Council Conclusions & Europeana Strategy

Next steps to implement Council Conclusions

Status: For consultation
Supporting documents: benchmark data slides

Preamble

Background

The Council Conclusions of May 2016 are a very positive signal that there is still large political support for Europeana. At June 23, 2016 Europeana Foundation Governing Board meeting, it was decided to create a strategy group to actively align Europeana Strategy 2020 to Council Conclusions.

Summary

Overall Council Conclusions largely affirm the strategy of Europeana, but call for several improvements and indicate that more clarity is needed on what a "multi-sided platform" is and its execution (in particular the role of a "portal"). The biggest challenges we face are streamlining how we bring in data and in shaping it to work for a very, very heterogeneous user base, in a new world of savvy internet users.

The core of our resulting position can be summarised as follows: Europeana Strategy 2020, which positions Europeana as a multi-sided platform to facilitates interaction between the CHI and the user, is still largely valid. But a shift in emphasis is needed make us more effective in the execution.

Preparatory work:
A brief for the strategy group ((Jan Muller (chair), Paul Keller, Tjeerd de Boer, Merete Sanderhoff, Stef Lewandowski, José Luis Bueren, Lora Aroyo, Laurence Engel, Jill Cousins, Harry Verwayen) was formulated (read here) and over summer the group was asked to think about two specifically contested areas: (1) which audiences should Europeana focus on? And (2) what should the relative position of the portal be in relation to our platform activities (such as interoperability, adoption of standards, etc.)? To get a balanced view on these questions we looked at these issues through the lenses of each of our five stakeholders (the European Commission, the Member States, the Cultural Institutions, The Europeana Network Association, the User (academic, general and creative).

Image 1: Strategy sub group [Meeting at Kennisland](#) offices.

Reflections from Commissioner Oettinger

We were able to test this position in a discussion with Commissioner Oettinger on September 5.

Commissioner Oettinger felt that our strategic direction is still very valid and that the shift towards stronger emphasis on 'B2B' activities (both Cultural Heritage Institutions and third parties in other sectors), if backed up by a yearly Thematic Campaign - will reactivate the reasoning for why we have a European Union at all. He liked the idea of modernising how we reach out to users through thematic channels and a large scale campaign in the shape of Europeana 1914-1918 or Europeana Art 280. He offered to help within the Commission to advocate for greater use of Europeana in Education, Research etc.

He recommended that we put more effort into the relationships with the MS, getting them to contribute ideas on how we get use and recognition of Europeana in a more contemporary way, while helping to coordinate their thoughts and play to our strengths. He wants to see them more involved so that they advocate for and make use of Europeana in their own education systems for instance.

Europeana Strategy 2020 Refined

Game changers

Given the Council Conclusions, the findings of the EF Board strategy group and the reflections of the Commissioner, we believe that the strategy of Europeana *an sich* is still valid, but that it needs to be sharpened, more explicit and in some cases modernised to create and own a position that Europeana Foundation can excel at *and* is supported by all stakeholders. An important element of this positioning is that we should make the 'European value' become more apparent, i.e. how are we supporting the ideals of Europe as shared cultural identity, a borderless union, a remover of friction between member states. In other words, the 'why' (we transform the world with culture' and the 'what' (we are a platform for cultural heritage) can remain largely untouched. What we should concern ourselves is the 'how' and the 'who does what'. We therefore propose 2 'game changers':[1]

Game changer 1: We invest in making it insanely easy and rewarding for CHIs to publish with Europeana

