



## Europeana Foundation Governing Board Meeting

27 September 2016  
10h00 – 17h00 CEST  
The Netherlands  
Institute for Sound &  
Vision, Theatre Two

### DSI I Review Results

*Action proposed: For information and Q&A*

On 15 July 2016, the European Commission and three independent experts reviewed the first Europeana DSI project (Europeana DSI-1). This was a very positive meeting with positive feedback on the project and its review report. The result of the review was 'good progress'.

Most of the recommendations of the reviewers did not come as a surprise and are addressed in the operation of the follow-up project Europeana DSI-2.

Here under is the review report of the Commission's reviewers. It will be discussed in Europeana's management team meetings, and its recommendations taken on board by the Steering Committee of DSI-2.

#### **Circulation:**

Europeana Foundation Governing Board Members & Observers

#### **Classification:**

Public



# TECHNICAL REVIEW REPORT

Grant Agreement number: CEF-TC-2014-2-01

Project Acronym: **Europeana DSI**

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Project start date: **01/04/2015**

Project duration: **14 months**

Period covered by the report, from **01/11/2015** to **30/06/2016**

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Date of review meeting (if applicable): **15/07/2016**

Name(s) of expert(s):

Mario Chiesa

Jarred McGinnis

Ioanna Tsakou

Individual report

Consolidated report **X**

If consolidated, name of expert drafting the consolidated report: Jarred McGinnis

## 1. OVERALL ASSESSMENT

### a. Executive summary

Comments, in particular highlighting the project progress towards achieving its objectives and reaching its impact:

The consortium has made good progress towards achieving the Europeana DSI project's key objectives to innovate the aggregation framework, to encourage the distribution infrastructure and to work towards long term financial stability.

In terms of the innovation of the aggregation framework, the increasing number of records is always welcomed and it was encouraging to hear the entire consortium agree that quality will take precedence over quantity in the future. The ongoing development of the Metis tool set is a positive step as well as the hedge 'Operation Direct' to explore more direct means to synchronize data with aggregation partners. The establishment of a data quality committee will hopefully contribute to an overall improvement of data quality as well as to engaging, encouraging and disseminating best practices.

Numerous successes in achieving the 'soft power' of Europeana are apparent. 'Soft power' here refers to the project's success in creating visibility amongst national ministries, successful campaigns such as Europeana280 and a much improved website for the Europeana Collections. Similar improvements to the Europeana Labs, Europeana Exhibitions and the launch of the Europeana Research should contribute to fostering an active professional community of creatives and academics engaging with European Cultural heritage. The tasks of the communications work package (WP8) have illustrated the strength of the project to engage targeted communities (e.g. academics, creatives, etc.) as well as the public at large. There have been a lot of positive developments to further encourage the reuse of Europeana content. The success of this 'soft power' will be truly realized when, hopefully, the data and content of Europeana is reused without the need for DSI-sponsored contests and initiatives.

The business plan described in D4.1 demonstrates a more realistic appreciation of Europeana within the digital ecosystem of cultural heritage and its positioning in related to the business/funding opportunities in the short, mid and long term. This includes the appreciation of the prohibitive start-up costs for tourism (D3.4) and a focusing on education, which is a vertical where Europeana is more likely to have an impact, which can be leveraged for other verticals. The understanding of the primal importance of quality data and the progress towards high quality content and data provided through user-friendly websites, APIs and portals will necessarily underpin the stability, sustainability of the DSI.

However, there still remains a number of serious obstacles to achieving the objectives of the project in the long term. The details of which are outlined in the next section 1b.

- Excellent progress (the project has fully achieved its objectives and goals for the period and has even exceeded expectations).
- Good progress (the project has achieved most of its objectives and goals for the period with relatively minor deviations).
- Acceptable progress (the project has achieved some of its objectives; however, corrective action will be required).
- Unsatisfactory progress (the project has failed to achieve critical objectives and/or is not at all on schedule).

b. Overall recommendations (e.g. corrective actions at Work Package level, or re-tuning the objectives to optimize the impact or keep up with the developments in relevant policies, or on best use of resources).

