# MINERVA - IST-2001-35461

| | |
|---|---|
| **Deliverable Number** | D2.2 |
| **Deliverable Title** | Second report on a benchmarking framework |
| **Deliverable Type** | Report |
| **Responsible Partner** | University of Helsinki |
| **Status** | Public |
| **Submission Date** | August 2003 |
| **Notes** | None |

**Contents**



# Digitisation of cultural heritage

## Introduction

### Objectives

The objectives of this deliverable - the Benchmarking Report – Second Edition - are to

- illustrate the benchmarking framework, the actions and the results of the working group
- act as a summary of the online benchmarking reports until 31st July 2003 and describe the online benchmarking tool
- suggest the way forward in the Phase III of benchmarking

- The first edition of this report was presented at the National Representatives Group meeting in Corfu on 26th June 2003.

## 1. Benchmarking and objectives

How to find good practices in digitisation? How and where to find benchmarking partners for digitisation projects and programmes? These have been the key guidelines in the work accomplished by the Minerva Working Group 2, Benchmarking framework. We also kept in mind the need for information about the digitisation initiatives in Europe.

The responsible partner for the Benchmarking Working Group was Centre for Microfilming and Conservation/National Library of Finland - Helsinki University Library, also responsible for the digitisation activities and programmes in the National Library. The leader of the working group has been Majken Bremer-Laamanen, Head of Preservation and Digitisation. Minna Kaukonen has been Project Coordinator. (Annex 1: Benchmarking Framework, European Working Group and the Finnish Benchmarking Group)

Benchmarking?

Benchmarking means an on-going search for best practices that produce superior performance when adapted and implemented in your own organisation (Bogan-English 1994). Your own performance can be improved by comparing yourself with others and by learning from the good practices of others - although this means that first you have to admit that someone else can do things better than you can. Benchmarking has five phases:

1. to describe the current situation and to choose the process to be benchmarked
2. to find a benchmarking partner and compare experiences
3. to analyse the differences in performance
4. to set a new goal
5. to implement, evaluate and develop

WP 2 has concentrated on the phases 1 and 2. The last steps are naturally up to the institutions and initiatives themselves!

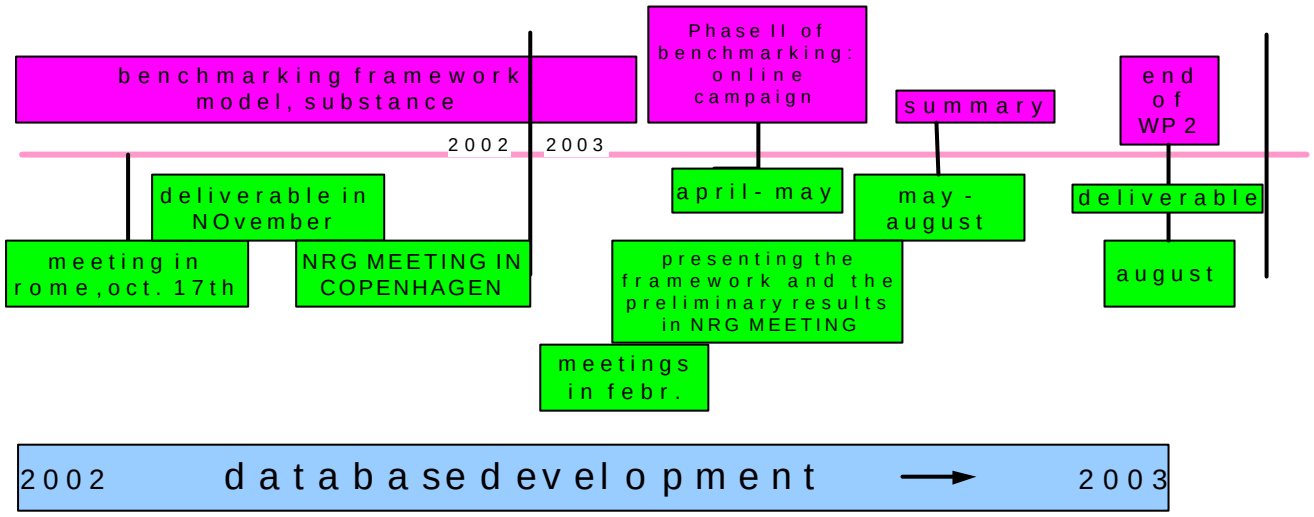
Benchmarking is not a throw-away quality management tool but has inherent the idea of continuity and the improvement of performance over the long term. Good practices are tightly connected with benchmarking. The benchmarking partners chosen should be organisations which are on a slightly higher performance level than yours. In addition they should employ good practices. By implementing in your own organisation what you have learnt in the benchmarking process you are creating good practices, yourself. Learning and implementation are essential. In the end, you define what good practice means through your own eyes. Benchmarking is an active process and not just comparing benchmarks: facts and measurements.

The final aims and results of Minerva WP 2 Benchmarking framework are:

- A self assessment online form, which contains both a quantitative and a qualitative part based on the key questions for benchmarking and good practices
- Helping initiatives to discover good practices to be implemented in their own organisation
  - By using the Minerva database and/or
  - By finding suitable benchmarking partners

## 2. Actions and Results

*The schedule of WP 2 from autumn 2002 to autumn 2003*




At the beginning of Minerva WP 2 in summer 2002, the eEurope benchmarking model and the answers – the accomplishments of Phase I of Benchmarking in Europe - were thoroughly analysed. The benchmark questionnaire was a good basis for the work of the Minerva Benchmarking WP, Phase II of Benchmarking in Europe. Nevertheless, it consisted of questions which partly apply to different levels of establishment. It wasn't easy to identify yourself with the questions. It was also perceived that policy, programme and project level need tailored questionnaires, because:

- not all the countries have a policy although they have programmes and projects
- the audience of the questionnaires is quite different.

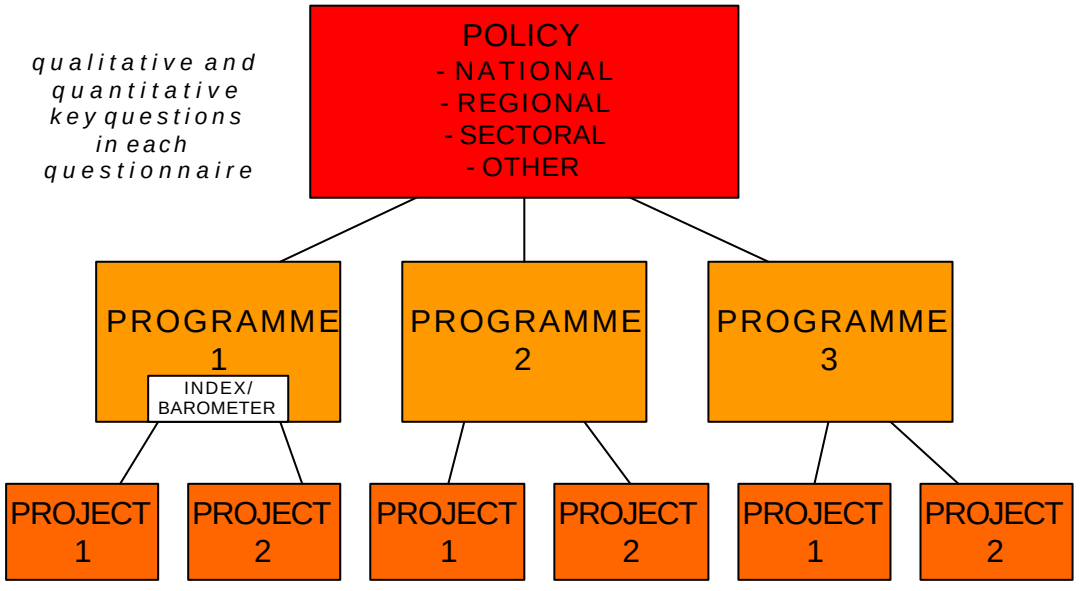
The Phase I of benchmarking in Europe ended with the first national benchmarking reports in March 2003 and was thus partly parallel with the Phase II development. The overview of the national benchmarking reports is available online on the website of Minerva (www.minervaeurope.org). Some of the answers included in these national reports have also been included in the Minerva database by the respective countries.

The background for the decision of applying the dynamic approach and an online system in Phase II benchmarking is the following:

- it is possible to concentrate on the key processes / questions instead of all the possible processes in an organisation
- exact answers to equivalent questions (both quantitative questions = facts, measurement, benchmarks and qualitative questions = self assessment).

The online system has an on-going and self-supporting character. The online forms can be filled in continuously and good practices can be implemented continuously, as benchmarking suggests. It is also essential that good practice is defined by the institution, what it regards as good practice for itself.

The Phase I questionnaire was slightly modified by Minerva WP 2 during autumn 2002. It was also developed further towards an online web interface, because an online system was estimated to give more opportunities than collecting information in paper format. Different search functions could be added. It could be possible to look for information according to country, sector (museum, archive, library…), source object (printed works, images, sound recordings…) and so on. The combining of questions – for instance target audience and user statistics or the size of budget and the amount of private/public funding – could also be possible. The information could automatically cumulate upwards, from projects to programmes, from programmes to policies, according to the hierarchy of levels. The online system could be used in the future benchmarking work because it would ease the process of finding benchmarking partners by enabling browsing the information of digitisation initiatives.




*The hierarchical relationships of the online forms for different levels*

The database development proceeded parallel with the content development. The draft was created during autumn 2002.

Organisation

To underline the close relationship of benchmarking and good practices MINERVA/WP 2 (benchmarking) and WP 6 (good practices) had a joint organisation, especially from late spring to early autumn in 2002. On top was a Ministerial Board with representation of the Ministries of Culture in Finland and Sweden. The actual work has been carried out by national project groups, one in Finland (benchmarking) and one in Sweden (good practices). All matters concerning the relations between the two work packages were handled by a Finnish-Swedish coordination group which met regularly or in meetings over the phone.

Finland and Sweden worked until the meeting in Rome in October 2002 to prepare the draft background position for benchmarking, and after the discussion in Rome the rest of the Member States were fully involved in the activities. There were many meetings during autumn 2002. The European benchmarking working group with members from all the partner countries was created. Some countries also have national benchmarking groups. Co-operation with the other WPs has been active during the life cycle of WP 2.

Phase II of Benchmarking in 2003

WP 2 had the responsibility for carrying out the implementation of the Phase II of benchmarking in Europe. The work done in 2002 has been described above. In 2003 Phase II included the following:

- meeting in London on 20th January 2003
  - draft for the timetable and the detailed workplan for the spring 2003 (annex 2)
  - consensus in a smaller group on the way forward during the Greek European Union presidency, as the NRG meeting in Copenhagen in December 2002 had suggested
- we did one test of the questionnaires before the campaign at European level
  - a content analysis of the questionnaires together with memory organisations which have different types of users, contents, source objects and processes
  - the test included museums, archives and libraries and was carried out in Finland in January 2003
- two meetings for the Minerva partners and the NRG representatives in February 2003
  - questionnaires modified from Phase I by WP 2 approved
  - demo of the database was approved as the basis for further development (the features it included: good practice links, explanations, definitions and so on )

The timeframe for the implementation of Phase II, database development and the test was very narrow in spring 2003, after the Phase II draft had been ready in 2002 and approved in London in January 2003.

- questionnaires transformed into a database format, database ready in April 2003
- meeting in Rome on the 20th March 2003
  - national benchmarking reports and an overview
- European benchmarking online campaign in April-May 2003
  - summarising the results in May-August
  - presenting the first results and the benchmarking framework in the NRG meeting in Greece in June 2003
- final deliverable of WP 2, Benchmarking Framework, in August 2003.

National benchmarking reports

The NRG representatives were asked to write national benchmarking reports by 7th March 2003. An overview of the reports (available on the Minerva website www.minervaeurope.org) was presented at the review of Minerva on 21st March 2003. The countries which wrote the national benchmarking report were: Belgium – Flemish, Finland, France, Greece, Italy, the Netherlands, Sweden and the UK.

The NRG representatives were given guidelines by WP 2 for writing the reports. (Annex 3)

The second editions of the national benchmarking reports were asked to be written for the NRG meeting in Corfu on 26th June 2003. Each NRG member had been allocated a country code which she/he could have used in the database for looking at the individual answers from his/her country. Only Finland and the Netherlands completed this report.

Phase III of Benchmarking

The Minerva benchmarking working group produced a part of the Minerva knowledge base. In Phase III of benchmarking in Europe the knowledge base will be extended to include inventories of digitisation projects, website quality issues, more good practices and competence centres. It is probable that some countries might still choose using their national online systems or the questionnaire in paper format for benchmarking. In any case, when the knowledge base will be ready, it is likely that the number of visitors soon increases. The knowledge base will offer various search alternatives and a lot of information on digitisation. The responsible partner for Phase III knowledge base development is Italy.

The online benchmarking campaign in April – May 2003

The aim of the campaign

- to collect information about the digitisation initiatives in Europe and for benchmarking purposes in Europe
- to give guidance of good practices.

In order to facilitate the work of project, programme and policy managers working on digitisation iniatitives and to collect information for follow-up, the Minerva benchmarking online database was launched on 14th April 2003.

The objective of WP 2 was to have the relevant questions for each phase (start, midway, end) and level (project, programme, policy). In the online benchmarking campaign the start and midway periods have been combined because of the few questions for midway projects at this stage.

*Visibility for digitisation activities*

All the Member States had the possibility to give visibility to their projects and programmes as the results are available on the Internet via the Minerva pages. As many as 85.7 % of the initiatives were willing to have their general information public! This makes benchmarking possible as the projects and their organisations – potential benchmarking partners for other initiatives – can easily be reached based on the available information on the web.

