



Report task force 'connecting networks for collaborating and information sharing'

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1. Aim of the task force

The task force was set up to achieve the following goals:

1. Identify existing local networks
2. Investigate the benefits of a more locally connected approach
3. Develop a roadmap or set of recommendations for setting up new networks and improving existing ones, based on the lessons learned from the existing cases.
4. Create a means for local networks to communicate with each other and with Europeana

2. Methodology

In order to achieve this aim the task force brought together experiences related to existing situations. Therefore the participants were chosen based on specific cases related to local networks on digital cultural heritage. The task force consists of nine people, a mix of policy makers and cultural heritage professionals, supplemented with a member of the Europeana staff. Its diverse composition allows the description of different settings and approaches and the development of overall conclusions. The outcomes of the task force are based on an analysis and assessment of the following cases:

- Danish Europeana Network (Denmark): The initial reason for setting up this network was a general need for coordination of the different Europeana projects in Denmark: at the time, there were several simultaneous projects which often overlapped. Nowadays the aims are broader: the exchange of information, ideas and problems regarding all kinds of Europeana and heritage-related matters, as well as the discussion of policy, and sometimes the establishment of collaborations.
- Serbian National Aggregator (Serbia): The primary task of the national aggregator will be to gather the metadata for all digital objects created in heritage institutions and to prepare them for ingestion in Europeana. In addition, the aggregator aims to establish communication on digitisation at a national level, and improve cooperation, both on a national and international level, in the heritage sector.
- weLand (South Piemonte, Italy): weLand is a non-profit organisation whose goal is to support the development of a regional network of individuals and groups interested in aggregating, sharing and reusing Open Data for cultural heritage, education and tourism stakeholders.
- Digisam (Sweden): Digisam is a secretariat for the national coordination of digitisation, digital preservation and digital access to cultural heritage in Sweden. Its main task is to coordinate the work based on a national digital strategy within the timeframe 2012-2015. An important task is adopting strategies on national and institutional levels in order to support standardization, interoperability and harmonization of data on an infrastructural level.

- Europeana Vlaanderen Overlegplatform (Belgium): The platform aims to unite stakeholders interested in Europeana, as *pars pro toto* for innovation in the field of digital culture. When setting up, the aims were threefold: (1) to increase the awareness around Europeana as portal/platform; (2) to improve the quality and handling of the digital heritage; (3) to translate the processes which Europeana helped to instigate into aspects of a digital strategy within the own organisation or in relation to the broader (local) heritage field and to provide for interaction.
- Estonian Europeana Group (Estonia): The working group aims to share information and ideas, gather and discuss problems in working with Europeana, and to develop a viewpoint on the Estonian interaction with, and expectations of, Europeana.
- Lithuanian Art Museum's department Lithuanian Museums' Centre for Information, Digitisation and LIMIS – LM CID LIMIS (Lithuania): The goal of LM CID LIMIS is twofold. Firstly, it is the national digitisation centre, and as such coordinates the process of the digitisation of cultural heritage, as well as the creation, preservation and dissemination of digital content. This includes raising awareness on the topic, providing guidance and trainings, and enforcing standards and procedures. Secondly, it is responsible for maintaining the Lithuanian Integral Museum Information System (LIMIS), a joint database for Lithuanian museums.

All cases were assessed by means of SWOT-analysis and through a participative process that involved all relevant stakeholders. SWOT is 'a structured planning method used to evaluate the strengths, weaknesses, opportunities and threats involved in a project or in a business venture'.¹

The result of this process is twofold:

- For the members of the task force, this provided a framework to assess their own situation and to improve it based on the identified points from the local SWOTS. Therefore each 'case' benefitted from this internal process for which this task force provides a benchmark.
- Discussion between the task force members has resulted into a series of recommendations, both general and target-specific, which are seen as important conditions enabling the development of networks of interest on the digital cultural heritage as effective ecosystems and their interaction at a European level.