**Recommendation 1:** As part of the process of innovating the aggregation landscape and persuading aggregators to become actively involved in important activities that affect the quality of the Europeana user experience (e.g. data quality improvement, content aggregation, etc.), Europeana should come up with and promote to aggregators best practice and practical examples highlighting the benefits of the envisaged (and suggested) aggregator roles and activities. Moreover, the positive evaluation results of the various user evaluation activities conducted by Europeana could be exploited for presenting convincing cases to content providers about the benefits of opening up their content and making it available to Europeana. Similarly, the Consortium should strive to close the feedback loop related to the work produced by the Network Task Forces/Working Groups by making more evident and clear what happens with the reports and recommendations produced by such Groups and how they are taken up to improve the Europeana offerings and impact.

**Recommendation 2:** The Consortium should consider piloting the new aggregation infrastructure under development (Metis) with more than one pilot aggregator in order to ensure that technical requirements related to each major type of aggregator, including MINT users, are adequately addressed without major additional development once Metis is fully deployed.

**Recommendation 3:** Efforts related to consulting directly with users (all types of Europeana users) and gathering their feedback should continue and be further intensified. In this respect, recommendation 1 of the previous (mid-term) Europeana DSI-1 review report is still valid, notwithstanding the fact that the goods effort paid by the Consortium to address the specific recommendation are acknowledged and appreciated. The feedback collected by such user consultation activities and the way it has affected the various Europeana activities (i.e. how the feedback loop was closed) should be reported in more detail. Hopefully, on the medium-long term, this could lead to a continuous and iterative process where different types of Europeana users contribute to the co-design of the Europeana user experience.

**Recommendation 4:** Given the importance of the role of aggregators and content providers in the process of improving data quality and the fact that, in most cases, such work is not funded, the Consortium should put together a concrete and systematic plan for motivating aggregators to work on data quality and define in a concrete way the role and specific responsibilities of each stakeholder (Europeana, aggregators, content providers, other relevant parties).

**Recommendation 5:** Where/if possible, the Consortium should consider strengthening the technical implementation activities/resources of the project so as to ensure the timely delivery of the relevant technical deliverables (e.g. Metis, multilinguality and search improvements, etc.), given that issues addressed by such technical deliverables are of utmost importance for the Europeana user experience. In this respect, re-considering the priorities of the overall Europeana work/deliverables could be helpful.

**Recommendation 6:** The impressive amount of knowledge and experience within the Europeana team could and should be elicited more, to motivate and engage stakeholders, aggregators, content providers, end users, and to support all the recommendations above, developing further the usage and update of a selection of design tools, like (to cite non exhaustively a few of them) customer journeys, personas, storyboards, etc. for each category.

**Recommendation 7:** According to the evolving roles of aggregators, content providers and experts, as well as of Europeana itself, KPIs and metrics should be continuously updated (confirmed, replaced with others more meaningful, or newly added) in order to follow those changes and provide meaningful feedback about impact achieved.

**Recommendation 8:** Activities to stimulate and engage external stakeholders or end users to use and re-use Europeana collections are encouraged, and a special focus should be devoted to the curation and re-use of homogenous sets of content and metadata (if and where feasible), rather than to single masterpieces or objects.

**Brief comment on how previous review recommendations have been responded to in the current period being reviewed:**

Recommendation 1: There has been commendable activity to involve end users more in the design of interfaces, collections and services. Many of the actions presented are one-way (mainly of informative nature) but several surveys and testing activities have also been organised that have guided development work. Efforts towards this direction of direct user involvement and collection of feedback should be followed and intensified, possibly into an iterative process.

Recommendation 2: Some action has been taken but a clear prioritisation of work in the different domains is still not evident. Although some narrowing down of target audiences has been done in each domain, it seems that activity is still ongoing in all of the domains. It is understood that tourism has been deprioritised.

Recommendation 3 has been sufficiently addressed.

Recommendation 4: Work on data quality continues but still has some way to go.

Recommendation 5: There have been some general remarks and some references to specific action to be taken (or not to be taken) and improvements targeted. More explanations were given during the review.

