

Pan-European Diagnosis & State of the Arts report about Archival Holdings Institutions



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I. Introduction

European Digital Treasures project

European Digital Treasures is a project selected in 2018 by the European Agency "The Education, Audiovisual and Culture Executive Agency (EACEA)", in the framework of Creative Europe-Culture Programme. The State/National Archives of several countries (Hungary, Malta, Norway, Portugal and Spain) and renowned European institutions such as the International Center for Archival Research (ICARUS) and Cork Institute of Technology (CIT) are part of it.

The General Subdirectorate of the State Archives of Spain leads the project which aims to address some of the challenges facing the archives in Europe.

Over the last decades, institutions with archival holdings (hereafter: "Archives") have invested important resources to offer access to digitized items. These "digital treasures" are thus incorporated as primary sources to free access portals, but they do not have a transformation process nor generate economic returns, despite the relatively important costs of digitization.

In that framework, and in line with the general objectives Creative Europe, the project plans to tackle some of the key new challenges faced by the digitized archives in Europe, mostly:

- ❖ The generation of a greater added value, profitability and sustainability, through the identification and implementation of new business models and cross-cultural cooperation and hybridisation.
- ❖ A greater diversification of the users, through the identification and implementation of new audience's development strategies and activities, especially towards the younger and older generations.
- ❖ A major visibility of the European Heritage, History and Culture, behind the available archives, and the transnational mobility of works and professionals.

Objectives of the document

In line with the philosophy of large-scale cooperation projects of the Creative Europe programme, European Digital Treasures will last some 48 months (from October 2018 till September 2022). In this timeframe, the partners collaborate in a wide range of complementary and, in most of the cases, cross-cultural activities and actions (exhibitions, training courses, research, gamification, etc.), distributed in different Work Packages (WPs).

The first Work Package (WP1) particularly promotes the generation of more detailed knowledge and homogeneous data on existing models. In that framework, under the leadership of the State Archives of Spain, the partners are identifying, generating and transferring a series of homogeneous information, and provoking cross-sectorial encounters. Among WP1 activities, two specific reports and desk-research works have been carried out:

1. **Pan-European Diagnosis and State of the Arts**
2. International benchmark

The present document corresponds thus to the first activity (Pan-European Diagnosis and State of the Arts): In order to be able to define New Business Models for European Archives, this diagnosis pretends to have a deeper knowledge on the existing “model” or management of such cultural heritage. Most National Archives are governmental bodies, but sometimes organised in different structures depending on each country (departments of Ministry of Culture or of other Ministries, such as Interior, Independent bodies, Foundations, etc.). From a budgetary perspective, depending on the country, they can have different sources of revenue, fees, human resources management, management of the audience, communication strategies, level and capacity of digitization, etc.

Throughout the past decades, the National Archives have closely worked together in order to define technical archival standards and tools, such as the Archives Portal Europe platform, in particular to encourage and secure interoperability with the various national and institutional archives portals. In addition, through the European Board of National Archivists (EBNA) and the European Archives Group (EAG), many efforts have been made to discuss strategic questions of the sector and its services, but mostly from technical – and not managerial – perspectives: Preservation of electronic records, digitisation, theft and natural disasters inflicting archives etc.

In that sense, despite the existing collaboration between European Archives, there was some lack of homogenous data on the existing models applied in each country, in particular towards their financial sustainability. The present document contributes to fill this gap, through the gathering of homogeneous data across Europe. It creates a necessary joint knowledge – not covered on statistics or by Eurostat so far – that will help to further define and monitor the New Business Models for the Archives subsector (Activities 7 & 8 of the European Digital Treasures project).

Methodology

For such purpose, under the leadership of the LP (Spanish Archives) and with the support of external/scientific experts from DEX, this Pan-European Diagnosis and State of the Arts has been carried out throughout the first semester 2020. From a methodological perspective, it consisted on a mapping of key data on the existing models being applied so far, based on an ad hoc Business Model Canvas adapted to the sector, that had to include, at least, the following information:

- ❖ Legal Structure
- ❖ Finances (Cost structure versus Revenue Streams, such as usage fees, subscription fees, licencing, advertising, projects generation, etc.)
- ❖ Key resources (Human & Technological Resources, including subcontracting policies, etc.)
- ❖ Distribution channels
- ❖ Digitization policy/activities
- ❖ Customer (Audiences) data (relationships, segments, etc.)
- ❖ Communication

To do so, a template questionnaire has been drafted and proposed to the project Steering Committee for discussion and approval. While it was initially planned to use an online questionnaire, at the end, due to its relatively long length and complexity, a Word Form was used, in order to make it easier for participants to fill it in (See [Annex III: Questionnaire used](#)). Throughout almost 10 pages, it included mostly closed categorized questions, which allowed to standardize data and streamline their process and statistical analysis, as well as some open questions in order to obtain more spontaneous answers and qualitative contributions.

The final questionnaire was thus divided into 5 sections:

- A) Profile & Management of the institution
- B) Contents & Digitization (basic figures)
- C) Audiences
- D) Communication & Distribution Channels
- E) Other Cooperation/Research and Innovation activities...

...and also included a last optional question (nr. 31) to share any Good and/or Innovative Practice or project. For that reason, the present document follows the same structure as the questionnaires.

The initial objective was to gather primary data from at least 20 archival holdings institutions from at least 8 European countries. Thanks to a personalised approach, such targets have been clearly overcome, as **42 questionnaires have been answered (21 from National Archives / 21 from either local and/or regional Archives), covering 21 countries**. The most participating countries have been Portugal (9 answers), Spain (6 answers) and Norway (4 answers). Though the treatment of the answers has been carried out anonymously, a list of institutions having answered the survey is included (See [Annex I: List of countries participating in the survey](#)).

Most of the results are presented under graphs formats in the following chapters. Depending on the information provided and interest, all answers can be presented together (under the "Global" denomination) or separately (under the "Local/Regional" or "National" denomination).

To complement the information, secondary data have been gathered from different European sources (networks, platforms, cultural institutions, etc. such as ICARUS, EBNA, EAG, Archive Portal Europe, etc.) and other parallel surveys being carried out in parallel by other institutions.

This composite report is completed by a SWOT Analysis and includes some first conclusions and definition of a general profile.

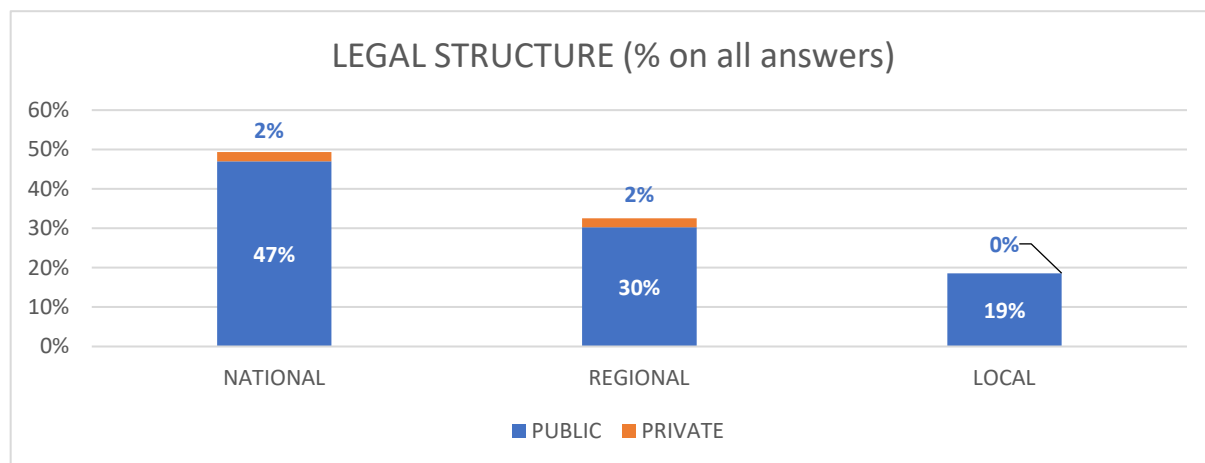
II. Results

A) General Profile & Management of European Archival Holding Institutions

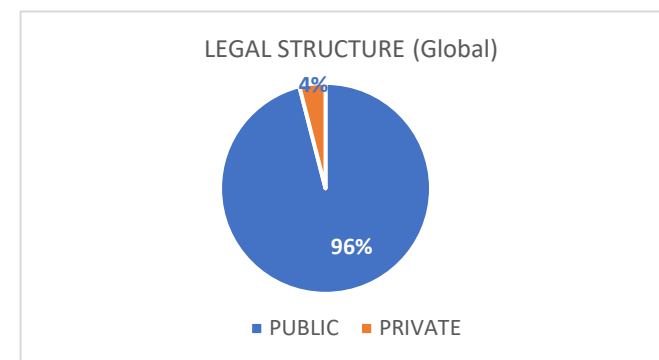
Legal Structure

As it was expected and according to “Annex I: List of countries participating in the survey”, a great majority (96% / 20 out of 22 participating institutions) of the participating “Archives” belong to the public sector.

Actually, the only 2 private institutions that have participated to the survey are a national one linked to labour movement and workers, and a regional one linked to a Roman Catholic Diocese.



Graph 2: Legal Structure (% on all answers, by National, Regional, Local levels)



Graph 1: Legal Structure (Global data)

Only 7 “Archives” of local competences have participated to the survey, in this case, representing mid- to large-scale European Cities. All of them belong to the public administration.

An interesting data to highlight is that none of the participating “Archives” have a mixed (public-private) legal structure.

Though these first data are not surprising ones, they are of importance especially when

analysing the resources, fields of interest and capacities of the “Archives”, especially towards the design of future business models, as any new initiative has to take into account the high public profile of both, National or Local/Regional Archives.

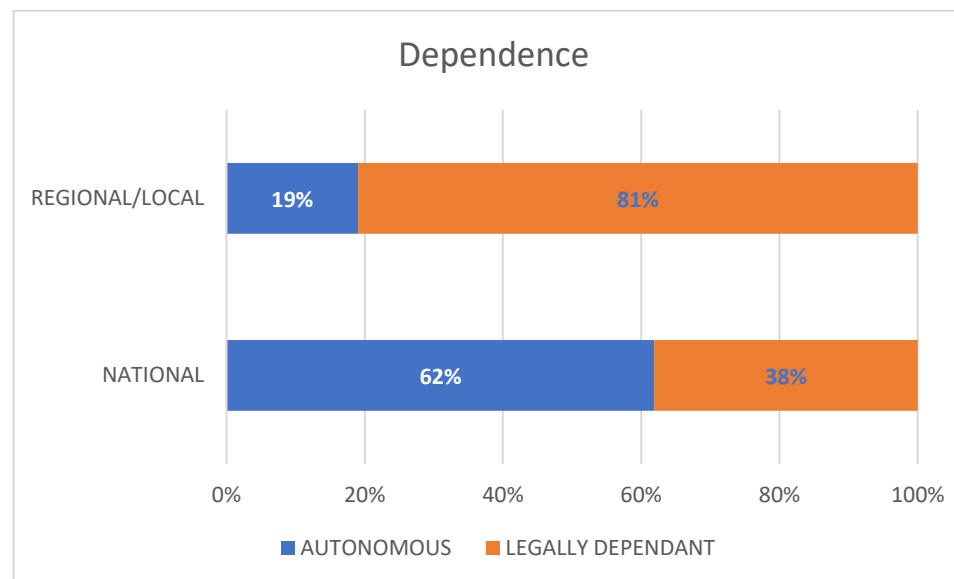
On that basis, it is also important to understand the level of dependency of the participating “Archives”.

In this case, there is a clear difference between National and Local/Regional Archives: While a majority (81%) of National Archives are autonomous body (e.g., with their own legal status or VAT code), two-thirds (62%) of the Local/Regional ones are a department, legally dependant to bigger organisations (Regional Councils, National Ministry, Municipality, etc.).

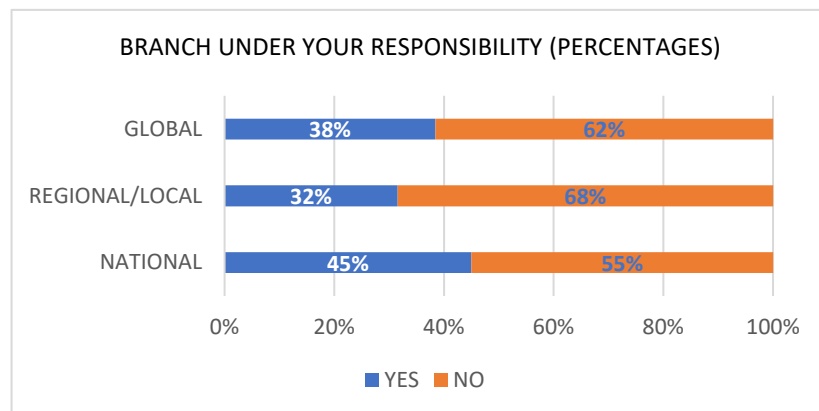
Actually, it has to be reminded that the participation to the survey of different Portuguese Archives has been particularly high. Their data of course influence somehow the Regional/Local answers, as most of them belong to their “National Ministry of Culture (D.G. LAB).

According to the collected answers, 38% of National Archives (7 institutions) do not enjoy a full autonomy, as they are legally and administratively dependant to higher levels of the public central administration, being in most of the cases a department of different a Ministry. Actually, among the 7 National Archives that are part of that group, it is interesting to highlight that over 70% (5 of them, namely 2 from Portugal, and 1 from Spain, Slovenia and Sweden) belong to their respective Ministry of Culture, while the rest (Georgia and Romania) would belong to Ministries of Justice or Interior.

However, it has to be highlighted that, for those National Archives that enjoy a major level of autonomy, as public organisations, most of them in any case do however belong to the some central administration, as it is the case for example of the Swiss Archives, that belong to Federal Department of Home Affairs (FDHA).



Graph 3: Dependence



Graph 4: % of Archives having branch(es) under their responsibility

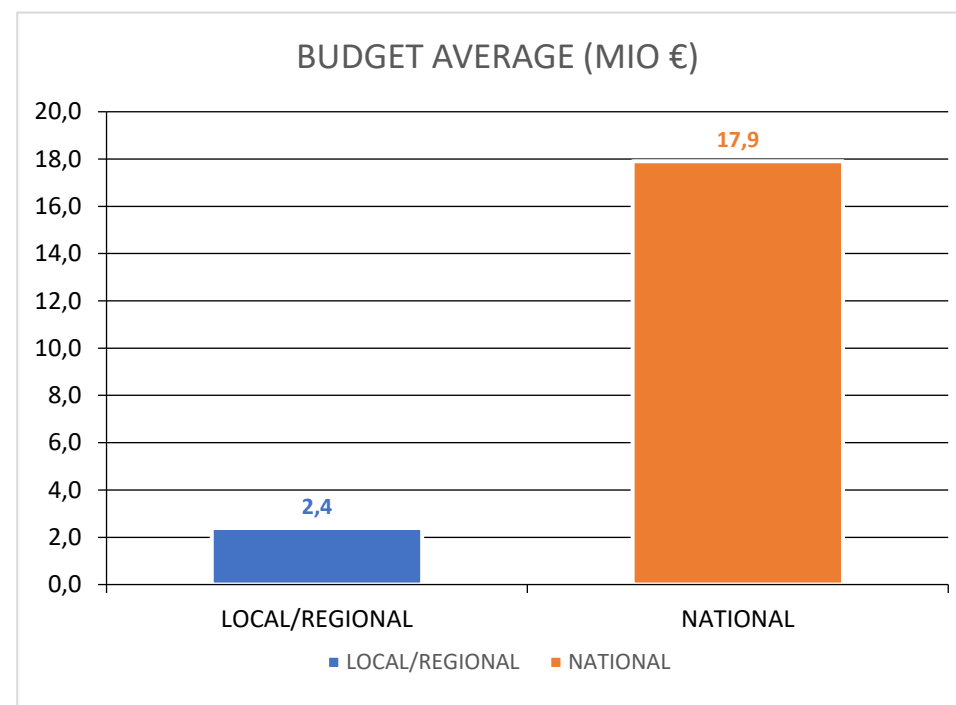
Resources & Costs

In order to assess and understand the capacities of the “Archives” to undertake activities, as well as their overall importance, it is interesting to know a bit more about both, their financial and human resources.

As far as the budget is concerned, we have to be very cautious when analysing the data, as they might differ significantly depending on the country and size of the institution.

In general, if we make the exercise of calculating an average, logically, the National Archives' budgets are over 700% higher (746%) than the ones of their local/regional counterparts: While the average budget for local/regional archival holding institutions turns around 2,4 Mio euros, the average of national ones is of 17,9 Mio euros.

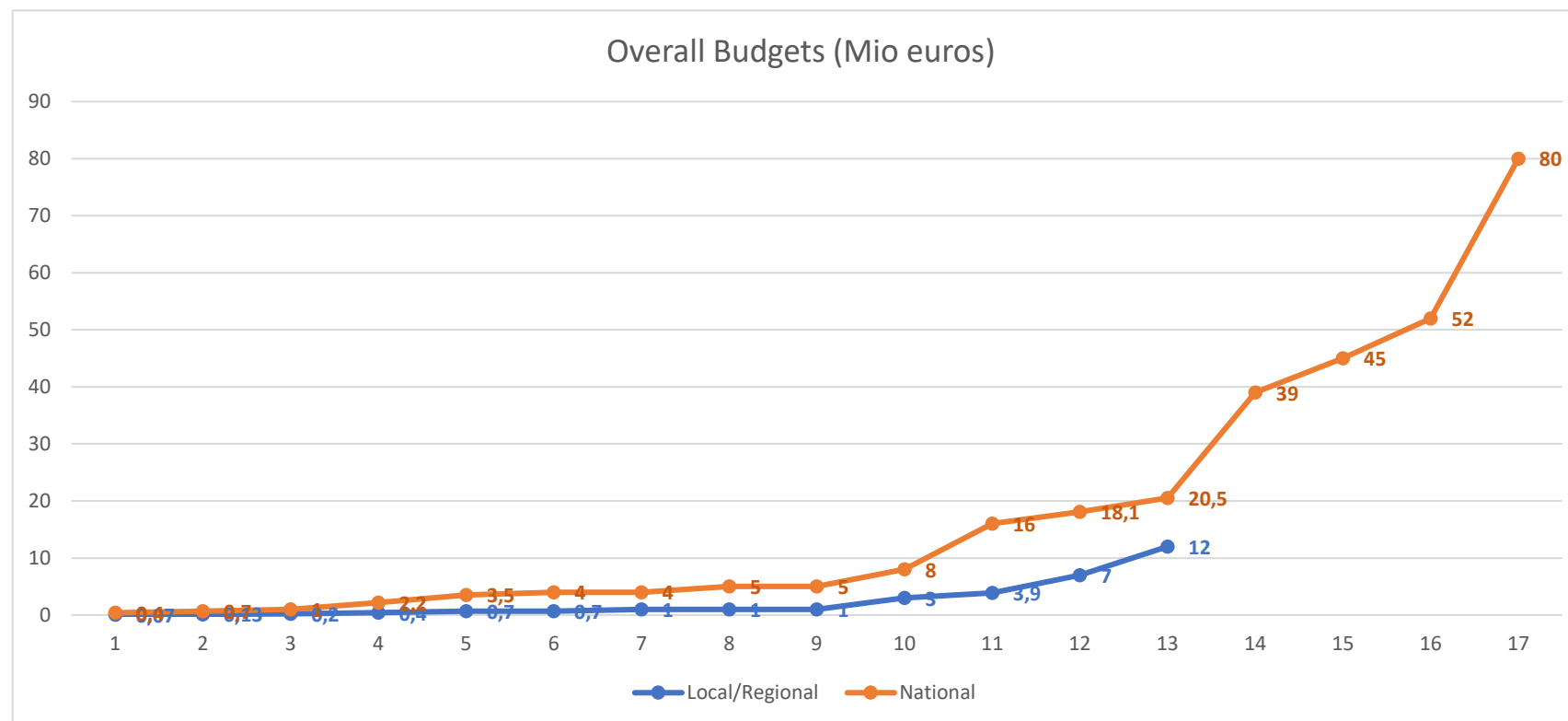
In the opposite, it can be highlighted that some 45% of National Archives do have branches under their responsibilities, against 32% for their regional counterparts. In fact, some National Archives can have a large number of local/regional/sectorial archives or representations under their responsibility (e.g.: over 50 in Georgia, 30 in Poland, around 10 in Spain or Portugal, etc.)



