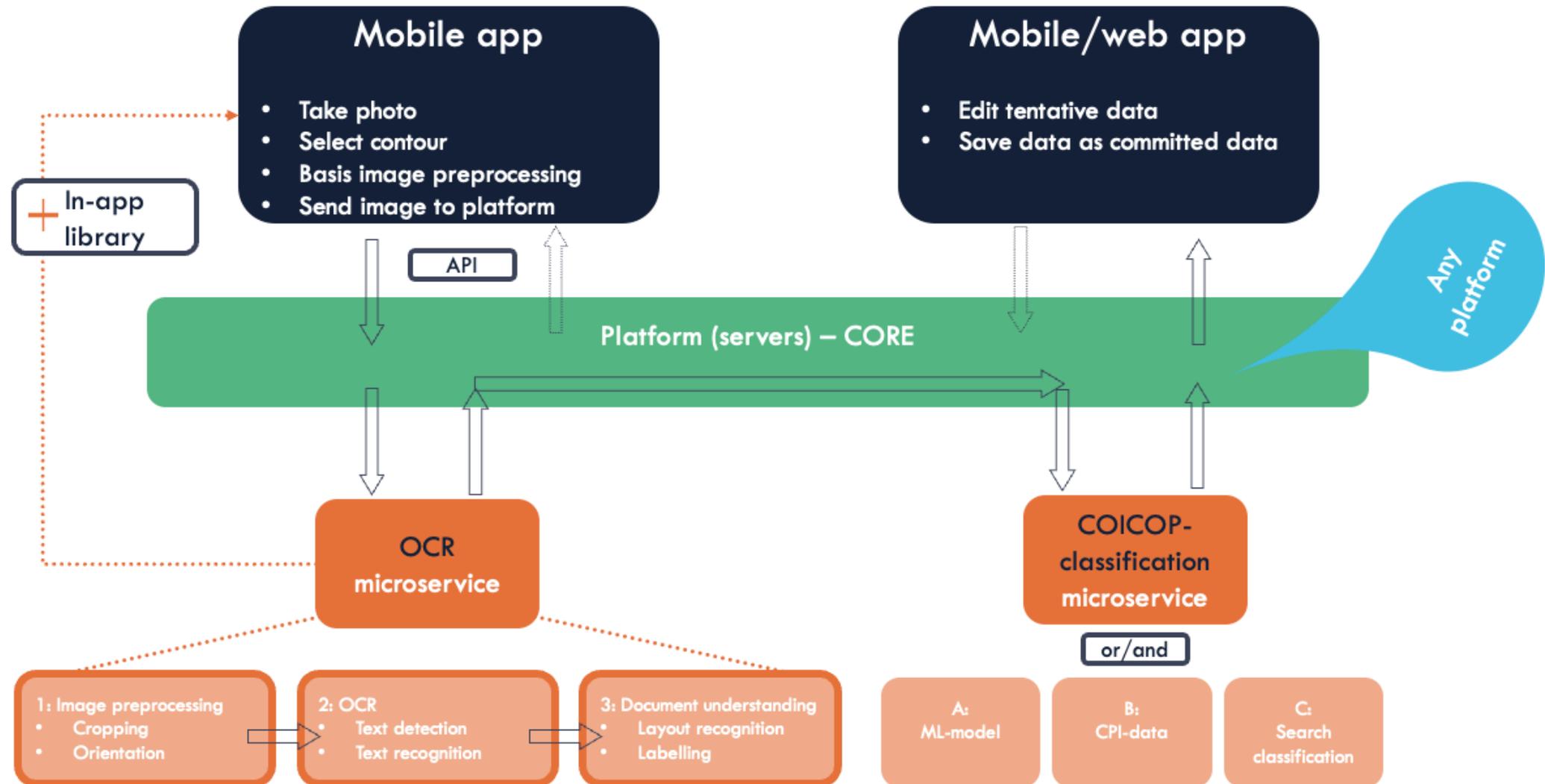
Sharing formal DPIA on the same survey of other countries (with DPO opinion) can be useful also for harmonize ESS-wide legal perceptions of NSI's