## 2. OBJECTIVES, QUALITY and PROGRESS OF WORK

- a. Have the objectives for the period been achieved? In particular, has the project as a whole been making satisfactory progress in relation to the Description of Work (Annex I to the grant agreement)?

*Comments – in particular highlight any outstanding achievements*

During the period under review, the Consortium has made good progress towards achieving its objectives and implementing the work described in the DoA. The project has had a number of high-profile collaboration successes such as the Europeana280. The project can be proud of the high quality user experience of the new Europeana offerings (Europeana collections, exhibitions, Europeana Pro, Labs, etc.) and its general online presence.

It is not to be understated how important the shift of the previous project-oriented mentality to a more market-oriented mentality will be for achieving the project's objectives and ensuring the long term success of DSI's aims. Such shift is already visible in the Europeana activities and reorganisation.

Overall the deliverables were of good quality and were good at addressing the comments from the previous project review.

- b. Has each work package (WP) been making satisfactory progress in relation to the Description of Work (Annex I to the grant agreement)?

*Comments on the quality of work per work package*

Overall, all work packages have made good progress in delivering results in accordance with the DoA (Annex 1) and at scheduled time. Shortcomings or areas for further improvement are noted in detail under each work package below.

### **WP1 Data Partner Services.**

We appreciate that a major change of the technical infrastructure happened in summer 2015 that enables the Europeana Foundation to publish data continuously via the Europeana Search API and Europeana Collections, which has led to several improvements. There have been and could be further delays in the delivery of the technical infrastructure. Recommendation 5 outlines our concerns regarding this matter. Operation Direct and its exploration of alternative data acquisition mechanisms is a positive strategic development. There remain a number of open issues concerning the aggregation landscape, the exact role and motivation of expert hubs, as well as the technical infrastructure that will support them. The consortium should appreciate that addressing these issues should be a priority. In addition, the content strategy for Europeana should be finalised sooner rather than later. We would expect this to include a thorough understanding of the role and wishes of end users (i.e. what attracts them) and user feedback about content mechanisms.

It was good to see that several consultation workshops took place with aggregators to understand their needs and the improvements necessary. It will be good to have a strategy in place to address how the cessation of funding for TEL will affect Europeana in terms of addressing the loss of a potential expert hub for the library domain and a source of knowledgeable feedback for the METIS tool.

In relation to the process for data quality, more consideration should be given to addressing the questions posed in the previous review report (see text in T1.1: how data quality is ensured in this model (and by whom), as well as what Europeana will/can do to motivate data providers to improve the quality of their data). See recommendation 4.

Deliverable D1.1 is a useful document and good high level plan. Several specifics are missing and will be defined along the way. Delays in the delivery of the technical infrastructure are possible.

Deliverable D1.2 presents a number of good outreach activities that achieved good results and more efforts in this direction should be paid. Of particular note is the success of the 280 campaign. This document was useful to appreciate the complexity inherent in an open data task that people often fail to appreciate. That something as simple as a 'content provider' requires normalization and even understanding just who is contributing to Europeana. The 'Lessons learned' section were a great way for a reviewer to appreciate successes of the organization.

Although considerable work on improving data quality has been achieved during the period, based on reporting and review discussions, a more systematic plan of how data quality will be improved with specific timelines is not yet evident. Although the intention of working with aggregators in order to increase the quality of data is clearly stated, this does not seem to happen in a systematic way with specific steps to be followed (at least such material has not been made available to the reviewers). Moreover, it is not always clear how Europeana will be controlling the different quality aspects of its content after it has been delivered by aggregators, or how it will ensure the commitment of aggregators to quality. We believe there needs to be a more structured plan in terms of defining the role of aggregators, content providers and Europeana in this process. Some thought and practice is needed around the incentives that will work for these partners. See recommendations 1 and 4.

