



ENUMERATE STAKEHOLDER REPORT

Welcome to the Annual Stakeholder Report for ENUMERATE, the European Initiative to develop strategic intelligence about digitisation and online access to the rich heritage contained in museums, galleries, libraries and archives.

ENUMERATE highlights opportunity to open up Europe's Cultural Heritage online

ENUMERATE, the Best Practice Network on Digitisation Statistics funded by the European Commission, has revealed both the extent of digitisation activity in Europe's cultural heritage institutions and the scale of the challenge that lies ahead.

The aim of the ENUMERATE Network has been to support the European Commission's ambition for smart, sustainable growth by developing the first comprehensive body of evidence about the scale, cost and impact of culture-sector digitisation.

This Stakeholder Report presents the findings of the 2013 Core Survey alongside the in-depth information provided by a detailed Thematic Survey, representing a cross-section of more than 1,400 museums, archives, audiovisual archives and libraries across Europe..

Key outcomes of the 2013 Core Survey included:

- Nearly 1,400 organisations from 33 countries (and 11 languages) responded to the 2013 ENUMERATE Core Survey
- An average of 20% of collections have been digitised so far
- 87% of respondents have a digital collection, but just 36% have a digitisation strategy
- 34% of respondents have an explicit policy concerning the use of digital collections
- Estimated annual budget for digitisation activity is EUR295,000



“Bringing our museums' and libraries' collections online not only shows Europe's rich history and culture but can also usher in new benefits for education, for innovation and for generating new economic activities. It will put high quality content on the net for many generations.”

Vice-President Mme Neelie Kroes, European Commission

Key Findings: Thematic Survey

The 2013 ENUMERATE Thematic Survey provided an opportunity to examine the scale, cost and impact of digitisation activities in detail in 24 museums, archives and libraries of different sizes.

Objectives of the Thematic Survey

Because it was based on a small sample size, there were two main objectives for the 2013 Thematic Survey:

- Evaluate the validity of *Core Survey 1 (2011-12)* &
- Improve the methodology of *Core Survey 2 (2013-14)*

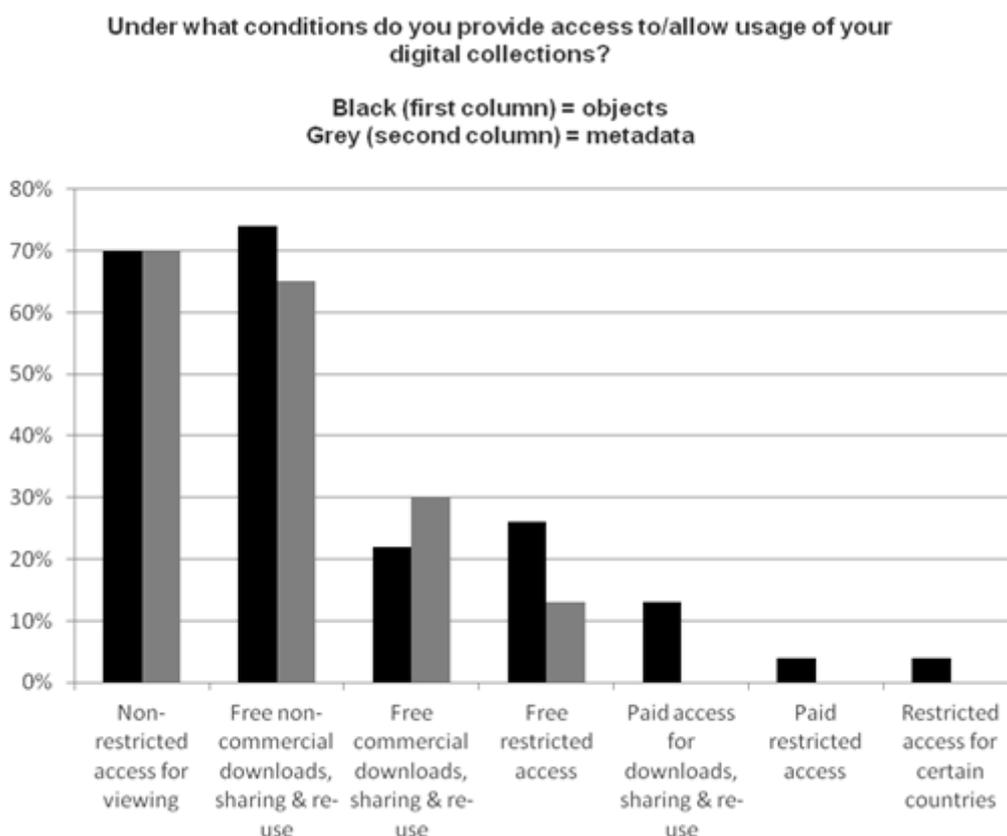
Focus of the Thematic Survey

The 2013 Thematic Survey focused on 4 key areas:

- Growth of digital collections
- Costs of digital collections
- Usage of digital collections
- Digital Preservation practices

Types of Use

Respondents to the Thematic Survey indicated a broad gap between open access for non-commercial use of digital collections and paid access to their content.



Lessons learned from the Thematic Survey include:

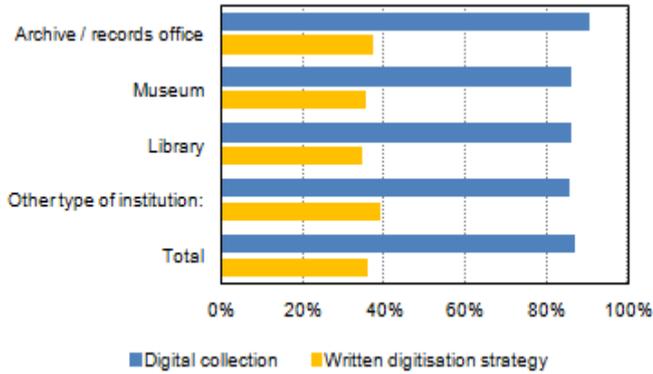
- The majority (74%) of respondents do not report expenditure on digitisation separately in their Annual Accounts
- Nearly 91% of participating organisations identified themselves as 'hybrid' – reflecting the changing nature of cultural services

Key Findings: Core Survey

The 2013 ENUMERATE Core Survey provided an opportunity to identify key trends and developments since the 2011-12 Baseline Core Survey and to assess the overall growth and development of digitisation in the Cultural Heritage sector.

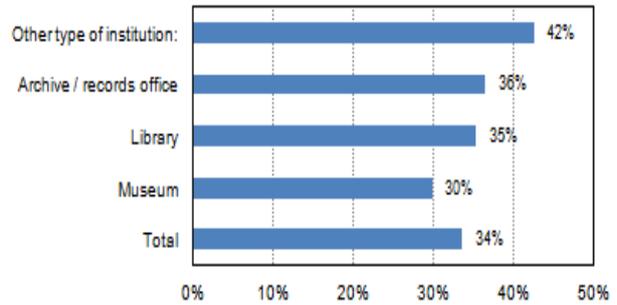
Digitisation Activity

87% of institutions have a digital collection (2012 baseline: 83%) and 36% have a written Digitisation Strategy (34% in *Core Survey 1*)



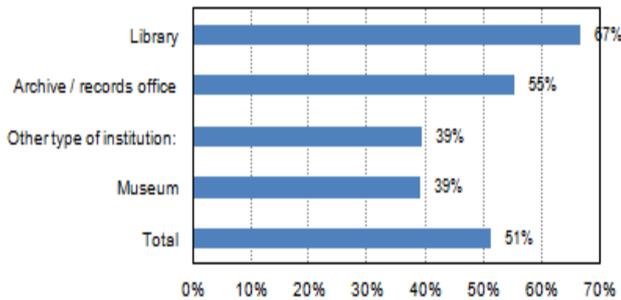
Digital Access

34% of institutions have an explicit policy regarding the use of their digital collections (2012 baseline 31%).