THANKS

cecilia.colasanti@istat.it

Demo of the receipt scanning service

WP3: Receipt scanning microservice(s): development and binding



WP3: Demo



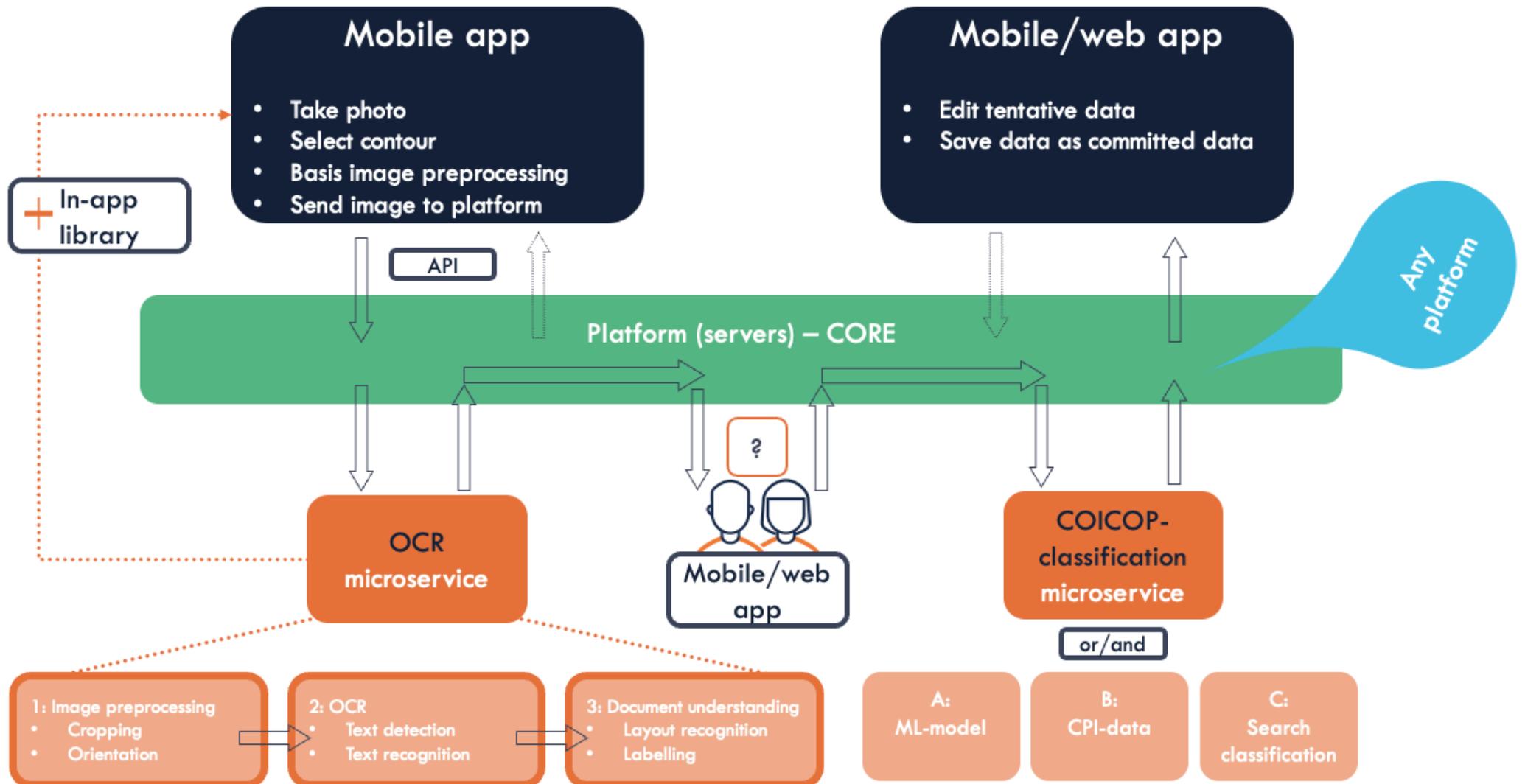
WP3: Independent services: to take or not to take

OCR
microservice



COICOP-
classification
microservice

WP3: Receipt scanning microservice(s): with in between user interaction



WP3: Question

Training of document understanding algorithm



Q&A



Thank You * Thank You
THANKS !!! * thank *
Thanks Thank You

thanks thank you *

THANKS! Thank YOU
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