The NRG representatives had an active role in spreading information about the campaign and encouraging the organisations to answer the questionnaires in their country. The respondents include national institutions, universities as well as other important institutions.

*Answers*

The campaign was based on population: 1 online response was required / 1 million inhabitants. The maximum number of online responses was limited to 50 in the original Minerva partners. Others (newer partners of Minerva) could have less. However, few Member States reached these thresholds (see the table in Conclusions).

By the 31st July 2003 there were 105 answered project forms and 5 programme and policy forms in the Minerva database system. The system records the registrations by institution (there can be from 0 to n projects, programmes or policies connected to one registration in the database) and they were divided in the following manner:

| | |
|---|---|
| Austria | 6 |
| Belgium (Flemish) | 4 |
| Belgium (French) | 1 |
| Denmark | 1 |
| Finland | 22 |
| France | 0 |
| *(6 paper forms/projects)* | |
| Germany | 1 |
| Greece | 2 |

| | |
|---|---|
| Ireland | 0 |
| Italy | 15 |
| Luxembourg | 0 |
| Netherlands | 1 |
| Portugal | 8 |
| Spain | 3 |
| Sweden | 14 |
| United Kingdom | 45 |
| Other (United States, Australia, Israel) | 3 |
| total | 126 |

Some respondents only filled in the registration part in the database. Some only filled in the project/programme/policy form or parts of it without the registration. There are also incomplete forms with for instance the first part answered and the rest left blank. The number of the more complete answers is about 80. More answers will come in the future. For instance the Netherlands was willing to send information about more Dutch initiatives. Due to the short time of the campaign it was not possible to transfer all their data at this point.

It is interesting that almost all the answers came from projects. Programme and policy managers have not filled in the forms so far. This is an objective for the future.

*Online forms*

The Index page of the database shows 3 levels of initiatives. The respondent can fill in information about projects, programmes and/or policies.

The actual online forms have been divided into two parts: general information and self assessment. General information has questions about source objects, funding, productivity, user statistics and so on. Self assessment is further divided into the management of digitisation iniatiatives and the digitisation process. In the self assessment part the respondent evaluates the performance of its project / programme against three statements. They represent basic, good and best practice. The database includes click-on explanations of the statements and other explanations of the questions. There are definitions of the terminology as well. Based on the answers the database will afterwards provide the respondent with information about the performance of the initiative in the different fields of digitisation.

The policy form differs somewhat from the others and is more descriptive because it is not relevant to evaluate policies according to basic-good-best categories. The questions asked about policies are mainly yes/no questions with open fields for comments. The data to be gathered can provide useful background information for the programmes and projects.

Some examples of best practices collected by Sweden (responsible for ‘good practices’ working group within Minerva, accomplished Handbook on Good Practices to be published in 2003) and the UK are linked to the web interface so that the

respondent can check out the good practices while answering the form. Good practice forms a bridge to benchmarking. The system gives the opportunity to get acquainted with good practices or/and to look for benchmarking partners. Both can be good approaches, depending on the situation.

*Reports*

The results of the extensive benchmarking campaign can be seen via http://www.minervaeurope.org/structure/workinggroups/benchmarking/digitquestion.htm (user- and passwords mindemo and mv1731).

The dynamic reports include the answers obtained in the Minerva benchmarking online system since 14th April 2003. Every new form filled in updates the reports. The scales have been created automatically. Individual institutions are not depicted.

It must be stressed that the reports of the qualitative part of the database are based on the subjective evaluation of the respondents, on the self assessment process. Critical attitude is therefore in place. Only the actual benchmarking process, with benchmarking partners, can show the real performance level of institutions. This feedback will hopefully also be visible in the knowledge bank later on. The current reports are valuable nevertheless because they show trends in the digitisation field in a certain country, for example, and can be used as reference material. It is possible to evaluate the areas where more education or support is needed. (See Conclusions.) The reports of the quantitative part tell for instance about the amount of projects in different sectors, in the European Union or in the Member States, the funding of digitisation projects in different sectors and the reasons for digitisation activities.

The basic reports

- show the situation in the whole of EU
- no distinction between the initiatives in the starting phase or in the ending phase (the questions have been partly divided depending on the status of the initiative).

The list of the questions included in a title can be obtained by clicking on it (project, digitisation productivity plan and so on). The summary page of a question appears by clicking on it. Combinations of variables are marked with a + (for instance original source objects + selection criteria).

You can make searches by

1. choosing a filter straight away: you are able to limit your search to a certain country/ies or sector/s (museums, archives…) or to both
2. looking at the results question by question and choosing different filters in each of them
3. using the additional filter field (another linked question, for instance original source objects seen through the selection criteria): you can tick all the relevant boxes at once and make the search with either search button.

For instance by choosing all the Nordic countries and 'museums' you can look at a chart and a table, based on the answers of all the museums that have filled in the online form in these countries.

The tables

total of answers = total of the amount of alternatives chosen (can exceed 100 % when multiple choice available)
total of questionnaires = questionnaires or sections of questionnaires (productivity) in which current question answered (= total, when only one choice available)

The summary of reports

The examples of the reports in this deliverable are all taken from the projects, because the number of answers in programmes and policies was so small. The total of answers varies from question to question due to blank answers. The total of questionnaires has been left out of the tables in this text if it has been the same as the amount of answers.

The following examples handle the situation either in the whole of the European Union, the interdependencies between the variables included, or in some individual countries, compared to the EU. Besides the graphs and the tables, the comments of the respondents have been taken into account in this report. These comments as such are not public information at the moment. There are more questions in the online form than are depicted in the reports which in this phase only include the most central questions.

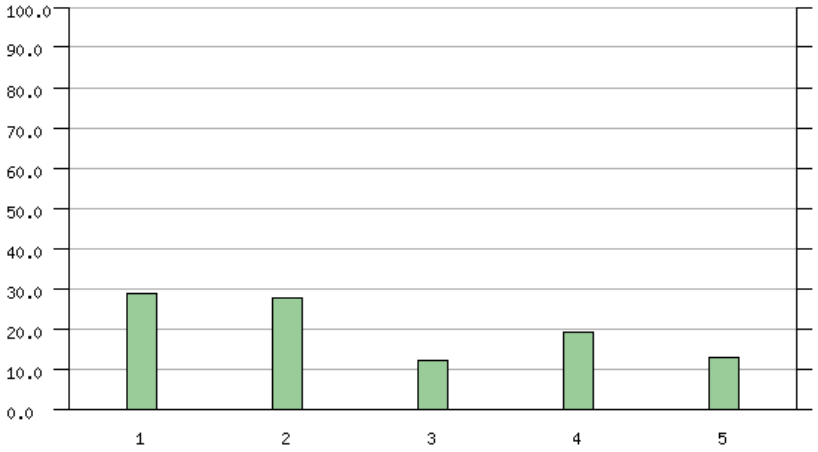
The first edition of the benchmarking report in June 2003 included all the answers in the benchmarking database. The small amount of test data has now been removed. It distorted the reports to a minor degree (max. 2-3 %).

# DATABASE: QUANTITATIVE PART

## Projects
## 1. General information

### Institution

The number of institutions include all the registrations in the system. Archives and libraries were the most active in filling in the forms. The other institutions (16 registrations) were for instance universities and other research institutes, regional or local authorities or agencies.

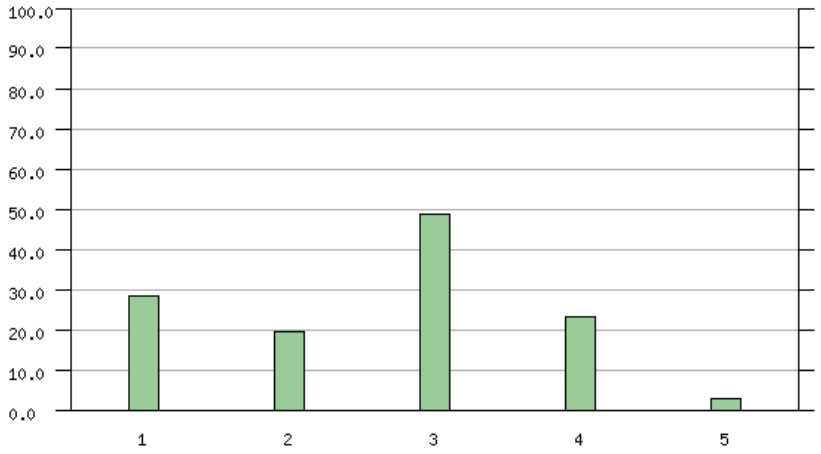



| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Archive | 36 | 28.6 % |
| 2 | Library | 35 | 27.8 % |
| 3 | Ministry | 15 | 11.9 % |
| 4 | Museum | 24 | 19.0 % |
| 5 | Other | 16 | 12.7 % |
| | TOTAL OF ANSWERS | 126 | 100.0 % |

## DATABASE: QUANTITATIVE PART, A. PROJECT

### Main scope(s) of project

In this question it was possible to choose multiple alternatives. That is why the total percentage exceeds 100 %. National was the most popular scope and regional the least popular. The other scopes mentioned included for instance internal aspects.



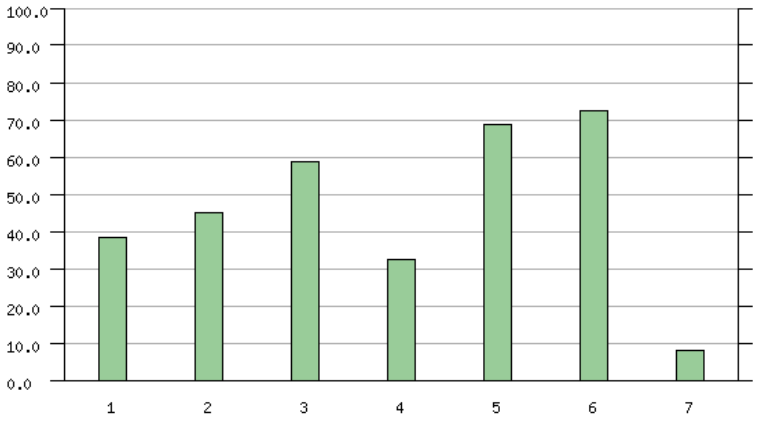

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Sectoral | 29 | 28.2 % |
| 2 | Regional | 20 | 19.4 % |
| 3 | National | 50 | 48.5 % |
| 4 | International | 24 | 23.3 % |
| 5 | Other | 3 | 2.9 % |
| | TOTAL OF ANSWERS | 126 | |
| | TOTAL OF QUESTIONNAIRES | 103 | |

## DATABASE: QUANTITATIVE PART, A. PROJECT

### Target audience/users

Academic research and the general public were the main target audience groups, with around 70 % each. Leisure and tourism was the smallest target audience group. In the group other commercial companies were one of the most common target groups as well as certain segments of the general public.

**Using the filter:** When life-long learning was the target audience, in 83.3 % of the projects the number of visitors was under 1.8 million. The highest scale of visitors mentioned was 5.4 to 6 million.

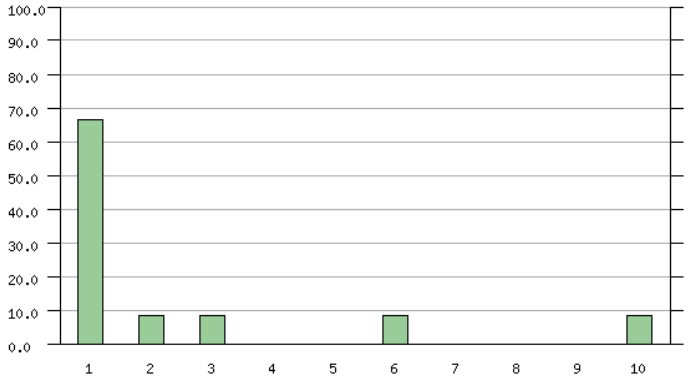



| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Formal education | 39 | 38.2 % |
| 2 | Life-long learning | 46 | 45.1 % |
| 3 | Professional | 60 | 58.8 % |
| 4 | Leisure / tourism | 33 | 32.4 % |
| 5 | Academic research | 70 | 68.6 % |
| 6 | General public | 74 | 72.5 % |
| 7 | Other | 8 | 7.8 % |
| | TOTAL OF ANSWERS | 330 | |
| | TOTAL OF QUESTIONNAIRES | 102 | |

## Visitors + Target audience

Choose: **Target audience/users** to filter reports

- ☐ Formal education
- ☑ Life-long learning
- ☐ Professional
- ☐ Leisure / tourism
- ☐ Academic research
- ☐ General public
- ☐ Other



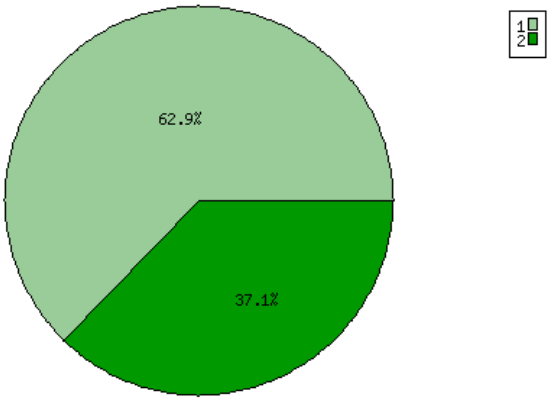

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | 0 - 600000 | 8 | 66.7 % |
| 2 | >600000 - 1200000 | 1 | 8.3 % |
| 3 | >1200000 - 1800000 | 1 | 8.3 % |
| 4 | >1800000 - 2400000 | 0 | 0.0 % |
| 5 | >2400000 - 3000000 | 0 | 0.0 % |
| 6 | >3000000 - 3600000 | 1 | 8.3 % |
| 7 | >3600000 - 4200000 | 0 | 0.0 % |
| 8 | >4200000 - 4800000 | 0 | 0.0 % |
| 9 | >4800000 - 5400000 | 0 | 0.0 % |
| 10 | >5400000 - 6000000 | 1 | 8.3 % |

| | | |
|---|---|---|
| TOTAL OF ANSWERS | 12 | 100.0 % |

## DATABASE: QUANTITATIVE PART, A. PROJECT

### Duration

About two thirds of the projects were in the starting/on-going phase and approximately one third included projects which were already finished. The on-going projects can later be asked to fill in information about their final performance. This would result in two versions of the answers in the knowledge base: the starting phase and the ending phase.




| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Start | 61 | 62.9 % |
| 2 | End | 36 | 37.1 % |
| | TOTAL OF ANSWERS | 97 | 100.0 % |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Original source objects

The source object alternatives are arranged in titles (for instance printed works) and subtitles (books, articles, newspapers…). The most common titles were printed works, manuscripts, images and sound recordings, all with the percentage of around 30. Numerical / statistical data and microform were the least digitised source objects.
**Using the filter:** When maps, both hand-drawn and printed, were the source objects, the type of the digital product was mostly image (85.1 %). Yet the types also included text (16.7 %), sound (13.2 %), moving picture (4.4 %) and 3D objects/panorama (3.5 %). Multiple choice was available.