Graph 5: Overall yearly budget average per kind of Archive (Mio euros)

While the difference between local/regional and national budgets can be taken as a fact, as any average calculation, the results need in any case some more details to be fully interpreted, due to the differences between institutions.

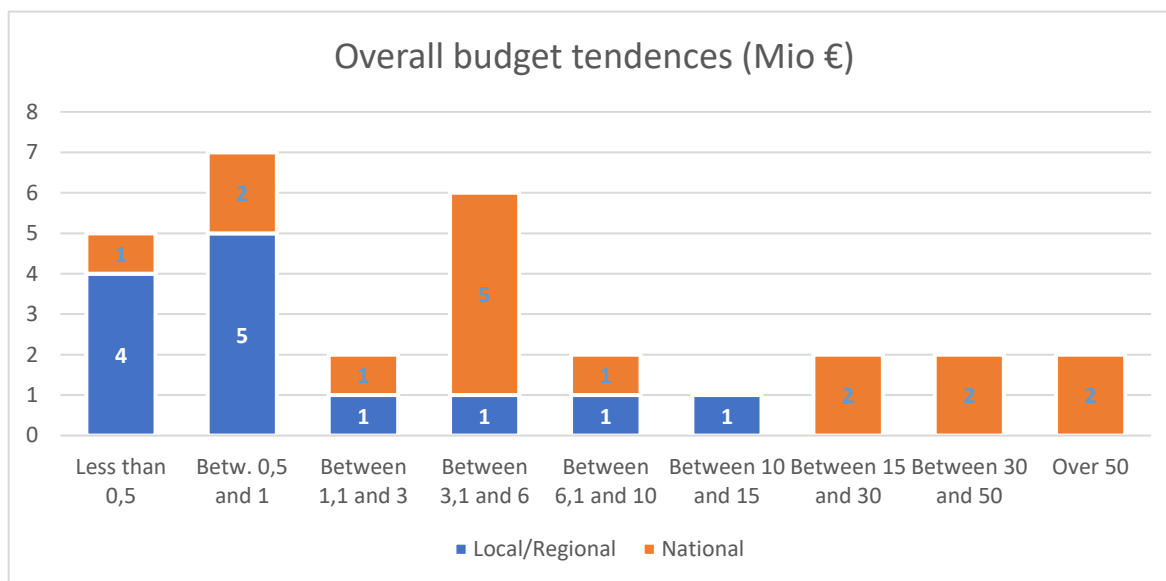
In that sense, next graph presents the answers received (in this case, 30 answers: 17 from National and 13 from Local/Regional institutions), and highlights the economic power diversity:



Graph 6: Overall budgets. Answers received in Mio euros

Though respecting the anonymous part of the answers received, we might however take note of some extremes and tendencies, as stated in the table and graphs below:

- Most of the Local/Regional Archives have budgets of up to 1 Mio euros (almost 70% of the answers)
- 31% of the National Archives have budgets of between 3,1 and 6 Mio euros
- 38% of the National Archives have budgets of over 15 Mio euros



Graph 7: Overall budget tendencies (grouped)

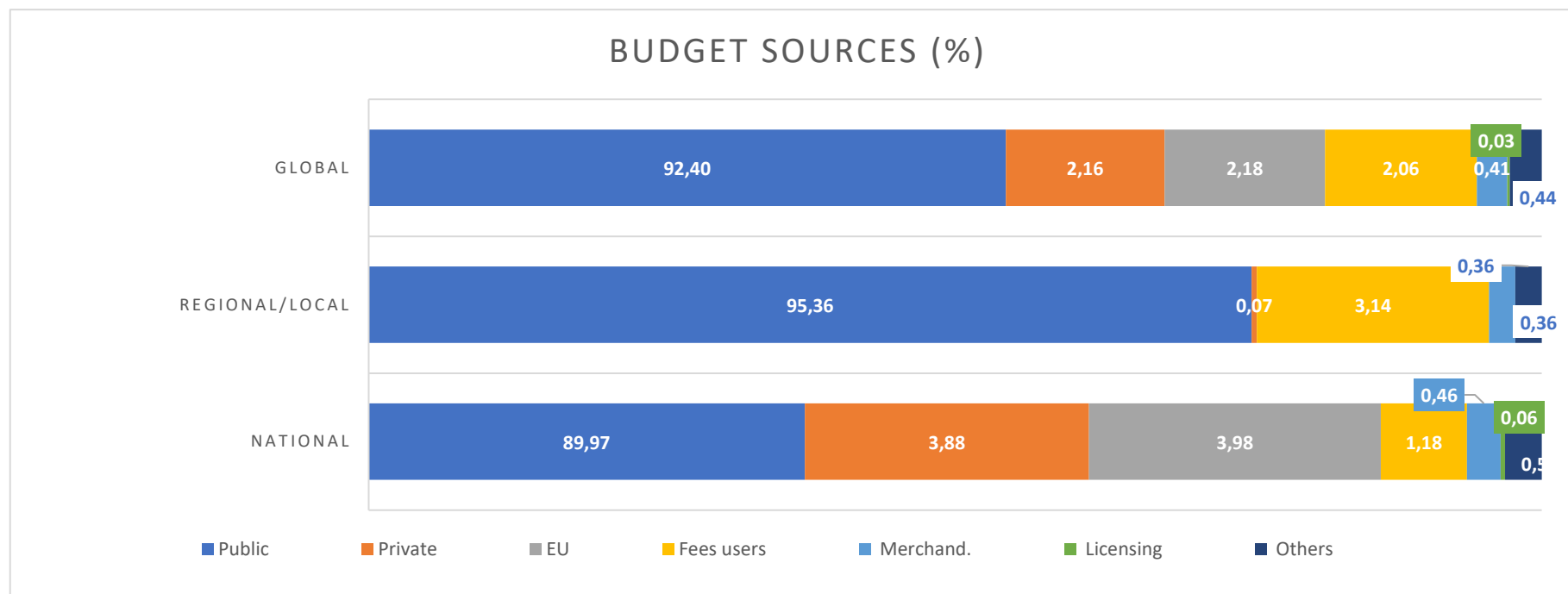
Table 1: Overall Budget tendencies

Mio euros	Nr. of answers	
	Local/ Regional	National
Less than 0,5	4	1
Betw. 0,5 and 1	5	2
Between 1,1 and 3	1	1
Between 3,1 and 6	1	5
Between 6,1 and 10	1	1
Between 10 and 15	1	0
Between 15 and 30	0	2
Between 30 and 50	0	2
Over 50	0	2

As far as the sources of funding are concerned, globally, over 92% of the budgets come from public funds (in most of the case, public "own" funds), and around 6,5% are divided in more or less equal shares proportions among private contributions (2,16%), E.U. funding/grants (2,18%) and user fees (2,06%). The remaining incomes linked to the sales of merchandising products, licensing rights or any other sources are all of them quite irrelevant, below 0,5% in a total average perspective.

The distribution of budget sources is slightly different between National and Local/Regional Archives, as these last ones have a stronger dependency on public funding (over 95% of their budget), and no income at all from E.U. funds, almost no private contributions (0,07%) and, in proportion, slightly more incomes from their users (3,14%), while the National Archives manage to get

almost 4% of their budget from private sources (3,88%) or E.U. projects (3,98%), and would generate an average of only 1,18% of their budget through fees charged to their users.



Graph 8: Budget sources (averages)

Table 2: Budget sources (averages)

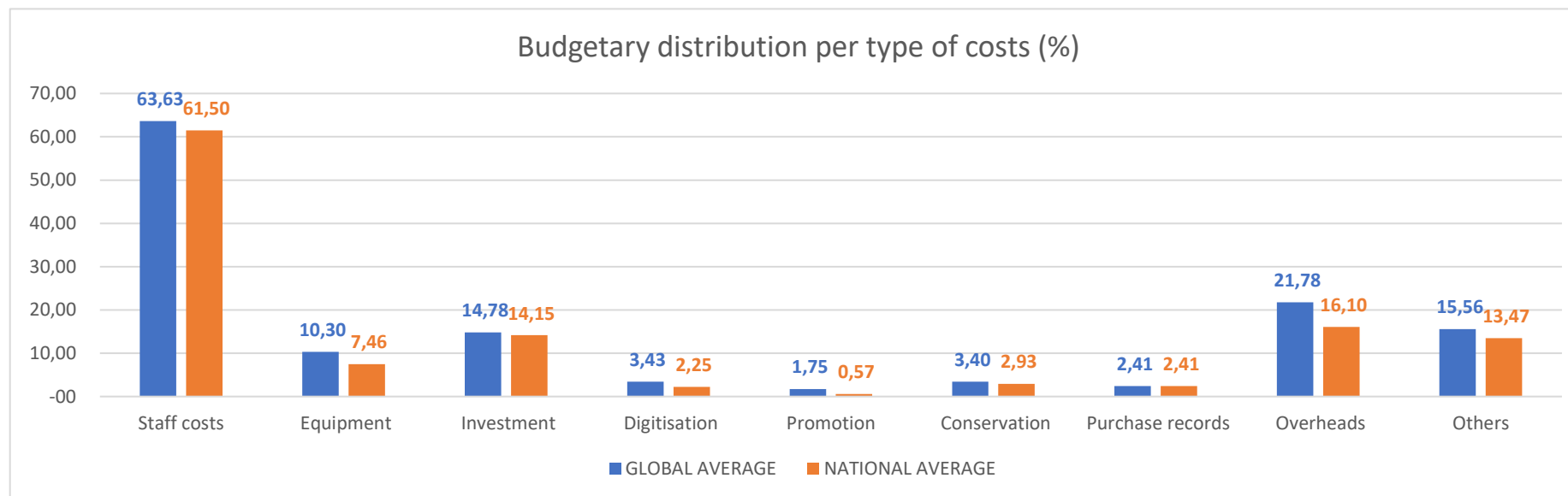
	Public	Private	E.U. funds	Users fees	Merchandising	Licensing	Others
NATIONAL	89,97	3,88	3,98	1,18	0,46	0,06	0,50
REGIONAL/LOCAL	95,36	0,07	0,00	3,14	0,36	0,00	0,36
GLOBAL	92,40	2,16	2,18	2,06	0,41	0,03	0,44

However, these data are average based on the nr. of answers received. Actually, only a few “Archives” do have certain incomes (E.U. funds, Merchandising) or the data available linked to e.g. user fees or licensing. In that sense, the percentage of such kind of costs on the total incomes and sources of the budget can vary depending on the institution, as follows according to the data obtained:

- Among the 6 institutions that count on EU funding, such kind of grants can represent between 2,5% and up to 30% of their total annual budget
- Among the 9 institutions that bring data on their users' fees, such kind of incomes can represent between 1-2% (for several of them) and up to 25% (in one case) annual budget
- Only 4 institutions declare incomes from merchandising. In their case, such kind of incomes represent between 2% and up to 5% of their total annual budget

In that sense, the generation of external outcomes through E.U. sources or user fees can represent a higher part of any Archives financial resources, and should be better explored or monitored.

As far as the **distribution of costs** is concerned, the following graphs and table bring some interesting data and trends about how European archival holding institutions distribute their budget, what are their main costs-



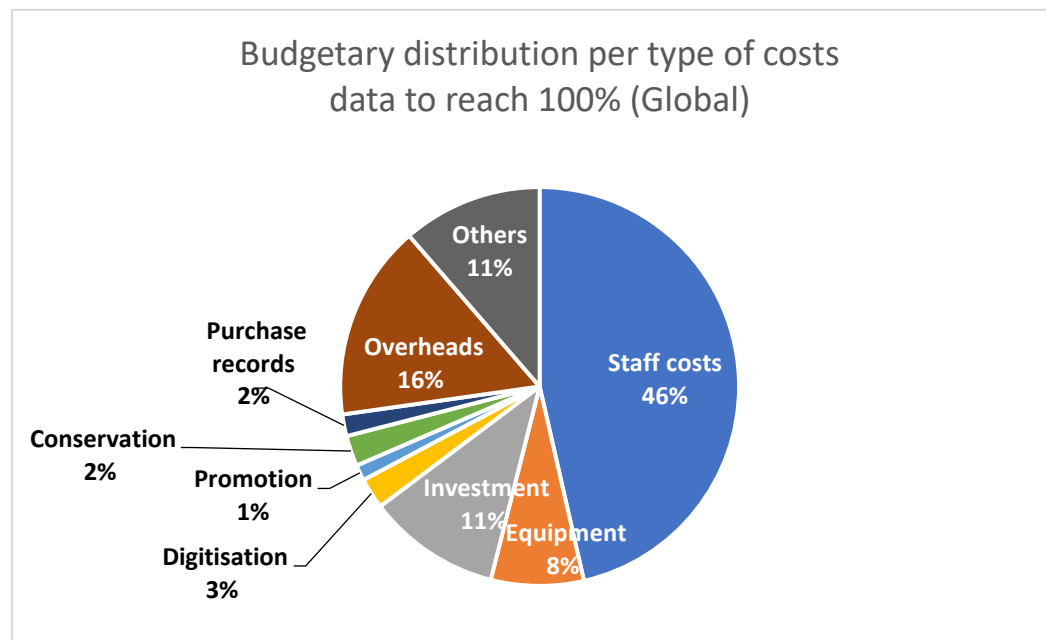
Graph 9: Average budgetary distribution per type of costs

It has to be highlighted that, according to the answers provided by the participants, a very important part of the annual budget is used to cover in house Human Resources (over 60%) and Overheads (between 15%-22%), which would leave around 15% only for further investments and activities.

However, it has to be noted that the totals of all cost categories do not represent 100%, as participants answered with different estimates that did not always match or were coherent. In that sense, higher percentages of costs linked to direct investments (around 14%), the purchase of equipment (between 7 and 10%) can be observed. In any case, the investments in activities such as digitisation (a clear priority for the sector) or promotion (a necessity to increase its visibility) remain somehow very low,

Table 3: Budgetary distribution per type of costs (averages)

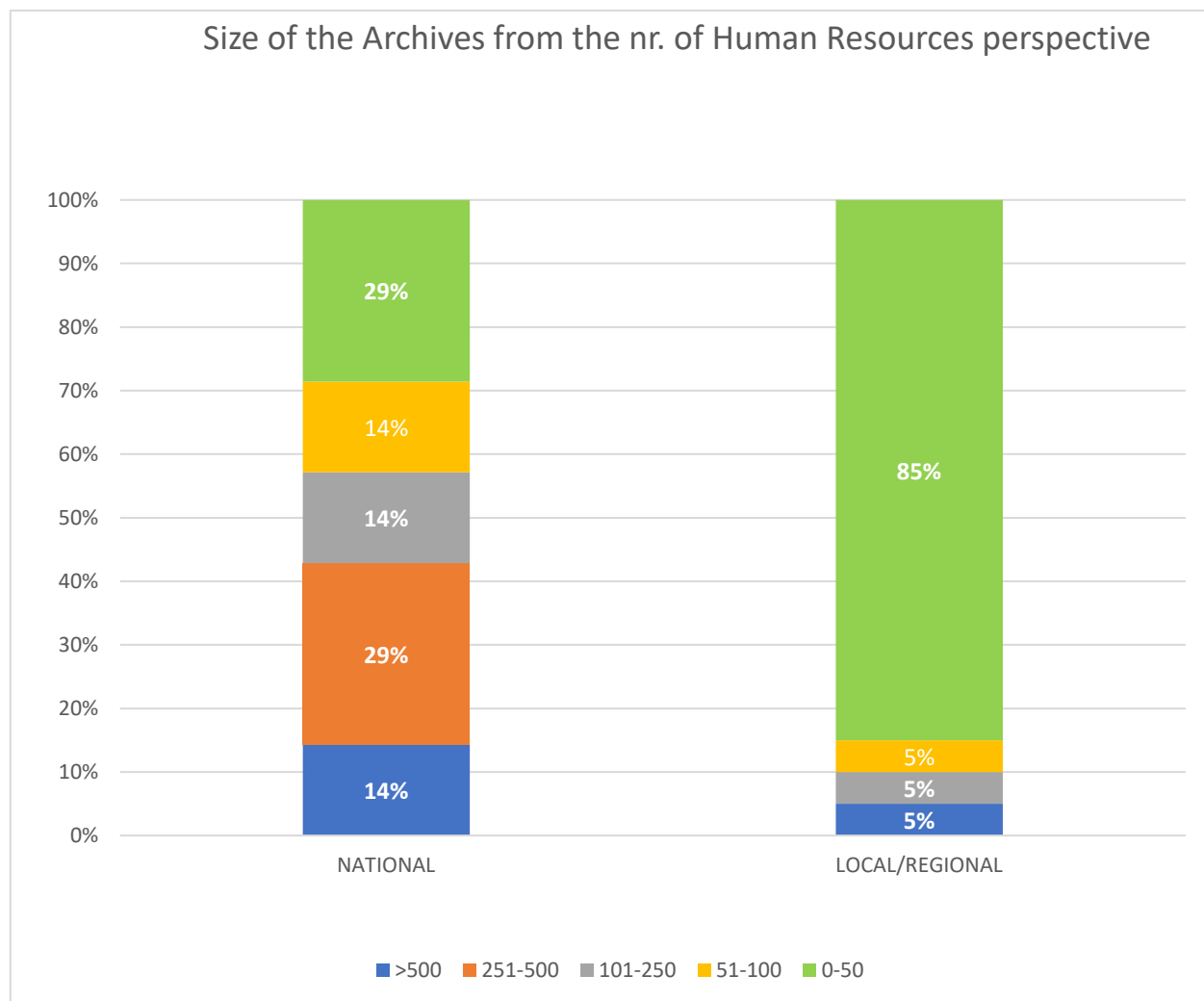
	GLOBAL AVERAGE	NATIONAL AVERAGE
Staff costs	63,63	61,50
Equipment	10,30	7,46
Investment	14,78	14,15
Digitisation	3,43	2,25
Promotion	1,75	0,57
Conservation	3,40	2,93
Purchase records	2,41	2,41
Overheads	21,78	16,10
Others	15,56	13,47
TOTALS	137,04 %	120,84 %



Graph 10: Average distribution of costs (data to reach 100%). Global average

The previous graph transformed the answers provided into proportional percentages to reach a total of 100%. In such case, the staff costs get probably too much reduce and do not correspond to the reality, but still, it serves to visually showcase the importance of staff and overheads, and minimum importance that have activities such as the promotion or purchase of records. Other costs might include maintenance, external expertise, R&D, travel costs, etc.

However, it has to be reminded that many of the activities linked to promotion, digitisation, conservation or even research are carried out directly through staff costs. In that sense, it is worth analysing the average size of the Archives from their Human Resources perspective, as well as the proportion of staff per profiles/functions.