Game changer 2: We introduce a more contemporary approach to reach end users

These two game changers empower a continued concentration by Europeana Foundation on true platform activities and will therefore provide the necessary focus on B2B activities, both towards Cultural Heritage Institutions (CHI's) and third parties in other sectors.
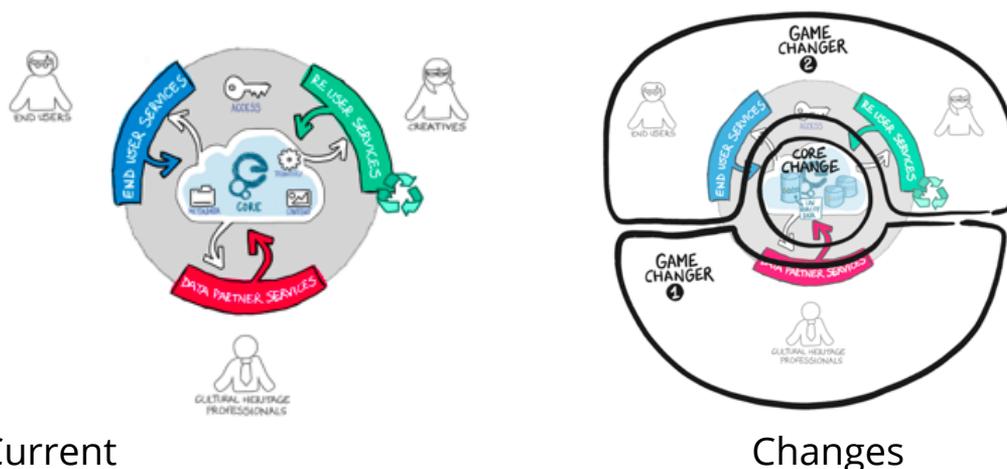
Current   Changes

Figure 1: Areas affected by the game changers

---

[1] We recognise that EF operates in an extremely complex environment and that it will be impossible to please everyone. What we aimed for is to take all perspectives on board and to boil that down to a position at the centre of the overlapping circles of interest, without compromising Europeana's mission and values and its ability to operate a much more focussed organisation.

In refining strategy the most important components of the 2 proposed gamechangers are outlined below. From this a picture starts to emerge what this 'modernised' view of Europeana can look like, pending discussions the MS and Cultural Heritage Institutions.

How, who and what

Underpinning everything is a need for much clearer ownership of roles and responsibility for all parties involved. To own any position it is critical to define 'us' in more detail and clarify roles and responsibilities. Europeana is an ideal, a movement, a network. But it includes different actors who have their own roles and responsibility. Who is ultimately responsible for data quality, who for platform performance and who for end user engagement? We believe that fundamentally it is the job of the Europeana Foundation to co-ordinate running the multi-sided platform, i.e. to remove any friction between source and user. But to be good at that, we need to set clearer boundaries where that responsibility begins and ends, and invest more in the relationships with and services for the partners who are responsible for the content and for end user engagement.

This is where the game changers come in: the platform needs to make it **'insanely easy' and rewarding** for institutions to share their data and mutatis mutandis for both Cultural Heritage Institutions and third or B2B parties to take the content and curate that for their audiences. On the back end, EF provides the technical infrastructure, including work on semantic and multilingual search and retrieval (as requested in Art 13 of Council Conclusions) policies, frameworks and customer service that such a role requires so that the Cultural Heritage Institutions and Member States feel supported and empowered and take responsibility for the quality of that content. On the front- end Europeana Foundation and DSI partners take responsibility for providing the (free) infrastructure necessary for others to curate content and engage with communities of interest (such as Fashionistas, Photography buffs, Art Historians, etc.).

A clear and explicit division like this will create the necessary 'front line' for EF: clear target audiences of customers whose needs must be fulfilled to be successful. Below the implications of these game changers are worked out in a bit more detail for your consideration.

Back end

Game changer 1: we make it insanely easy and rewarding to publish with Europeana

Who is responsible? The responsibility for the mechanism to publish lies with Europeana Foundation and the DSI partners but the responsibility for the quality of the content and metadata necessarily lies with the cultural institutions and the MS. This latter is not really felt as true compounded by the aggregation infrastructure we have built with now slow and cumbersome systems, complex routing, tardy feedback. Often incentivised primarily by project subsidies, it has been more 'publish and forget'. The Council Conclusions (point 12) also call on the EF to enhance platform functionality " to allow Cultural Heritage Institutions

to connect, and share and update their content and metadata in a flexible, easy and sustainable way."

What are we going to do to support them? We will aim to make it 'insanely easy' and rewarding to publish with Europeana. The system of aggregating content in a central repository (in combination with plenty EU funding) worked very well to quickly grow a large inventory of data. To increase the quality of the Europeana database (in terms of technical quality, reliable licensing and metadata) a number of changes need to be quickly initiated (DSI-2 and 3). Our partners to effect these changes are the domain aggregators[2] () in DSI-2. They have the relationships with the data partners and the knowledge of what and how to improve that data. Additionally we will continue to work on and implement multilingual solutions to improve cross border access to our rich cultural heritage. This is part of the workflow for the Europeana platform and creates added value for the providing cultural heritage institutions.

