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# **Pilot testing and implementation - Monitorisation**

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## Introduction

The following report presents the results of the activity 8 Pilot testing and implementation - Monitorisation in the framework of the Work Package one: New Business Models for European Archives in the XXI Century.

One of the objectives of the project European Digital Treasures is to generate a greater added value, profitability, visibility and economic return of European archives, through the identification and implementation of new business models and activities.

Two initial project activities were developed before the pandemic in order to catch this objective:

- **Diagnosis & State of the Arts:** To identify, generate and transfer a series of homogeneous knowledge and to provoke cross-sectorial encounters.
- **Benchmark practices** made by institutions worldwide such as public and private Museums, Libraries, Heritage and Cultural Centres, to showcase innovative solutions in cultural management carried out by organisations that share the similar goals of protecting, enhancing arts and cultural heritage.

As far as the Pan European Diagnosis and State Arts is concerned, within its methodology, 42 questionnaires were obtained (21 at National levels / 21 at either local and/or regional levels) covering 21 countries.

Following these first recommendations and actions identified, the partners of the project agreed on a realistic objective to implement at least 4 new and alternative managerial actions each (20 in total), that will contribute to improve their existing models, in terms of income generation, visibility or relation with existing and new users and visitors.

Our Digital Treasures project doesn't include budgetary previsions to the implementation, but only staff cost to assess which ones will be carried out and how.

The present report refers to 20 actions taken in the National/State Archives that were grouped in several categories as follows:

Management:

- Self-copying service in the researching rooms of the Spanish State Archives.
- Implementation of an online booking system for appointments at the researching rooms of the Spanish State Archives.
- Creation of an image bank for dissemination use within the Spanish State Archives.
- Identification of potential for revenue generation in the National Archives of Malta.



#### Cooperation

- Collaboration with private institutions within the Spanish State Archives.
- Crowdsourcing activities in the National Archives of Hungary.
- Make a plan to follow up the Adelaide declaration within the National Archives of Norway.
- Saving an endangered archive in the National Archives of Malta

#### Audience Development

- Broader test of handwritten text recognition (HTR) in combination with crowdsourcing within the National Archives of Norway.
- Collaborate with a government entity to popularise the archives in the National Archives of Malta.

#### Audience Development & Cooperation

- Opening the field for user generated contents in the National Archives of Hungary.
- Participating in programmes that lead people to digitize their family memories and heritage in the National Archives of Hungary.
- E-learning programmes for users and employees of the National Archives of Hungary.
- A series of productions (articles and short videos) about archives in the National Archives of Malta.
- Info products model in the National Archives of Portugal.
- Consulting in the National Archives of Portugal.

#### Technological

- Improve access to digitized archives using artificial intelligence within the National Archives of Norway.
- Improve the support of users in the National Archives of Norway.

#### Management & Technological

- E-commerce in the National Archives of Portugal.

#### Audience Development & Technological

- Events and exhibitions within the National Archives of Portugal

The duration for the implementation of the activities was September 2021 to September 2022. At the Executive Committee meeting held in January 2022, it was agreed to report on the status of the implementation of the different activities by each of the partners involved, in addition to the aforementioned meeting in Malta, in May and September when the activity would end. Before January 2022 it was reported monthly.

## Description, implementation and results of the activities in the Spanish State Archives

### Self-copying service in the researching rooms of the Spanish State Archives

A pilot project started on October 5<sup>th</sup> 2021 until September 2022 in the General Archive of Simancas and the Archives of the Royal Chancery of Valladolid. Some indicators were used in order to get information: number of applications submitted, number of approved applications, number of rejected applications, number of applicants for the service, total number of documents included in the applications, number of self-copied documents, number of documents auto copied during more than one session, number of applications reaching the limit of 50 self-copies, total number of self-copies made, average number of self-copies per request and average number of self-copies per user.

January 27 2022	May 23 2022	September 16 2022
50 %	80 %	98%

Between October and February 2022 data were collected, more than 1.000 self-copies were made in the Archives of the Royal Chancery of Valladolid and 5.299 in the General Archive of Simancas. From March 2022, the possibility was considered of implementing the self-copying service to the rest of the Spanish State Archives; finally it will be extended to all the State Archives dependent on the Ministry of Culture and Sport from November 2<sup>nd</sup> 2022.

<https://www.culturaydeporte.gob.es/en/cultura/archivos/destacados/2022/autocopia-archivos.html>

### Collaboration with private institutions

One archivist hired by the “The Royal Association of Hidalgos (Nobels) of Spain” started working in the National Historic Archive describing records related with the association. The estimate was 3 files per day from September 2021 to September 2022. The entire task was supervised by experts from the National Historic Archive. In return the “The Royal Association of Hidalgos (Nobels) of Spain” received a copy of the descriptions.