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | **Printed works** | 24 | 27.0 % |
| 2 | Books | 22 | 24.7 % |
| 3 | Articles | 17 | 19.1 % |
| 4 | Newspapers | 14 | 15.7 % |
| 5 | Serials | 7 | 7.9 % |
| 6 | Ephemeral material | 10 | 11.2 % |
| 7 | Yearbooks | 8 | 9.0 % |
| 8 | **Manuscripts** | 24 | 27.0 % |
| 9 | **Bibliographic records** | 11 | 12.4 % |
| 10 | **Numerical / statistical data** | 4 | 4.5 % |
| 11 | **Archival records** | 16 | 18.0 % |
| 12 | Containing personal data | 6 | 6.7 % |
| 13 | Without personal data | 12 | 13.5 % |
| 14 | **Notes, coins and medals** | 9 | 10.1 % |
| 15 | **Maps** | 23 | 25.8 % |
| 16 | Printed maps | 16 | 18.0 % |
| 17 | Hand-drawn | 12 | 13.5 % |
| 18 | **Moving image** | 18 | 20.2 % |
| 19 | **Images** | 30 | 33.7 % |
| 20 | Printed images | 19 | 21.3 % |

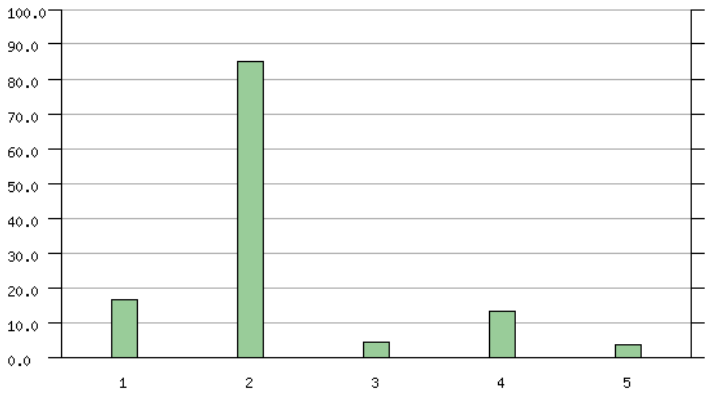
| | | | |
|---|---|---|---|
| 21 | Drawings | 22 | 24.7 % |
| 22 | Engravings | 17 | 19.1 % |
| 23 | Lithographs | 13 | 14.6 % |
| 24 | Illustrations | 21 | 23.6 % |
| 25 | Photograps | 31 | 34.8 % |
| 26 | **Physical objects** | 17 | 19.1 % |
| 27 | Paintings | 15 | 16.9 % |
| 28 | Cultural historical | 10 | 11.2 % |
| 29 | Sculptures | 9 | 10.1 % |
| 30 | Arts and crafts | 10 | 11.2 % |
| 31 | Textiles | 9 | 10.1 % |
| 32 | Installations | 3 | 3.4 % |
| 33 | Environmental art | 2 | 2.2 % |
| 34 | **Sound recordings** | 27 | 30.3 % |
| 35 | **Micro form** | 1 | 1.1 % |
| 36 | **Archeological sites** | 8 | 9.0 % |
| 37 | **Other** | 5 | 5.6 % |
| | TOTAL OF ANSWERS | 522 | |
| | TOTAL OF QUESTIONNAIRES | 89 | |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Type of digital product + Original source objects

Choose: **Original source objects** to filter reports

- ☐ **Printed works**
- ☐ Books
- ☐ Articles
- ☐ Newspapers
- ☐ Serials
- ☐ Ephemeral material
- ☐ Yearbooks
- ☐ **Manuscripts**
- ☐ **Bibliographic records**
- ☐ **Numerical / statistical data**
- ☐ **Archival records**
- ☐ Containing personal data
- ☐ Without personal data
- ☐ **Notes, coins and medals**
- ☑ **Maps**
- ☑ Printed maps
- ☑ Hand-drawn



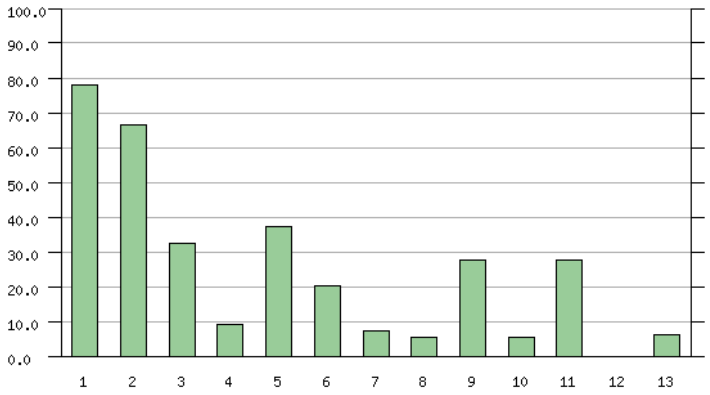
## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Text (or OCR) | 19 | 16.7 % |
| 2 | image | 97 | 85.1 % |
| 3 | moving picture | 5 | 4.4 % |
| 4 | sound | 15 | 13.2 % |
| 5 | 3D Objects/Panorama | 4 | 3.5 % |
| | TOTAL OF ANSWERS | 140 | |
| | TOTAL OF QUESTIONNAIRES | 114 | |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Selection criteria

Access (77.9 %) and scholarly value (66.4 %) were the most frequent selection criteria. Around 70 % of the projects had one or both of these as their criteria. PR issues, saving space and preservation were the least common selection criteria.
**Using the filter:** When short-term and PR issues were the selection criteria, the most digitised source objects were printed works, maps (instead of manuscripts in the overall results), images and sound recordings. The least digitised source objects were notes, coins and medals (instead of numerical/statistical data in the overall results) and micro forms. When developing new services was the selection criterion, the mode of access was mostly the Internet including databases (8 %). The second most frequent mode was the Intranet (13.7 %). The least used mode of access was the Extranet (2.7 %). The mode other was explained to be for instance digital tape or a workstation.




| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Access | 169 | 77.9 % |
| 2 | Scholarly value | 144 | 66.4 % |
| 3 | Critical mass | 70 | 32.3 % |
| 4 | Monetary value | 20 | 9.2 % |
| 5 | Institutional needs | 81 | 37.3 % |
| 6 | Easy to digitise | 44 | 20.3 % |
| 7 | Short-term issues | 16 | 7.4 % |
| 8 | PR issues | 12 | 5.5 % |
| 9 | Developing new services | 60 | 27.6 % |

| | | | |
|---|---|---|---|
| 10 | Saving space | 12 | 5.5 % |
| 11 | Digital surrogate / replacement | 60 | 27.6 % |
| 12 | Preservation | 0 | 0.0 % |
| 13 | Other | 13 | 6.0 % |
| | TOTAL OF ANSWERS | 701 | |
| | TOTAL OF QUESTIONNAIRES | 217 | |

**Original source objects + Selection criteria**

Choose: **Selection criteria** to filter reports

- ☐ Access
- ☐ Scholarly value
- ☐ Critical mass
- ☐ Monetary value
- ☐ Institutional needs
- ☐ Easy to digitise
- ☑ Short-term issues
- ☑ PR issues
- ☐ Developing new services
- ☐ Saving space
- ☐ Digital surrogate / replacement
- ☐ Preservation
- ☐ Other

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | **Printed works** | 4 | 36.4 % |
| 2 | Books | 3 | 27.3 % |
| 3 | Articles | 2 | 18.2 % |
| 4 | Newspapers | 3 | 27.3 % |
| 5 | Serials | 1 | 9.1 % |
| 6 | Ephemeral material | 2 | 18.2 % |
| 7 | Yearbooks | 2 | 18.2 % |
| 8 | **Manuscripts** | 3 | 27.3 % |
| 9 | **Bibliographic records** | 3 | 27.3 % |
| 10 | **Numerical / statistical data** | 2 | 18.2 % |
| 11 | **Archival records** | 2 | 18.2 % |
| 12 | Containing personal data | 1 | 9.1 % |
| 13 | Without personal data | 2 | 18.2 % |
| 14 | **Notes, coins and medals** | 0 | 0.0 % |
| 15 | **Maps** | 4 | 36.4 % |
| 16 | Printed maps | 5 | 45.5 % |
| 17 | Hand-drawn | 1 | 9.1 % |
| 18 | **Moving image** | 3 | 27.3 % |
| 19 | **Images** | 6 | 54.5 % |
| 20 | Printed images | 3 | 27.3 % |
| 21 | Drawings | 3 | 27.3 % |
| 22 | Engravings | 1 | 9.1 % |
| 23 | Lithographs | 0 | 0.0 % |
| 24 | Illustrations | 2 | 18.2 % |
| 25 | Photograps | 4 | 36.4 % |
| 26 | **Physical objects** | 2 | 18.2 % |
| 27 | Paintings | 2 | 18.2 % |

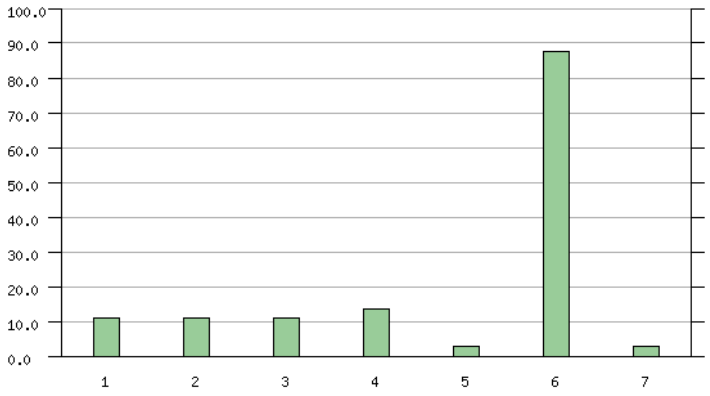
| | | | |
|---|---|---|---|
| 28 | Cultural historical | 0 | 0.0 % |
| 29 | Sculptures | 0 | 0.0 % |
| 30 | Arts and crafts | 0 | 0.0 % |
| 31 | Textiles | 0 | 0.0 % |
| 32 | Installations | 0 | 0.0 % |
| 33 | Environmental art | 0 | 0.0 % |
| 34 | **Sound recordings** | 4 | 36.4 % |
| 35 | **Micro form** | 0 | 0.0 % |
| 36 | **Archeological sites** | 1 | 9.1 % |
| 37 | **Other** | 0 | 0.0 % |
| | TOTAL OF ANSWERS | 71 | |
| | TOTAL OF QUESTIONNAIRES | 11 | |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Mode of access + Selection criteria

Choose: **Selection criteria** to filter reports

- ☐ Access
- ☐ Scholarly value
- ☐ Critical mass
- ☐ Monetary value
- ☐ Institutional needs
- ☐ Easy to digitise
- ☐ Short-term issues
- ☐ PR issues
- ☑ Developing new services
- ☐ Saving space
- ☐ Digital surrogate / replacement
- ☐ Preservation
- ☐ Other



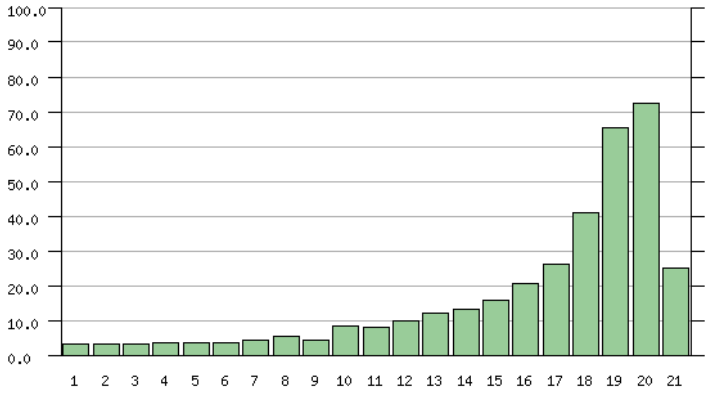
## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | Local | 8 | 11.0 % |
| 2 | CD-ROM | 8 | 11.0 % |
| 3 | DVD | 8 | 11.0 % |
| 4 | Intranet | 10 | 13.7 % |
| 5 | Extranet | 2 | 2.7 % |
| 6 | Internet including databases | 64 | 87.7 % |
| 7 | Other | 2 | 2.7 % |
| | TOTAL OF ANSWERS | 102 | |
| | TOTAL OF QUESTIONNAIRES | 73 | |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Centuries / A.D.