1. **Technology shift:** We are investing in technical infrastructure that makes it much easier to deliver data directly to Europeana or through National Aggregators (Metis and Operation Direct). And places the onus of enriching (language and semantically) the data in the hands of the Europeana platform

2. **Organisational shift:**
    a. **Domain aggregators:** Under DSI-2 we are changing the working relationship with domain aggregators. We currently spend a large amount of DSI budget on domain aggregation (in DSI-2 302 person months/1.8 million). But we need to reinstate confidence on both sides that the relationship bears fruit. Non-performing aggregators will not be funded under DSI in the future. Infrastructure that only works for single aggregators (both the pipelines and end user facing websites) will also not be supported anymore in favour of investment in the shared infrastructure which will be provided for free for all participating partners. This should lead to a combined expert workforce (including the domain aggregators) of approx 25 FTE/1.8 million/yr working on advocacy and relationship building and to a strongly improved brand recognition of Europeana among the 3,500+ cultural institutions who are currently contributing data and content.
    b. **Member States:** we will investigate the possibilities for getting to agreements between MS and the EC for data quality targets under the Maltese Presidency. MS used to have digitisation targets, progress on which was reported through the MSEG. We would like to have a similar mechanism for improvements of the current database of 53 million objects, in line with point 31 of the Council Conclusions calling upon MS to encourage online accessibility of high-quality cultural heritage content and metadata from national and regional collections.

---

[2] Domain aggregators are: Archives-APE, Television Archives - EUScreen, Archaeology Collections - CARARE, Film Archives- EFG, Museums- MUSEU, Libraries-TEL, Social History Archives- HOPE, Natural History -OpenUp! Photoconsortium - photography collections, Most of these domains grew from EU sponsored projects

c. **Cultural Heritage Institutions:** we will cultivate direct relationships with the many Cultural Heritage Institutions (CHI's) asking them to share their metadata and links to better quality material with us. We will automate the signing of the data exchange agreement between each institution and Europeana at the point of first data delivery.

3. **Data shift:** Our strength is that we are one of the largest repositories of cultural heritage. Our main weakness is that the quality of the repository varies dramatically between good and bad. Our plan is to work more directly with our CHI partners to take ownership of data quality and their brand reputation. To empower them to say where they want data published in Europeana distributed to. We will continue to rely both National and Domain Aggregators to improve data quality by making use of the Europeana Publishing Framework to encourage CHI's to produce and deliver tier 2, 3 and 4 material. The gamechanger here is that in 4 years we could still have 53 million objects in the repository (or less - with 25 million great items we will still have a unique position). But instead of 15% tier 2, 3 and 4 compared with 85% tier one we will have flipped the numbers. 85% of the database will consist of objects that can be used in Education or beyond. We'd need to be much stricter in enforcing our own frameworks (data, licensing and CRF).

Front end

Game changer 2: We will introduce a more contemporary approach to reach end users

The Council Conclusions (point 14 and 18) stress that content shared through Europeana needs to be presented in attractive and diverse ways, in particular by involving Cultural Heritage Institutions and other public and private parties in developing user-oriented projects that build on the Europeana platform.

Who is responsible? The shift we propose is to make Europeana Foundation responsible for the **platform activities (B2B) and the B2B relationships**, while the responsibility for reaching out to end user communities becomes the responsibility of partners.

What are we going to do?
Our approach is three-pronged:

1. **Research, Education and Creative industries:** EF continues to invest in B2B partnerships in the areas of Research, Education and Creative industries, aiming to get partnerships that deliver scale use of the Europeana database. We have experimented with Tourism and Smart Cities but as these do not have European nor in many cases national remits but are by their nature very local we have decided to drop them for now. Here we are already working quite closely with Wikipedia, a great example was the Wikidata Art Challenge using Europeana 280 material.

2. **Thematic collections:** Europeana Foundation has set the stage with the launch of two thematic collections (Art and Music) with promising results: we see three times the user engagement here compared to Europeana total. However, this is only scalable if thematic collections are run by external third parties. Some are already lined up in DSI-2 (Photography, Fashion, Newspapers, …) but we need to become clearer on our proposition:
   a. EF provides (free, paid by DSI) platform and functionality (under the core service), including access to data and tools which enable reuse of content of Cultural Heritage Institutions.
   b. the partners curate and market the service to end users and acquire extra metadata and content from relevant cultural heritage institutions.