3. The strategic context to which these recommendations apply

This report focuses on local networks for the sustainable handling of digital cultural heritage.² In order to define a strategic context that seems fit for this purpose, we would like to underline principles based on inspiring international documents such as the Europeana Strategy 2015-2020,³ the recommendations by the European Commission on the digitisation and online accessibility of cultural material and digital preservation of 2011⁴ and the Recommendation concerning the preservation of, and access to, documentary heritage (including in digital form), which was adopted by the General Assembly of UNESCO in November 2015.⁵

- Lifecycle approach

The UNESCO-Recommendation defines 'documentary heritage' as *comprising those single documents – or groups of documents – of significant and enduring value to a community, a culture, a country or to humanity*

¹ See https://en.wikipedia.org/wiki/SWOT_analysis

² Sustainability implies technical, societal, legal and economic aspects. Handling includes all actions related to a lifecycle approach (creation, preservation, enrichment, making accessible, ...).

³ <http://strategy2020.europeana.eu/>

⁴ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:283:0039:0045:EN:PDF>

⁵ <http://unesdoc.unesco.org/images/0023/002339/233916e.pdf>

generally, and whose deterioration or loss would be a harmful impoverishment. Significance of this heritage may become clear only with the passage of time. Hence, the term ‘documentary heritage’ is strongly related to the terminological scope of ‘cultural heritage’ that Europe stands for⁶ and focuses on the lifecycle of digital content. This term appears in the Recommendation of 2011 on digitization and digital preservation, adopted by the European Commission and being the basis of the work of the Member State Expert Group.⁷

- Memory institutions at the heart of sustainable ecosystems

The UNESCO-recommendation introduces the concept of Memory institutions, a “category” that may include but is not limited to archives, libraries, museums and other educational, cultural and research organizations. The recommendation encourages memory institutions to link with the appropriate professional associations, working as connectors (see 6.1 (4) of this paper), to both enhance and share their technical knowledge, and contribute to the ongoing development of international standards (*Recommendation, 2.8*). The avenues for providing access to documentary heritage are multiplying through the growth of Information and Communication Technologies and the development of global networks among memory institutions and their partners. (*Recommendation, 3.3*) The recommendation also points out that programmes for access to documentary heritage may be facilitated by partnerships, including public-private ones (*Recommendation, 3.4*). This means that memory institutions are part of broader networks in which different partners collaborate in delivering shared results, in this case the sustainable handling of digital cultural heritage.

Memory institutions are at the heart of these networks, which we would like to refer to as ecosystems: *a distributed, adaptive, open socio-technical system with properties of self-organisation, scalability and sustainability inspired from natural ecosystems*.⁸ As for their biological models, socio-technical ecosystems are defined by the network of interactions among members and their environment, thus they can be of any size but usually encompass specific, limited spaces.⁹ We will therefore refer to existing networks of interest on the digital documentary heritage as specific ecosystems, which can and should interact with each other within the broader scale of an encompassing European ecosystem.

We believe the UNESCO-recommendation sets the right frame to investigate ways for the Europeana Network Association and (connected) local networks¹⁰ to contribute to this. We would like to echo the goal that the Europeana Network set for itself: “The Europeana Network is united by a common cultural mission to work together to improve access to Europe’s cultural heritage in balanced and sustainable ways.”¹¹ This means that the benefits should be shared between all stakeholders and the overall aim focusses on the need for sustainable models.

- Capacity-building and cooperation within ecosystems

In regard to the preservation of documentary heritage Member States are encouraged to develop awareness-raising and capacity-building measures and policies as a key component of preservation, including promoting research as well as training for documentary heritage professionals and providing facilities for such (*Recommendation, 2.4*).