The amount of source objects increases in a linear relationship with the centuries (in A. D.). Source objects from the 20th century are the most digitised ones (72.3 % of the projects had this source material). There is considerably less material from B. C. than A. D.



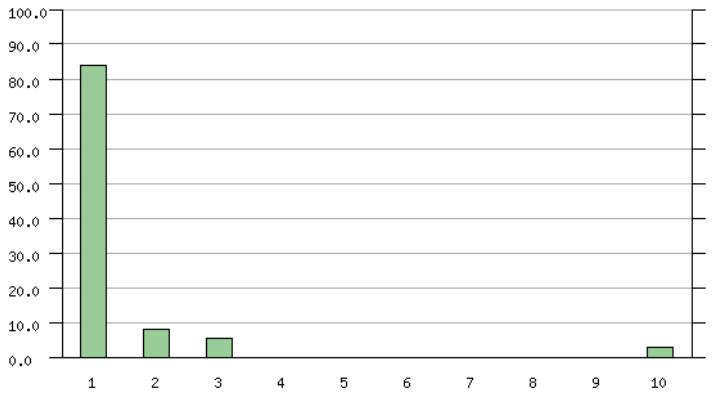

| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | 1 | 6 | 3.1 % |
| 2 | 2 | 6 | 3.1 % |
| 3 | 3 | 6 | 3.1 % |
| 4 | 4 | 7 | 3.7 % |
| 5 | 5 | 7 | 3.7 % |
| 6 | 6 | 7 | 3.7 % |
| 7 | 7 | 8 | 4.2 % |
| 8 | 8 | 10 | 5.2 % |
| 9 | 9 | 8 | 4.2 % |
| 10 | 10 | 16 | 8.4 % |

| | | | |
|---|---|---|---|
| 11 | 11 | 15 | 7.9 % |
| 12 | 12 | 19 | 9.9 % |
| 13 | 13 | 23 | 12.0 % |
| 14 | 14 | 25 | 13.1 % |
| 15 | 15 | 30 | 15.7 % |
| 16 | 16 | 39 | 20.4 % |
| 17 | 17 | 50 | 26.2 % |
| 18 | 18 | 78 | 40.8 % |
| 19 | 19 | 125 | 65.4 % |
| 20 | 20 | 138 | 72.3 % |
| 21 | 21 | 48 | 25.1 % |
| | TOTAL OF ANSWERS | 671 | |
| | TOTAL OF QUESTIONNAIRES | 191 | |

## DATABASE: QUANTITATIVE PART, B. DIGITISATION PRODUCTIVITY PLAN

### Costs of digitisation

Costs of digitisation per source object category usually do not exceed 300 000 €. 83.8 % of the answers are in this scale of costs.

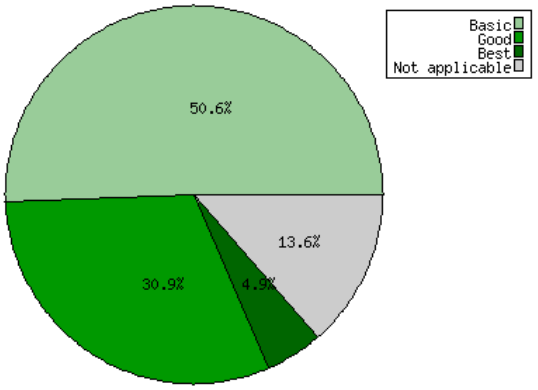



| code | Alternative | Amount of answers | % |
|---|---|---|---|
| 1 | 0 - 300000 | 31 | 83.8 % |
| 2 | >300000 - 600000 | 3 | 8.1 % |
| 3 | >600000 - 900000 | 2 | 5.4 % |
| 4 | >900000 - 1200000 | 0 | 0.0 % |
| 5 | >1200000 - 1500000 | 0 | 0.0 % |
| 6 | >1500000 - 1800000 | 0 | 0.0 % |
| 7 | >1800000 - 2100000 | 0 | 0.0 % |
| 8 | >2100000 - 2400000 | 0 | 0.0 % |
| 9 | >2400000 - 2700000 | 0 | 0.0 % |
| 10 | >2700000 - 3000000 | 1 | 2.7 % |
| | TOTAL OF ANSWERS | 37 | 100.0 % |
| | TOTAL OF QUESTIONNAIRES | 37 | |

## DATABASE: QUANTITATIVE PART, C. FUNDING

### Estimated budget

Half of the projects have an internally generated estimate of their budget. Only 4.9 % base their budget on a large-scale comparative production study.
**Using the filter:** In the library sector almost half of the projects base their budget on small-scale pilot testing and 8.7 conduct a large-scale study.



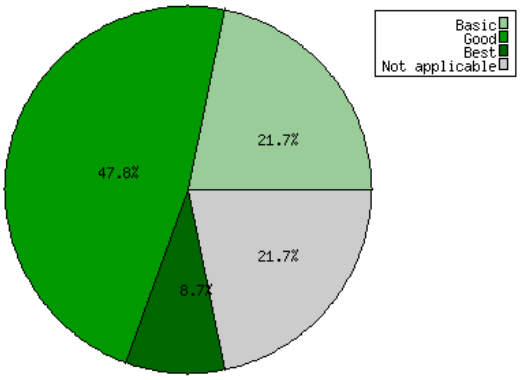

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Internally generated estimate | Basic | 41 | 50.6 % |
| 2 | Based on small-scale pilot testing | Good | 25 | 30.9 % |
| 3 | Based on large scale comparative production study | Best | 4 | 4.9 % |
| 4 | Not applicable in this project | | 11 | 13.6 % |
| | TOTAL OF ANSWERS | | 81 | 100.0 % |

## DATABASE: QUANTITATIVE PART, C. FUNDING

**Estimated budget**

**Sector**

- ☐ **Archive**
- ☑ **Library**
- ☐ **Ministry**
- ☐ **Museum**
- ☐ **Other**



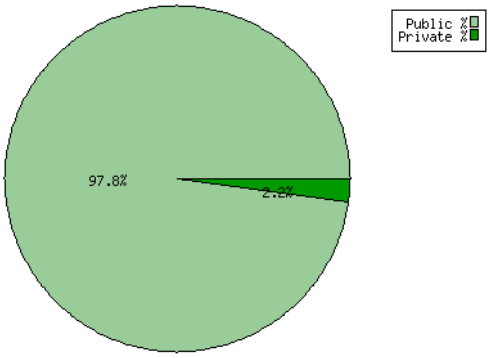

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Internally generated estimate | Basic | 5 | 21.7 % |
| 2 | Based on small-scale pilot testing | Good | 11 | 47.8 % |
| 3 | Based on large scale comparative production study | Best | 2 | 8.7 % |
| 4 | Not applicable in this project | | 5 | 21.7 % |
| | TOTAL OF ANSWERS | | 23 | 100.0 % |

## DATABASE: QUANTITATIVE PART, C. FUNDING

### Internal: Public / Private % + Size of the budget

In average, almost all (97.8 %) the internal funding is public in European projects. The external funding has exactly the same distribution and trends as the internal funding.

**Using the filter:** When the budget of the project is under 50 000 €, the amount of private funding is considerably bigger (24.7 %). There are big differences in the Member States. In the United Kingdom the amount of private funding in all projects, regardless of funding scale, is 88.5 %!

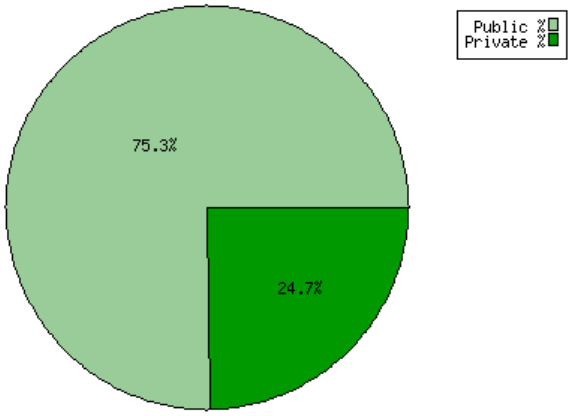



| code | Alternative | | % |
|---|---|---|---|
| 1 | Public % | | 97.8 % |
| 2 | Private % | | 2.2 % |
| | TOTAL OF ANSWERS | | 100.0 % |
| | TOTAL OF QUESTIONNAIRES | 79 | |

## Internal: Public / Private % + Size of the budget

| Choose: **Size of the budget** to filter reports | |
|---|---|
| ☑ | < 50 000 € |
| ☐ | 50 001 - 249 999 € |
| ☐ | 250 000 – 499 999 € |
| ☐ | > 500 000 € |

## DATABASE: QUANTITATIVE PART, C. FUNDING



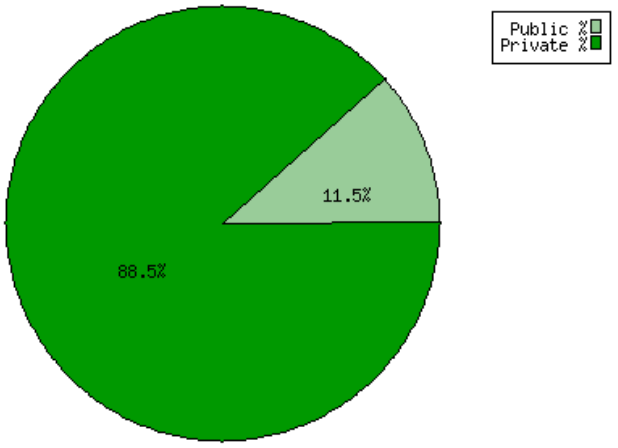

| code | Alternative | | % |
|---|---|---|---|
| 1 | Public % | | 75.3 % |
| 2 | Private % | | 24.7 % |
| | TOTAL OF ANSWERS | | 100.0 % |
| | TOTAL OF QUESTIONNAIRES | 19 | |

### Internal: Public / Private % + Size of the budget

**Country**

- ☐ Austria
- ☐ Belgium (Flemish)
- Belgium (French)
- ☐ Denmark
- ☐ Finland
- France

- [ ] Germany
- [ ] Greece
- [ ] Ireland
- [ ] Italy
- [ ] Luxembourg
- [ ] Netherlands
- [ ] Portugal
- [ ] Spain
- [ ] Sweden
- [x] United Kingdom

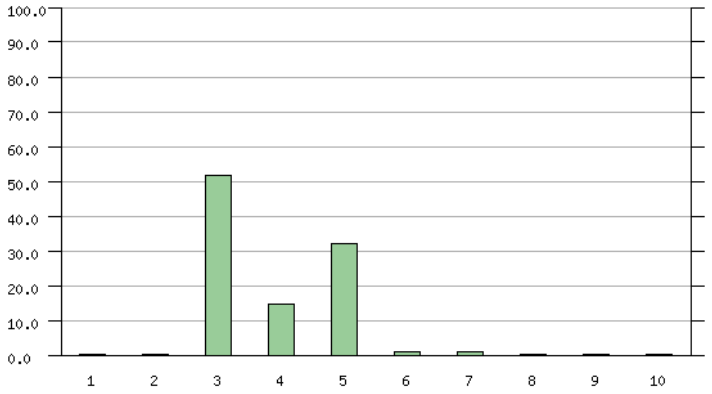



| code | Alternative | | % |
|---|---|---|---|
| 1 | Public % | | 11.5 % |
| 2 | Private % | | 88.5 % |
| | TOTAL OF ANSWERS | | 100.0 % |
| | TOTAL OF QUESTIONNAIRES | 19 | |

**DATABASE: QUANTITATIVE PART, C. FUNDING**

## Expenditure

Hardware for digitisation (51.5 %) and digitisation staffing (32.1 %) are the biggest categories in expenditure. Software takes up 14.6 % of the costs. The rest of the alternatives do not individually exceed 1.0 %. The concentration on hardware can reflect the early stages of development in digitisation. Later on the focus should move towards other issues, such as IPR, software and workflow.

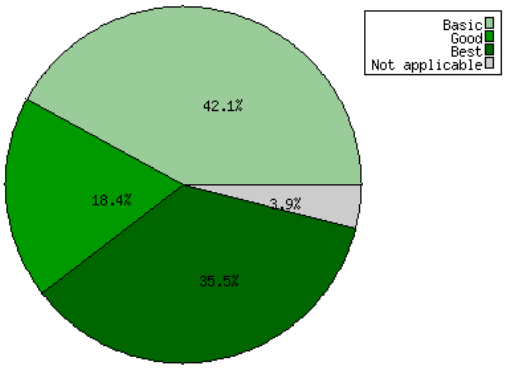



| code | Alternative | | % |
|---|---|---|---|
| 1 | Administration | | 0.2 % |
| 2 | Intellectual Property Rights | | 0.0 % |
| 3 | Hardware for digitisation | | 51.5 % |
| 4 | Software for digitisation | | 14.6 % |
| 5 | Staffing (digitisation) | | 32.1 % |
| 6 | Staffing (other) | | 0.7 % |
| 7 | Outsourced services | | 0.8 % |
| 8 | Digital preservation and maintenance | | 0.0 % |
| 9 | Marketing and promotion | | 0.0 % |
| 10 | Other | | 0.0 % |
| | TOTAL OF ANSWERS | | 100.0 % |
| | TOTAL OF QUESTIONNAIRES | 79 | |

## DATABASE: QUANTITATIVE PART, C. FUNDING

## Sustainable future planned

42.1 % of the projects are on the basic level, ‘reliance in finite funding’, in looking for sustainable future. On the other hand 35.5 % are on the best level, where sustainable development is assured.
**Using the filter:** In the archive sector 61.9 % of the projects rely on finite funding. 19 % look for sustainable future.