Under the EU's Connecting Europe Facility, the "core service platform" will be fully funded through procurement from October 2017. From September 2016 a separate budget is available for EU co-funding of "generic services" i.e. related user-oriented projects. The latter funding mechanism, for which the EC publishes calls for proposals, can play an important role to make it attractive to MS and CHI to publish on the Europeana platform: digitization and curation will be 50% funded by the EU while the Content Management System and underlying technologies are supplied at no costs (or cost price). By joining forces on the platform we can show high impact (consolidated user statistics) and brand recognition. CHI's then get to curate their collections in a wider context, contributing to the connecting of our cultures across Europe.

Illustration: For the first call on Generic Services Europeana will submit a coordinated proposal for 3-4 Thematic Collections. EF will be responsible for the technology and functionality under the DSI3 core platform funding. Three or four primary partners will submit for the curation of the collections and relationship management in their area of knowledge. Digitisation will be encouraged. Our preferred topics for the first round are: Literature, Manuscripts, Newspapers and Fashion because we have strong institutional partners and good content already in these areas. They all also have strong audience potential.

For the second call - 2017 - we would encourage Social History, Art, Archaeology, Sounds and Sport

3. **Pan-European campaigns:**
Creating a large-scale participatory campaign takes considerable time and effort. We will therefore use 2017 to start to build such a campaign while also conducting yearly smaller pan-european campaigns to boost a thematic collection or particular subject.

   a. One large pan-European campaign will be developed on migration building up in 2017 for a set of launch events in 2018 and 2019. The campaign will tie to the European Year of Cultural Heritage. This campaign will like Europeana 1914-1918 and Europeana 1989 be participatory, inviting individuals from

across Europe to submit their family stories and memorabilia to be juxtaposed with material that is available or can be digitised from the Cultural Heritage Institutions. This campaign will work with Ministries of Culture and other relevant policy bodies. [3]

b. Each year we will hold smaller campaigns starting in 2017 with text and word with the libraries and archives. As achieved by Europeana Art 280, we aim to improve the quality of the textual items to tier 2, 3, or 4 and broaden public knowledge of a particular area by engaging in new, innovative ways to show that material. These campaigns will be conducted at the CHI level.

Both types of campaign aim to resonate with European citizens. It is envisaged that such campaigns will combine the best of past campaigns (Europeana 1914-1918, Europeana 280) aligning citizens (participate and share your story), institutions (find relevant content on …and make it work on the web) and MS (European cohesion) around central themes that are relevant to all.

All campaigns and thematic portals rely heavily on social media with their own facebook pages, twitter and intstagram accounts and Pinterest expressions. Europeana will continue to invest heavily in these awareness raising mechanisms calling on the help of the Network Association, MS and CHI's and for future #AllezCulture campaigns to widen understanding and use of our cultural heritage.

Organisational shift: The shift towards B2B platform activities should free up some people on the EF staff currently working on end user services to shift towards more relational, B2B activities. Main metric here would become the amount of partners that are attracted to develop thematic collections, exhibitions, services for education, research and creative industries.

Technology shift: Europeana thematic collections and exhibitions would need to be designed for use by third parties rather than by Europeana staff. The professional services would be consolidated into one and we will consider a different landing page for europeana.eu to showcase the professional services much more prominently than is currently the case. This will allow us to move away from the idea of portal serving all and will likely lead us to a redesign of what is first seen as Europeana under our primary url Europeana.eu.

Concluding remarks

Europeana needs to be packaged for the different audiences we serve, but first we need to get agreement on direction and goals by which we will be evaluated from our major stakeholders MS and Commission. We believe that by making user needs the most important result for all of us we can shape a future that satisfies more stakeholders more of the time and fulfills the ambition of Council Conclusions.

---

[3] A project will be submitted under the Generic Services call 2016 to support this campaign.

We need to keep investing in a healthy relationship with the Cultural Heritage Institutions, including through the Europeana Network Association, which is developing into a powerful force. We believe that if the two 'game changers' are well executed they will be a powerful way to claim and own a strong position as an innovator in the cultural heritage field in the years to come, while answering the needs of European citizens in a much more targeted fashion.