⁶ “The cultural heritage of the European Union is a rich and diverse mosaic of cultural and creative expressions, our inheritance from previous generations of Europeans and our legacy for those to come. It includes natural, built and archaeological sites; museums; monuments, artworks; historic cities; literary, musical, and audiovisual works, and the knowledge, practices and traditions of European citizens.”

http://ec.europa.eu/culture/policy/culture-policies/cultural-heritage_en.htm

⁷ <https://ec.europa.eu/digital-agenda/en/member-states-expert-group-digitisation-digital-preservation>

⁸ https://en.wikipedia.org/wiki/Digital_ecosystem

⁹ <https://en.wikipedia.org/wiki/Ecosystem>

¹⁰ By ‘local’ we mean networks that are not organised centrally (i.e. European-wide, like Europeana, or worldwide), but instead work on a decentralised level: national, regional or local.

¹¹ http://ec2-54-194-239-109.eu-west-1.compute.amazonaws.com/files/Europeana_Private/Network/europeana_network_terms_of_reference.pdf

The UNESCO-recommendation introduces the need for cooperation with international and regional professional associations, institutions and organizations concerned with documentary heritage preservation and access, with a view to implementing bilateral or multilateral research projects and publishing guidelines, policies and best practice models (*Recommendation, 5.2*).

4. Generic problems to be addressed

When assessing the different cases, some generic problems were unfolded. This paper wants to address these problems:

- (Cultural heritage) institutions are often isolated and find it difficult to connect to other institutions or initiatives.

Networks provide a balanced ecosystem where you find your place regardless of the size, the position, ... of your institution. This allows institutions to tap into these networks and connect to other partners by means of the connectors. Networks also enable awareness raising on issues such as (international) collaboration.

- (Cultural heritage) institutions often are not informed and are lacking valuable information on topics such as policy (European, UNESCO,...), activities, projects (both on local and national level), funding issues, ...

Networks are vital for sharing information and can also lead to shared viewpoints.

- (Cultural heritage) institutions often lack the skills, knowledge and capacity to improve their sustainable handling of digital cultural heritage.

Joining a network can lead to enhancing competences and skills in your organisation. Networks stand for capacity building and increasing competence on technical issues such as data quality (which allows linking to existing systems/initiatives), the exchange of information and experiences, and the improvement of skills for all partners. Networks enable awareness raising on issues such as digital strategies.

- There often is a gap between (a digital) strategy and the daily practice. However a strategy is only valuable when it facilitates an operational context.

Networks can provide support, experiences and be a platform for collaboration, vital to bridge policy and daily practice. By doing this, networks help to implement a strategy into practical and real results.

- The value for society of digital cultural heritage is not fully evident yet. However, the value of digital cultural heritage will only be clear when it is accessible to many and through various other 'channels.'

Networks provide the possibility of linking with initiatives that have similar goals (e.g. Wikipedia, commercial parties or other ways to engage users) by creating trusted connections. Networks contribute to increased visibility of material (both in local and European contexts) and, by consequence, to increased (awareness of the) value and relevance of cultural heritage.

5. Principles to set up open networks

The principles mentioned underneath are derived from the assessment of the existing networks that the task force took into account. These principles serve as a point of departure when setting up new networks, and should guide the structure and activities of these networks.

- Lifecycle approach

The overall focus of networks on the sustainable handling of digital cultural heritage should be to support the digital lifecycle in all its aspects. This lifecycle starts from the creation of the material (both digitised and born-digital material) and includes its handling and (re)use. This means that actions regarding the digital preservation are as important as the visibility of the digital cultural heritage. As the UNESCO-recommendation points out, the significance of this heritage may become clear only with the passage of time. This notion implies that organisations that are 'producing' cultural expressions (or: future cultural heritage) are also taken into account, although selection mechanisms should be in place.

- Mutuality

Networks need to bridge different viewpoints that are linked to specific approaches/partners. They have to look and allow actions beyond silos. Within ecosystems, organisations integrate their views in the overall goal and for mutual benefit.

Mutuality is one of the core principles for Europeana as described by its Strategy for 2015-2020. We also refer to the UNESCO-recommendation that introduces the need for memory institutions to cooperate with international and regional professional associations, institutions and organizations concerned with documentary heritage preservation and access.