There have been several activities and workshops ongoing by various aggregators for attracting new content partners, informing existing ones about new developments, training them on various issues, putting together plans for delivery of new and improved data to Europeana DSI in relation to films, museum content, natural history, archaeology, fashion, social history. Moreover, good activity has been reported in relation to the development of the Europeana DSI ingestion product requirements and improvement of the operational workflow. In addition, activities and subcontracts took place in relation to each aggregator for developing and maintaining the technical infrastructure.

## **WP2 End User Services**

The users' engagement and direct consultation is crucial for the further development and growing of end-user products and re-uses. During the period, a user survey has been conducted which has led to a better understanding of behaviour and end user needs for Europeana Collections and the thematic Collections. In addition, the Consortium started an end user validation project where various assumptions are being tested in short sprints by talking directly with users of the service. Overall, good activity was achieved in the latest evaluation period. It should be increased and move beyond already explored channels and contacts.

Moreover, in the future, it is advisable that the Consortium puts more emphasis in documenting the process and results of user consultation activities (where "user" refers to all types of Europeana users). For instance, reporting about areas of interventions, identification of the target users, implemented features, etc. Moreover, the incorporation of the evaluation

activities into a continuous process could lead to significant improvements of the Europeana offerings.

Online exhibitions and presence on social media are strengths in the current Europeana. It will be interesting to see how this will be further developed in DSI2, especially for the ingestion of new collections and a more extensive curation of new exhibitions or initiatives. Issues around data quality may continue to cause drag. Utilising external platforms such as BuzzFeed is fine but it is important to appreciate the different tone and timbre of the platform. Engagement with external platforms should also be realistically evaluated in terms of effort versus impact.

The task related to the creation and curation has a good plan for collection days and open collections. Nevertheless, more emphasis should be placed on the curation for Exhibitions and other initiatives that will lead to richer content re-uses. An initial benchmark and comparison with other similar non-Europeana exhibitions and initiatives could be planned in order to understand better priorities for future developments and re-use. Additionally, it would be helpful for the consortium and potential collaborators to have an understanding of the costs in terms of time and resources required to create a collection. Having this defined would create certainty for potential collaborators and make engagement more likely.

Overall, good progress is achieved in relation to monitoring tasks. It would be useful to pursue some understanding around the Google Analytics statistics that showed a static trend in the last months and explain what is motivating this inertia: e.g. lack of indexing or IT performance, etc. and how this could be transformed into a positive trend. An interesting source of information could come from the statistics about activities on data and content providers' websites. It would be good to see this addressed more concretely.

## **WP3 Re-user services**

### **Task 3.1 Expand the distribution infrastructure**

The Consortium has been good at approaching and supporting re-users of Europeana content. A number of different activities took place towards this goal, mainly through competitions and partnering with intermediaries for outreach to their networks. Some good results in terms of impact on creatives are starting to appear although there is still a lot of room for improvement. However, the real challenge (and impact) is to make Europeana discoverable by creatives and trigger reuse without contests that include a prize offering. During the review, the consortium agreed to this notion and work direction. Therefore, it might be a good idea to define relevant KPIs. If the consortium sees mobile applications as integral to its strategy, more needs to be done to ensure that those applications are a success or seen as a success as they may become the means to demonstrate the value to collection holding institutions of engaging with Europeana. It would be good to have KPIs defined to understand the measurement for success for applications like the Art Stories Face App.

It is commendable to see that there is some kind of validation process for new applications or datasets, where the best ones are featured on the Labs home page and promoted to the Labs community via the regular e-newsletter as soon as they are added by the Community. The approach of targeting creatives through intermediaries is right, however, the consortium understands that direct contact with end users (creatives) is needed to ensure a continuous validation of the Europeana offerings. It is worth noting that the DSI1 project duration proved to have quite a limiting influence on the campaign outcomes.

Task 3.2 delivered D3.4 'Plan for Europeana's distribution in the tourism market' which includes useful recommendations for Europeana in addressing tourism. The document reiterates that "data quality remains a barrier, requiring a significant amount of work to overcome this critical barrier". This is true especially for the tourism domain but it will continue to be the limiting factor for uptake in other verticals as well. It might be possible that tourism as an industrial

sector can be looked at again after the plan for data quality has been completed and tools for searching content in different ways are in place but, at present, this strand of work does not appear to be impactful. There was discussion that the preliminary work in Tourism can be applied in Smart City initiatives, which might be correct but will still need to be based on high-quality content.