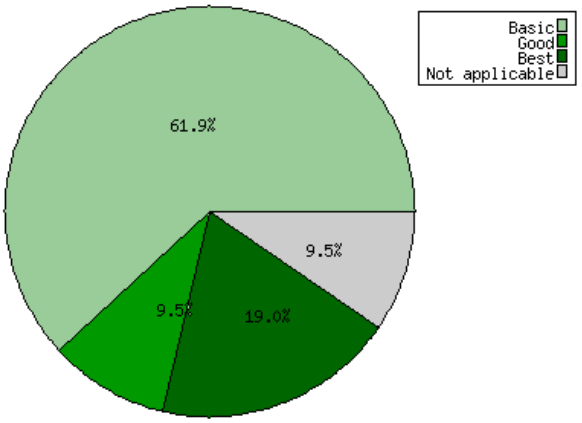



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Reliance on finite funding | Basic | 32 | 42.1 % |
| 2 | Maintenance | Good | 14 | 18.4 % |
| 3 | Sustainable development | Best | 27 | 35.5 % |
| 4 | Not applicable in this project | | 3 | 3.9 % |
| | TOTAL OF ANSWERS | | 76 | 100.0 % |

## Sustainable future planned

**Sector**

- [x] Archive
- [ ] Library
- [ ] Ministry
- [ ] Museum
- [ ] Other




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Reliance on finite funding | Basic | 13 | 61.9 % |
| 2 | Maintenance | Good | 2 | 9.5 % |
| 3 | Sustainable development | Best | 4 | 19.0 % |
| 4 | Not applicable in this project | | 2 | 9.5 % |
| | TOTAL OF ANSWERS | | 21 | 100.0 % |

## DATABASE: QUALITATIVE PART

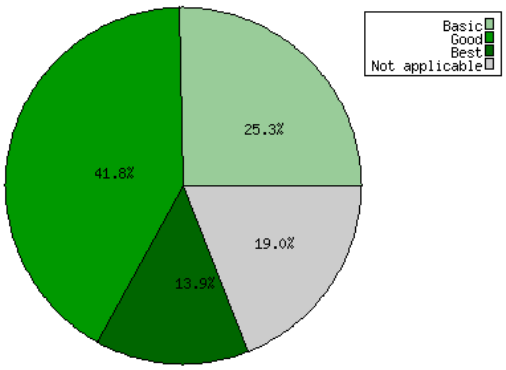
# Projects
# 2. Self Assessment

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Intellectual Property Rights and related issues

'Internal plan is adopted' which is 'good practice' is the most common answer in the IPR question. Almost 20 % have chosen the alternative 'not applicable in this project' which can mean old source objects with no copyright, objects in the public domain or digitisation for preservation purposes. About 25 % of the projects are also on the basic level.

**Using the filter:** In Finland 46.7 % have answered 'not applicable' in this question. This might reflect the fact that most of the source material in Finnish digitisation projects has been outside the copyright that is from the 19th century or older.



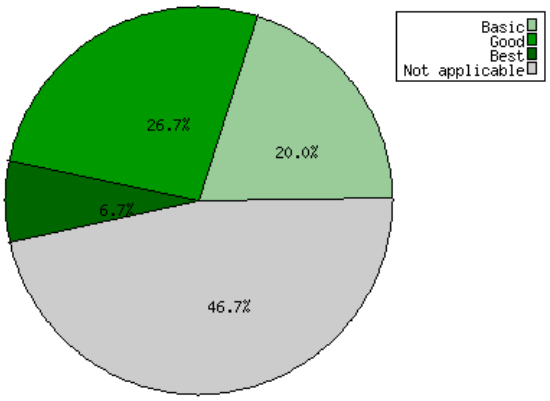

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Working on adoption of a plan | Basic | 20 | 25.3 % |
| 2 | Internal plan adopted | Good | 33 | 41.8 % |
| 3 | Published policy publicly available | Best | 11 | 13.9 % |
| 4 | Not applicable in this project | | 15 | 19.0 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Intellectual Property Rights and related issues

**Country**

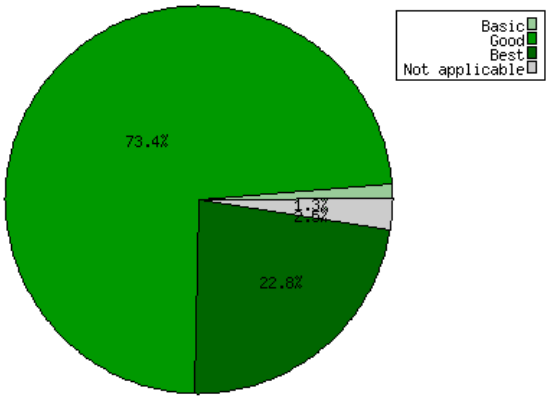
- ☐ Austria
- ☐ Belgium (Flemish)
- Belgium (French)
- ☐ Denmark
- ☑ Finland
- France
- Germany
- ☐ Greece




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Working on adoption of a plan | Basic | 3 | 20.0 % |
| 2 | Internal plan adopted | Good | 4 | 26.7 % |
| 3 | Published policy publicly available | Best | 1 | 6.7 % |
| 4 | Not applicable in this project | | 7 | 46.7 % |
| | TOTAL OF ANSWERS | | 15 | 100.0 % |

## End users' needs

End users' need are taken into account:over 73 % of the projects reach the good level and an additional 22.8 % the best level. End user testing is widely employed and even digitisation on demand. 'Not applicable' means in this question probably more the reluctance to answer than to forget about the end users since there are always end users. Some respondents have mentioned a project in the prototype design phase as a reason for 'not applicable' though.

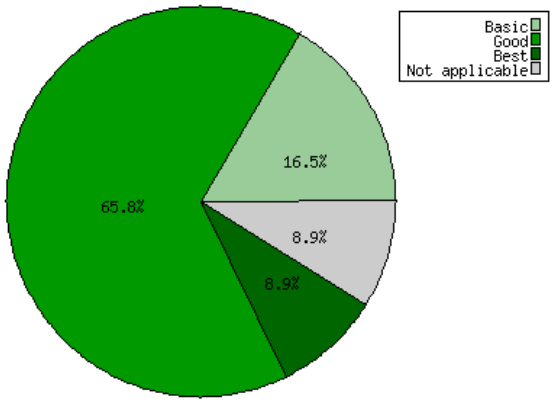



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | No specific interest in end users' needs | Basic | 1 | 1.3 % |
| 2 | End users' needs taken into account | Good | 58 | 73.4 % |
| 3 | End users' needs broadly surveyed | Best | 18 | 22.8 % |
| 4 | Not applicable in this project | | 2 | 2.5 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Digitisation selection

Multiple models can apply in digitisation selection. Few obtain the best level in the online form but the majority are on the good level ‘internal assessment’. There are also projects going on in order to enhance the level of the management of digitisation projects. 16.5 % feel that they are still on the basic level and 8.9 % have found the question difficult to answer / not applicable.



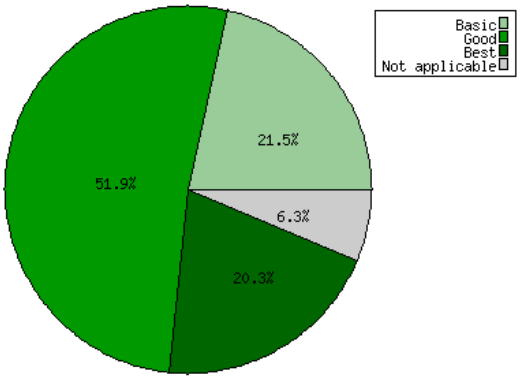

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Informal view | Basic | 13 | 16.5 % |
| 2 | Internal assessment | Good | 52 | 65.8 % |
| 3 | Externally validated | Best | 7 | 8.9 % |
| 4 | Not applicable in this project | | 7 | 8.9 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Communication plan

Most respondents felt that communication (information, marketing, PR…) is important for the digitisation projects – only 6.3 % answered 'not applicable'. 21.5 % are on the basic level and 72.2 % on the good or the best level in communication. Many claimed that answering the e-mail of the users is also an important part of communication. Projects are publicised for instance in conferences and via the web.

**Using the filter:** When the target audience is general public, 25 % of the projects have no specific communication plan early on. The same amount have communication as an essential part of their project, and are on the best level.



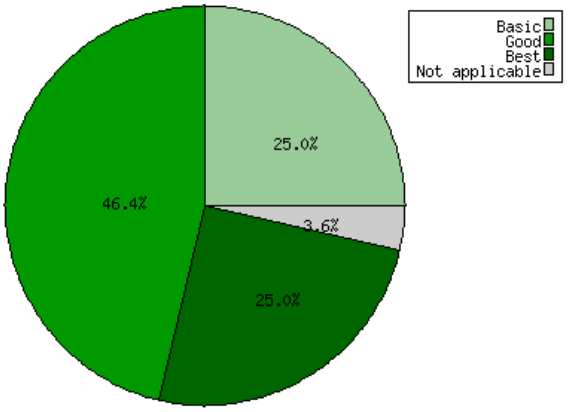

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | No specific plan early on | Basic | 17 | 21.5 % |
| 2 | Communication important | Good | 41 | 51.9 % |
| 3 | Communication essential | Best | 16 | 20.3 % |
| 4 | Not applicable in this project | | 5 | 6.3 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Communication plan + Target audience/users

Choose: **Target audience/users** to filter reports

- ☐ Formal education
- ☐ Life-long learning
- ☐ Professional
- ☐ Leisure / tourism
- ☐ Academic research
- ☑ General public
- ☐ Other



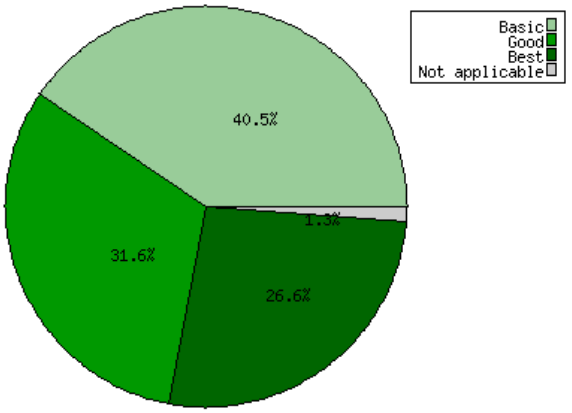

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | No specific plan early on | Basic | 14 | 25.0 % |
| 2 | Communication important | Good | 26 | 46.4 % |
| 3 | Communication essential | Best | 14 | 25.0 % |
| 4 | Not applicable in this project | | 2 | 3.6 % |
| | TOTAL OF ANSWERS | | 56 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Management mechanisms

In most cases (40.5 %) there is an identified manager of the project, who also has other duties. A good practice suggestion from a respondent: “project management should be codified in a management statute; contingency plans are very important”. In co-operation projects management was sometimes seen as a problem.

**Using the filter:** In Finland over half of the projects only have an identified manager.



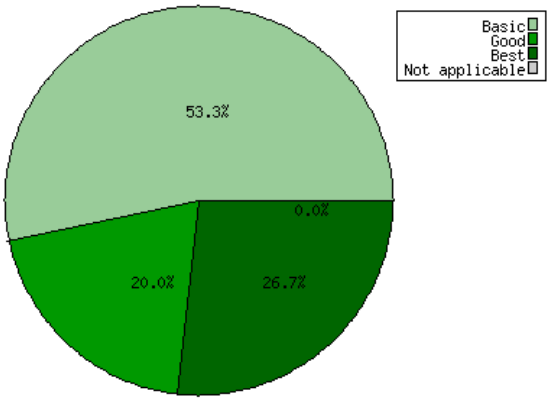

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Identified manager | Basic | 32 | 40.5 % |
| 2 | Dedicated manager | Good | 25 | 31.6 % |
| 3 | Steering group | Best | 21 | 26.6 % |
| 4 | Not applicable in this project | | 1 | 1.3 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

### Management mechanisms

**Country**

- [ ] Austria
- [ ] Belgium (Flemish)
- Belgium (French)
- [ ] Denmark
- [x] Finland
- France

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

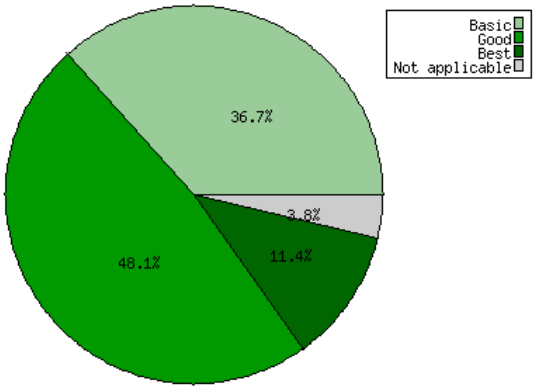



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Identified manager | Basic | 8 | 53.3 % |
| 2 | Dedicated manager | Good | 3 | 20.0 % |
| 3 | Steering group | Best | 4 | 26.7 % |
| 4 | Not applicable in this project | | 0 | 0.0 % |
| | TOTAL OF ANSWERS | | 15 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Project plan

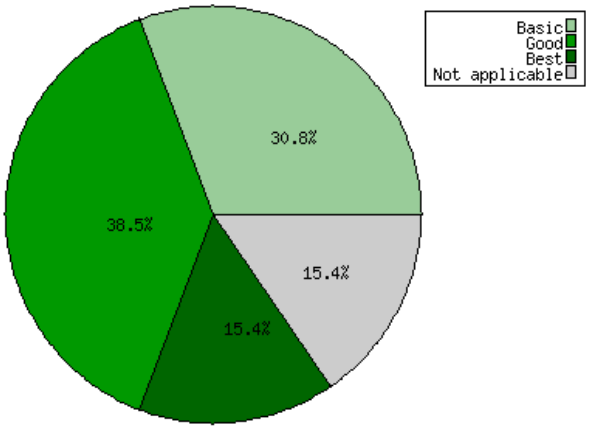
The project plan can be linked to funding so that funders require regular reports. Yet 36.7 % of the projects have an informal review of the project plan. 48.1 % are on the good level and 11.4 % on the best level: there is a steering group reviewing the objectives.