The indicators to measure the development of the activity were basically records of Documentary Units (files) and records of Non-Documentary Entities (persons).

January 27 2022	May 23 2022	September 16 2022
50 %	70 %	100%



By the end of the activity: Records of Documentary Units (files): 460 and Records of Non-Documentary Entities (persons): 3.300.

### **Implementation of an online booking system for appointments at the researching rooms of the Spanish State Archives**

Implementation of an online booking system for appointments at the researching rooms of the Spanish State Archives. The licence was acquired in December 2021. The pilot project is going to be tested in The National Historic Archive, General Archive of the Indies and the General Archive of the Administration. The indicators used were: number of users using the service, number of bookings requested and number of complaints and suggestions arising from the procedure.

January 27 2022	May 23 2022	September 16 2022
30 %	60 %	97%

On 3 October 2022, the pilot project was authorised in the National Historic Archive and the General Archive of the Administration. In the General Archive of the Indies from 17 October. After a period of 4 months, the convenience of implementing this service in general to all the State Archives dependent on the Ministry of Culture and Sport in the course of the year 2023 will be evaluated.

<https://www.culturaydeporte.gob.es/en/servicios-al-ciudadano/fundaciones/informacion-general/contacto-cita-previa.html>

### **Creation of an image bank for dissemination use within the SA Spain**

The idea was to create an image bank for dissemination purposes by the communication teams of the Spanish State Archives. Its creation began between November 2021 and June 2022. The indicators used to measure the development of the activity: number of images uploaded, number of images used, external demand for images and number of images withdrawn from the bank due to full digitisation in PARES.

January 27 2022	May 23 2022	September 16 2022
40 %	70 %	100 %

Between June 2022 and September 2022 the new tool has been disseminated with the help of the Dissemination Groups and the editorial teams of every archive.



## Description, implementation and results of the activities in the National Archives of Hungary

### Crowdsourcing activities

The activity consisted of selecting data, building an online platform, recruiting contributors from the crowdsourcing activity, opening the new crowdsourcing activity with the volunteers, maintaining technological, professional and community support and finally publishing of data. Some indicators to measure the development were number of volunteers, median of records per person and number of records processed.

The implementation stage started with a hybrid information session on 26<sup>th</sup> September 2022, indexing from 1 October to 15 November 2022. During this period, 69.208 cards were transcribed manually, including 333 in Russian and 26 in Portuguese languages. A total of 70 volunteers participated in the project, of which 56 were returning (those who had participated in the previous EDT A21 volunteer programme). Contributors were asked to process 500 cartons as a condition for participating in the prize draw at the end of the project. This was achieved by 48 people. On average, one volunteer indexed 1007 cartons, with the most active participant 7710. Participants were kept informed of their progress, which proved to be a significant motivating factor. In 418 cases volunteers identified additional information about the persons observed by means of additional Internet or registry search. The maintenance of a Facebook group was also motivating, with 125 posts, 378 comments and 1387 reactions. The posts were mainly about the prominent individuals who were unexpectedly found in the series, volunteers also repeatedly asked each other for help with transcription, and MNL tried to keep the momentum sharing six academic posts. In the end, 550 files were found that could be linked to well-known people (politicians, writers, artists, intellectuals), including some international celebrities such as Walter Ulbricht, Bertold Brecht, Zoltán Kodály, János Kádár, Martin Andersen Nexø, Louis Aragon, Heinrich and Klaus Mann, Anna Seghers, Egon Ervin Kisch, John dos Passos.)

January 27 2022	May 23 2022	November 2022
50 %	70 %	100 %

The data publication will take place early 2023.

### Opening the field for user generated contents

The function to let customers, researchers, etc. upload a comment, or a photo as an addition to the databases was developed and tested by the staff members of the National Archives of Hungary. With this tool, the National Archives of Hungary enables users of its databases to add data and additional details to the shared historical knowledge. It is available on each database published on the official site of the National Archives of Hungary's databases.



January 27 2022	May 23 2022	November 18 2022
50 %	80 %	100 %

Some indicators and figures reached were: number of contributions 4.136, number of contributions handled 4.060 of which data clarification/correction 3.608, of which additional information 1.729. With the upload function the databases were enriched with 69 new photos.