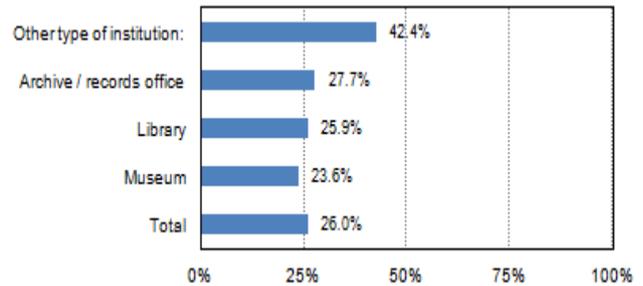
Measuring Use of Digital Collections

51% of institutions measure the use of their digital collections (2012 baseline 42%)



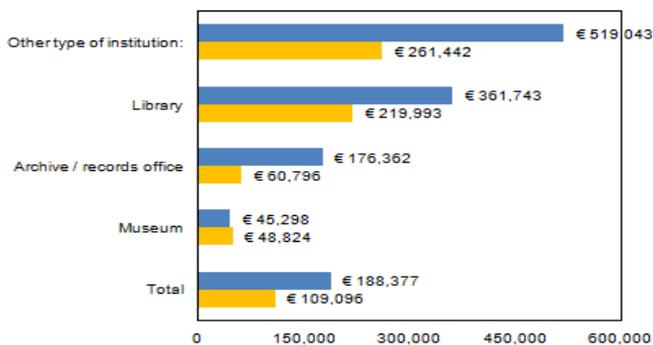
Digital Preservation

26% of institutions have a written digital preservation strategy that is endorsed by their management (2012 baseline 23%)



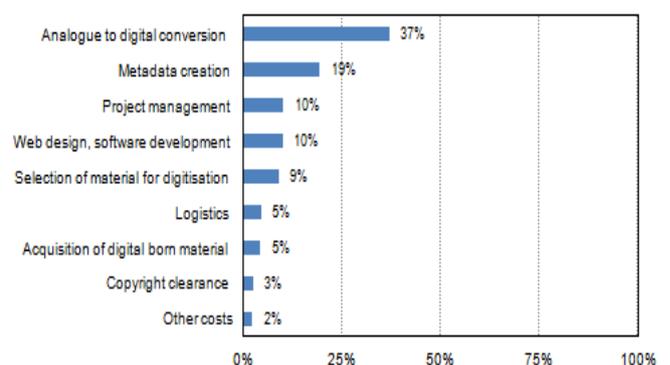
Digitisation Expenditure

The average institutional spend per annum on digitisation activities is EUR295,000.



Cost Components

Archiving (23%) and Management (18%) are the main structural cost components for digitisation, and the majority (88%) of spend is funded by internal budgets.



What have we learned?

ENUMERATE has been an exciting and challenging process to be involved in. It has significantly advanced both the baseline understanding of cultural heritage digitisation and the validity of methodologies for capturing this information in future.

Looking back over the past 3 years of work, we wanted to share a few insights with the wider community:

- There is no simple definition of 'digitisation' in the cultural heritage sector – it is an embedded, long-term activity that is interwoven with the daily work of collecting and preserving cultural heritage.
- The 3 years of this first phase of ENUMERATE have coincided with a period of significant economic and political change for Europe's cultural heritage institutions, and our findings should be read in this context.
- Digitisation has become core business for the cultural heritage community, but it seems clear that in the absence of strategies and structures both for preservation and revenue-generation, the sustainability of this digital output is at risk.
- There is an important balance to be struck between a purely 'statistical' approach to digitisation and the need to generate practical information that can be used by heritage institutions.

A look to the future

This Stakeholder Report marks the final stage in the EU-funded ENUMERATE Best Practice Network. However, the story doesn't end here!

The ENUMERATE Consortium has been working hard to ensure that the outcomes and learning from our work will continue to support the needs of Europe's cultural heritage sector.

- The ENUMERATE website and data platform will be maintained and developed at www.enumerate.eu
- The data, analysis and methodology from this first phase of ENUMERATE activity will continue to be available online
- The ENUMERATE Core Group will continue to liaise and explore opportunities for further development
- The core ENUMERATE activity will be integrated into the work of the Europeana Foundation under the *Europeana Version 3.0* project
- A further *Core Survey* will be carried out in 2015 as part of the work of Europeana

Thanks and acknowledgements

The ENUMERATE Network would like gratefully to acknowledge the 1,400 institutions across Europe that participated in these surveys, as well as the contribution of the 28 National Coordinators who helped implement the survey in each EU Member State.



"ENUMERATE has created a conceptual framework that brings together various separate monitoring activities on digital heritage that were set up in the past decade.

ENUMERATE has brought consistency to the methodology, and a reliable dataset has been created that can be used as an evidence base for future policies and practices"

Marco de Niet, Director of The DEN Foundation

www.enumerate.eu