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Informal review | Basic | 29 | 36.7 % |
| 2 | Formal review | Good | 38 | 48.1 % |
| 3 | Public formal review | Best | 9 | 11.4 % |
| 4 | Not applicable in this project | | 3 | 3.8 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## Skills of the workforce

The development of the skills of the workforce is a big task. 30.8 % are on the basic level and 15.4 % have felt that this issue is not relevant for them. In the development efforts for instance partnerships and training courses are utilised.
**Using the filter:** In Portugal 44.4 % of the projects only have organisational skill audits. 22.2 % reach the best level.



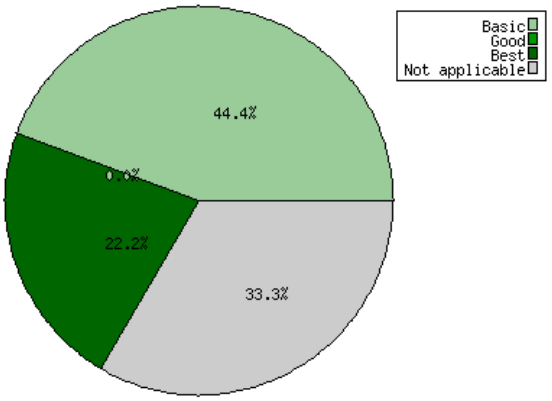

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Organisational skill audit | Basic | 24 | 30.8 % |
| 2 | Organisational skill audit and identification of partnerships | Good | 30 | 38.5 % |
| 3 | Individual skills audit and follow-up training within organisations and partnerships | Best | 12 | 15.4 % |
| 4 | Not applicable in this project | | 12 | 15.4 % |
| | TOTAL OF ANSWERS | | 78 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Skills of the workforce

**Country**

- [ ] Austria
- [ ] Belgium (Flemish)
- Belgium (French)
- [ ] Denmark
- [ ] Finland
- France
- Germany
- [ ] Greece
- Ireland
- [ ] Italy
- Luxembourg
- [ ] Netherlands
- [x] Portugal
- [ ] Spain



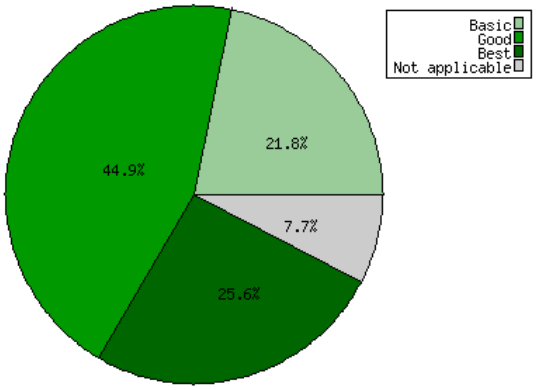

| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Organisational skill audit | Basic | 4 | 44.4 % |

| | | | | |
|---|---|---|---|---|
| 2 | Organisational skill audit and identification of partnerships | Good | 0 | 0.0 % |
| 3 | Individual skills audit and follow-up training within organisations and partnerships | Best | 2 | 22.2 % |
| 4 | Not applicable in this project | | 3 | 33.3 % |
| | TOTAL OF ANSWERS | | 9 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Evaluation plan

There is a link between this question and the question about the project plan. Funders and users are evaluating the projects in both the cases, as well as for instance government organisations. Evaluation on completion is rather common (21.8 %) but even so are peer reviews (44.9 %) and iterate evaluation by end users (25.6 %).

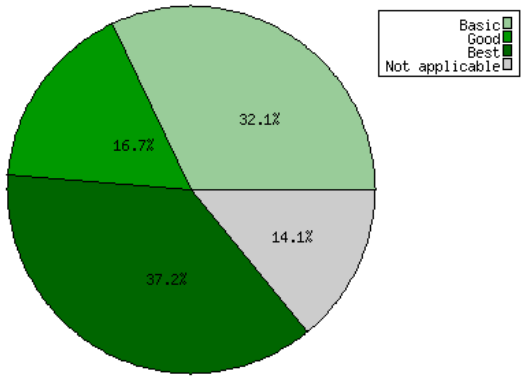



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Evaluation on completion | Basic | 17 | 21.8 % |
| 2 | Peer review by experts during life-cycle of project | Good | 35 | 44.9 % |
| 3 | Iterative evaluation by end users | Best | 20 | 25.6 % |
| 4 | Not applicable in this project | | 6 | 7.7 % |
| | TOTAL OF ANSWERS | | 78 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Co-operation

On the one hand co-operation seems to be a wide-spread and well employed way of working. For instance software and metadata are subjects for co-operation. On the other hand one third of the projects are only aware of related projects but are in no closer contact with them.

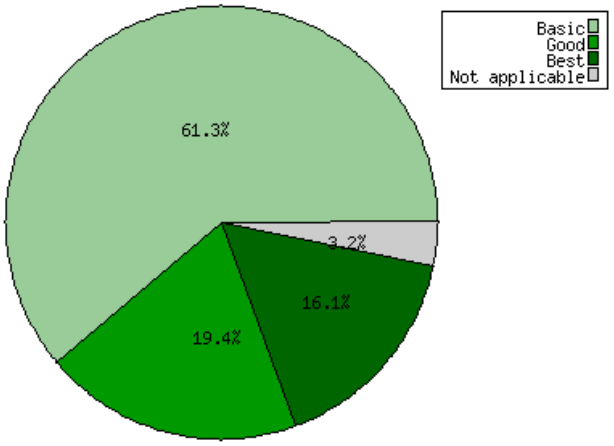



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Information sharing | Basic | 25 | 32.1 % |
| 2 | Sharing good practice | Good | 13 | 16.7 % |
| 3 | Co-operation | Best | 29 | 37.2 % |
| 4 | Not applicable in this project | | 11 | 14.1 % |
| | TOTAL OF ANSWERS | | 78 | 100.0 % |

## DATABASE: QUALITATIVE PART, A. MANAGEMENT

### Educational content creation

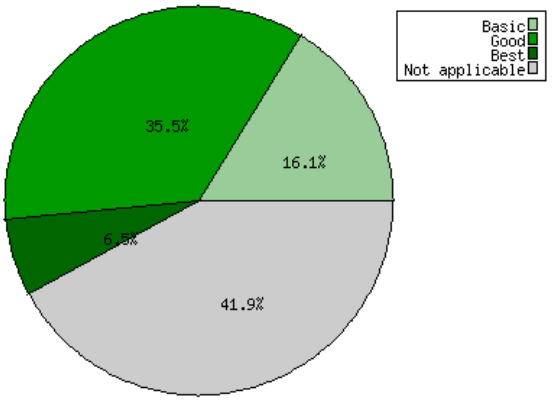
About one third of the projects (31) answered the question about educational content creation. This question was for the projects in the ending phase only. The vast majority of the respondents are on the basic level in creating educational content. Access is the main goal - as in the selection criteria described earlier.




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Emphasis on enabling access | Basic | 19 | 61.3 % |
| 2 | Creation of digital versions of existing print-based learning resources | Good | 6 | 19.4 % |
| 3 | Creation of new and user-centred learning resources integrated | Best | 5 | 16.1 % |
| 4 | Not applicable in this project | | 1 | 3.2 % |
| | TOTAL OF ANSWERS | | 31 | 100.0 % |

## Creating new job opportunities using IT technologies

About one third of the projects (31) answered the question about creating new job opportunities which was also intended for the projects in the ending phase. The majority say that job opportunities are not relevant in their projects. Short-term employment (35.5 %) is the second most common answer, good level.

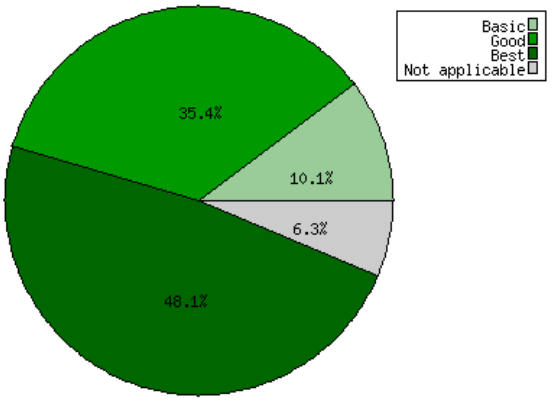



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Increase internal opportunities | Basic | 5 | 16.1 % |
| 2 | Create new short-term employment | Good | 11 | 35.5 % |
| 3 | Creation of new sustainable employment | Best | 2 | 6.5 % |
| 4 | Not applicable in this project | | 13 | 41.9 % |
| | TOTAL OF ANSWERS | | 31 | 100.0 % |

## DATABASE: QUALITATIVE PART, B. DIGITISATION

### Technical and content standards or guidelines to ensure interoperability and added value

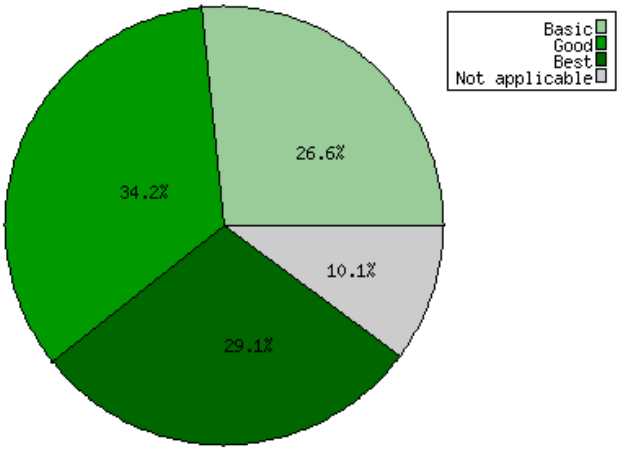
One of the questions in which most of the answers (48.1 %) are in the best category: standards mandatory / process ensures interoperability. Only 10.1 % are on the basic level and working on the standards issue.




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Working on adoption of international standards | Basic | 8 | 10.1 % |
| 2 | Standards recommended | Good | 28 | 35.4 % |
| 3 | Standards mandatory / process ensures interoperability | Best | 38 | 48.1 % |
| 4 | Not applicable in this project | | 5 | 6.3 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## Digital preservation

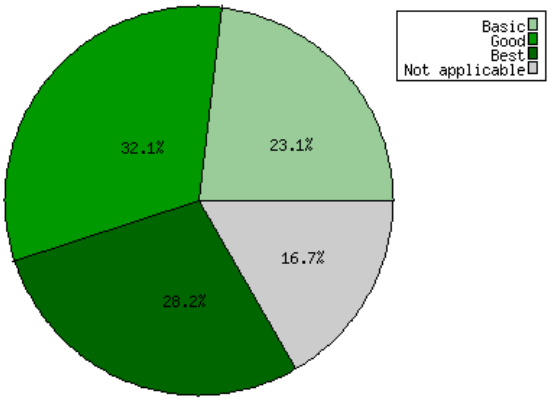
The distribution of answers is even in all the categories. Some are only becoming aware of the preservation issues as the project proceeds, some are creating separate copies for preservation. 10.1 % consider that digital preservation is not relevant for them.




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Awareness | Basic | 21 | 26.6 % |
| 2 | Strategy defined | Good | 27 | 34.2 % |
| 3 | Strategy implemented | Best | 23 | 29.1 % |
| 4 | Not applicable in this project | | 8 | 10.1 % |
| | TOTAL OF ANSWERS | | 79 | 100.0 % |

## Provision for physical preservation

The physical preservation seems to have almost the same even distribution as the digital preservation. An example of the most advanced preservation is storing print, microfilm and digital copies at different locations. Preservation should, according to a respondent, be part of the digitisation programme.

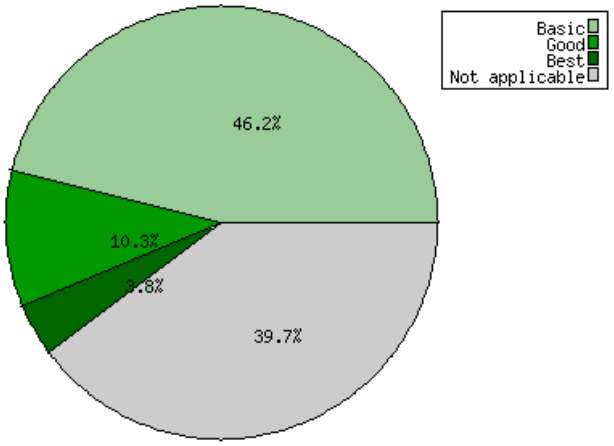



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | No support | Basic | 18 | 23.1 % |
| 2 | Indirect support | Good | 25 | 32.1 % |
| 3 | Direct support | Best | 22 | 28.2 % |
| 4 | Not applicable in this project | | 13 | 16.7 % |
| | TOTAL OF ANSWERS | | 78 | 100.0 % |

## DATABASE: QUALITATIVE PART, B. DIGITISATION

### Integrated approach to multi-linguality

Only 3.8 % have multi-lingual and multiple character set support on their website. 46.2 % have limited multi-lingual support and 39.7 % don't see multi-linguality relevant for them. A respondent tells that originally their website was intended for native use. Now about 50 % of the users are foreign and they have both English and the native language on the site.