Task 3.3 has taken positive steps towards managing user and re-user expectations from Europeana but further efforts are necessary. It is a positive development to see the Consortium focusing on education where impact is possible and already visible through distribution of Europeana content and services to education intermediaries. The continuing positioning of Europeana as a broker between Europeana partners and industries wishing to associate with culture is progressing well. There have been good results already produced from collaboration with Apple and discussions about extending the collaboration to more Europeana partners. The partnership between Europeana and ENOLL is proceeding well and hopefully leads to interesting developments and outcomes in the near future. It was good to see the Consortium already developing similar collaborations with Smart Cities representatives and practitioners.

#### **WP4 Policy, Research, Knowledge and Program Management**

The statistics board addressed within Task 4.1 will be very useful for content providers to demonstrate value internally and externally. Helping them do that is an important contribution of the DSI1 project and will further help Europeana increase their impact with other institutions. Such transparency also creates the responsibility of ensuring that KPIs are understood, defined and met. In this respect, the document MS26 "Recommendation Report on Business Model Impact and Performance Indicators 2016" provided generic recommendations but not specific impact indicators to be adopted by Europeana. It is unclear if Europeana is keeping an updated list of indicators, including User Experience-related indicators, and to what extent these indicators reflect the developing and impact needs of DSI-2.

In terms of R&D coordination, various committees have been set up. The evaluation of enrichment technologies and the understanding gained about which are most useful for Europeana is a positive development. Moreover, a good amount of activity has taken place to extend and develop the EDM, as well as concrete progress for improving search and multilinguality. However, based on MS31, progress has not been as extensive as planned and there are still many technical difficulties to solve and significant work to be done. Given the importance of good search facility for end users, these efforts should be more intensive. See recommendations.

#### **WP5 Network and Sustainability**

Activity in Task 5.1 is moving Europeana in the right direction and the valuable input of the Europeana Network is acknowledged through the various Task Forces and new Governing structure. In the review, the Consortium discussed involving members of the Network through task forces and work groups and reported good engagement and time spent. However, the concerns of the previous review report in relation to the Network and its level of involvement, as well as the necessity to simplify processes (see detailed comments in the mid-term review report of DSI1 under Task 5.1) are still valid and further efforts are necessary. For instance, regarding network activities, Europeana should measure "success" with more concrete indicators than only the number of participants (e.g. number of participants per domain of activity, type of involvement of members, active vs. passive members, etc.).

The development and maturation of the Europeana Pro platform during the period has been satisfactory. The relevant website, as a tool for engagement, is much improved.

One of the main benefits of Europeana to the EU Member States is correctly identified as “community cohesion and understanding – a truly interconnected Europe through its culture”. This is indeed a very important return of investment for Europe as a whole and the Europeana280 campaign has been an excellent effort towards this goal. Taking into account the current difficult situation of the EU and the increasing voices against the EU, the “uniting” role of Europeana through culture becomes even more important than before, therefore, Europeana should reinforce its efforts and plans that push towards more EU-wide cohesion. Specific campaigns for identifying common cultural elements and other “uniting” activities and their dissemination to EU populations should form part of such campaign. The direct involvement of end users in these activities is very important. The consortium is very much aware of this and intends to continue in this pursuit.