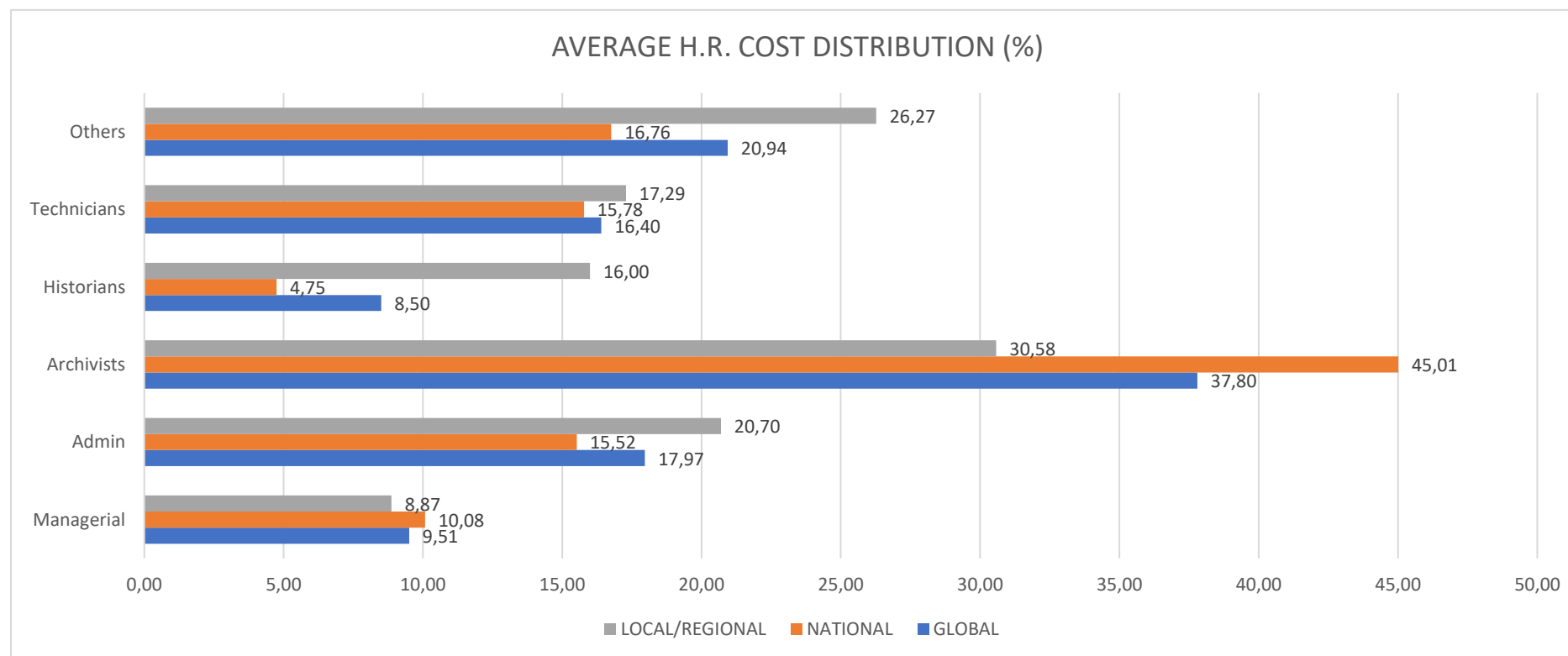
Graph 11: Size of the Archives from the Staff perspective

It would be wrong to make a general profile of the Archives in terms of size, mixing Local/Regional Archives with National ones, as the trends are totally different:

While we can affirm that a clear majority of the Local/Regional Archives have a relatively small size (less than 50 employees), as it occurs with the financial resources, there is a wide range of differences among National Archives.

Almost 30% of them are of small size (<50), another 30% would be of medium size (between 50 and 250), and over 40% have quite an important size (over 250, including 3 answers received from National Archives that count on over 500 employees).

As far as the profiles of the Archives teams are concerned, the specialisation is more important at National level than at Local/Regional one, as, for example, some 45% of the staff of National Archives are “archivists” (against 30% only for local/regional ones), and National Archives count on slightly less “administrative staff” than their local/regional counterparts.



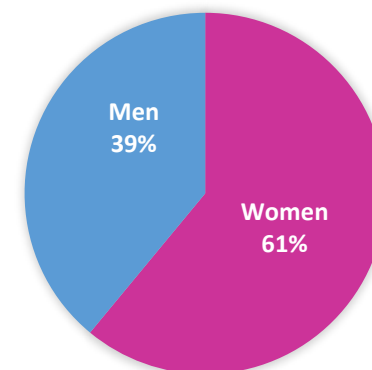
Graph 12: Average staff profiles distribution

However, maybe to compensate the lack of “archivists” specialisation in non-centralised areas, Local/Regional Archives count on almost twice “historians” than their national counterparts (16%, against 8,5% for National Archives).

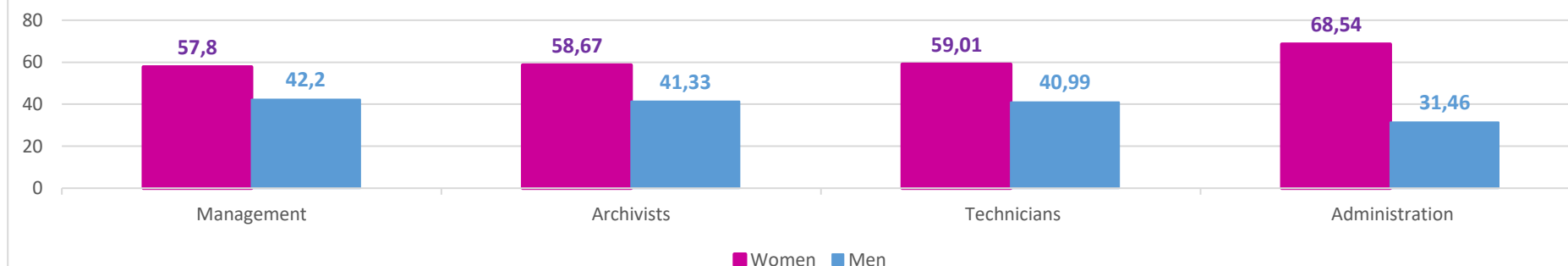
As a final remark around Human Resources, very important to highlight, that the Archives cultural subsector is probably the most “feminized” one among all subsectors of the cultural and creative industries, with over 60% of the positions covered by women.

From a gender equality perspective, the fact that such predominance of women in the “archives world” occurs in all kind of positions, including at managerial ones, is a clear differential aspect that should be underlined and promoted as a positive characteristic of this subsector.

AVERAGE GLOBAL GENDER DISTRIBUTION



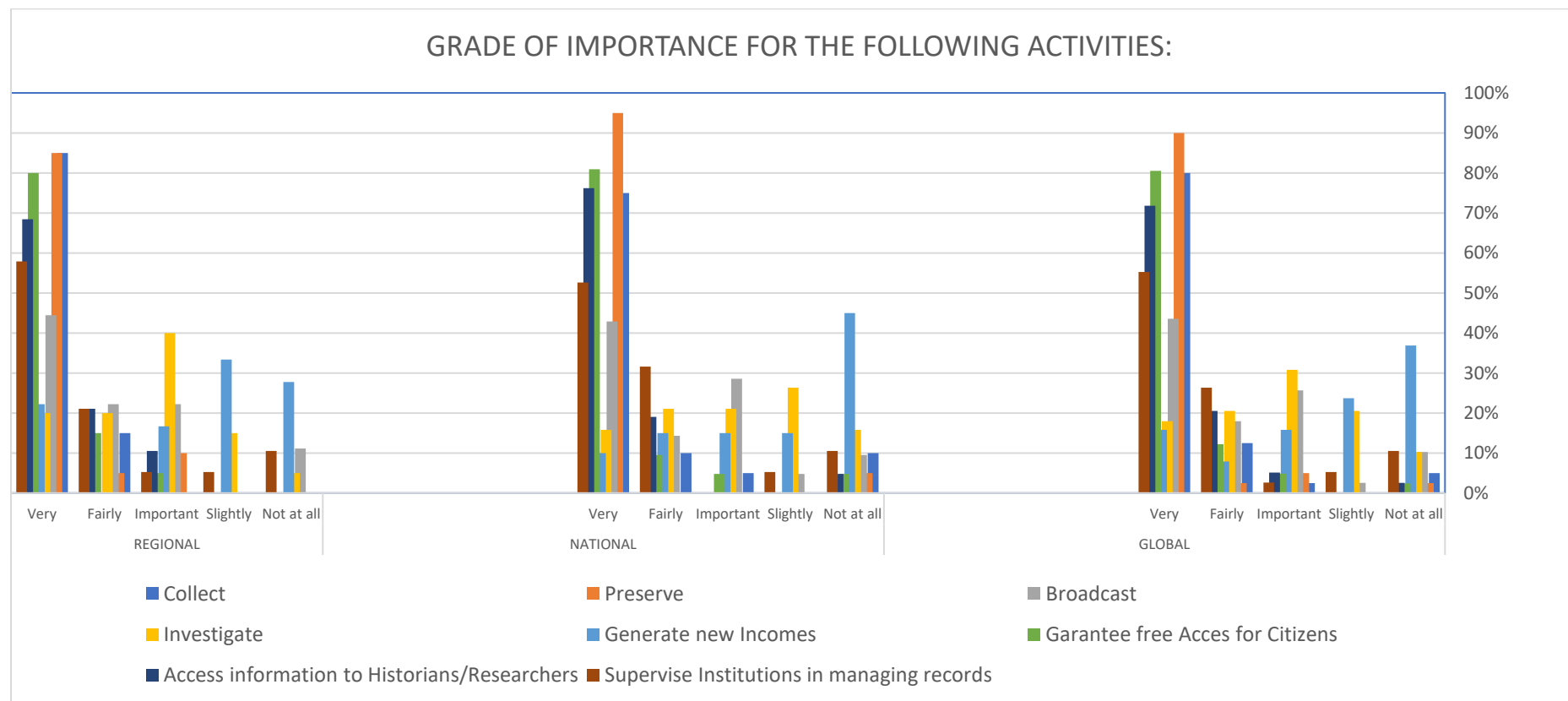
GLOBAL GENDER DISTRIBUTION (by positions)



Graph 14: Global Gender Distribution (by positions)

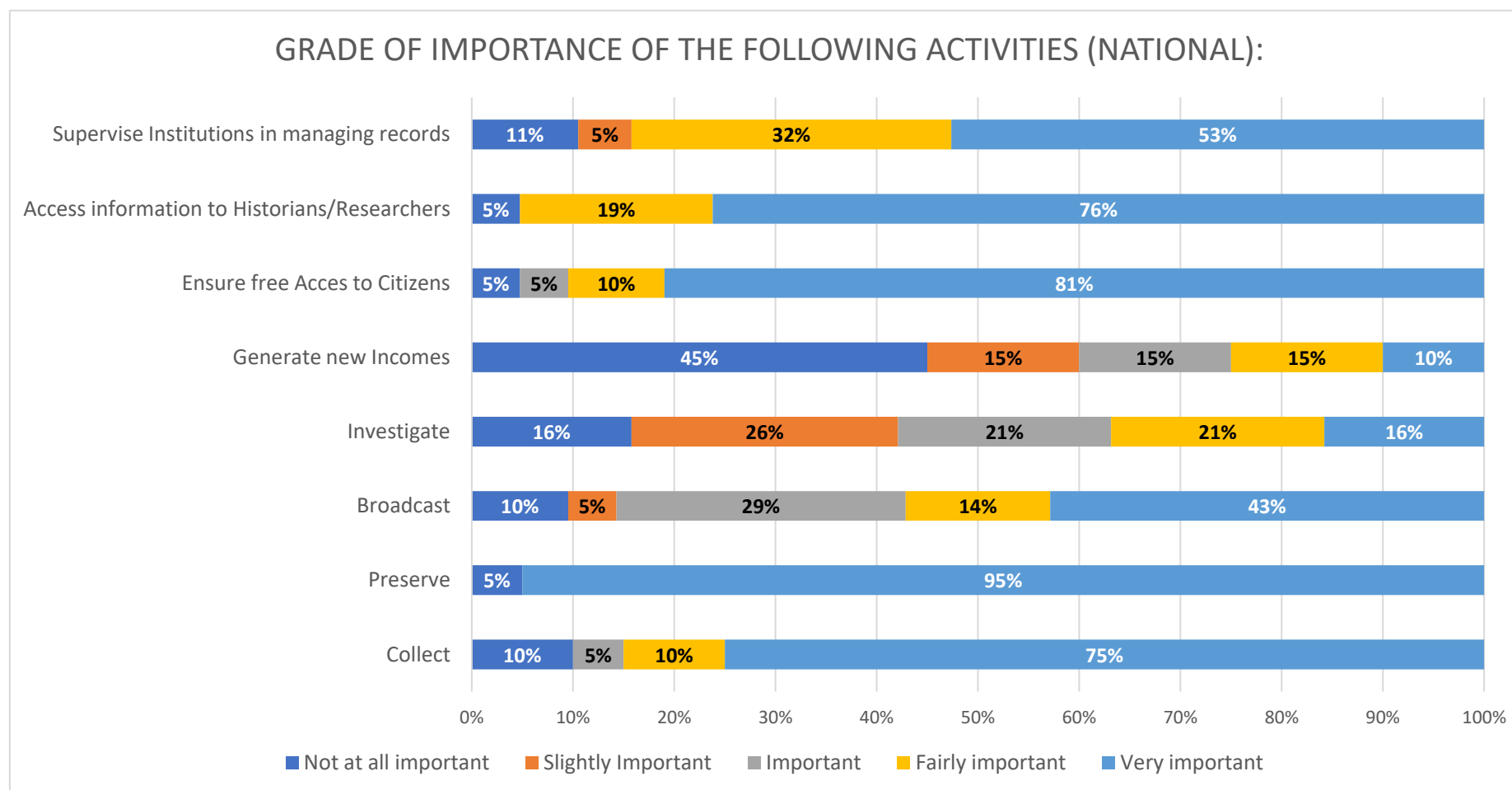
As far as other resources are concerned, most “Archives” would refer mostly to their existing/own digitalisation equipment and software, as well as online tools and platforms, not only to disseminate, but also to aggregate digitized items.

In fact, digitisation is part of the preservation process and work of the “Archives”, and their most important task according to the participants perspective.



Graph 15: Grade of importance of different activities (all)

As such data are very similar among kind of "Archives", the following graph provides a more detailed information from the National Archives perspective in terms of self-assessment of their role:



Graph 16: Grade of importance of different activities (National perspective)



As it can be observed, 95% of the participants consider “Preservation” as very important. Such activity is followed by the guarantee of access to citizens (81%) or Historians/Researchers (76%) and the “collection” tasks (75%). On the opposite, the generation of new incomes is not considered as a priority for National Archives (60% consider it not or slightly important), nor are the investigation activities (42%).

When participants to the survey were asked to highlight any other function, the most common trend and answers are linked again to digitisation and e-archiving. Only one participant mentioned the development of educational, volunteering or crowdsourcing projects.

B) Contents & Digitization (basic figures)

Archival holdings, archives, documents, records, etc., there are different ways to name the materials preserved by Public or Private Archival Holdings Institutions. In addition, there is no official or homogeneous list of the kind of records and we can find several definitions, e.g.:

- "Archive: a physical or digital collection of historical records" / "Record: 1. A written or printed work of a legal or official nature that may be used as evidence or proof; a document. 2. Data or information that has been fixed on some medium; that has content, context, and structure; and that is used as an extension of human memory or to demonstrate accountability. 3. Data or information in a fixed form that is created or received in the course of individual or institutional activity and set aside (preserved) as evidence of that activity for future reference." (Dictionary of Archives Terminology – Society of American Archivists)¹
- "Archives are the documentary by-product of human activity retained for their long-term value. They are contemporary records created by individuals and organisations as they go about their business and therefore provide a direct window on past events. They can come in a wide range of formats including written, photographic, moving image, sound, digital and analogue." (International Council on Archives)²

For the present research and survey, the terminology "records" has been used to refer to the materials preserved. To assess how many "records" are kept and/or available is almost an impossible task, as the way of calculating the materials available is not homogeneous either, and vary depending on the institutions and criteria: Documents? (A document can have several sizes and nr. of pages, and not all records are paper-made); Boxes? (a quite common indicator, especially for records that are not already identified or described); Linear meters? (the most commonly used criteria to calculate the amount of materials available). In any case, this is not the objective of the present report, and our survey let the choices to participants to quantify their records according to their own preferences and habits. In any case, we are talking about hundreds of millions of records being preserved by European Archives, and a large majority of their contents are still to be discovered, as, according to the answers received, globally, an average of around 18% of the total records are described, around 15% only at National levels. In other words, the contents of **85% the records being preserved in European National Archives buildings remain unknown or undescribed...**

¹ <https://dictionary.archivists.org/>

² <https://www.ica.org/en/what-archive>

Table 4: % of described records (answers received)

Geographical competences	% Described
National	3
Regional	10
National	5
National	15
National	1
Regional	34,8
National	20
Local	25

Regional	34
Regional	34
Regional	5,3
Local	8
Local and Regional	100
Regional	10
Regional	4
National	3
Local and Regional	10
Local	5

Local	8
National	1
National	85
National	7
National	5
Regional	3
Average Local/Regional	20,79%
Average National	15,77%
Average Global	18,17%

As it can be observed, only one Local/Regional Archives that has answered our survey has 100% of its records described. These first data help to better understand the volume of information kept, and the low percentage of digitisation of the records.

The following table in fact includes the estimates of records preserved at different Local/Regional and National Archives (as stated, with different, non-homogenous, kind of criteria and methods of calculation), and, above all, their percentage of digitization. This ultimate data is particularly interesting, and shows that, **in average, only 4,41% of the records kept in European Archives are already digitized** (a process that has started several decades ago): Over 95% are thus only available in their original analogue format.

Again, due to the differences in terms of size and amounts of records available, the Local/Regional Archives have a higher percentage than their National counterparts (5,27% of their records being digitized, again **3,61% only for National Archives**).

Table 5: Total holdings (gross data) and percentage of digitization

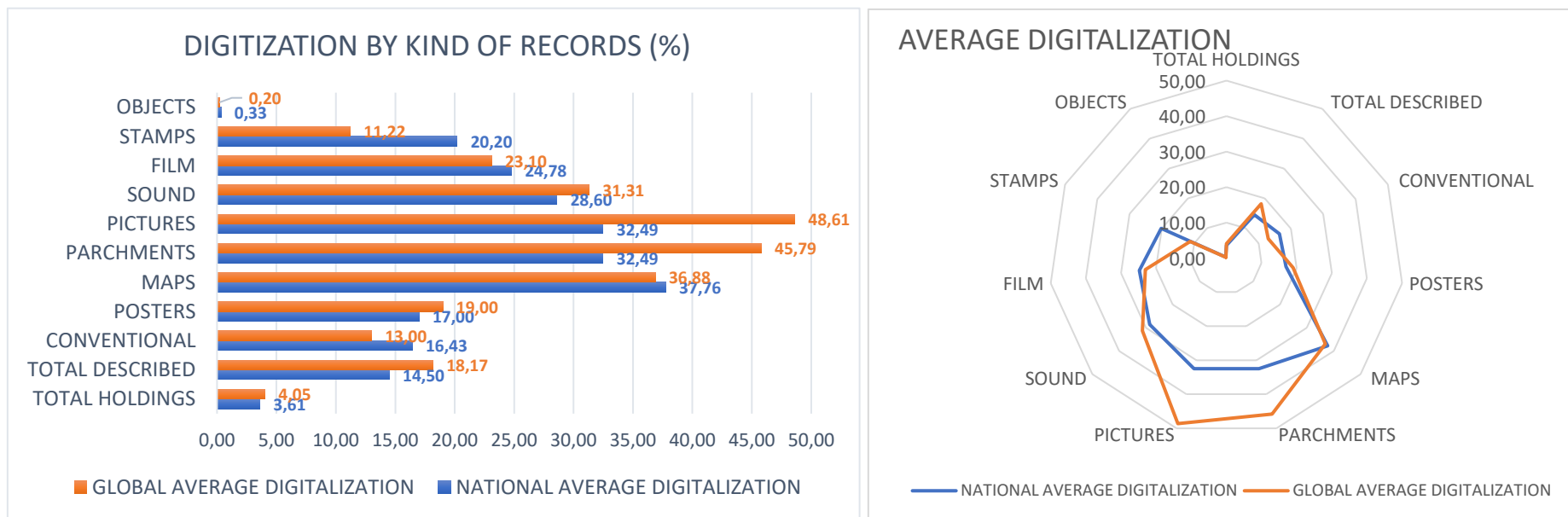
Geographical competences	Total holdings (Gross answers / different kind of criteria)	% of digitized
National	210.000	2
National	9.700.000	5
Regional	19.857	3
Local	2.816	10
National	14.447	10
National	16 Km	5
National	2.444 Archival; Fonds 175.000; linear meter	1
Regional	430.500	11,6
National	17,5 Km	2
Regional	30	2
Local	40.000 meters	5
Local and Regional	1,7 mill	10
Regional	360.000 meters	10

Regional	5.236 m.l	3
National	5.473.787	3
Local and Regional	160.708 boxes	1
Local	149.600.000	0
Local	48.7210 records/ 1.307 archives	5
Local	60.300.000	7
National	45.000	0,55
National	25.780 m (1923 fonds na collections)	1
National	333.845 linear meters	5
National	84.960	6
National	5.050.000 files	1
National	11.000.000 accounting units	6
Regional	98.5760 units of installlations	1
National	271.103 shelf metres	3
Average Local/Regional		5,27%
Average National		3,61%
Average Global		4,41%

In this case, we can observe that only one Archive has managed to digitized over 10% of its records, but it is a “small” Regional Archive, with 430.500 holdings only (11,6% of them being digitized). Only one National Archives reaches 10% of level of digitization.