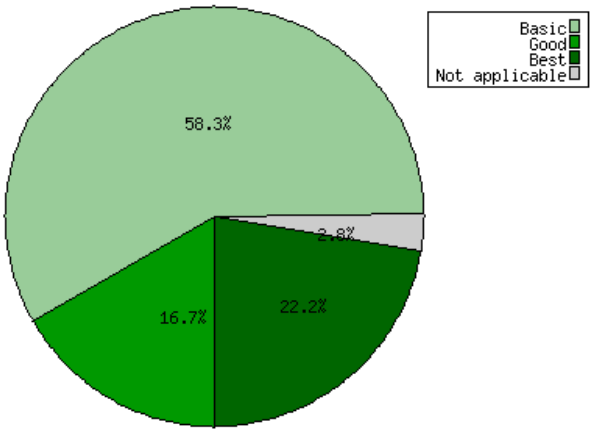



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Limited multilingual support | Basic | 36 | 46.2 % |
| 2 | Multilingual support | Good | 8 | 10.3 % |
| 3 | Multilingual and multiple character set support | Best | 3 | 3.8 % |
| 4 | Not applicable in this project | | 31 | 39.7 % |
| | TOTAL OF ANSWERS | | 78 | 100.0 % |

## DATABASE: QUALITATIVE PART, B. DIGITISATION

### Security - outsourced digitisation

The question about security is intended for those who have outsourced digitisation and is not mandatory. 36 respondents have answered it and 58.3 % of them are on the basic, informal level in the issue. They may be in the early phases of the project or for example the material may not be classified. 22.2 % have special measures and written contracts with their partners.

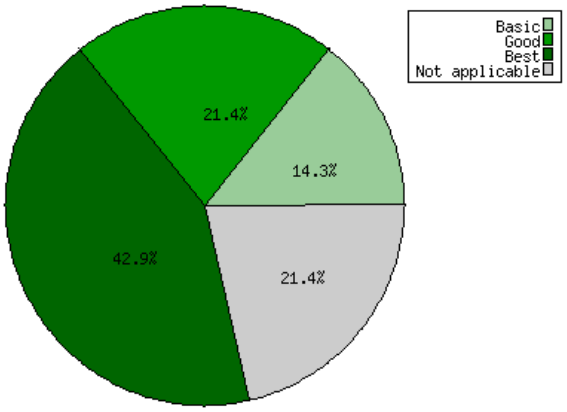



| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Informal | Basic | 21 | 58.3 % |
| 2 | Formal | Good | 6 | 16.7 % |
| 3 | Special measures | Best | 8 | 22.2 % |
| 4 | Not applicable in this project | | 1 | 2.8 % |
| | TOTAL OF ANSWERS | | 36 | 100.0 % |

## DATABASE: QUALITATIVE PART, B. DIGITISATION

### Innovation is encouraged - inhouse digitisation

The question about innovation is intended for those who have inhouse digitisation and is not mandatory. 28 respondents have answered it and 42.9 % of them are on the best level in the issue: innovations implemented in the processes. 14.3 % use basic products and programmes in the market.




| code | Alternative | Practice | Amount of answers | % |
|---|---|---|---|---|
| 1 | Vision | Basic | 4 | 14.3 % |
| 2 | Plan for innovation | Good | 6 | 21.4 % |
| 3 | Innovation implementation | Best | 12 | 42.9 % |
| 4 | Not applicable in this project | | 6 | 21.4 % |
| | TOTAL OF ANSWERS | | 28 | 100.0 % |

## 3. Phase III – the future – benchmarking

The data included in the benchmarking database at the moment will be transferred to the Italian knowledge base during autumn when the launch of the extended site, Phase III of benchmarking, is intended to take place. After that it will also be possible to look for international and national benchmarking partners. An important aspect is encouraging the programmes and policies to fill in the forms in order to enhance the possibilities of the knowledge base. The NRG could have a crucial role in this activity.

In the future, when the Minerva knowledge base is completed, the person responsible for for instance a project could use the benchmarking tool to:

- feed in information of the project at the beginning of it = *self assessment, the planned results*
- with the help of the pre-selection criteria of his own choice limit the amount of projects he is interested in to a handful (by using the information gathered in the database)
- think about the important individual questions he would like to pose to another project manager and further limit his selection by contacting the most interesting projects
- have 1-3 benchmarking contacts with projects he would look at in-depth either by visiting or in some personal contact = *benchmarking*
- implement the knowledge in her/his own project = *benchmarking*
- update the data yearly if the project is long
- feed information of the completed initiative in the knowledge base = *the actual results.*

It will also be possible to look for good practices via links to websites.

Different online modules (general information, management, digitisation, etc.) can belong to different levels (ministries/institutions) in different countries. The knowledge base should be able to adapt to these situations. Another important matter is proper and effective maintenance of the knowledge base.

As 85,7 % of the institutions / organisations are willing to share their experience and information of their projects / programmes / policies there should be a positive atmosphere in Europe to promote benchmarking. It can be made a valuable tool to enhance digitisation activities in Europe.

Suggested actions/additions

WP 2 suggests the following actions and the additions in the benchmarking part of the knowledge base. These details were deliberately postponed because of the becoming additional pieces of the puzzle. Minor features can also be changed due to the restructuring of the entity.

Search functions (on the basis of general information) = looking for benchmarking partners = role models, good practices etc. (WP 6 has been working on these matters)

1. browsing the initiatives in English (listing now in native language for the institution itself) (connections with inventories, good practices)
2. criteria (choosing the criteria for benchmarking and good practices, combining them and the possibility to make own combinations of them) (connections with inventories, good practices)

Start-midway-end

1. change of logic (now: only start and end questions, also in end-phase you have to answer basically all the questions; final objective own questions for each phase)
2. in the summaries: projects in start phase and end phase separately
3. updating remembrances by e-mail
4. at least two versions of the data in the database, the starting phase and the ending phase

Hierarchy

1. the hierarchy of projects, programmes and policies automated
2. data from projects and programmes updating upwards automatically

Timeplan

- for having all the data available for a limited time (five-ten years) due to for example the technology changes

The other suggestions: annex 4.

## 4. Conclusions

The results of the benchmarking online campaign must be considered a success. The number of answers and registrations was big compared to the short answering time available. It is evident that institutions were interested in the exercise and actively contacted the administrator (project coordinator) to ask questions or to express their views. Of course there is always room for improvement and the interface can be further developed, as WP 2 has suggested, but a solid base is ready.

WP 2 is very much looking forward to the finalisation of the Minerva knowledge base. In its entirety it will provide a unique opportunity to look into the digitisation practices in the European Union. Good practices will spread more easily and information about projects, programmes and policies will be available to a large public. In the end this will lead to more successful new initiatives and better quality end products for digitisation.

How are we going to use the information? What do we get? Institutions and Ministries will benefit from the various possibilities to exert data from projects / programmes / policies. The raw data (general information) gathered is probably the most important tool for follow-up, while the self assessment part is also important for each participating body. (Annex 5)

All surveys are subjective and result from assessment. The answers in the online campaign depend on the self evaluation of the institutions involved. Due to the limited number of answers the conclusions from the reports cannot be all-embracing or scientific. The slight differences with the individual results presented in the overview of the national benchmarking reports cannot be explained either. The chosen questions can also have been left blank. The national situation has influence on the interpretations and it is realistic that the Member States have different approaches to the use of the tool. The cultural context might influence the answering process. Nevertheless, the trends and areas for improvement in the countries can be examined in the table. The situation could be looked into internally in each Member State.

Benchmarking online campaign: spring/summer 2003
Majority of answers in the question (projects)[1]

| MS | | FUNDING | MANAGEMENT | | DIGITISATION | | |
|---|---|---|---|---|---|---|---|
| | Number of answers in the questions | Sustainability | IPR | Management mechanisms | Awareness of technical and content standards | Digital preservation | Physical preservation |
| **Austria** | 5 | best | good | basic | best | best | best |
| **Belgium-Flemish** | 1-2 | good/ best | basic | basic | good | good | |
| **Finland** | 14-15 | basic | good | basic | best | good | good |
| **France**[2] | 5-6 | basic | good | best | best | basic | basic |
| **Greece** | 6 | basic | basic | good | good | basic | basic |
| **Italy** | 6 | basic | good | good | good | good | good |
| **Netherlands** | 4 | basic | basic | basic | good | basic | basic |
| **Portugal** | 9 | best | best | good | good | basic/ good | best |
| **Sweden** | 4 | basic/ best | basic/ good/ best | basic/best | good | basic | basic/ good |
| **United Kingdom** | 18-20 | best | good | best | best | best | best |

On the basis of this choice of questions and the small sample it seems that in general the basic level is prevalent. Only IPR and standards reach the good performance level in average. In standards the basic level is even totally absent. Funding still has some progress to make despite the best alternatives answered: the situation seems polarised.

The projects of Austria and the United Kingdom have assessed themselves best in this survey. The Netherlands and Sweden are at the 'basic' end of the scale. The answers from Sweden are strongly polarised though due to the even, small number of forms. The performance of the sample of Dutch projects seems surprisingly basic, bearing in mind the framework and the conditions for digitisation in the Netherlands. In the Dutch national benchmarking report from June 2003 it is stated that "most of the Dutch initiatives have only the vaguest of notions about digital preservation [since it]--- is an issue addressed by the National Library.--- IPR is often an uncertain factor.--- Pragmatic avoidance of heavy management solutions marks the projects.--- Physical preservation is treated as a secondary benefit and often is passive and indirect."

[1] All the countries with answers to these questions are included. The alternative 'not applicable' has not been taken into account.
[2] forms in paper format

David Dawson states in the Overview of the national benchmarking reports: “It is striking that Technical and Content standards are regarded as meeting best practice in several Member States, whilst a survey of Technical Standards found few nationally-agreed Technical Standards in place. It appears that the areas causing particular concern are digital preservation, ensuring that digitisation is accompanied by programmes to ensure the physical preservation of the original materials and sustainability. This is linked to IPR, where it is clear that there is an understanding of the issues, but that it has not yet been possible to establish sound business models to ensure sustainability. Sustainability is currently most successfully being addressed by culture change within the cultural institutions - a management decision to create and maintain the new service within existing budgets and mechanisms.”

“Within the following term of the Dutch benchmarking activities members of the national benchmarking group together with the Mondriaan Foundation will develop a workable format for project proposals in which benchmarking indicators are embedded.” –Dutch national benchmarking report, June 2003. France has integrated benchmarking in a project call in 2003, in order to evaluate impact of the programme's framework (criteria to be met before funding). Benchmarking has been implemented in many different ways, and for different purposes. In some countries, such as Greece, there has been a large amount of activity, but in most countries it has progressed to the stage of piloting and development. In Italy the government is active in promoting benchmarking. -Overview of the national benchmarking reports

Benchmarking partners are important in the process. It is realistic that in the next phase of Minerva the first benchmarking partnerships are born. The ultimate goal of this and of spreading the good practices might be that more and more initiatives would reach the best level in more and more issues. At the same time the knowledge base will continue to collect information for follow-up, in a flexible way. The statistical analysis would give even more possibilities for the use of the data.

There are more results of the Dutch benchmarking activities in their national system: http://www.cultuurtechnologie.net. The Greek national system additionally includes the results of the Phase I of benchmarking in Europe: http://www.benchmarking.gr

## 5. Acknowledgements

The input of the Member States, the NRG representatives, the national benchmarking groups and all the Minerva partners has been valuable in taking part in the benchmarking online campaign and in the work of WP 2. Finland and Sweden had a joint organisation with a Ministerial Board and two project groups, one in Finland and one in Sweden, since benchmarking and good practices are two sides of the same coin. The smooth co-operation and reinforcement of the Swedish partners from Riksarkivet and Kulturnätet have been precious. The effort of all the other partners, especially the UK and France, has also been constructive. In addition WP 2 expresses its thanks to its predecessor, the eEurope benchmarking group, Minerva coordinator Rossella Caffo, technical coordinator Antonella Fresa, Pier Giacomo Sola and all the friendly Minerva staff in Italy.

WP 2 thanks the Finnish Benchmarking group for superior co-operation: Minna Karvonen, Mirva Mattila and Vesa Hongisto at the National Board of Antiquities, Eljas Orrman at the National Archives, Jukka Kervinen and Marko Tenkanen at Centre for Microfilming and Conservation. Ministry of Education has given its support during the working process.

WP 2 especially appreciates the insight and expertise of Päivi Strömmer at Centre for Excellence, Finland and the accomplishment of Pekka Kantola in the creation of the database.

## 6. References


http://www.benchmarking.gr

http://www.benchmarking-in-europe.com

http://www.benchmarking-in-europe.com/homepage/message.htm

http://www.cordis.lu/ist/ka3/digicult/eeurope-overview.htm

http://www.cordis.lu/ist/ka3/digicult/benchmarking.htm

http://www.cultuurtechnologie.net

http://memory.loc.gov/ammem/prjplan.html

http://www.minervaeurope.org/structure/workinggroups/benchmarking/digitquestion.htm (user- and passwords mindemo and mv1731)

http://www.minervaeurope.org/structure/workinggroups/benchmarking/documents/overbenchreports.htm
Overview of the national benchmarking reports. David Dawson – Minna Valtonen (Kaukonen). March 2003.

http://www.qualitydigest.com/oct97/html/benchmk.html
Selecting a benchmarking partner. Vicki J. Powers. Quality Digest. 1997.

http://www.unesco.org/webworld/mdm/survey_rtf_en/appendix1_a.rtf

Benchmarking for Best Practices, Winning Through Innovative Adaptation. Christopher E. Bogan, Michael J. English. McGraw-Hill Inc. 1994.

Monitoring, updating and disseminating developments in innovation and technology diffusion in the Member States. The Identification of 'Best Practice'. Period: December 2000 – September 2001. P. Cunningham, M. Boden, J. Butler. PREST. University of Manchester.