Timetable

Consultation paper Next Steps:
- Issued to all MS, who are invited to comment: 21 October 2016
- One-to one calls with selected MS 24 October to 9 November 2016
- Analysis of MS input by MS Consultation taskforce: Jill Cousins and Shadi Ardalan, Europeana Foundation, Marit Vochteloo, Dutch Ministry of Culture, Education and Science, Jana Knazkova , Slovakian Ministry of Culture, Monika Hagedorn-Saupe, SPK (TBC).
- Review of input with Europeana Foundation Board 16 November 2016
- Revised Strategy paper ready for MSEG meeting 19 November
- Discussion in MSEG meeting of 22/23 November
- Parallel work with Cultural Heritage Institutions and the Europeana Network Association
- Refined Strategy Draft mid January 2017

Related processes

There are a number of related processes that directly relate to our strategic positioning:
- Evaluation by the EC. This is due in October 2017 but we need to be evaluated also on our new agreed position.
- DSI-3 and Generic Services proposal (December 2017)
- Europeana Business Plan 2017 (November 2016)

Annex 1 Supplementary information on audiences and markets.

Audience:

Users: two primary types professional and casual.

a. **Professional users** (Researchers, Educators, Creative Industries) have a strong need for re-usable (from a rights and quality view) cultural heritage material. They

need the full picture of what is available in Europe and want the material delivered re-packaged through interfaces they are familiar with.

b. **Casual users** don't use overarching heritage destination sites to satisfy their needs. They may be interested in niche service on subjects like Art, or Photography, but will mostly find and use cultural heritage via referral from friends, interest groups etc. on Facebook, Pinterest, Instagram or Wikipedia.

Stakeholders: EC, MS and Cultural Heritage Institutions (CHI)

- **CHI's** - want infrastructure to support them to make their data better suited for the web and increase the visibility of their collections;
- **CHI's & MS** - want a learning network and cost reduction on managing data, multilingual access, frameworks for interoperability (quality, rights, data model etc)
- **MS** want bigger role in the policy and decision making of Europeana
- **EC & MS** - want value for the European citizens

B2B distributors:

Education networks use the API (European Schoolnet, Euroclio) and so are Education publishers looking for digital resources for their school systems (iTunesU, Maskott, Promethean); Ministries of Education want to use the resource (Europeana was guest of honour at the annual educator's conference organised by the Ministry of Education France). Issues: openness of data for reuse and quality of material plus knowing if educationally appropriate - See Europeana for Education Recommendations

Research: Europeana is most used and appreciated by humanities / social science researchers. Universities are using Europeana Research endorsed by its powerful Advisory Board. Use cases: Optical Recognition software, Geo Visualisation, Music21, (TimeMapper), Newspaper Exploration Environment, Clarin linguistic network use.

Creative Industries: Use of the API is increasing, from 40 apps in 2014 to 160 mid 2016 and take up of the material via Challenges and Competitions is bearing fruit: #BigArtRide, #JumpingJacks, Storypix, Art Stories, Picryl, CREATE, with Frankfurter Buchmesse Arts+ partnership (new business models for publishers) - not yet PokemonGo but....

B2C Thematic collections: expanding on the thematic collections approach (engagement level 3 times higher than in collections in general), but operated primarily through external networks/ partners supported through EU Generic Services call and MS co-funding.
- ○ Currently live: Europeana Art History, Europeana Music, Europeana 1914-1918
- ○ Near future: Europeana Fashion, Europeana Newspapers, Europeana Photography

- To be assessed: Natural history, Archaeology, Architecture, Film, Performing Arts, Literature, Religion, Maps, Science and Technology etc,

Pan European Campaigns (1-2 per year, all countries): a large pan European thematic campaigns modeled on the successful Europeana 1914-1918, Europeana Art 280, Europeana 1989 campaigns. Themes we are considering: Poetry - involving National Libraries and Archives, WWII - Refugee Stories (audio and photo collection campaign), Migration, ...

Advantages of this approach:

MS actively participate, creating and running campaigns, **CHI's** develop participatory access to their collections, Europeana gains new better quality material for thematic collections and a brand awareness of Europeana as the space for open, shared cultural heritage of Europe. **Users** get to participate in and connect to their cultural heritage, developing understanding and forming a shared European identity.

Consequences of this approach

Impact would be measured in brand awareness of Europeana as the open, unifying space for cultural heritage, not about achieving wide recognition of the Europeana portal.

Europeana.eu becomes a landing page showing the B2B possibilities, the learning network, the B2C collections - not just Europeana Collections.