As it occurs with other questions, not all Archives have been able to answer such question, which is relatively surprising and demonstrate a lack of basic data available on their own activities and activities, and made next questions even more tricky to answer...: What kind of contents are being digitized? From which periods? And which geographical origin?

As stated, profiles of the records and their definitions vary from one country/Archive to other. For the purpose of the present research and of the survey, 9 different categories have been chosen and proposed (pictures, parchments, maps, "conventional", etc.). While the exact number of records by this kind of categories is impossible to obtain so far, the survey did generate some interesting data

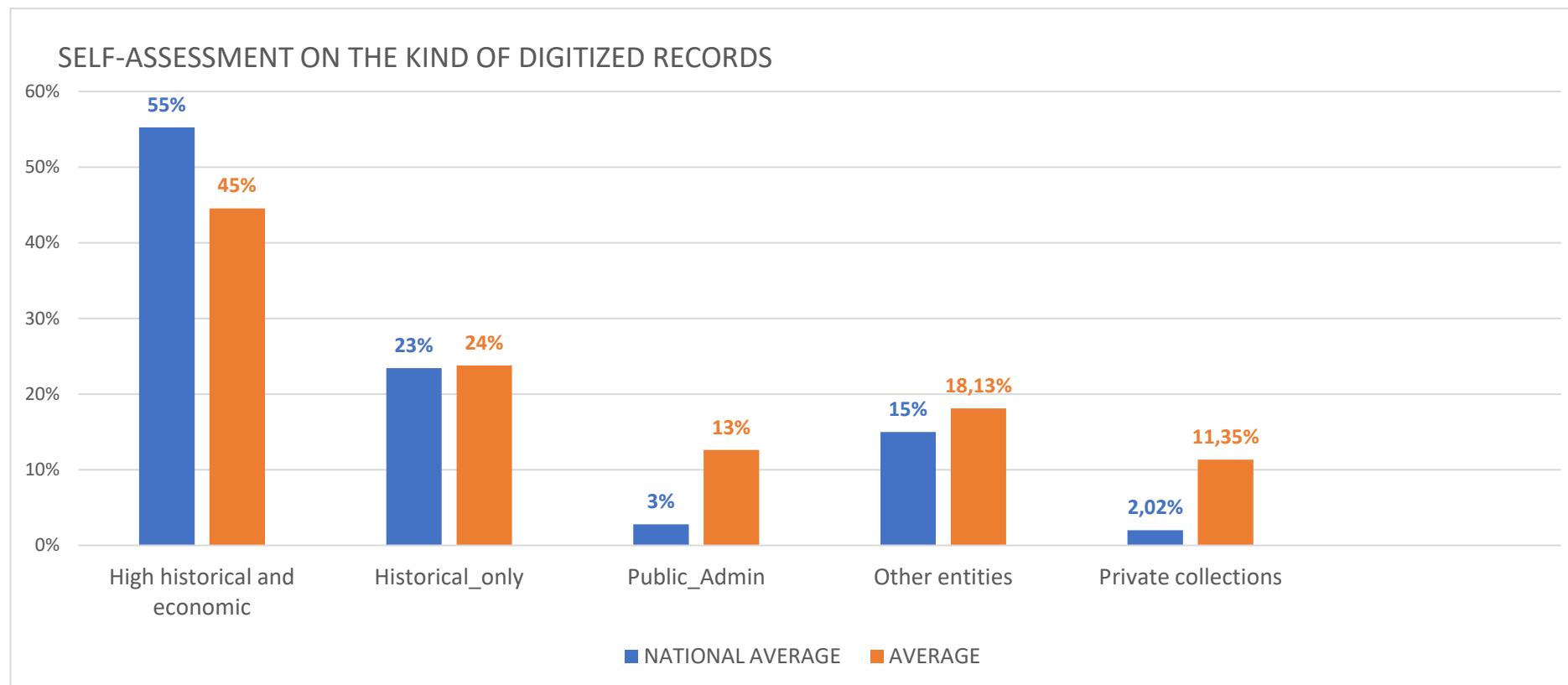


Graph 17: Percentage of digitization per kind of records

to know which one are being digitized.

As we can observed, globally, the digitization efforts are concentrated in pictures (globally around 48% of the described ones would be digitized, 32% at National level), parchments (around 45% globally, 32% at National level) and maps (36% globally, and in this case a slightly higher percentage at National level, 37,76%). This can be understood and interpreted as pictures are easier to digitize (and to collect already digitized), and due to the high historical value of parchments and maps, and thus major efforts of conservation

and dissemination. In fact, when self-assessing the kind of records that are already digitized, 55% of National Archives declare that such records are of high historical AND economic values, against 23% of historical value only.



Graph 18: Self-assessment on the kind of digitized records

The survey didn't enter into further details to know what criteria guide the selection of materials for digitization, which could be an interesting data.

This question was however asked in a previous survey answered by Libraries and Archives at the end of the XXth Century for IFLA/UNESCO (Survey on Digitisation and Preservation)³. Though such work was carried out a couple of decades ago, some of its results might remain of interest, in particular the ones linked to the criteria, that do not seem to have changed that much

Table 6: Criteria for digitization

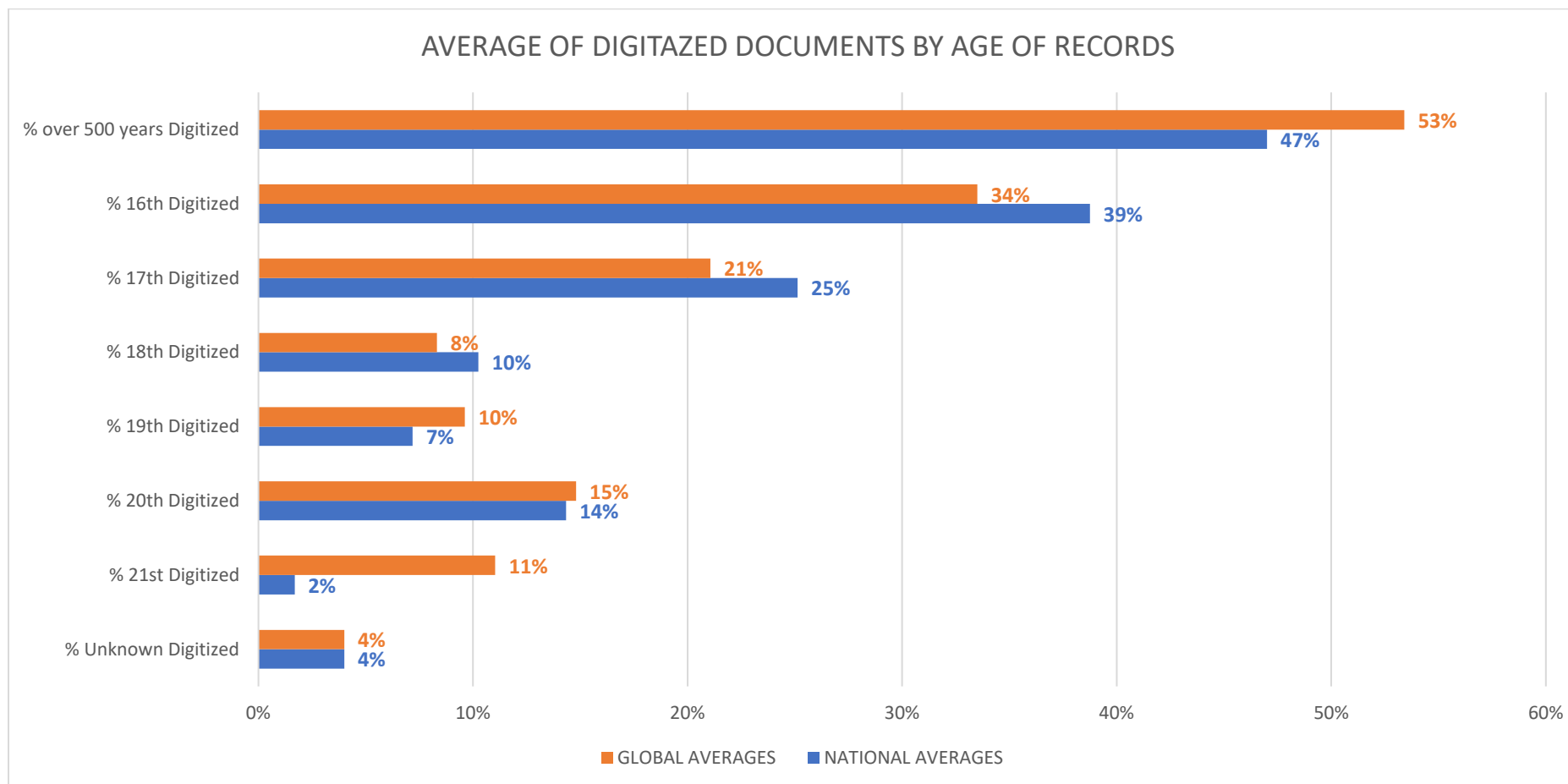
Criteria	Percentage of libraries/archives choosing each criterion
Historical/cultural value	100%
Increase access	100%
Academic importance	92%
Reduce damage	69%
Preservation	69%
Provide document delivery services	46%
Save space	15%
Research into digital processes	15%
Commercial exploitation	7%

Source: IFLA/UNESCO. 1998

While it is clear that the historical/cultural value and accessibility remain of key importance, it would be particularly interesting to update these data especially to link the digitization efforts and policies to research or commercial criteria, and include some new ones in relation to the new digital era of communication and Social Media.

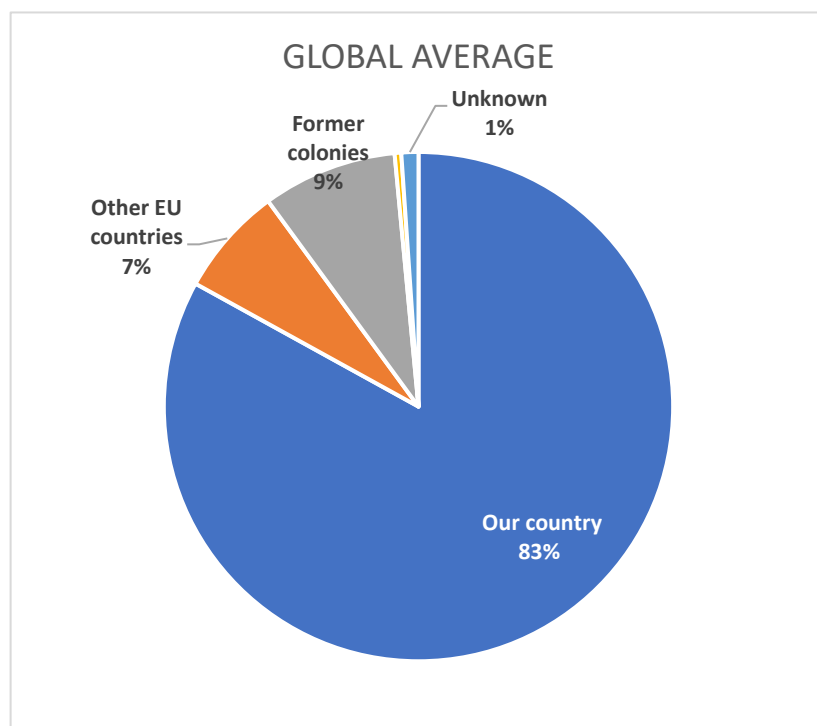
In any case, the historical and preservation interest of the digitized records is also confirmed as the efforts are proportionally higher depending on the age of the records (parchments, maps, etc.). Actually, according to our survey, we can affirm that, **the oldest the records are, the higher probability they have to be digitized**. As it can be observed in the following graph, globally, 53% of records of over 500 years old are digitized (47% at National level); 34% of records from the 16th Century (39% at National level), etc.:

³ IFLA/UNESCO. Survey on Digitisation and Preservation compiled by Richard Ebdon and Sara Gould under the direction of Marie-Thérèse Varlamoff for the IFLA Core Programmes for PAC and UAP on behalf of UNESCO

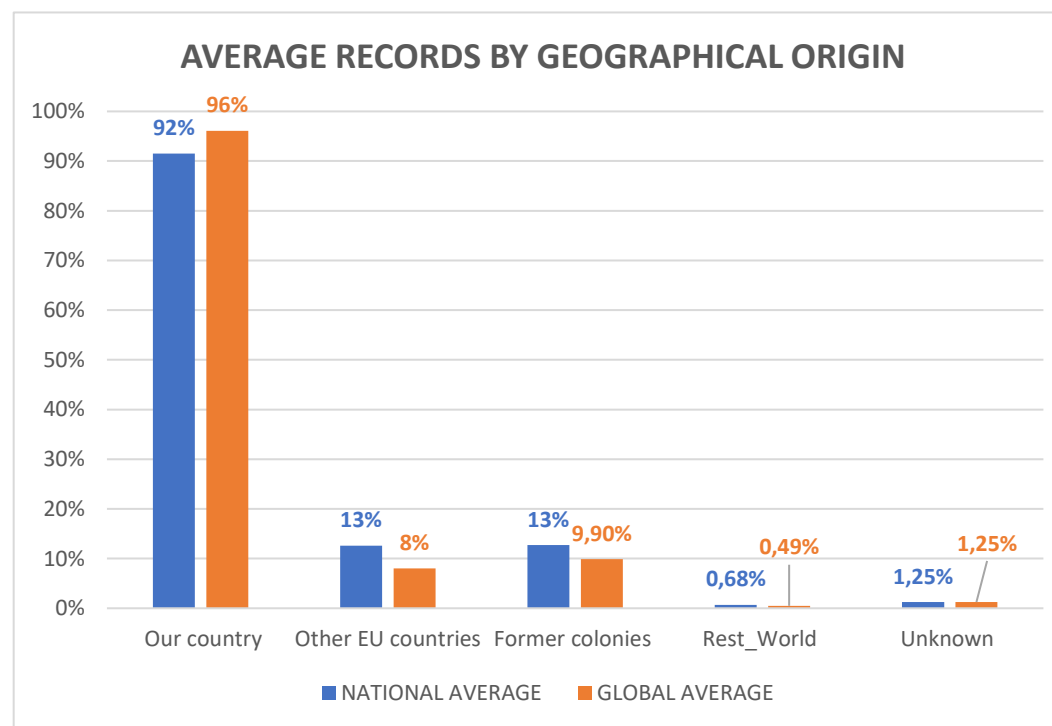


Graph 19: Average of digitized documents by age of the records

As far as their geographical origins are concerned, globally, over 95% of the records preserved in European Archives come from their own country, against 13% from other EU countries and 13% from former colonies (see graph on the right). Again, these gross estimates do not match 100%, as some answers were somehow incoherent, but they do provide a general idea of the origin of the records. If we transform the answers to match 100%, the percentage of "own national origin" would remain in any case very high (83%) and be followed by former colonies, from a global average perspective.



Graph 21: Global average of geographical origins (on 100%)



Graph 21: Average records by geographical origin (answers)

From a digitization efforts perspective, according to the answers obtained, a major efforts has been carried out with records from former colonies than with records from other EU countries: A global average of around 18% of former colonies records have been digitized (28% in the case of National Archives), against 12,5% for EU ones (7,5% at National Archives).

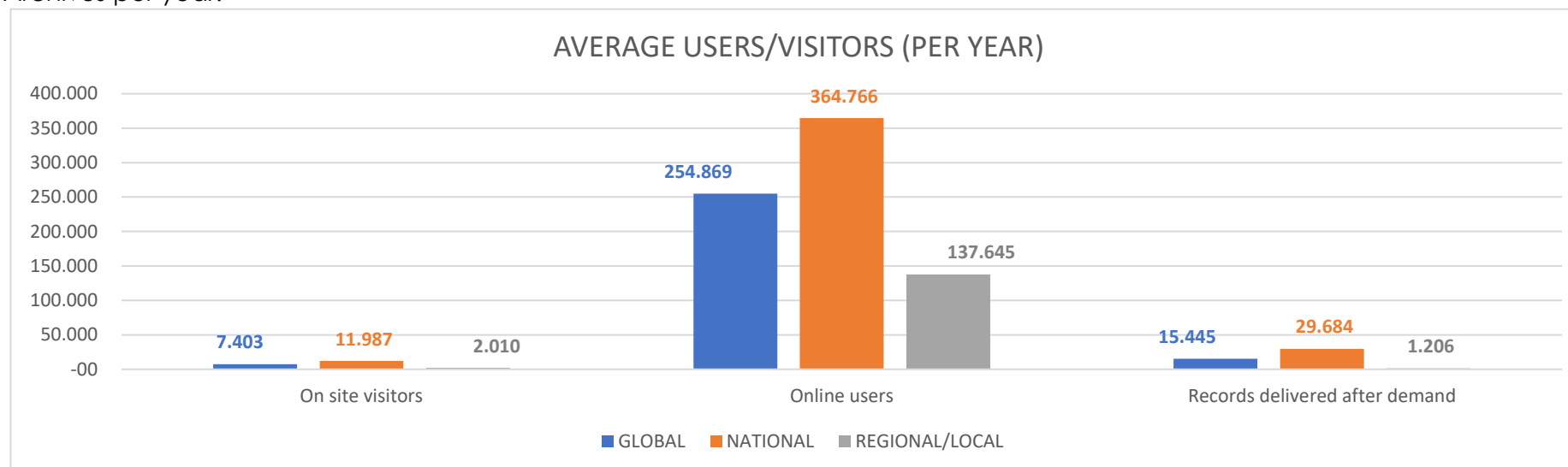
C) Audiences

Users

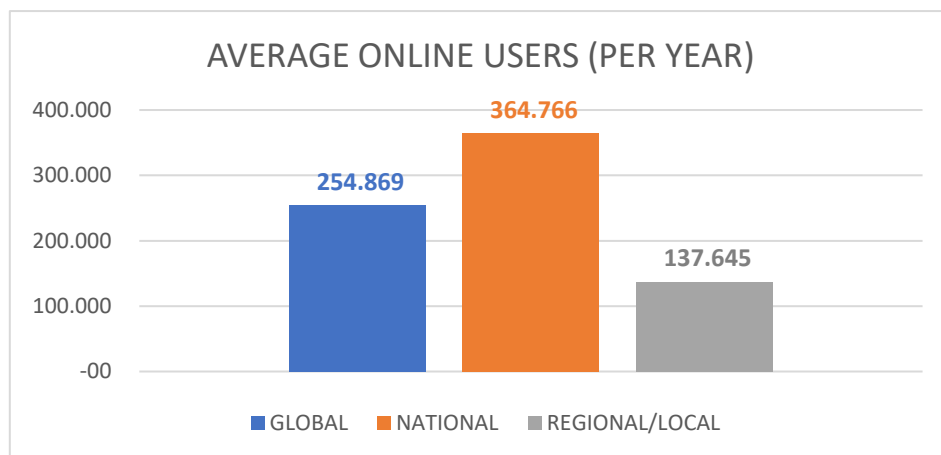
Audience development is a key priority of the Creative Europe Programme of the E.U., and should be a transversal part of any future business model or management plan. By “audience development”, the whole chain of creation, management and follow-up of existing or new target groups should be meant, in order to extend access to as wide an audience as possible. It is somehow interlinked to next chapter (D), as well as to educational programmes or activities.

The present chapter pretends to introduce to the current situation of European Archives as far as Audience development/management is concerned, and answer some key basic questions: Do Archives implement any specific audience strategies? What is the profile of their current users? What are their target audience priorities?

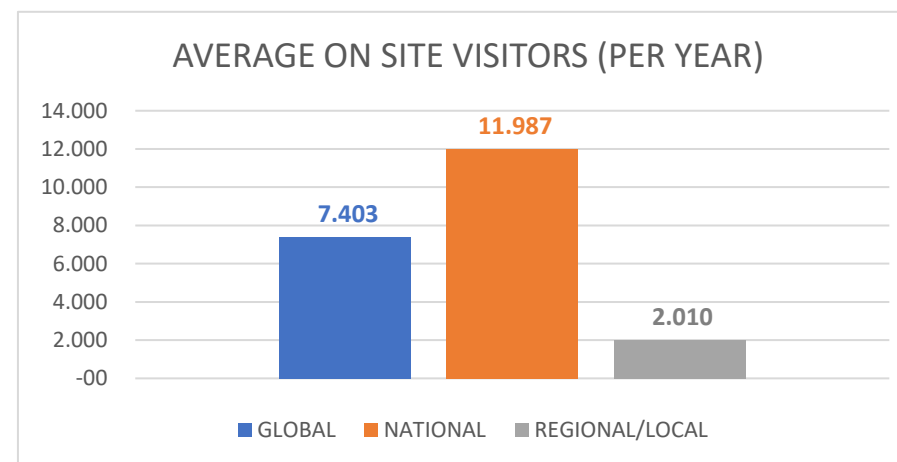
First of all, from a quantitative perspective, the following graphs bring some idea about the “average visitors/users” of European Archives per year.