- Reliability

We refer to the Strategy of Europeana once more to introduce the principle of reliability. Since the Europeana Network Association represents the cultural organisations that have safeguarded our heritage for hundreds of years, the network is committed to ensuring that the digital content handled is always authentic and trustworthy and that all network partners benefit from sharing it. This relates to the profile of the memory institutions that the UNESCO-recommendation puts forward and the need to build capacity amongst memory institutions on both a technical and a strategic level so that they could play a crucial role in the aforementioned ecosystems. Networks need to be dependable and trustworthy. Building trust is key for both bottom-up and top-down approaches.

- Shared long term vision

In order to enhance interoperability with other initiatives, networks should be aligned with and be part of existing strategies (on relevant (policy) levels) that relate to the sustainable handling of digital cultural heritage. This includes the possibility to reflect critically on issues and to interact based on consensus. Networks therefore can be instruments to create a strategy and to implement it. It is however vital that within local networks, a strategy must be shared -meaning agreed upon and understood- by all partners.

- Flexibility

Flexibility refers to the capacity to adapt and innovate. Networks need to tie in with wider strategies but remain flexible towards developments, both on a technical (agile) and organisational level.

In this sense, networks help the partners in a network to be flexible and scalable towards other initiatives. In line with what has been said above concerning ecosystems, interlinked and shared infrastructures, tools and services are the most cost-effective way to move ahead. Shared infrastructures, with interoperability as one of the main goals, supports the implementation of commonly accepted, open standards and help the networks to contribute with, as well as, manage their cultural heritage information in a cost-effective way.

6. Recommendations

These recommendations are both general and target-specific. The task force addresses the European level, the macro-regional level and the local level.

6.1. General recommendations

1. A network should develop shared points of view supported by all partners concerning the creation and development of interoperable ecosystems for cultural heritage in a digital environment. Every ecosystem is envisaged as an organic network with specific expertise, goals, scale and scope. The construction of a European ecosystem is an objective made possible by promoting the connectivity between the different existing networks.
2. The principles discussed above should guide the action of the network members in order to foster connectivity with other initiatives and to establish an interaction between them modelled on an open innovation approach. Connectivity should work at different geographical scales and organisational levels.
3. The interaction between different networks within a European ecosystem for digital cultural heritage is expected to improve negotiations between the different stakeholders, to facilitate collective responses to proposals and policies on 'digital issues' and to improve the interaction between top-down and bottom-up innovation.
4. Interaction between networks can be promoted both inside and outside each ecosystem, by enabling the work of individuals and professional associations as connectors. Connectors are actors with specific roles in the ecosystem. They can be institutions, people, ... They can be formal and/or informal. The formal ones have a specific role and responsibility.

How should connectors work:

- Connectors are bridges between partners in the ecosystem and across interacting ecosystems.
- Connectors act as ambassadors. *Goodwill ambassadors generally deliver goodwill or promote ideals from one entity to another.*¹²

This function can be taken up by a variety of members. Besides the policy level, connectors can also relate to technical fields of expertise, to international evolutions, to digital infrastructures, education, tourism, etc.

Examples:

- Permanent Representations to the EU
- Members of the Europeana Network Association
- Members of the Member State Expert Group on Digitisation and digital preservation
- Members of the Memory of the World committee (and driver for the aforementioned UNESCO-recommendation)
- Representatives of the Council of Europe
- Policy level (various: culture, education, research, tourism, ...)
- Professionals (various: culture, education, research, tourism, technical ...)
- Aggregators
- Public libraries (this recommendation should be considered in relation to those emerging from the parallel task force on public libraries).
- ...

¹² https://en.wikipedia.org/wiki/Goodwill_Ambassador

5. General recommendations refer to all networks. They include a list of minimum requirements to set up organic networks as autonomous ecosystems that will prove able to interact within an encompassing European ecosystem:

- Connect formal and informal roles

The sustainable handling of digital cultural heritage involves a wide variety of partners. This can be related to areas of research, infrastructure, education, open data, policy, It is crucial not to strictly define the areas that need to be connected since this depends on specific situations and needs to be flexible to adapt to a continuous changing ecosystem.