## **WP6 Product Development**

There has been continued good progress in all tasks and subtasks of this work package. During the review meeting, it was clarified that the development of Europeana Cloud storage solution is no longer a priority, although using cloud technologies mainly for service delivery for some of the Metis tools is still part of the product development plan. The new METIS tool is expected to be available for pilot use by external aggregators during DSI-2 in the next year. Deliverable 6.4 "Three Thematic Channels" marks a deviation from the DoW: The fourth thematic channel on newspapers is not publically available (only internally) and will be released in DSI-2. This is because the Consortium encountered various difficulties during DSI-1 that had external dependencies beyond the control of the Consortium, thus the deviation is acceptable. In relation to product development of end-user applications, there has been good work addressing the comments of the last review concerning this task. The work prioritising requirements for end user applications and making such prioritisation and accomplishment plan more transparent and better structured is very positive. Moreover, good work has been carried out related to direct consultation with end users such as the developer-users of the Europeana APIs and ingestion tools that has resulted in valuable feedback for improvements. The surveying activity (direct participation of end users) in relation to Europeana Collections and the Virtual Exhibitions is also well done. Such activity should continue and intensified further, leading to a continuous effort. It will be good to have a special focus on documenting its results for further communications activities inside and outside the Network. The user surveys don't necessarily need great numbers (e.g. users, surveys, tasks); a qualitative approach could give already interesting insights.

## **WP7 Technology**

In this WP, the two serious outages have had a serious effect on achieving KPIs for the project. It will take some time to achieve the visitor numbers undermined by these outages. It is hoped that the underlying causes of these outages have been solved.

### **Task 7.3 Metadata and content synchronisation with PSNC**

The prototyping of more innovative lightweight and user-friendly solutions to acquire data from partners (“Operation Direct”) is a welcome and important development in the project as it will enable direct interaction with the Europeana platform for a very large number of content providers. During the review it was explained that within DSI-2 the consortium will experiment with different solutions to define requirements and decide whether it makes sense to continue development in this direction or not.

## **WP8 Communications**

The communication activities focused mainly on the Europeana 280 campaign and provided very good results. There have been a number of successful public engagement activities co-organised with other stakeholders, which have contributed to the re-use of the content submitted to the campaign. Overall, there has been good progress with communication activities addressing end users (as opposed to intermediaries), thus taking good steps in addressing last review's recommendations. The feedback gathered should prove to be valuable to Europeana.

Moreover, advocacy on policies relating to European cultural heritage at European and Member State levels has been one of the strong points of the DSI1 project and hope is that activities will continue to push the use of European cultural heritage to further a more pan-European cohesiveness.

The Europeana 280 campaign has been one of the crown jewels for the DSI project with excellent results and hope is that the Consortium will go forward with similar plans and campaigns.

### **WP9 People and Business Support**

Given the limitations of contract terms that can be made available, there has been good human resource management.

No detailed financial information was provided at the review. This is still under preparation.

Reasonable decisions with regard to operations and support of the business have been made.

c. Have planned milestones and deliverables been achieved for the reporting period?

*Overall comments with a focus on milestones – detailed comments per deliverable are annexed to this review report (if evidence of plagiarism is identified it should be mentioned here and described in more detail in the annexed deliverable table)*

All deliverables and milestones have been submitted within the period under review. Most of them are of good quality. The explicit reporting of responses to previous review comment was much appreciated. However, there is still a tendency to only provide high level descriptions of plans and achievements in the deliverables. Supporting these successes with more concrete examples, documenting some processes and presenting specifics related to the task at hand would give the reviewers more insight to those reported achievements (see Annex I and section 2.b above for more details).

d. Are the objectives for the coming period(s) i) still relevant and ii) still achievable within the time and resources available to the project? Note that both aspects (i) and (ii) have to be covered in the comments.

#### *Comments*

ad (i)

Objectives for the coming period are still relevant. A prioritization of objectives according to feasibility and impact is recommended (see recommendation 2).

ad (ii)

Objectives are still achievable within the time and resources available to the project though not all relevant project results are expected to be of equal impact.

### 3. RESOURCES and IMPLEMENTATION OF THE PROJECT

- a. To the best of your estimate, have resources used, i.e. personnel resources and other major cost items, been (i) utilized for achieving the progress, (ii) in a manner consistent with the principle of economy, efficiency and effectiveness<sup>1</sup>. Note that both aspects (i) and (ii) have to be covered in the comments. The resources should be examined at the level of work packages and at the level of participants.