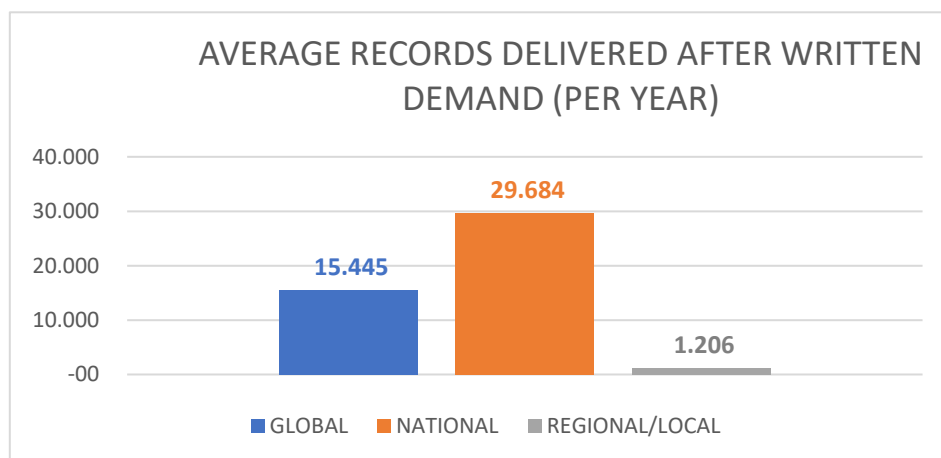
Graph 22: Average visitors/users (per year)



Graph 24: Average "online" visitors (per year)



Graph 23: Average "on site" visitors (per year)



Graph 25: Average nr. of records delivered after written demand (per year)

As we can observe, the average nr. of onsite visitors turns around 12.000 users at National Archives, six times higher than their local/regional counterparts. The difference is not surprising, not only for the nr. of records available, but also taking into account that some National Archives would include data from their different branches.

With over 350.000 online visitors, the average number of digital users is also 265% higher than for Local/Regional Archives, and the difference is even higher when it comes to the delivery of copies after written demands, as National Archives would deliver almost twenty-five times more numbers of records than local/regional ones.

Table 7: Nr. of visitors/users/delivered copies: Gross data-answers obtained

Geographical competences	Users onsite	Online visitors	Delivered	Geographical competences	Users onsite	Online visitors	Delivered
National	7.600	50.000	2.000	Regional	60	5.000	
National	8.000	1.500.000	6.000	Regional	884		346
National	1.250	139.970	581	Local	9.873		
National	1.600			Local	447	651	250
National	28.484	204.610		Regional	500	21.000	500
National	2.200	5.000	760	Local		810.987	300
National	1.040	109.000	232	Regional		53.619	
National	2.758	2.190	25.745	Regional	341	74.738	2.000
National	6.734	937.550		Regional	575	67.763	900
National	400	2.500	6.000	Regional	600		1.500
National	531		440	Local	600	282.000	2.400
National	35.000	85.000	67.000	Regional	600	282.000	2.400
National	34.058	1.545.403	93.016	Local and Regional	3.000	10.000	1.000
National	4.295	123.534		Regional	2.800	270.000	1.100
National	3.200	120.000		Regional	2.654	2.587	347
National	5.509	14.500	2.000	Local and Regional	2.137	77.829	553
National	70.953		68.853	Local	6.000	100.000	200
National	5.962		27.502	Local	602		
National	14.559	197.000	30.132	Local	2.500	6.500	4.300
National	5.600	800.000	115.000	AVERAGE REGIONAL/LOCAL	2.010	137.645	1.206
AVERAGE NATIONAL	11.987	364.766	29.684				
AVERAGE GLOBAL	7.403	254.869	15.445				

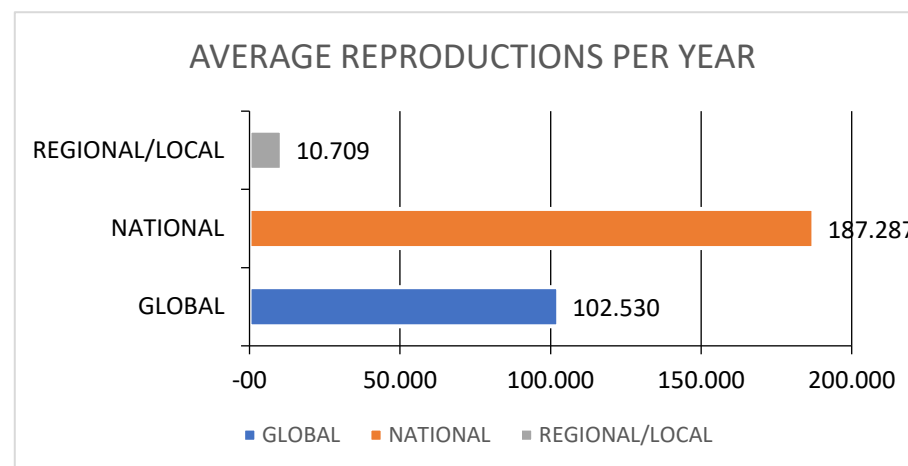
The previous table clarifies how the average has been calculated, using the answers obtained from the participants, and having taken away some random errors or extremely low or high answers. The table highlights the differences among Archives, as their data can vary significantly from one to another institution. It is particularly interesting to observe the importance of online users that, in average, are 30 times higher than onsite visitors for National Archives, and almost 70 times higher in the case of Local/Regional Archives.

Though some National Archives present some important numbers of visitors (e.g. 70.953, though this includes branches), among the 20 National Archives that have answered that question, only 3 of count with over 30.000 yearly visitors, which means **that 85% of the National Archives have less than 30.000 visitors/year**. These amounts are thus not particularly high, especially if they are compared to other national cultural institutions such as “Libraries” (e.g., between users and visitors to its exhibitions and participants to events, the Spanish National Library receives over 200.000 people yearly).

We have to be more careful when analysing the answers received around the online visitors, as the interpretation of “online users” might differ from one institution to another, as some people would count different kind of online tools, including Social Networks, while others the access to their platform only. Still, among the 16 answers received (for National Archives), 38% (6) have less than 100.000 online visits, 25% (4) would count on between 100-200.000 online visitors, and only 2 National Archives refer to around 1.5 million users.

In order to better assess Archives visitors' activities, a more interesting data is the number of document reproduction requests. 25 European Archives have answered such question (12 Local/Regional; 13 National ones), **reaching altogether over 2.5 Million of reproduction requests**. The averages and data are however very different among them, as National Archives' average of requests is of almost 190.000, while for their local or regional counterparts, the data is slightly above 10.000 requests.

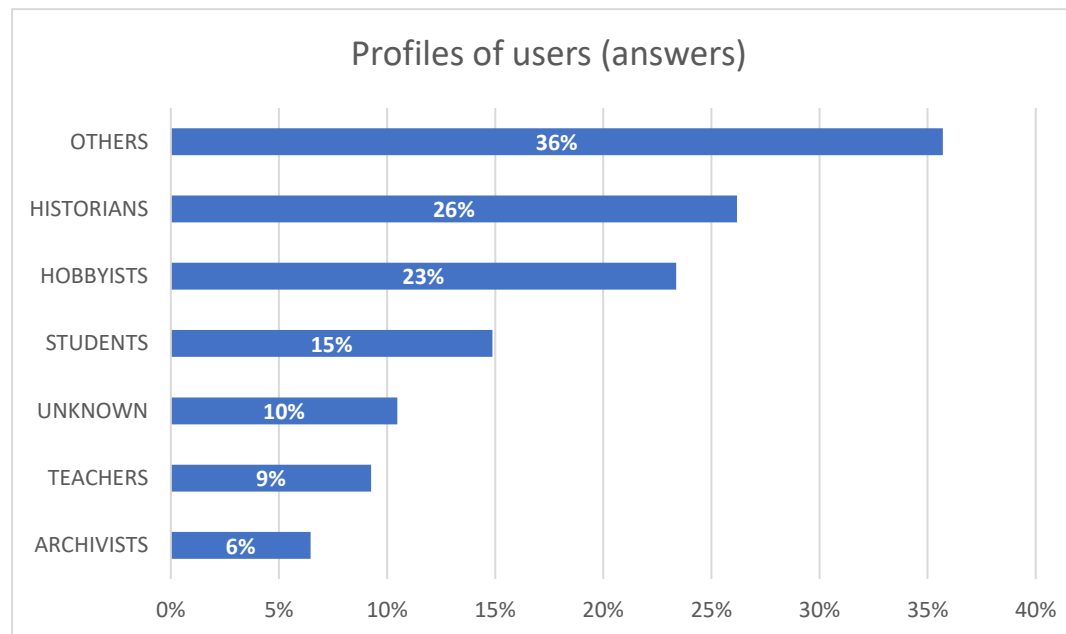
This might mean that the records kept at National Archives have a clearly more important relevance and usefulness for research purposes, and that Local/Regional Archives contributions are more orientated to conservation.



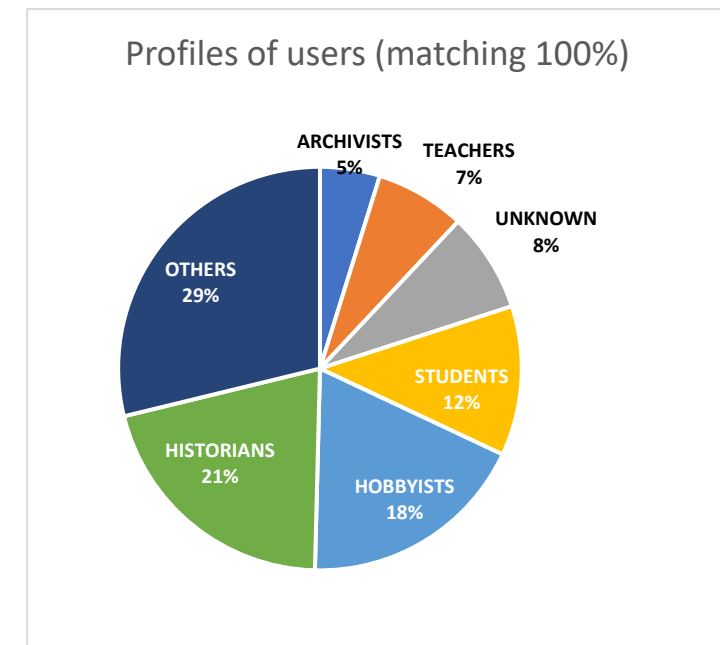
Graph 26: Average nr. of document reproductions request per year

Profiles

Among the 42 participants, 29 have been able to answer the question related to the profile of the users, which means that a majority (almost 70%) of them do have an idea of their existing audience, even if there were some usual incongruities (answers that do not match 100%) and almost half of the profiles of the visitors (46%) is not properly identified (36% are identified as “others”, and 10% as “unknown”). Still, the information provides a ranking of users per profiles, being “Historians” the most common users, followed by “Hobbyists” and “Teachers”.



Graph 28: : Profiles of users (answers received)



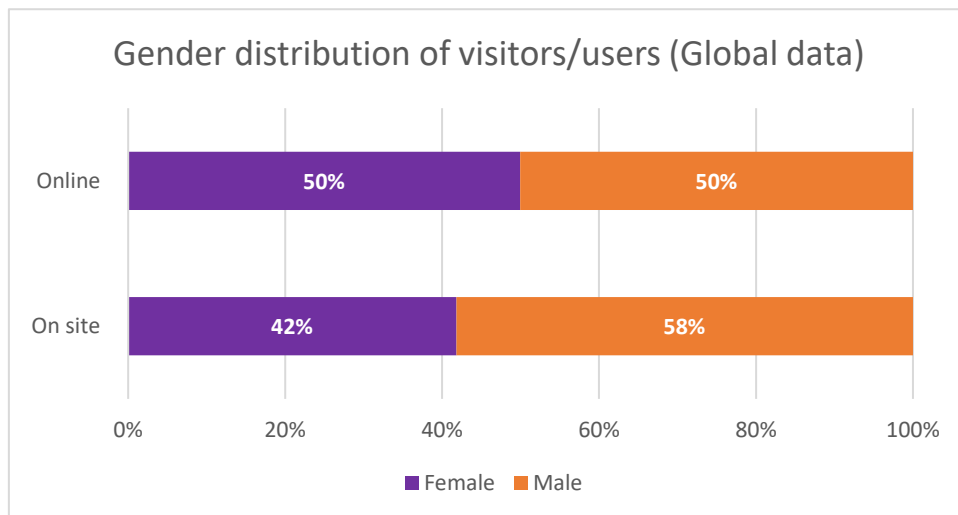
Graph 28: Profiles of users (matching 100%)

As persons in charge of maintaining and preserving the records, “Archivists” are not considered among the most important users, while together, “Students” and “Teachers” would represent between 19-24% of the users, depending on the data selected.

When it comes to the gender perspective, only 16 European Archives out of the 42 participants - which means, almost two-thirds (62%) - do collect information about the profile of its users and/or visitors.

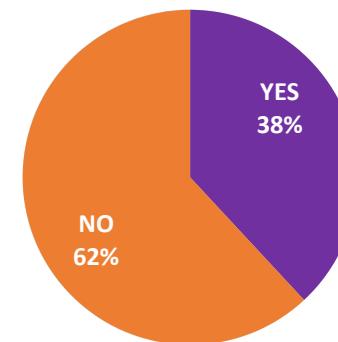
Only 9 Archives (21%) collect that information concerning the online visits and, surprisingly, a majority of them (6 out of 9) are either Local or Regional Archives. Actually, this is due to the fact that most of the Portuguese “regional” (districts) branches do collect such kind of data, and had an important contribution to the survey. In that sense, we can conclude that the data are not totally extrapolated to the whole European situation, and thus that this basic information is not available in a large majority of archival holdings institutions.

Still, the answers obtained from a global perspective show a clear equal gender distribution as far as male and female online users and visitors



Graph 30: Gender distribution of visitors/users (Global)

Do you collect/have data about the gender of your users/visitors?



Graph 29: Gender data collection of users

are concerned.

However, among the users and people visiting European Archives *in situ*, either for research or for cultural purpose, men presence remains predominant, as they reach almost 60% of the visitors.

Strategy and interests

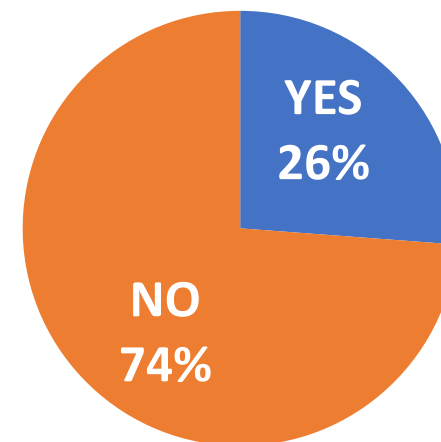
To attract, maintain and manage specific audiences requires ad hoc strategies and plans, including activities that takes into account the needs, interests and capacities of the different target groups. However, as far as European Archives are concerned, three-quarters of such institutions do not have any specific “Audience Development Strategy or Plan”.

The graph in next page brings however more information about the kind of profiles targeted as potential new audiences for European Archives, according to their existing efforts, plans or objectives. As it can be observed, according to the participants, the most important potential “new” groups are, globally, the society in general (100% of the participants find it important), followed by higher education students.

On the opposite, people with risks of social exclusion, e.g. migrants or people with mental or, in a minor grade, physical disabilities, are not considered as a priority target group for European Archives.

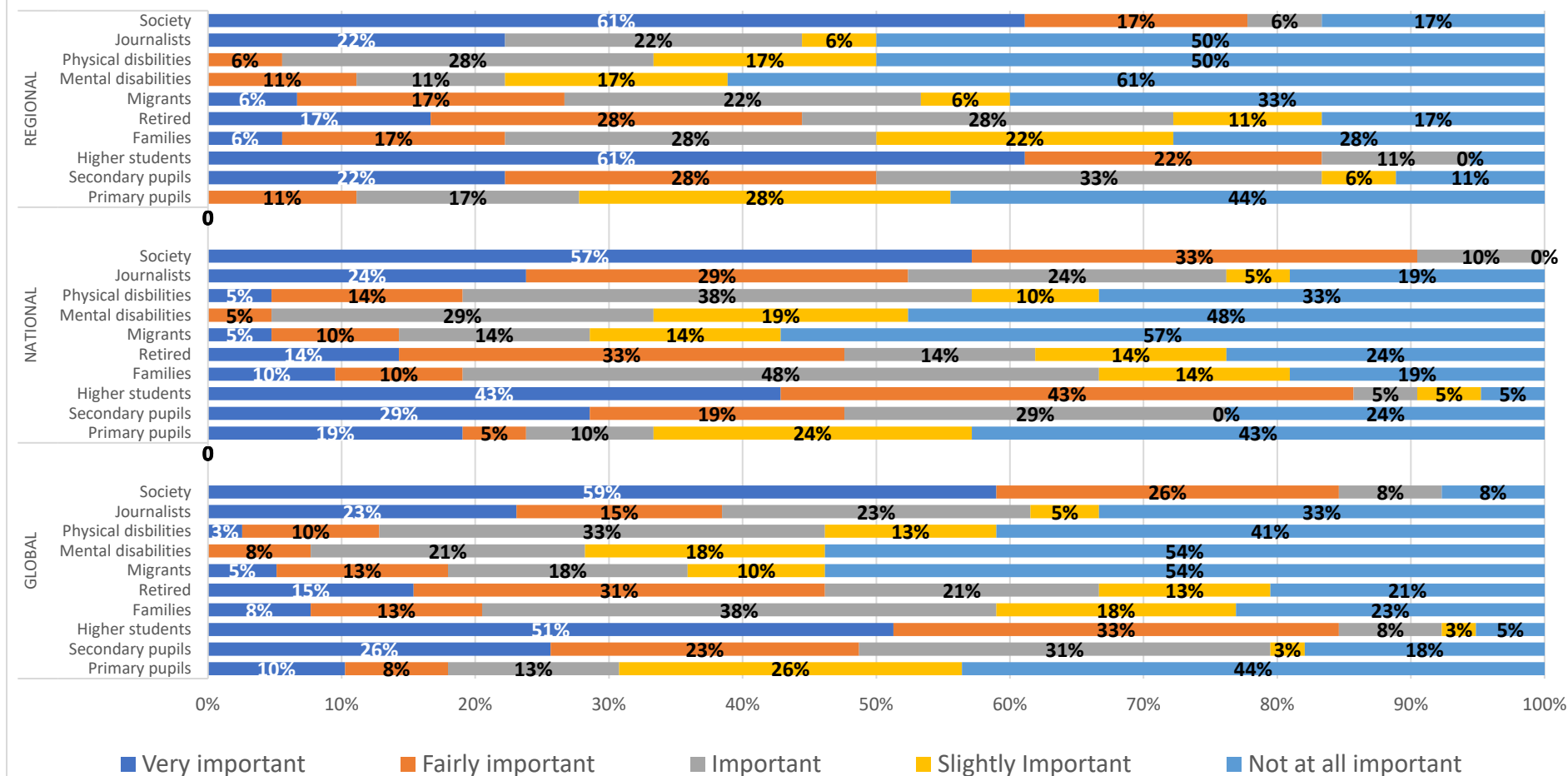
There is a balanced diversity of opinions in regards to “retired people” target groups (some find them of high or relative interest, others less), and one-third of participants do not find “journalists” as a particularly interesting group.