### Programmes that lead people to digitize their family memories and heritage

The task addressed five main points: selection of data, participation in building online platform, publication of data and maintain a professional support and maintain a community support. With the help of the Simon Kézai Programme, the National Archives of Hungary reached out to users who were previously unaware of the institutional network. The point of intersection between the two groups is to answer any questions about family history that may arise during the management and digitisation of family photos. For this reason, the National Archives of Hungary was part of the mentor network of the programme.

<https://www.kezai.hu/search?keywords&date=1800-2020&country&settlement&tags=>

January 27 2022	May 23 2022	September 16 2022
40 %	60 %	100 %

### E-learning programmes for users (researchers, teachers, students) and for the employees of the National Archives of Hungary

The National Archives of Hungary developed self-training support for certain groups of researchers and interested parties, as it is in the common interest that the researchers seek archival assistance after adequate training and find answers to some of their questions independently. The Archives' thematic videos, available on the Internet in Hungarian and English, help with this. Their number is constantly growing. Some indicators used were: number of newly published e-learning courses / tutorials, number of viewers / participators and number of visitors at offline events of the archives where these contents are used / shown.

January 27 2022	May 23 2022	September 16 2022
30 %	70 %	100 %

Some results: series in connection with types of archival materials: between 700 and 800 viewers each; series on certain historical periods in Hungarian and in English: from 7 to more than 9,900 viewers; series on practical questions regarding the archival research in Hungarian and in English: YouTube videos: between 500 and 2.300 viewers and Roots series on Facebook: between 3.400-13.000 viewers.

<https://www.facebook.com/watch/126030587498141/3677806432262092/>

<https://www.facebook.com/HCCNY/videos/1191411927958214/>





## Description, implementation and results of the activities in the National Archives of Norway

### Broader test of HTR in combination with crowdsourcing

The task addressed four main points: selection of data, build the platform, recruit the volunteers and publication of the data. The volunteers were recruited in August 2022 via Facebook. Only five showed their interest. Some indicators reached are the number of volunteers: 5, the number of records processed: 600.

January 27 2022	May 23 2022	September 16 2022
20 %	30 %	70 %

The work with the volunteers keeps running, and will do so until finishing the entire volume. The person in charge will hire new volunteers to finish the rest of the volume. When it is finished, The National Archives of Norway plans to use it as Grand Truth (GT) for other volumes with similar handwriting.

### Make a plan to follow up the Adelaide declaration

There has been developed a Sámi archives portal, and it has been important to prepare content to be imported to the portal. The portal is ready to be launched in December 2022. The portal is maybe one of the best ways to decolonizing Sámi archive material. It is done entirely digitally, and the holders of the originals will have an extra way of promoting their material.

January 27 2022	May 23 2022	September 16 2022
20 %	30 %	60 %

Some tasks are pending completion such as showing to other countries and learn from their experiences, discuss the results with the Sámi communities in the three countries and produce an action plan.

### Improve access to digitized archives using artificial intelligence

The Artificial Intelligence started with the newest cards, as they are in most demand by our case handlers. Later on they started to work on older cards. The results from Activity 21, the ground truth that we established, is valuable input to the handwritten text recognition (HTR) process on the oldest registration cards.

January 27 2022	May 23 2022	September 16 2022
30 %	50 %	95 %



The goal has been set to identify names on the newest index cards so they can be used in the daily case handling. Millions of cards have been processed and are made available for internal case handling.

### **Improve the support of our users**

The system works well for cases that follow a standardized process ("simple cases"), but not optimally for more complicated cases. The National Archives of Norway is trying to improve the functionality for the complicated case.

January 27 2022	May 23 2022	September 16 2022
30 %	50 %	95 %

The system is fully implemented in the organization, some indicators used have been: the number of problems, time spent on user requests, feedback from our employees and feedback from external users.

## **Description, implementation and results of the activities in the National Archives of Malta**

### **Collaborate with a government entity to popularise the archives**

A 2022 calendar using 1922 passport applications from the National Archives was developed, designed, printed and distributed with Identity Malta, the Maltese government agency responsible for passports. 2500 copies were printed and distributed. There was an excellent feedback to the extent that some descendants of persons featuring in the calendar remarked that they 'discovered' their ancestors.

January 27 2022	May 23 2022	September 16 2022
30 %	50 %	100 %

There were instances of people who came to the National Archives looking for photos of their ancestors informing that they knew of this possibility from the calendar.

### **Saving an endangered archive**

A condition survey of the Siggiewi Parish Archive was carried out by the National Archives Conservation Lab. Siggiewi (Malta). Parish church was founded prior to 1436 and the archive includes documents of historical nature. In 2021, staff from the National Archives, the Department for Archival Studies at the University of Malta and Hill Museum and Manuscript



Library (USA) visited the Archive to analyse the situation. Assisted by the National Archives of Malta, an agreement was reached between Hill Museum and Manuscript Library and the parish for the digitisation of the historical records.