#### *Comments*

The annual report document submitted for review (D9.1) relates to the year 2015. No other financials for the overall project DSI-1 or for other partners has been provided as it is still under preparation. Taking this limitation into account:

ad (i)

The project results delivered indicate that resources have been utilized for achieving progress.

ad (ii)

There has been no evidence that resources have not been used in a manner consistent with the principles of economy, efficiency and effectiveness. The funding mechanism which provides funding on a 1-year basis has made it difficult to find skilled technical staff (e.g. developers) and it continues to create risk to a project concerned with developing an infrastructure. The difficulty created consists mainly in a) inability to pay market rates for expensive but valuable technical staff and b) inability to offer a more secure position by being able to offer contracts longer than a year.

- b. If applicable, please comment on large deviations with respect to the planned resources.

#### *Comments*

The annual report document (D9.1) relates to the year 2015. No other financials for the overall project DSI-1 or for other partners has been provided. However, it is understood that no large deviations have occurred.

<sup>1</sup> "The requirements of sound financial management, in particular regarding economy and efficiency refer to the standard of "good housekeeping" in spending public money. Economy can be understood as minimising the costs of resources used for an activity (input), having regard to the appropriate quality and can be linked to efficiency, which is the relationship between the outputs, in terms of resources used to produce them." Guide to Financial Issues, Article II.20(1).

- c. Do you identify evidence of underperforming beneficiaries, lack of commitment/performance or change of interest of any beneficiaries? Do you identify any beneficiaries with no visible contribution to the project in the examined period?

*Comments*

There was little discussion during the review meeting about the commitment and contribution of project partners other than Europeana. At the review meeting there did not seem to be a concern by the consortium.

#### **4. MANAGEMENT and COLLABORATION**

- a. Has the project management been performed as required?

*Comments*

The project management has been performed in a professional and effective way. Overall, good management techniques and tools have been deployed and no particular problems have been identified.

The consortium is still having difficulties finding technical staff because of the short one-year contract terms they are able to offer.

- b. Has the collaboration between the beneficiaries been effective?

*Comments*

Overall, communication and collaboration processes and mechanisms have been effective among the beneficiary partners and the collaboration has been generally effective.

#### **5. POLICY SUPPORT and BROADER IMPACT**

- a. Will the project have an impact on the implementation of the policies it supports?

*Comments on the usefulness/sustainability/scalability/accessibility/usability of the results of the project (results can be for example services, content, specifications, reference implementations, source code, etc.).*

Europeana DSI has contributed to making available materials (e.g. white papers, data models, policies, reference implementations, etc.) that could significantly contribute to policy-making at national and mainly at European level (e.g. Europeana Licensing Framework). In this sense, the project produces results that are of particular usefulness and could have a significant impact on

European digital cultural heritage policies. The impact of projects such as Europeana 280 create high profile examples of the reuse of content which is accessible to the general public and demonstrates the value of Pan-EU collaboration of cultural institutions for increasing impact.

Sustainability of results will largely depend on the sustainability of Europeana. At the moment, sustainability can only be achieved with national and EU funding support.

b. Are the plans for the use and exploitation of results appropriate?

*Comments on the plans of use of results of the consortium as a whole and for individual beneficiaries or groups, if applicable also outside of the consortium*

The shift away from a funded research project mentality to a more market-driven approach has been made which puts the project in a better position to make use of the results of the project and enable third-party SMEs use cultural heritage materials. However, there is still a lot of work to be done especially in terms of data quality and facilitating aggregators via user-friendly tools. Europeana could be in the position to provide technical expertise that the GLAM sector generally lacks. Revenue opportunities may emerge from professional services and providing technical infrastructure. There is already an amount of engagement with the results via the various web portals which could be considered a form of exploitation.

c. Have the beneficiaries disseminated project results and information adequately?

*Comments on dissemination and exploitation activities*

The project has organized a number of successful communication activities (e.g. Europeana 280 campaign) and has helped to co-organize a number of high-profile events that have been successful in disseminating various results to the relevant stakeholders. More detailed comments can be found in section 2b above.

d. Are potential users and other stakeholders (also outside the consortium) suitably involved (if applicable)?