**Do you have any
“Audience Development Strategy”?**



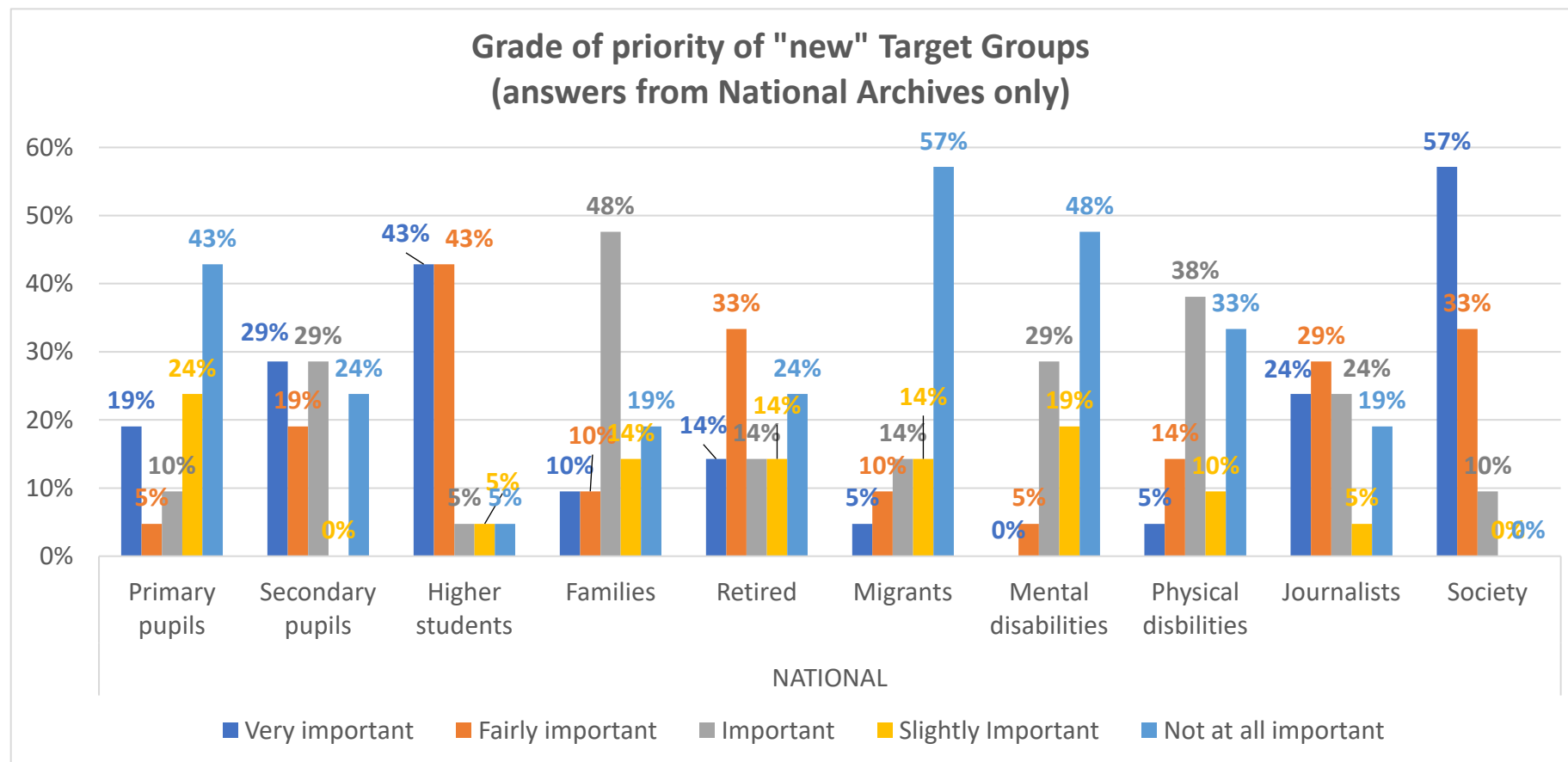
Graph 31: Existence of specific “Audience Development Strategy”

Grade of priority of the following "new" target groups (%)



Graph 32: Target groups assessment of priorities

The following graph present the results for "National Archives" only:



Graph 33: Grade of priority of "new" target groups (National Archives)

D) Communication & Distribution Channels

Teams & Social Networks

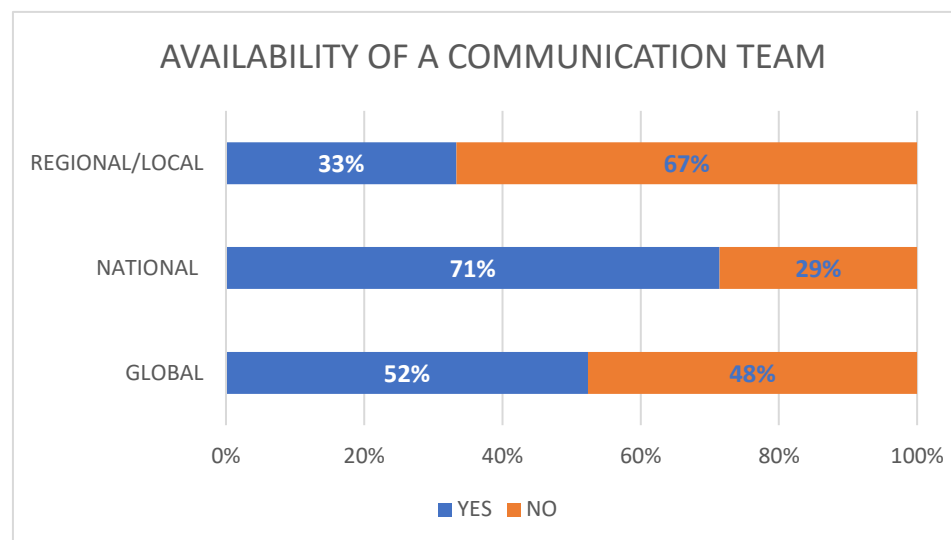
In order to assess the dissemination activities of European Archives, it is important first of all to know whether these institutions count on specialised communication teams in charge of communication.

This is the case for a majority of National Archives (71%), but not for Local/Regional ones, where only one-third of the Archives do have some staff in charge of communication.

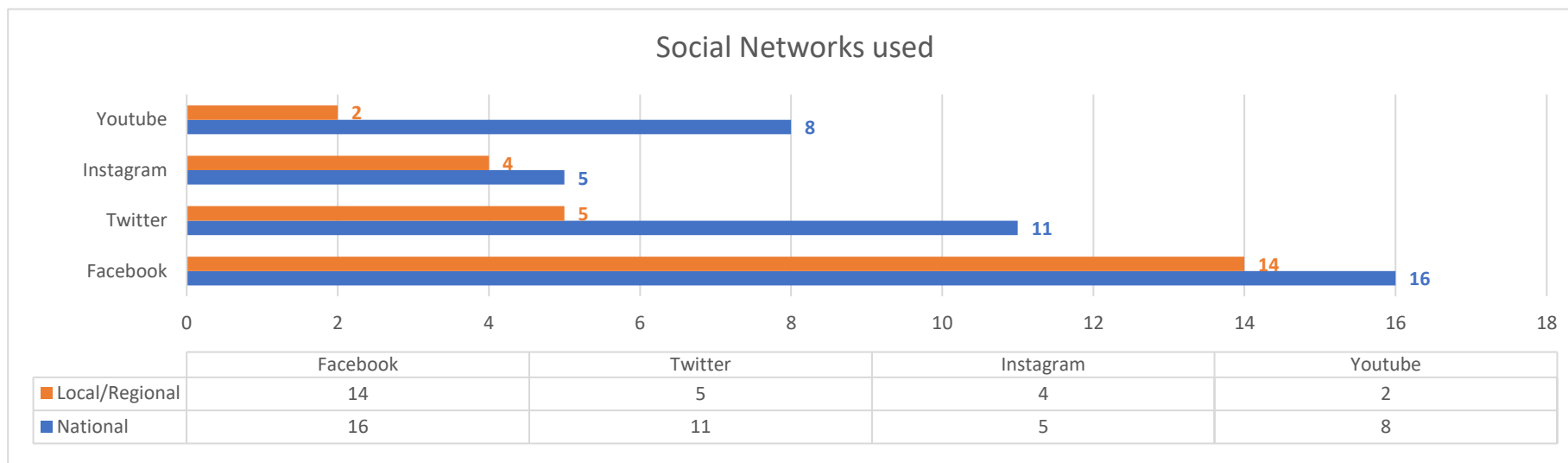
In average, the communication teams are formed by between 2-3 people for general Press and Public Relation purposes, and 1 Community Manager (sometimes part of the mentioned team).

As far as Social Networks are concerned, only 30 participants have provided more details about their activities, which doesn't mean that the rest of the Archives do not use Social Networks to inform about their activities.

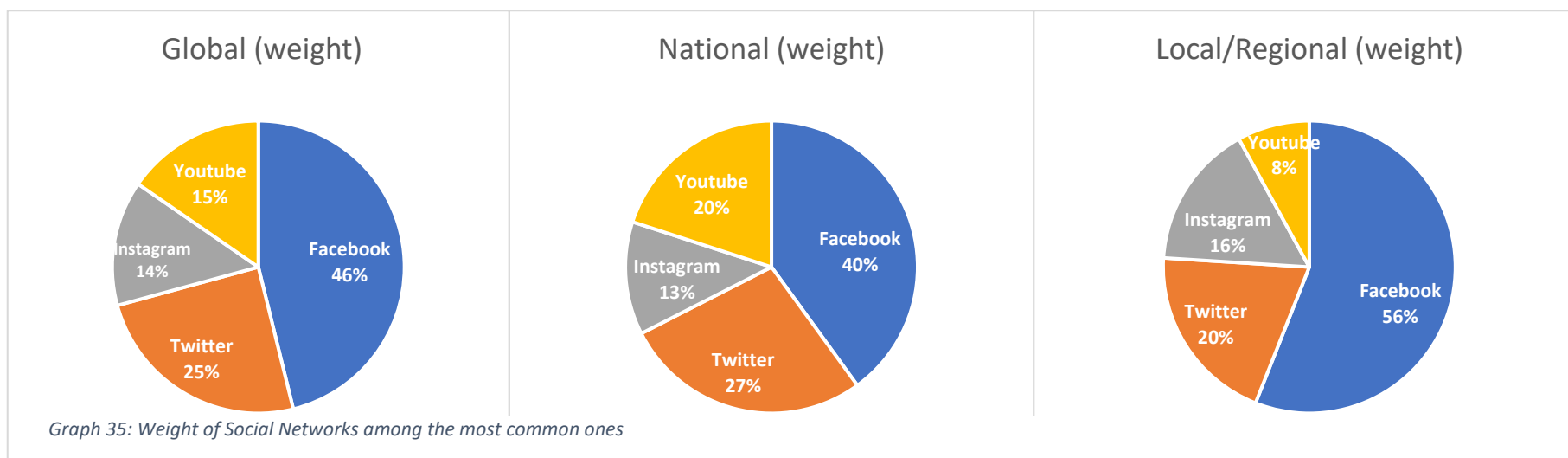
Among the 5 main digital channels/Social Networks proposed, according to the following graphs, Facebook is clearly the most popular one in terms of weight, as **100% of the participants that have answered question 23 do mention Facebook, while half of them also use Twitter, and around one-third are also present on Instagram and/or on Youtube**. While Facebook or Instagram are used in a similar proportion, independently of the kind of Archives (Regional or National), as far as Youtube and Twitter are concerned, National Archives are however more active than their local/regional counterparts.



Graph 34: Availability of a Communication team

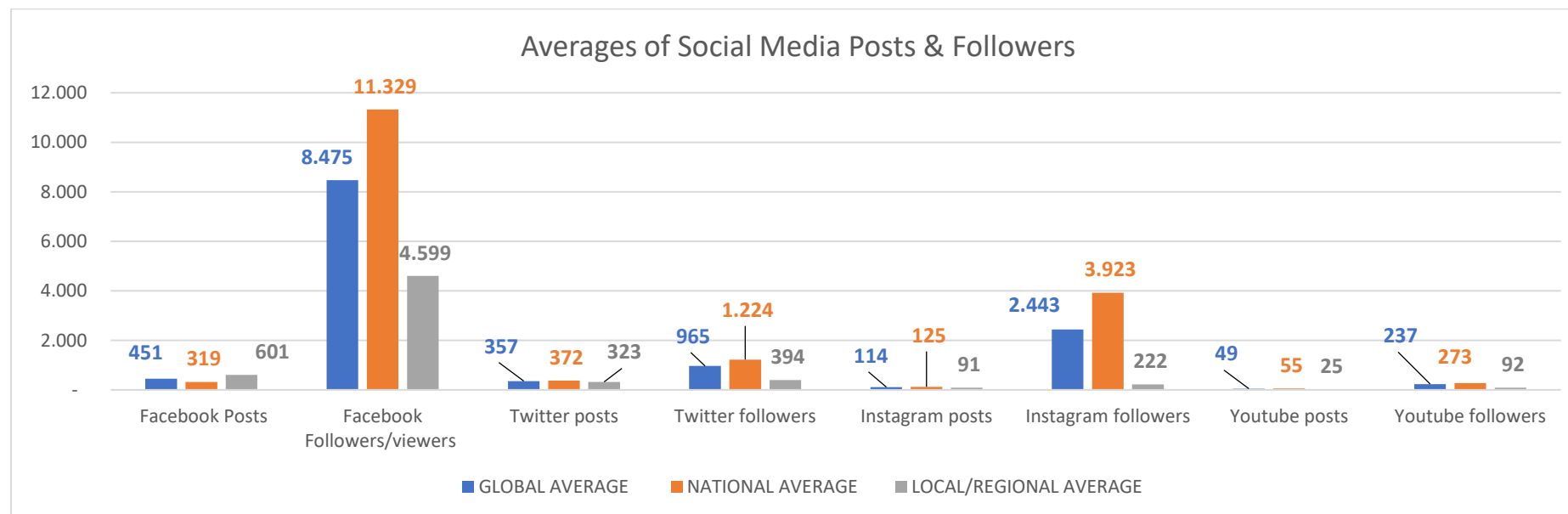


Graph 36: Social Networks used



Graph 35: Weight of Social Networks among the most common ones

As far as the number of posts and followers are concerned, the averages presented below are indicative, and followed by their respective tables to fully visualise all data. As a global average, the European Archives count on around 8.500 followers in Facebook, and 2.500 in Instagram.



Graph 37: Averages data of Social Media posts and followers

They would post an average of around 2 Facebook posts per working day (451/average/year), and those active in Instagram an average of 1 image every 2-3 days.

For those Archives that have a Youtube channel, the number of followers ("subscribers") is much lower, which is something very common in this Social Network. But that doesn't mean that they do not have viewers: According to some information provided by e.g. Malta National Archives or Budapest City Archives, their posts in Youtube have reached over 15.000 viewers. The following tables show the gross data gathered from the participants.

Table 8: Social Networks – Followers and Posts (Gross Data from National Archives only)

Social Networks - National Data							
Facebook Posts	Facebook Followers/ viewers	Twitter posts	Twitter followers	Instagram posts	Instagram followers	Youtube posts	Youtube followers
180	4.500			120	1.850		
400	13.410					20	256
420	10.200	26	117	143	529	1	90
240	67.000	50	90			150	200
947	2.448	1.993	2.164				
70	3.000						
40	528	40	81				
100	15.000					10	500
144	13.500	96	550	240	11.300	45	200
1.237	3.508						
80	2.200	100	3.500				340
250	2.500	200	100				
56	142	124	91				
400	8.000	600	1.500	100	1.500	200	
300	14.000			50	1.270	2	50
246	26.054	67	2.526	97	7.090	12	549
		800	2.750				
Averages	319	372	1.224	125	3.923	55	273

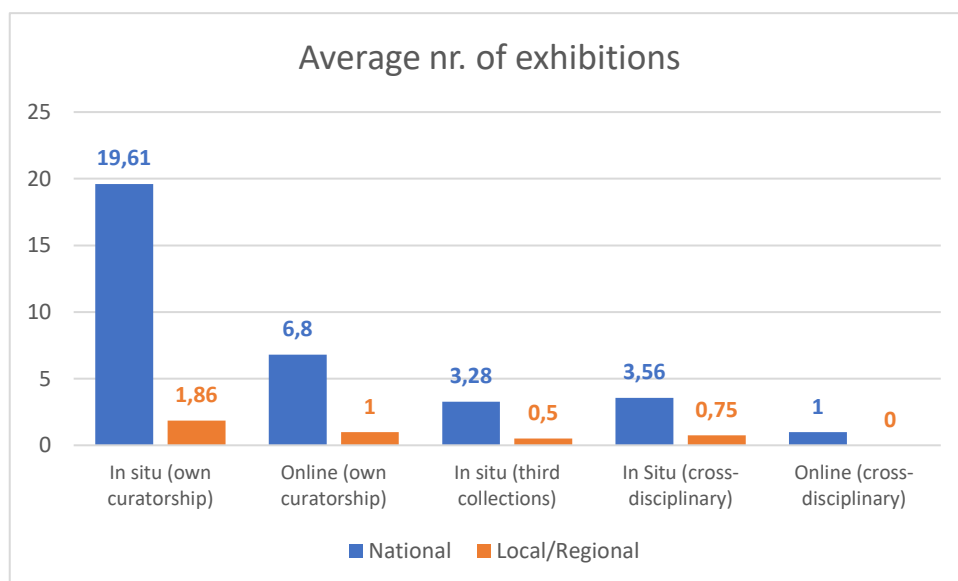
Table 9: Social Networks – Followers and Posts (Gross Data from Local/Regional Archives only)

Facebook Posts	Facebook Followers	Twitter posts	Twitter followers	Instagram posts	Instagram followers	Youtube posts	Youtube followers
100	2.375						
114							
300	23.000	350	430		45		
365	1.500	365	230	150	126		
25	3.000					1	100
180	2.200	50	330				
180	2.200	50	330				
5.000	1.200						
150	2.701			92	515	48	83
215	5.500						
182	8.000						
50	5.000						
50	2.500			30	200		
1.500	610	800	650				
Averages	601	323	394	91	222	25	8.800

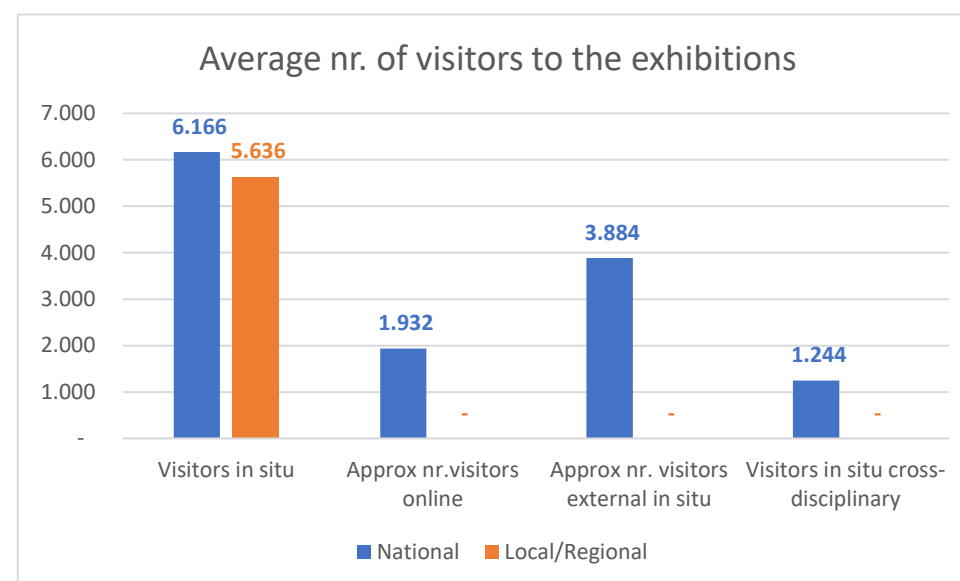
Apart from these main Social Networks, some Archives have also promoted their own blogs, and several also refer to Flickr to share photos, images and videos.

Exhibitions & Publications

When it comes to sharing their collections through in situ or online exhibitions, the European Archives are particularly active, especially the National ones, that organise an average of almost 20 in situ exhibitions based on their own collection or curatorship per institution/year (against around 2 exhibitions in the case of Local/Regional Archives). This amount is quite high (more than one exhibition per month), but can be explained in certain cases due to the fact that they have several branches and thus take them into account when counting the nr. of exhibitions. In fact, **for a large majority of European Archives, the average number of exhibitions hosted per year would be of between 1 and 5**. The average number of visitors to these exhibitions at their own buildings is of between 5.500-6.000 people.



Graph 39: Average nr. of exhibitions by European Archives



Graph 39: Average nr. of visitors to exhibitions

These averages do not take into account however a couple of extremely succesful cases and much higher data presented, as it is the case for Lithuanian Archives (with around 275.000 visitors), and, especially, the Spanish Archives (with almost 1.4 million visitors to their 12 in situ exhibitions).