A network needs to be able to act, so both formal and informal elements should be connected. In case there is a need for a (national) coordination or for a mandate from formal decision makers to do something, a formal element is required.

- Combine top-down and bottom-up approaches

Networks can bridge the gap between policy and the workplace and facilitate operational situations. It is a way to connect both if there is a possibility for all partners to set the agenda or to bring up issues to tackle together. When combining top-down and bottom-up communication, a dialogue starts. This also applies to situations that are not strictly related to policymaking.

- Develop a common understanding of the value chain

An ecosystem brings together stakeholders from different contexts in order to have them work together. How can they deliver results? Networks work as a communication hub that connects different levels and in doing so, they bring together both the formal and informal elements. It is important that all partners involved in a network develop a common understanding of the value chain. This means that the benefits of engaging in the network need to be clear and discussable.

- Balance the partners within the ecosystem but be flexible

In order to elaborate on a value chain related to the sustainable handling of digital cultural heritage, the right balance between partners in that ecosystem needs to be found. A balance between continuity (long-time members) and new partners needs to be in place. Networks need to be flexible enough to adapt to new circumstances and be open to new partners.

6.2. Target-specific recommendation 1: The European level: the Europeana Network as the node of the nodes

The Europeana Network can be the node of the nodes, the connector between different networks. As an important hub between several ecosystems dedicated to the sustainable handling of digital cultural heritage, the Europeana Network Association can take up a diverse role:

1. In relation to communication and strategic capacity building:
 - Via the Europeana Network Association, members of 'local' networks could get 'access' to members of other local networks (via other connectors).

- This allows interaction with Europeana. Interaction between the Europeana Network Association and the concerned (cultural) institutions in networks happens in two ways. The contribution towards and participation in Europeana can be discussed in the frame of local networks.
- On the other hand, developments within Europeana need to be translated to and reflected on within a local context. In that sense 'local networks' can be seen as 'local' branches of the Europeana Network Association and a reflection board. If there are (local) Network Councillors assigned, they can act as elected members in the Europeana Network Association and be important connectors in local networks.
- This approach enables to reach out to smaller institutions which do not interact directly with Europeana.
- Europeana Pro can be activated as a platform for dissemination (eg. by highlighting good examples,) for and from the Europeana Network Association that taps into local connections.

2. In relation to measuring progress and benchmarking:

- As stated before, flexibility is key for open ecosystems. This relates also to being open for a great variety of network partners that want to connect to the overall message. However, it is important to maintain a balance between network partners. The Europeana Network Association Members Council could take up a role in supporting the 'local sections' by providing ways to benchmark the balance between partners in local networks.
- The Europeana Network Association Members Council could also establish ways to measure the qualitative progress of digitization efforts within local networks. This could be a new approach based on the experiences of the Enumerate-project¹³ that takes into account both quantitative and qualitative issues, and relate this to the Europeana Strategy 2015-2020.
- The link between the Europeana Network Association Members Council and the member states (currently MSEG) might be defined in order to bring into scope the development of national strategies, large-scale digitisation etc. These issues certainly benefit from (inter)national collaboration.

3. In relation to networking and facilitating collaboration between various organisations:

- The European context allows professionals active in various fields such as culture, education, research, tourism, ... to connect in order to share ideas, work on projects, Networks provide the possibility of linking with initiatives that have similar goals (e.g. Wikipedia, commercial parties, other ways to engage users, ...) by creating trusted connections. Hence networks provide opportunities for new collaborations between various partners of the ecosystem. In order to facilitate this, the potential of European funding schemes (such as Erasmus+) could be investigated.

6.3. Target-specific recommendation 2: Macro-regional level

'Macro-regional' refers to a central/federal or regional level, where decisions concerning policy are taken. Stakeholders involved in this level include the Member State Expert Group on Digitisation and digital preservation, the various organisations that play an active part in policy (concerning culture, education, research, tourism, ...), 'national' aggregators,

The taskforce shares the following target-specific recommendations for this level:

1. Macro-regional policy makers should promote and guide the establishment of a national/regional network of interest, by including and balancing the largest variety of stakeholders with regard to the whole lifecycle of the digital cultural heritage. A list of minimum requirements to set up networks includes the following points:

¹³ <http://www.enumerate.eu/>

- Define the aim of a network

Set up a mission that takes into account the mentioned principles, adapted to the specific situation wherein the network is operational.