*Comments*

Europeana DSI is interacting with numerous categories of stakeholders outside of the project Consortium and is paying efforts to involve them in many different ways in producing the corresponding project results. The Europeana activities related to coordinating and interacting with external stakeholders are, in some cases, particularly impactful (e.g. Europeana Network, DPLA, Creative Commons, and many others).

The project has improved its direct interaction and engagement with end users and re-users through the organisation of challenges, surveys, collections campaigns. This activity could be further enhanced especially with respect to its aggregation partners with the goal to create a continuous effort and action. Such partner-driven involvement could contribute to co-design

new features and/or improving existing elements.

- e. Is the consortium interacting in a satisfactory manner with other related programmes projects or other relevant national/international programmes, standardisation bodies (if relevant)?

*Comments*

Europeana DSI is interacting in a satisfactory manner with many other related projects and programmes, at a European as well as international level. Partnerships with networks like Smart Cities and ENoLL are in progress, with more achievements and activities already planned for the near future. Work on rightsstatements.org with DPLA and Creative Commons should help foster adoption of the developed standards. Increased quality of data and visibility of Europeana should also help the Europeana Data Model.

**6. OTHER ISSUES**

- a. Have policy-related and/or regulatory issues been properly handled (if applicable)?

*Comments*

Policy-related and regulatory issues have been properly handled. The project/Europeana Foundation is fully aware of relevant issues, but is also greatly contributing to shaping European policies in many areas such as open data, content use and reuse, IPR issues, etc.

- b. Have ethical issues been appropriately handled (if applicable)?

*Comments*

The Consortium is fully aware of relevant ethical and privacy issues.

- c. Have safety issues been properly handled (if applicable)?

*Comments*

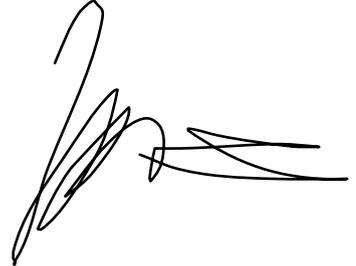
N/A

Names of the experts: IOANNA TSAKOU MARIO CHIESA JARRED MCGINNIS

Date: 28/07/2016

[Redacted]

[Redacted]  
Signature(s):

## ANNEX I to the review report

### Assessment of deliverables

<b>DELIVERABLES LIST STATUS</b>			
<b>No.</b>	<b>Title</b>	<b>Status (Approve<sup>2</sup>/R eject<sup>3</sup>)</b>	<b>Comment<sup>4</sup></b>
D1.1	Work and implementation plan to innovate the aggregation infrastructure	Approve	Useful document and good high level plan. The document could have included more concrete specifics.
D1.2	Amount of data partners and outreach to major institutions	Approve	Good document.
D3.1	Creative industries reach report 2016	Approve	A good overview of the domain, activities done and key findings. Some external links could be introduced better with expanded internal sections.
D3.4	Plan for Europeana's distribution in the tourism market	Approve	A good analysis of the tourism landscape and the potential positioning of Europeana in it.
D4.1	Europeana DSI 2016 business plan	Approve	Good high-level plan but mostly a promotional document that lacked specific milestones
D4.2	Assessment report on needs for intelligence on digital heritage collections and services	Approve	Although the report on ENUMERATE is an acceptable deliverable, it would have been improved by including more UX-related indicators.
D4.3	Analysis report of new statistical content 2016	Approve	
D6.3	Portal	Approve	Direct link to the portal

<sup>2</sup> In whole or in part or approval subject to certain conditions

<sup>3</sup> Appropriate justification needs to be given

<sup>4</sup> Comments are mandatory if deliverables are only accepted in part, or approval subject to certain conditions, or if they are rejected. In case of suspected plagiarism, details should be given here and it should be mentioned under 2.c. of the report.

D6.4	Three thematic channels	Approve	Brief document introducing the online channels
D9.1	Annual report of the Europeana foundation	Approve	A nicely produced and informative promotional document that was a bit too high level.
D9.2	Progress report	Approve	
D9.3	Final technical report 2016	Approve	Excellent general overview and review document.