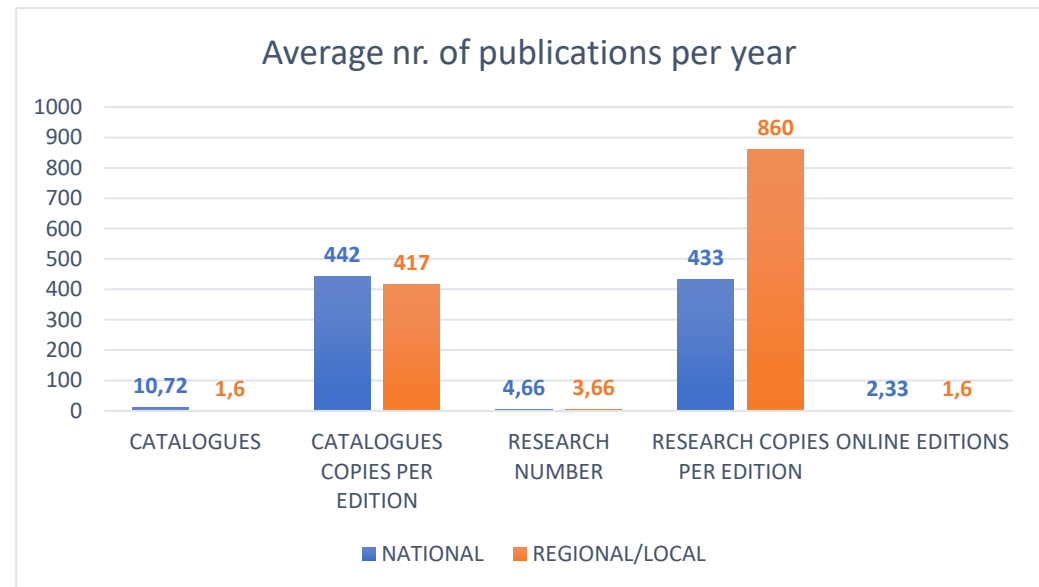
In addition, some European Archives are also promoting online almost exhibitions (an average of 6,8/year for National Archives) and hosting in situ exhibitions based on third collections (an average of 3,28/year) or of cross-disciplinary perspective (3,56/year). The average number of visitors to these last kind of exhibitions is however surprisingly lower (or unknown for Local/Regional Archives), which is not consistent with the exclusivity of such activities.

As far as the dissemination of the heritage conserved at Archives is concerned, and closely linked to the exhibitions, another interesting data is the nr. of catalogues produced per year. According to the information provided by participants, **National Archives would produce an average of almost 11 catalogues per year, but in very limited number of copies (below 450 copies/catalogue).** The number of edited catalogues is similar for Local/Regional Archives, but in their cases they produce less than 2 catalogue/year/institutions.

As far as Research publications are concerned, despite the clear link of Archives to historical investigations, European Archives publish some limited number of research outputs (around 4,5 for National Archives, and 3,5 for Local/Regional ones). In this case however, it has to be underlined that, in average, Local/Regional Archives print twice copies of such kind of documents than their national counterparts (average of 860 copies, agains 433 only for National Archives).

Finally, in line with the new digital era, it has become relatively common to edit disseminate different kind of publications through online means, though the numbers in these cases still remain relatively low (average of between 1,5-2,5 online publication/year/Archive).

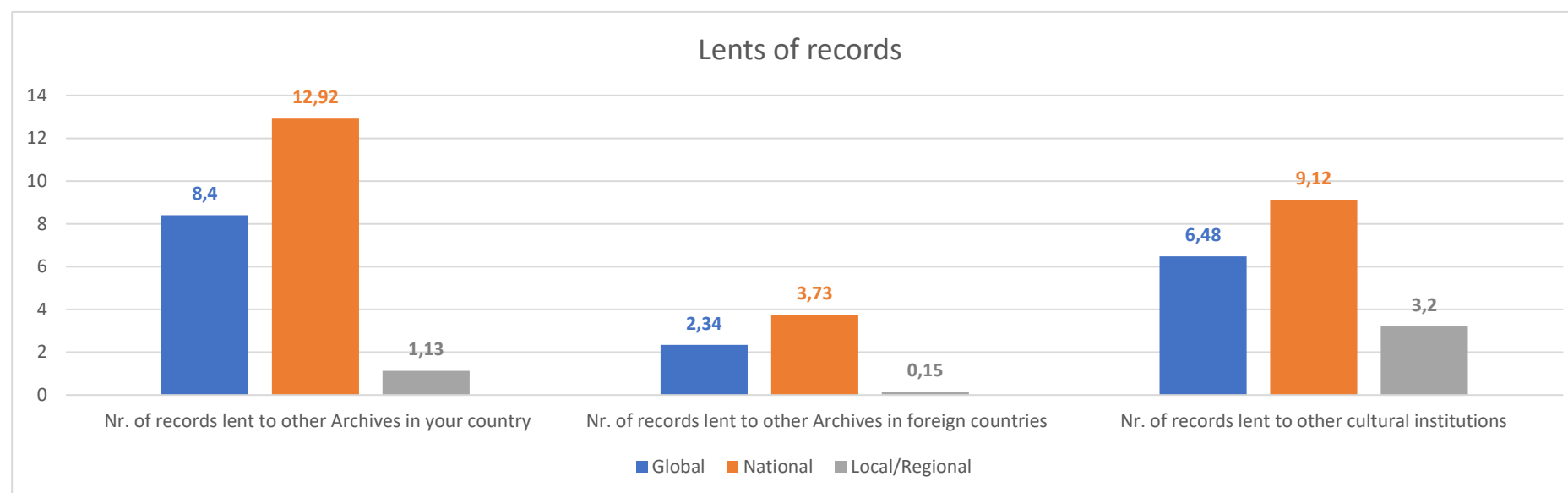
In addition to such kind of efforts, of course, it has to be reminded that most of the digitized records are made



Graph 40: Average nr. of publications/year

available through different national and international online portals.

Finally, half of the participants (21) have provided some figures about the number of records lent either to other archival holding institutions within their own countries or abroad, or to other cultural institutions. Actually, 13 of them (62%) do not usually lent any record to any institution, which means that **around 40% of European Archives only do cooperate from time to time with others through lentings of their records.**



Graph 41: Lents of records

The National Archives are more active in this field, which is not surprising as, according to the data provided in next section, they are more active in cooperation actions and networks. In any case, while the percentage of Archives lending their records is not very high, the average number of records lent yearly are not impressive either (under 15 to other Archives in the country or to other cultural institutions, and under 5 lent to foreign institutions). We might conclude here that the mobility of (original) records is very limited.

E) Cooperation/Research and Innovation activities

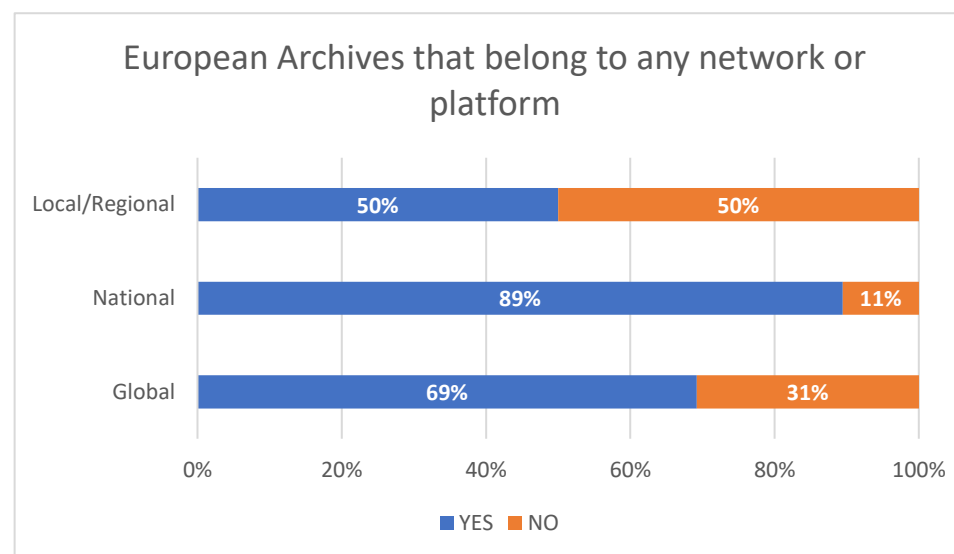
This last chapter of analysis intends to assess the State of the Arts of European Archives towards international cooperation and networking activities from one hand, and to rank their main fields of interest in terms of new trends and technologies, some of them still cutting-edge ones for the sector.

Cooperation

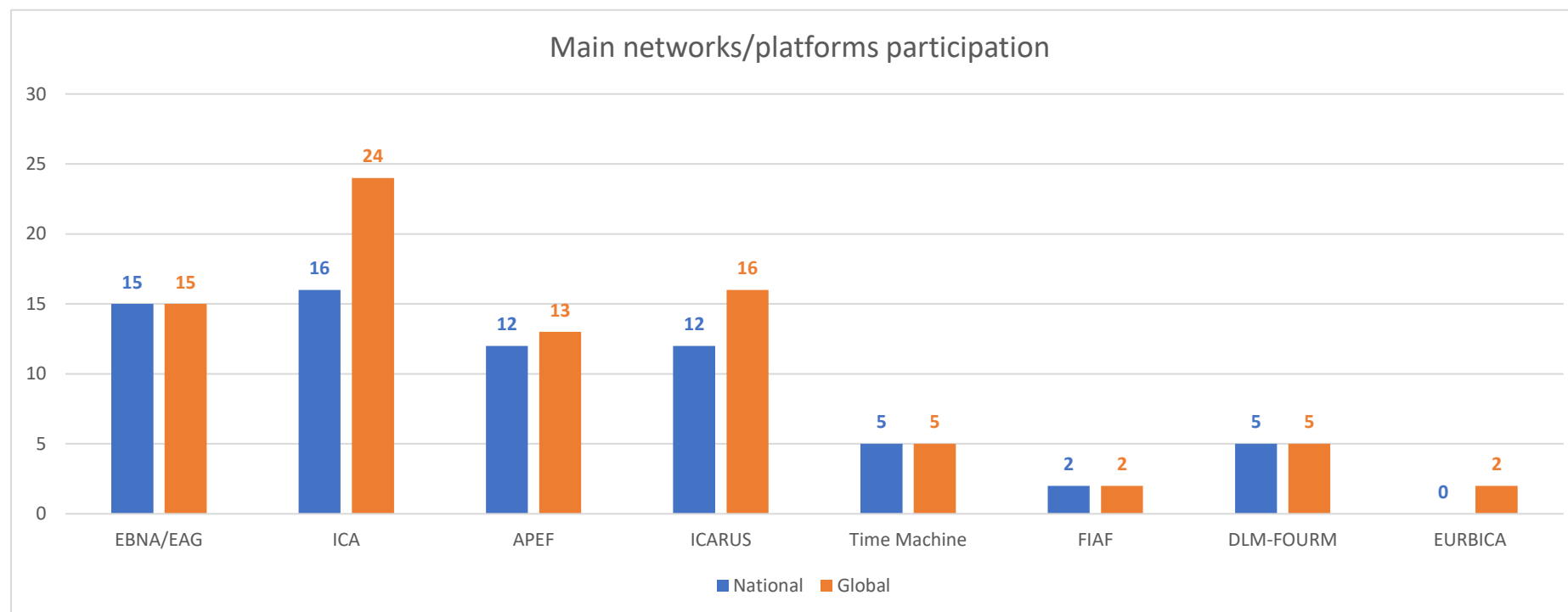
First of all, the answers obtained showed that almost 70% of European Archives do belong to some international networks or platform. Actually, the figures are slightly different when analysed taking into account their profiles, as almost 90% of National Archives belong to (several) networks, while the figure is reduced 50% when it comes to Local/Regional Archives.

In the case of the National Archives are concerned, they are much more active on international networking activities. Most of them would belong to at least 4 networks or platforms, above all to the International Council on Archives (ICA) and European Board of National Archivists/European Archives Group (EBNA/EAG)– in both cases, almost 80% of them do participate in such networks – and to the International Centre for Archival Research platform (ICARUS) and Archives Portal Europe Foundation (APEF), in such cases, reaching 63% of participation.

As far as Local/Regional Archives are concerned, the ones that have answered positively are mostly members of the International Council on Archives (ICA, 80% of them), and 4 answers referred to their membership of the International Centre for Archival Research platform (ICARUS, 40% of them).



Graph 42: Participation into Networks/platforms

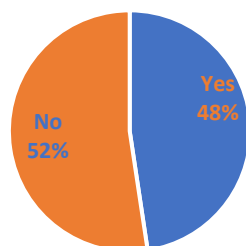


Graph 43: Main Networks/platforms participation (Global and National data)

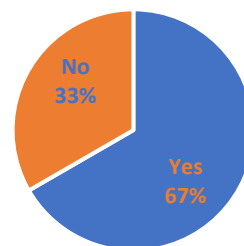
Other networks mentioned by some Archives include mostly national ones and/or projects related ones (E-ARK; SAVE1; Photographic Society of France; Blue Shield; AIME;), some specific continental groups of ICA (EURBICA, EURASICA), regional networks such as BAAC (Baltic Audiovisual Archival Council) or other cross-continental networks such as Iberarchivos (Latin American network of Archives) or ACARM (Association of Commonwealth Archivists and Record Managers).

As far as the participation in European cooperation projects is concerned, globally, almost half of the European Archives have participated in some E.U. funded initiative in the past 5 years. However, it has to be underlined that National Archives are much more active in this field, with a participation of around 67%, against 29% only for their local/regional counterparts.

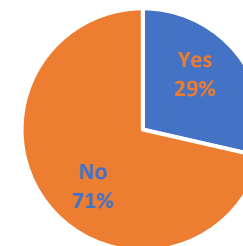
E.U. Projects (Global)



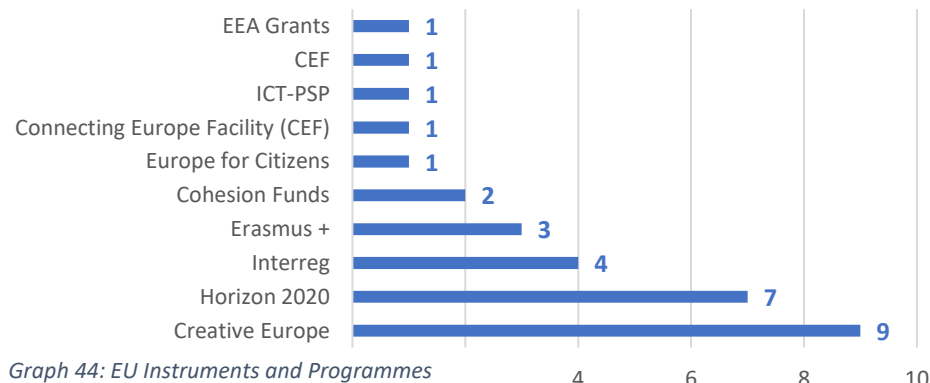
(National)



(Local/Regional)



EU Instruments or Programmes



Graph 44: EU Instruments and Programmes

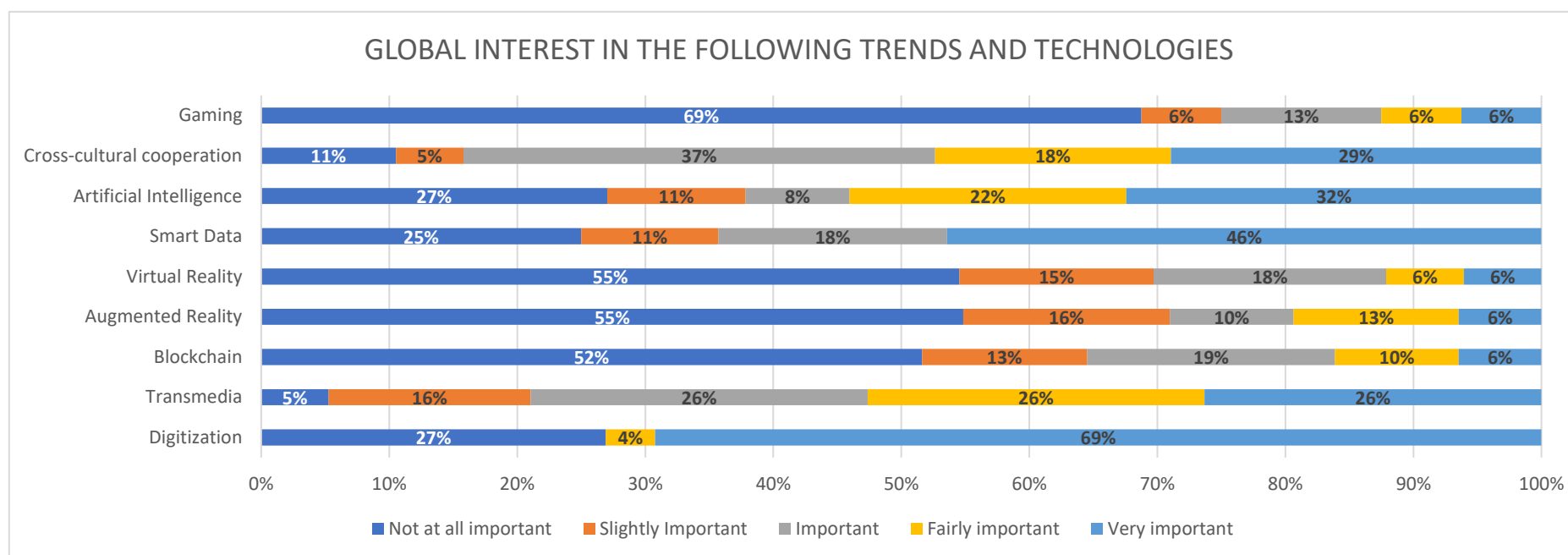
Though Creative Europe is the Programme appears as the Programme with more European Archives participating in it, it has to be reminded that these data include the participation to the present “Digital Treasures” project, that counts on 5 National Archives among its partnership.

The other key EU Programme of interest, with 7 participants, is the one for Research, Development and Innovation, Horizon 2020.

Several Archives have also participated in territorial cooperation (4) or on educational (3) projects.

New trends and technologies

Finally, participants were asked to rank (from 1 to 5) their interest and position towards a selection of new trends and technologies. This gives a general overview of their key preferences, confirming again the still very high importance of digitization issues (almost 75% find it very or fairly important), as well as the interest on Smart Data (over 60% find it very interesting or interesting) and Artificial Intelligence (60% of interest). With more balanced data, but still positive ones, cross-cultural cooperation, that means, the cooperation with other cultural sectors and, in that same/similar field, the development of Transmedia projects are considered of interest. On the opposite, Virtual or Augmented Reality and Blockchain technologies do not represent a priority for European Archives. Other specific fields of interest mentioned include automatic recognition of texts and images, optical data storage or technologies linked in general to the digital transformation.