- Keep in mind the need to be flexible

This relates both to partners and technology. The landscape of meaningful partners related to the sustainable handling of digital cultural heritage is continuously shifting so make sure to be able to connect to interesting opportunities. As for the technology aspect, its agile character means that there never will be a final technical solution that fits all (current and future) needs. Therefore the process and the way towards solutions is more important. Networks should embrace this idea.

- Develop working methods

It is also important to join with other initiatives (if existing) and join forces when organising an approach. Open networks shouldn't be standalone islands.

- Provide coordination

Coordination can be taken up by one coordinating partner. This doesn't have to be a policy level but may also be a councilor in the Members Council, a representative of museum or other heritage institution, ... there may also be a system of rotating coordination. Coordination should take into account balance between the partners.

- Reach out

This relates to both creating awareness and recruiting new members, who will be able to contribute to the network with their specific expertise, interests and methods. Raising awareness includes all the initiatives meant to sensibilise the public opinion about the societal value of cultural heritage and about the potential of a digital environment for its creation, transmission, enrichment and reuse. Recruiting new members is crucial for the implementation of the principles discussed above and thus for the sustainability and durability of the network.

2. National/regional networks should pay special attention to bridging the gap between macro- and micro-ecosystems, by acting as a middle ground between the global/European level and local initiatives. The scope of this action includes:
 - sharing information;
 - helping local entities become aware of, and respond/adapt to, European and global recommendations and good practices;
 - building trust at a local level and using it to empower local institutions to increase their visibility and negotiating power at a broader level.Connectors can play a crucial role in this respect.
3. Interactions should be facilitated on both directions, i.e. both top-down and bottom-up:
 - national/regional networks should disseminate information on European and worldwide (UNESCO) policy, projects and funding possibilities (including European funding schemes), paying attention that

this information reaches the local, fine-grained entities that are usually unable to receive this autonomously. This also implies helping local institutions develop a fruitful digital strategy, with special regard to a sustainable business plan for digitisation and release of cultural content. Existing models of digital strategies are usually based on the experience of big institutions, which do not represent the vast majority of memory organisations in Europe;

- national/regional networks should be particularly receptive towards local initiatives that are worth being selected for adapting, scaling-up and possibly being integrated at a policy level.

6.4. Target-specific recommendation 3: Local level

The local level relates to the daily working experience of individual memory institutions and of small networks of institutions, based on formal or informal collaboration, and acting with a local scope. While playing a fundamental role in the lifecycle of cultural heritage (within and outside a digital environment) as well as in the construction of its societal impact, these institutions are the first to suffer from the weaknesses of their environment: budget and expertise limits; direct dependence on local policy and bureaucracy, not always updated to current global trends and challenges; lack of connections with similar institutions and consequent lack of visibility and negotiating power.

On the other hand, the local level provides the best environment for a variety of crucial activities, when placed within an organic working ecosystem:

1. It is easier to engage a non-professional audience on a small-case project and to build upon small, fast and easy-reachable successes by creating a 'me too' process of replication. In this respect, being part of a network is fundamental for the dissemination and sharing of good practices;
2. The more direct link between different stakeholders should be seen as an optimal condition enabling closer collaboration and creating mutual trust among partners. This applies to both non-profit and for-profit reuse of digitised material, as part of the process of creating and testing sustainable digital agendas for small and middle memory institutions;
3. The local level should be seen as the milieu where top-down approaches can be tested, adapted and, in some case, rejected on the basis of experimentation in a well-defined laboratory. The specific conditions of a local environment urge to make big models more flexible and can suggest interesting case studies, through which bottom-up innovation can establish a dialogue with top-down standardisation.