Strategies for Building Digitised Collections. Abby Smith. Council on Library and Information Resources, Digital Library Federation. 2001.

## 7. Glossary

### *Benchmarking*

- is action -- discovering the specific practices responsible for high performance, understanding how these practices work, and adapting and applying them to your organisation
- enables real improvement
- calls for own experience and own insight
- the practice of being humble enough to admit that someone else is better at something and being wise enough to learn how to match and even surpass them at it (American Productivity and Quality Centre 1993)
- on-going search for best practices that produce superior performance when adapted and implemented in one's own organisation (Bogan - English[3])
- The process of identifying, learning, and adapting outstanding practices and processes from any organization, anywhere in the world, to help an organization improve its performance. Benchmarking gathers the tacit knowledge -- the know-how, judgments, and enablers -- that explicit knowledge often misses. (American Productivity and Quality Centre)

### *Benchmarks*

- are performance measures: How many? How quickly? How high? How low?
- are facts

### *Good practice*

- sometimes referred to as best practice
- No standard definition exists for "best practice." "Best" at General Motors, for example, is defined as "information we can use." At Pennsylvania-based AMP, Benchmarking Manager John Davis says his company bases "best" on other companies that are objectively better than AMP at a given practice. If organizations look for "truly best practices," they will never find a match, he adds. (Vicki J. Powers: Selecting a benchmarking partner. 1997. Quality Digest. http://www.qualitydigest.com/oct97/html/benchmk.html)

[3] Benchmarking for Best Practices, Winning Through Innovative Adaptation. Christopher E. Bogan, Michael J. English. McGraw-Hill Inc. 1994.

- need not be confined to specific policy measures but may be embodied in the principles that help construct policies, for example, or facilitate policy implementation (Monitoring, updating and disseminating developments in innovation and technology diffusion in the Member States. The Identification of 'Best Practice'. Period: December 2000 – September 2001. P. Cunningham, M. Boden, J. Butler. PREST. University of Manchester)

**Abbreviations**

MS > Member States
NRG > National Representatives Group
WP > Work package

## Annex 1

## Benchmarking framework
## European Working Group


# Components

- Majlis Bremer-Laamanen **(leader)**
  National Library of Finland -Helsinki
  University Library
  Centre for Microfilming and Conservation
  Saimaankatu 6
  FIN-50100 Mikkeli
  Tel. : +358 (0)15 3211 250
  majlis.bremer-laamanen@helsinki.fi

- Minna Kaukonen **(coordinator)**
  National Library of Finland - Helsinki
  University Library
  Centre for Microfilming and Conservation
  Saimaankatu 6
  FIN - 50100 Mikkeli
  Tel. : +358 (0)15 3211 250
  minna.kaukonen@helsinki.fi

- Eelco Bruinsma
  Director Cheperu Design BV
  Digital Heritage Benchmark Coordinator
  Netherlands
  Oostervalge 2
  9989 EJ Warffum
  Netherlands
  Tel. +31 6 53848684
  eelco.bruinsma@cheperu.nl

- Laure Cedelle-Joubert
  Conservateur des bibliothèques chargée des nouvelles technologies
  Bureau des politiques documentaires
  Ministère de la culture et de la communication
  Direction du livre et de la lecture
  180, rue de Rivoli
  75001 Paris
  Tel. +33140157494
  Fax +33140157404
  laure.cedelle@culture.fr

- David Dawson
  Resource: The Council for Museums, Archives and Libraries
  16 Queen Anne's Gate
  London SW1H 9AA
  Tel: 020 7273 1415
  david.dawson@resource.gov.uk
  www.resource.gov.uk
  www.peoplesnetwork.gov.uk

- Isabelle Dujacquier
  Ministère de la Communauté française de Belgique
  Coordinatrice Minerva pour la Communauté française de Belgique
  Boulevard Leopold II, 44
  B-1080 Bruxelles
  Tel : +32.2.413.32.19
  Isabelle.dujacquier@cfwb.be

- Ana Maria Durán
  Manager and editor-in-chief
  CultureNet Sweden,
  Swedish National Council for Cultural Affairs
  Box 7843
  SE-103 98 Stockholm
  Tel. 46 8-5192 6495
  Mob. 46 70-588 61 88
  Fax 46 8-5192 6496
  ana.duran@kur.se
  www.kultur.nu

- Hanna Eriksson
  Riksarkivet Sweden
  hanna.eriksson@riksarkivet.ra.se

- Muriel Foulonneau
  Relais Culture Europe
  17, rue Montorgueil
  75001 Paris
  Tel : +33 (0)1 40 41 01 21
  Cel : +33 (0)6 74 82 55 95
  mfoulonneau@relais-culture-europe.org

- Börje Justrell
  Riksarkivet
  Fyrverkarbacken 13 - 17
  S-102 29 Stockholm
  borje.justrell@riksarkivet.ra.se

- Hans Nissens
  hans.nissens@cultuurnet.be

- Giuliana Sgambati
  Istituto Centrale per il Catalogo Unico delle Biblioteche Italiane (ICCU)
  gi.sgambati@iccu.sbn.it

- Päivi Strömmer
  Center for Excellence, Finland
  paivi.strommer@laatukeskus.fi

- Dimitris K. Tsolis
  University of Patras
  dkt@hpclab.ceid.upatras.gr

- Annick Vilain
  annick.vilain@cfwb.be

## National Benchmarking Working Group: Finland

- Majlis Bremer-Laamanen (chair)
  National Library of Finland - Helsinki University Library
  Centre for Microfilming and Conservation
  Saimaankatu 6
  FIN-50100 Mikkeli
  majlis.bremer-laamanen@helsinki.fi

- Vesa Hongisto
  IT manager, National Board of Antiquities
  vesa.hongisto@nba.fi

- Minna Karvonen
  Consulting Officer, National Board of Antiquities
  Minna.Karvonen@nba.fi

- Jukka Kervinen
  National Library of Finland - Helsinki University Library
  Centre for Microfilming and Conservation
  jukka.kervinen@helsinki.fi

- Mirva Mattila
  National Board of Antiquities
  mirva.mattila@nba.fi

- Eljas Orrman
  National Archives
  eljas.orrman@nar.fi

- Päivi Strömmer
  Center for Excellence
  paivi.strommer@laatukeskus.fi

- Minna Kaukonen
  Project coordinator
  National Library of Finland - Helsinki University Library
  Centre for Microfilming and Conservation
  Saimaankatu 6
  FIN - 50100 Mikkeli
  Tel. +358 (0)15 3211 250
  minna.kaukonen@helsinki.fi

## Annex 2

| WP 2: Detailed timetable and workplan January-August 2003 | | | | |
|---|---|---|---|---|
| **Deadline** | **Task** | **Deliverable** | **Responsible** | **Notice** |
| *20th January* | Benchmarking meeting | Draft for the timetable and the detailed workplan for the spring 2003 | Finland, Greece, Netherlands, UK | Consensus on the way forward during the Greek European Union presidency |
| *January* | Test of the questionnaires before the campaign at European level | | Finland | Content analysis of the questionnaires with memory organisations: museums, archives and libraries in Finland |
| *17th Febr.* | Two meetings (technical and content) for the Minerva partners and the NRG representatives | Questionnaires modified from Phase I by WP 2 approved | Finland | Demo of the database approved as the basis for further development |
| *18th Febr.* | First call for national benchmarking reports | | Finland | |
| *24th Febr.* | Second call and guidelines for national bench-marking reports | | Finland | Practical and simplified guidelines |
| *25th Febr.* | Phase II questionnaires and implementation strategy delivered for translation | | Finland | |
| *Febr. – April* | Database development | The ready database | Finland | |
| *7th March* | National bench-marking reports | | Member States (NRG representatives) | Based on national status reports presented in Cph, updates until 7th March, narrow basis |
| *20th March* | Benchmarking meeting | Overview of national benchmarking reports, web interface | Finland: web interface, Finland with UK: overview | Information sharing, NRG representatives invited, overview of the reports: end of Phase I in benchmarking |
| *21st March* | Minerva review | - "- | -"- | |
| *14th April – 15th May* | Benchmarking campaign (Phase II) | Online; respondents are supposed to translate open answers into English | Member States (NRG representatives and Minerva partners) | Implementation strategy sent to responding institutions in Member States (national and other important ones from the heritage sectors) |
| *26th June* | NRG meeting | First edition of the benchmarking report (Phase II), II national benchmarking reports with more depth | Finland, Member States (NRG representatives) | From Corfu meeting onwards: the strategy for going forward (Phase III) |
| *31st August* | End of WP 2 | Deliverable: second edition of the bench-marking report | Finland | Published on the web |

**Annex 3**

Guidelines for the national benchmarking report

**Benchmarking of digitisation in your country up-to-date**

- based on existing information from Copenhagen (National Status Reports)

Policy for benchmarking

- benchmarking in your country today
- national benchmarking groups
    - have you got one?
    - accomplishments of the group (e. g. questionnaires sent out to institutions)
    - encouragement of institutions

Benchmarking questionnaires collected

- how many
- from which level (project, programme, policy)
- publishing mode of the results (please send the possible reports in English)

Description of the situation in your country

- Are there digitisation
    - policy/ies
    - programme(s)
    - projects

    for the cultural heritage in your country?
    Yes / no

If you have collected data in your country, please also describe the results

- IPR
    a. objects off-line/on-line
    b. what has been done for IPR in your country?
- influence of management mechanisms to the results of project / programme
- awareness of technical and content standards
- digital preservation
- physical preservation
- how is sustainability of projects and programmes ensured?
    a. business models for usability of public data
- other interesting results

*For the second national benchmarking reports the last part of the guidelines was changed to the following text based on the database system and the reports it is able to produce per country:*

If data has been collected in your country, please also describe the results

- source objects
    - most digitised objects (3)
    - least digitised objects (3)

- what has been done for IPR in your country?

- Internal funding + public and private
- external funding + public and private

- Target audience
- + user statistics / estimated user statistics
- + end users' needs
- + communication plan

- Selection criteria
    - most used, least used

    + original source objects
    + User statistics
    + Target audience
    + Mode of access

- source objects +
    - digital product type
    - Technical quality
    - Mode of access
    - Costs of digitisation

- other interesting results

**Annex 4**

**Phase III – the future – benchmarking - suggestions**

Content issues

1. Type of institution and domain
   - two-step approach? (hierarchical: ministry> department of ministry etc.)

     museum
     archive
     library
     local community/administration
     regional administration
     (national administration (can this be other than ministry?))
     ministry > department of ministry
     church
     monument
     private sector > company, foundation, association, other
     research, education > university, education centre, research centre, other
     media > cinema, TV, radio, music, publishing house, other
     performing arts > theatre, circus, other
     archeology
     ethnology
     general inventory
     other

2. Country of origin / publication and focus of publication
   - how to combine the two perspectives

3. Transfer of the registration information
   - vcard information in the benchmarking database incomplete and in one block, must be divided in proper fields in the integration phase of data

4. Other content issues

   1. more clickable good practices examples (WP 6), requires mapping of good practices categories with the benchmarking questions
   2. 'Pitfalls and successes' question can be omitted because asked in the role model section
   3. user statistics: amount of info on a website should be asked?
   4. source objects linked with quantity as a matrix (as in digital objects)
   5. drop menus for technical quality criteria (productivity > digital product)
   6. productivity questions in general could be less extravagant, for instance most of the questions could be voluntary except for the source objects, quantity and centuries plus type and quantity in the digital product
   7. addition of the accessing states instead of the option other in the question of the country

8. forms for browsing all the levels to reduce the amount of nonsense data

Informing the respondents (e-mail addresses available) and the NRG representatives

1. of completing the possibly missing information and new personal codes or country codes (NRG)
2. of the change in the nature of the website and the public part, 85.7 % of the projects would allow their general information to be published

Reports

1. statistical analysis, e.g. multicriteria analysis to be developed
2. extension of the reports to include more questions
3. more cross-linking of variables, for instance source objects linked to the budget
4. the number of included projects, programmes and policies visible in the reports instead of registrations
5. summaries of hierarchies: project-programme-policy belonging together

Results

- developing the presentation of the results and self assessment results

Languages

- additional language versions
  - existing translations which must be slightly modified: French (made by France and French Belgium), Greek, Dutch (national use)

Data exchange format

- must be developed for the whole system for import of data from the national systems

Inclusion of the results from the Phase I of benchmarking

- creation of a link to the Greek benchmarking online which includes the results from the Phase I and the Dutch benchmarking online website

Mac interoperability

- how to make the system interoperable with Mac

**Annex 5**

**How to use the data?**

*The target is to get information on:*

- Digitised content and scope; digitised results (quality, type, costs) and mode of access
  - According to MS vs. EU
  - According to sector and region
  - In a project / programme / policy (hierarchical links between the levels)
  - Starting / on-going / finished
- Internal / external funding – from the public and private sector
- About the target audience / users, your estimated and / or fulfilled user statistics (one year after the project) and from the self assessment part: how you have taken into account end users' needs and marketing in the project
- How and which criteria is promoting / influencing the use of digitised collections
  - Which is the most used selection criteria
  - How do selection criteria and
    - Original source objects
    - User statistics
    - End users (research, general public)
    - Mode of access

    influence one another
- How does the choice of original source objects influence the digital product
  - Text (OCR) and image type
  - Image type
  - Resolution (Technical quality)
  - Mode of access
  - Costs of digitisation
- The Intellectual Property Rights and related issues
  - Plans MS / EU
  - Plans and centuries (interpretation of the copyright law)

Self assessment part

The influence of every aspect (question) separately on results of the project / programme (policy as background information) taking into consideration cross-links of MS and sector: different patterns in MS, results, source objects, user statistics, target audiences etc.

## Annex 6 Benchmarking database structure