Graph 46: Interests in new trends and technologies

III. General profile: European Archives in a nutshell

Profile & Management	European Archives	
	National Archives	Local/Regional Archives
	Public ownership (96%)	
	62% Autonomous	81% Legally dependent
	45% have branches	32% have branches
	€ 17,9 Mio (Yearly average budget)	€ 2,4 Mio (Yearly average budget)
	(Majority with less than € 6 Mio)	(Majority with less than € 1 Mio)
	90%-95% public funds (Limited capacity to generate other incomes)	
	75-85% of budget spent on Human Resources and Overheads (Limited capacity for further investment in knowledge or equipment)	
	Different sizes in terms of teams (from large ones of over 500 to smaller ones below 50 people)	Large majority under 50 employees
	<u>Formed by:</u> 45% Archivists 18% Admin. staff 16% Technicians 10% Managerial staff 5% Historians ... among others	<u>Formed by:</u> 30% Archivists 20% Admin. staff 17% Technicians 9% Managerial staff 8,5% Historians ... among others
	Highly “feminized” sector (60% o workforce)! ... in all positions (Management, Archivists, Technicians, etc.)!	
	1. Key interests remain around the collection and preservation of records, and their access to citizens 2. Medium interest in Research or Broadcasting activities 3. Low interest in generating new incomes	

	European Archives	
	National Archives	Local/Regional Archives
Contents conserved and digitized	82% of the records remain unknown or undescribed	
	+/- 15% of described records	+/- 20% of described records
	+/- 4,5% of the records are digitized	
	+/- 3,6% digitized records	+/- 5,3% digitized records
	A wide and different (non-homogeneous) range of methods to calculate the records being kept in archival holdings institutions (units, documents, linear meters, boxes, etc.)	
	The most commonly digitized materials are pictures (easier to digitize), parchments and maps (mostly for their high historical and economic value, and academic importance)	
	the oldest the records are, the higher probability they have to be digitized (53% of records of over 500 years old are digitized; 34% of records from the 16th Century, etc.)	
	Most of the records conserved at European Archives come from their own countries (between 85-95%) A small percentage (between 8-10%) would come from other EU countries or former colonies	
Users/Audience	<u>Yearly average of:</u> +/- 7.500 visitors-users/year +/- 250.000 online visitors/users +/- 15.000 records delivered after written demand +/- 100.000 reproductions	
	<u>Yearly average of:</u> +/- 12.00 visitors-users/year +/- 360.000 online visitors/users +/- 30.000 records delivered after written demand +/- 190.000 reproductions	<u>Yearly average of:</u> +/- 2.000 visitors-users/year +/- 140.000 online visitors/users +/- 1.200 records delivered after written demand +/- 10.000 reproductions
	<u>Profile of users:</u> There is no systematic record of profiles (between 37%-46% are unknown) Majority of known profiles are "historians" (between 20-25%), followed by "hobbyists" (18%-23%) and "students" (12%-15%)	
	62% do not collect gender data of their visitors/users	
	50/50 equal share presence of female-male "online" users	

	European Archives	
	National Archives	Local/Regional Archives
	Still a majority (58%) of male among the users/visitors “on site”	
	74% of European Archives do not have an “Audience Development Strategy/Plan”	
	<u>New Target Groups:</u> <ol style="list-style-type: none"> 1. <i>High interest: Society of general & Higher education students</i> 2. <i>Medium/different interest: Retired people & Journalists</i> 3. <i>Low interest: Primary and Secondary pupils, people with physical accessibility difficulties</i> 4. <i>Very low interest: People with risks of social exclusion (migrants or people with mental disabilities)</i> 	
Communication and Distribution	Half of European Archives do count on specialised in-house communication teams, formed by 2-3 people, incl. one Community Manager	
	71% in the case of National Archives	33% for Local/Regional ones
	<u>Ranking of Social Networks by account and averages of posts and followers</u> <ol style="list-style-type: none"> 1. <i>Facebook (almost all Archives): +- 450 posts, 8.500 followers</i> 2. <i>Twitter (around half Archives, though less at Local/Regional levels): +- 360 posts, 1000 followers</i> 3. <i>Instagram / Youtube (around one-third, less at Local/Regional levels): +- 114 Instagram posts; 2.500 followers</i> 	
	<ul style="list-style-type: none"> - <i>High nr. of exhibitions hosted yearly, with an average nr. of +- 6.000 visitors/exhib.</i> - <i>Increasing nr. of online exhibitions</i> - <i>Limited nr. of cross-disciplinary exhibitions and of exhibitions from third collections</i> 	<ul style="list-style-type: none"> - <i>Low nr. of exhibitions hosted yearly, with an average nr. of +- 5.500 visitors/exhib.</i> - <i>Very limited nr. of online exhibitions</i> - <i>Very limited of cross-disciplinary exhibitions or of exhibitions from third collections</i>
	Yearly publication of +- 10 catalogues and 4-5 research works, but with limited copies/distribution (+- 450/publication)	Limited nr. of publications (1,5 catalogues, 3,5 research work), with higher copies/distribution of the research (+- 850 /publication)
	Limited number of records lent every year (less than 15 within the same country, less than 5 abroad) And limited cooperation with other cultural institutions through lending of records (less than 10/year)	

International Cooperation & Technological interests	European Archives	
	National Archives	Local/Regional Archives
	+ - 90% are members of international networks and platforms Would belong to at least 4 of them, mostly: ICA, EBNA/EAG, ICARUS and APEF	+ - 50% are members of international networks and platforms Mostly to: ICA and, in a minor proportion, to ICARUS
	Two-Thirds (67%) active in EU Projects	Only a few of them are active in EU Projects
	<u>Main EU Programmes:</u> 1. <i>Creative Europe & Horizon 2020</i> 2. <i>Interreg / Erasmus+</i> <u>Main new trends and technology of interest:</u> 1. <i>Very high: Digitization</i> 2. <i>High: Artificial Intelligence & Smart Data</i> 3. <i>Relatively High: Cross-cultural cooperation</i> 4. <i>Low interest: Augmented or Virtual Reality & Blockchain</i>	

IV. SWOT Analysis (key highlights)

STRENGTHS



- Strong and specialised own teams. No gender equality challenges (higher representation of women already in the teams)
- Particular digitization efforts for older records and records of high historical and economic values
- Consolidated existing specialised audience (historians, hobbyists, researchers/students, etc.)
- Growing efforts and results observed towards the availability of online services and users
- Availability of specialised communication teams and growing efforts towards the use of Social Media
- Capacity to exhibit records, mostly from the own collection
- Strong international cooperation and networking commitments

OPPORTUNITIES



- To increase public-private partnerships
- Creation of new services and related incomes
- To increase efforts towards the attraction of new of target audiences gender-equality targets in terms of users/visitors
- Major use of new technologies (Smart data, AI, VR, AR)

WEAKNESSES



- Lack of diversity of financial sources
- Relatively low numbers in terms of onsite visitors/users, including to the exhibitions
- Lack of Audience Development Strategy
- Low numbers of research and publications edited
- Low numbers of lending of records
- Apart from digitization, low capacity and activity in RDI, including the use of new technologies

THREATS



- Very high proportion of undescribed records
- Low budget availability for diversification and the development of new services/products
- Very low proportion of digitized records despite several decades of efforts / High digitization costs

V. Conclusions & Recommendations

In line with the results presented, the general profile and the first basic SWOT analysis drafted, the following lines highlight the main trends and conclusions observed, and intend to identify some initial recommendations, especially towards next step of the Digital Treasures project, aiming at the improvement of business/management models and plans for European Archives

In general, the European Archives have **highly qualified and specialized teams**, and are one of the few sectors of the cultural industry that show **a positive trend in gender equality**, with a majority of women in all the profiles of their workers, managers and executives included. Although a general profile has been drawn for illustrative and demonstrative purposes, the reality of the data shows that Archives have financial resources and sizes that can vary considerably depending on their competences, country and level of responsibility (it should be remembered that 45% have also branches or delegations under their umbrella).

In any case, by dedicating a very large majority of their budget to operating expenses (personnel and general expenses), it can be affirmed that they **lack the margin of economic maneuver** to be able to invest in new products and services (facilities, equipment, promotion, external experts, research, etc.).

Likewise, the fact that an important part of the Archives does not have administrative independence (dependency of Ministries, Councils or Municipalities) does not facilitate their capacity and motivation when it comes to generating additional income. As it usually happens in many cultural institutions in the public sphere, either due to administrative difficulties, initial lack of need or simply due to inertia, the Archives have **little experience in generating external income**, particularly by private entities (e.g. sponsorships, financial donations, merchandising, etc.) and in general in cooperating with the private sector. In fact, as we have seen, income generation is also not among their key priorities or concerns.

However, they do have some experience in generating activities and income through E.U. funds and a **long tradition and commitment in international institutional cooperation**, in particular through networks and platforms specific to their sector. However, that experience is significantly reduced when it comes to lending original documents, or to promote cross-sectorial activities.

Cooperation with other sectors could, however, be a solution to their lack of resources, since it would allow acquiring and having not only knowledge, but also additional technologies, equipment and networks. It could also contribute to diversifying services and products (e.g. through *transmedia* experiences) and giving greater visibility to preservation and digitization efforts and records' content.



The greater use and exploitation of new technologies, particularly in the matter of automatic recognition and treatment of texts and images, is not only a clear wish of the sector (particularly interested in topics such as **Artificial Intelligence** or **Smart Data** management), but also **a necessity**, since only a minimal part of the heritage kept on the shelves of the Archives is known and is available online (and only new technologies will allow to reduce digitization and description expenses).

Although professionals in the sector show less interest in other technologies such as **videogames** or **Augmented or Virtual Reality**, as well as in broadcasting activities and Research in general, collaborating with entities and companies specialized in this type of sectors could also achieve a **greater diversification of activities and visibility**.

The Archives have a certain presence on social networks, with respectable numbers of followers, but they need to continue to strive **to reach more and more diversified audiences and target groups**: Compared to other cultural institutions, their numbers of visitors on site are relatively low, and their current audience responds to a profile closely linked to “file query” (which is logical). Like any cultural institution open to the public, the European **Archives must develop strategies to attract and manage new users** and new audiences, without underestimating their social and educational responsibility, including the promotion of activities for groups at risk of social exclusion.

This report therefore presents a diagnosis of the situation and tries to identify some current trends in the Archives subsector, and is complemented by the International Benchmark carried out in parallel, which identifies trends and good practices in other subsectors of the cultural and creative industries and provides a series of more specific recommendations in line and consistent with the diagnosis.



VI. Annex I: List of countries participating in the survey

National archival holding institutions that have answered the questionnaire (Country of origin)			Regional or local archival holding institutions that have answered the questionnaire (Country of origin)	Geographical competences
1	Bulgaria	22	Austria	Regional
2	Croatia	23	Austria	Regional
3	Czech Republic	24	Bosnia and Herzegovina	Regional
4	Estonia	25	Denmark	Local and Regional
5	Georgia	26	Denmark	Local
6	Germany	27	Estonia	Local
7	Hungary	28	Hungary	Regional
8	Lithuania	29	Norway	Local
9	Luxembourg	30	Norway	Local
10	Malta	31	Portugal	Regional
11	Norway	32	Portugal	Local
12	Norway	33	Portugal	Regional
13	Poland	34	Portugal	Regional
14	Portugal	35	Portugal	Regional
15	Portugal	36	Portugal	Regional
16	Portugal	37	Republic of Serbia	Local
17	Romania	38	Spain	Regional
18	Slovenia	39	Spain	Local
19	Spain	40	Spain	Regional
20	Sweden	41	Spain	Local and Regional
21	Switzerland	42	Spain	Regional

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VIII. Annex III: Questionnaire used

A) Profile & Management of Historical Archive Institution	
1. Geographical competences/Profile	<input type="checkbox"/> Local <input type="checkbox"/> Regional <input type="checkbox"/> National Others (please specify):
2. Location	Country:
	Region:
	City:
3. Legal Structure	<input type="checkbox"/> Public <input type="checkbox"/> Private <input type="checkbox"/> Public & Private Partnership (PPP) If PPP, please inform about the percentage of participation shares: % Public / % Private
4. Autonomous / or Dependent...	a) Please, tick the correct answer: <input type="checkbox"/> We are an autonomous body (e.g. with your own legal status or VAT code) <input type="checkbox"/> We are a department, legally dependant to a bigger organisation In such case, which department(s) do you belong to (e.g. to Ministry "X" or "Y", D.G. "X" or "Y", Department of etc.)?
Resources & Costs	
5. Finances / Key incomes	a) Approximative overall annual budget (or turnover): Million € b) Of which, approximative distribution of sources of revenues/incomes: % Public % Private donors % EU funding/projects % Fees for users or of subscriptions % Merchandising % Licensing % Others We know this issue is sometimes tricky, feel free to add any information about your sources of revenues:
6. Finances / Key costs	a) Approximative distribution of your annual costs: % Staff costs % Equipment % Investment (building) % Digitisation(non-staff) % Promotion % Conservation (non-staff) % Purchase of records % RDI (non-staff Research related costs) % Overheads We know this issue is sometimes tricky, feel free to add any information or clarification about your costs and investments:
7. Human Resources	a) Nr of employees: <input type="checkbox"/> 0-50 / <input type="checkbox"/> 51-100 / <input type="checkbox"/> 101-250 / <input type="checkbox"/> 251-500 / <input type="checkbox"/> >500 b) Of which, approximate distribution per profiles/departments: % Managerial/Direction % Administration % Archivists % Historians/Researchers % Technicians % Others Feel free to add any comment:

8. Gender issues	Can you provide us about the following gender distribution among your team?		
	Managerial/Direction:	% Female /	% Male / % Others
	Archivists/Historians:	% Female /	% Male / % Others
	Technicians:	% Female /	% Male / % Others
	Administrative staff:	% Female /	% Male / % Others
	Any other comment or data you would like to highlight on Gender issues:		
9. Technical resources	Is there any specific technical resource, technology or equipment that you own/use and would like to highlight?		
10. Other Archives under your responsibility / control	Do you have different branches / Archives under your responsibility? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If the answer is yes, can you name/list them?		
	- - - - - -	- - - - - -	
11. Assess your role	Please, assess the importance of the following activities within the functions of your institution? From "1" (not important at all) to "5" (very important)		
	<ul style="list-style-type: none"> - To collect records - To preserve records - To broadcast records - To investigate/research - To generate new incomes 	<ul style="list-style-type: none"> - To guarantee free access to information for citizens - To guarantee free access to information for Historians/Researchers - To supervise institutions in management and safekeeping of records 	
	Any other function that you would like to highlight?		

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<i>B) Contents & Digitization (basic figures)</i>			
12. Kind of formats	Kind of records	Number	Of which, % of already digitized (Approx.)
	Total of your holdings documents/ records/archives		%
	<u>Of which:</u>		
	Total of <u>described</u> documents/records/archives		%
	<u>Of which:</u>		
	- <i>Conventional documents (Text docs)</i>		%
	- <i>Posters/Prints/drawings...</i>		%
	- <i>Maps / Cartographies</i>		%
	- <i>Parchments</i>		%
	- <i>Pictures (photography)</i>		%
	- <i>Sound records</i>		%
	- <i>Audiovisual (film) records</i>		%
	- <i>Stamps</i>		%
	- <i>Others (objects)</i>		%
	- <i>Electronic documents (not available on hard format) only</i>		
	- <i>Microcopies/microforms</i>		
	- Any others you might want to mention/highlight:		
-		%	
-		%	
13. Age of records	Century from (for described documents only)	Number (or percentage if it is easier for you)	Of which, % of already digitized (Approx.)
	- <i>Unknown...</i>		%
	- <i>21st Century</i>		%
	- <i>20th Century</i>		%
	- <i>19th Century</i>		%
	- <i>18th Century</i>		%
	- <i>17th Century</i>		%

	- 16th Century		%
	- Over 500 years old (15th Century and older...)		%
14. Kind of records (if possible...)	Could you inform about the kind of records that you have (documents of high historical value – Approx)	Number (or percentage if it is easier for you)	Of which, % of already digitized (Approx.)
	- Records of very high <u>historical AND economic</u> value:		%
	- Records of historical value “only” (with less economic value):		%
	- Records linked to the Public Administration management:		%
	- Collections from other public entities:		%
	- Private collections:		%
	Any others you might want to mention/highlight:		
	-		%
	-		%
	-		%
	-		%
15. Geographical origins (if possible...)	Country / Continent of origin of your documents	Number (or percentage if it is easier for you)	Of which, % of already digitized (Approx.)
	- Our own country:		%
	- Other European Countries:		%
	- Former colonies (which ones):		%
	- Rest of the world:		%
	- Unknown...		%

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C) Audiences		
16. Average- Approximate number of users / consumers per year	On site(s):	
	Online visitors:	
	Delivered after written demand:	
17. Approximate number of <u>document reproduction</u> request per year		
18. Profile of users / consumers	Historians/Researchers:	%
	Archivists/Professionals from Archives sector:	%
	Teachers/Professors:	%
	Students:	%
	Hobbyists:	%
	Unknown...	%
	Others (please specify):	%
19. Gender issue	Do you collect/have any data about the gender of your users/consumers? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If the answer is yes, can you provide us with the results:	
	On site:	% Female / % Male / % Others <input type="checkbox"/> n/a
	Online:	% Female / % Male / % Others <input type="checkbox"/> n/a
20. Audience development	Do you have Any specific "Audience Development" Strategy? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If the answer is yes, can you briefly explain its main targets:	
21. Assess your new target audience priorities	Please, asses the importance of the following target groups as potential new audiences for your institution, according to your existing efforts, plans or objectives? From "1" (not important at all) to "5" (very important)	
	<ul style="list-style-type: none"> - Primary school pupils - Secondary school pupils - Higher education students - Families (cross-generation) - Retired people/Ageing society 	<ul style="list-style-type: none"> - Migrants - People with mental disabilities - People with physical disabilities - Journalists - The society in general
	Any other target groups/profiles that are of particular interest?	

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D) Communication & Distribution Channels			
22. Communication team	Do you have any proper Communication team? <input type="checkbox"/> Yes <input type="checkbox"/> No If the answer is yes, how many full-time people form it (nr.): For general Public Relation & Relation with the press Community Manager (for Social Networks & online communication) <input type="checkbox"/> Please tick if the same above-mentioned people manage general PR, Press & Social Networks		
23. Social Networks	Social Networks you are using	Approx. nr. of posts/year	Approx. nr. of followers
	- Facebook <input type="checkbox"/> n/a		
	- Twitter <input type="checkbox"/> n/a		
	- Instagram <input type="checkbox"/> n/a		
	- LinkedIn <input type="checkbox"/> n/a		
	- Youtube <input type="checkbox"/> n/a		
	- Others (which ones):		
	-		
24. Number of publications per year	Kind of publications	Nr. of editions	Approx. nr. of copies per edition (average)
	- Catalogues:		
	- Research / Essay:		
	- Online editions:		n/a
	- Others (which ones):		
25. Nr. of exhibitions per year	Kind of exhibition	Nr. of exhibition	Approx. nr. of visitors (average)
	- IN SITU: Based on our own collection (own curatorship)		
	- Online: Based on our own collection (own curatorship)		
	- IN SITU: Based on third collections (external curatorship / lending)		

	- <i>IN SITU</i> : Cross-disciplinary (organised with other cultural disciplines than Archives)		
	- <i>Online</i> : Cross-disciplinary / (organised with other cultural disciplines than Archives)		
26. Approximate number of records (archives) lent per year	- <i>Nr. of records lent to other Archives in your country:</i>		
	- <i>Nr. of records lent to other Archives in foreign countries:</i>		
	- <i>Nr. of records lent to other cultural institutions (out of the Archives sector):</i>		
27. Others	Any other comment or experience you would like to highlight regarding your distribution channel?		

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E) Other Cooperation/Research and Innovation activities			
28. Networks	Do you belong to any official network or platform? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If the answer is yes, which ones?		
	<input type="checkbox"/> EBNA/EAG <input type="checkbox"/> ICA <input type="checkbox"/> APEF <input type="checkbox"/> ICARUS	Others: - - - -	
29. EU projects cooperation	Have you participated in any international cooperation project co-funded by the European Union in the last 5 years? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If the answer is yes, co-financed by which EU Programmes?		
	<input type="checkbox"/> Creative Europe <input type="checkbox"/> Horizon 2020 <input type="checkbox"/> Erasmus+ <input type="checkbox"/> Interreg	Others: - - - -	

30. Assess new trends	Please, assess your knowledge/interest about the following trends or technologies? From "1" (no idea/opinion) to "5" (very important)	
	<ul style="list-style-type: none"> - Digitization - Transmedia - Blockchain - Augmented Reality - Virtual Reality 	<ul style="list-style-type: none"> - Smart (Big & Open) Data - Artificial Intelligence - Cross-cultural cooperation - Gaming
	Any other trend or comment you would like to share on such kind of issue?	

31. Any other Good Practices (OPTIONAL)
If you have any Good and/or Innovative Practice or Project that you would like to share, we would be happy to hear more about it and contact you, in such case, please, just answer the following points:

- Name/Title of the GP:
- Topic/What is it about?:
- Any link of interest: [www](#).

CONTACT DETAILS (OPTIONAL) To be able to contact you if needed and to share the results of this research

- Contact person (name):
- Position: / e-mail address:

GDPR data processing compliance (PLEASE, TICK)

☐ By filling in this questionnaire, I authorize the personal data provided in this form to be processed by the partners of the European Digital Treasures project in accordance with the General Data Protection Regulation (GDPR) approved by the European Union.

Thank you very much for your time and kind collaboration! 🍷🍷🍷

Should you have any question, please, do not hesitate to contact us at xxx@xxx.com