January 27 2022	May 23 2022	September 16 2022
30 %	50 %	100 %

The digitisation of the identified 48 volumes (ca 600Gb of data) was concluded and a copy of the data was handed over to the parish. In the meantime the National Archives of Malta assisted the archive by proposing several measures aimed at improving the storage conditions and the handling of the records. The Malta Study Centre (within Hill Museum and Manuscript Library) started uploading the digital copy of the digitised records on its site.

#### **A series of productions (articles and short videos) about archives**

The task is based on identifying, discussing and developing a series of audio-visual productions inspired by records from the archives.

January 27 2022	May 23 2022	September 16 2022
25 %	90 %	100 %

An agreement has been reached with The Sunday Times of Malta for the development and publication of such productions. To date, 9 services have been developed and published: Goats and the Empire (14 November 2021; Archives (28 November 2021); Malta's Railway (19 December 2021); Christmas Parties (26 December 2021); Rape and Femicide (30 January 2022); Deportation of Maltese to Uganda during WW2 (23 February 2022); 1953 Royal Opera House building competition (27 February 2022); Easter Traditions (17 April 2022); Glorious 10 May 1942 (8 May 2022).

#### **Identification of potential for revenue generation**

This activity was intended to address the identification of an expert to carry out the study, developing terms of reference and presenting the findings to the top management of the public service.

January 27 2022	May 23 2022	September 16 2022
30 %	70 %	100 %

The Management Efficiency Unit (office of the Prime Minister) drew up a report identifying several new revenue-generating business models for the National Archives of Malta.

## Description, implementation and results of the activities in the National Archives of Portugal

### E-commerce

Invest in the acquisition of an e-commerce platform solution to enhance the visibility of the online presence of the DGLAB Store.

January 27 2022	May 23 2022	September 16 2022
30 %	70 %	98 %

Almost all objectives have been accomplished: organization and stocktaking (100%); restructuring of the front office store's warehouse space (100%); transfer of surplus books to intermediate warehouse (100%); organization and parameterization of the e-commerce platform (100%); beginning of the process to collect new book titles to insert online (90%); start training the 3 DGLAB adherents to the e-commerce platform (30%) and implementation of the project online (98%). Some indicators used to measure the development of the activity: % Increase revenue; % Client Satisfaction and % increase of visitor access to the web site (0%).

### Infoproducts model

Establish agreements with external entities; develop concepts together with research designers; product manufacturing and online promotion.

January 27 2022	May 23 2022	September 16 2022
10 %	20 %	50 %

Several internal design studies have been made with recycle materials in order to evaluate internal capacity to produce low budget products, like: keyrings; magnets; paper blocks, etc. Some indicators used: % increase revenue; % Client Satisfaction and % increase of Visitor Access to the e-commerce web site.

### Consulting

Facilitate access to documentation; insure the good state of the documents and offer guidance in specific research processes of documentation location.

January 27 2022	May 23 2022	September 16 2022
30 %	70 %	100 %

### Events and exhibitions



Presentation of exhibitions through tools such as Interactive html flipping book publishing that allows the incorporation of other media such as video, sound, links to databases, etc.;; Presentation of information through QR-Code; Provision of touch screens that allow the visualisation of various documents.

January 27 2022	May 23 2022	September 16 2022
30 %	70 %	100 %



## General Conclusions

These are some conclusions of these activities carried out in the National/State Archives involved in the project that will contribute to improve their existing models, in terms of income generation, visibility or relation with existing and new users and visitors:

- ❖ The European archives count on highly qualified and specialized teams.
- ❖ In general there is a lack of margin of economic manoeuvre to be able to invest in new products and services (facilities, equipment, promotion, external experts, research, etc.).
- ❖ There is also little experience in generating external income, particularly by private entities (e.g. sponsorships, financial donations, merchandising, etc.)
- ❖ An important part of the Archives does not have administrative independence (dependency of Ministries, Councils or Municipalities) this situation does not facilitate their capacity and motivation when it comes to generating additional income.
- ❖ It is important to highlight the tradition and commitment in international institutional cooperation (within the sector). Cooperation with other sectors could be a solution to their lack of resources (diversification, digitalization, visibility).
- ❖ 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.
- ❖ 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.
- ❖ It would be positive to increase the engagement with association of professionals, club of friends and crowdsourcing activities.
- ❖ Other fields of interest to income generations could be merchandising products, crowdfunding campaigns and sponsorship with private companies.