Grant agreement for: CIP-Best Practice Network

Annex I - "Description of Work"

Project acronym: APEX

Project full title: " Archives Portal Europe network of eXcellence "

Grant agreement no: 297355

Version date: 2011-11-16

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Part A

Workplan Tables

A1:
Project summary

Project Number [1]	297355	Project Acronym [2]	APEX

General information

Project title [3]	Archives Portal Europe network of eXcellence
Starting date [4]	01/03/2012
Duration in months [5]	36
Call (part) identifier [6]	CIP-ICT-PSP-2011-5
Objective most relevant to your topic [7]	:		
Free keywords [8]			APEnet Archives Portal Europe Europeana Aggregator Widening Deepening Organise Connect Aggregate Innovate Digital Archival Content EAD ESE EDM conversion

Abstract [9]

APEX will be the follow-up of the APEnet project, in which national archival institutions from 14 European countries have realised – in collaboration with Europeana – the Archives Portal Europe, the first version of an internet portal for documents and archives in Europe and an archives aggregator for Europeana. APEX aims at widening, deepening, improving and sustaining this initiative, thus expanding in quality as well as quantity the delivery of digital archival content to Europeana. This goal comprises actions in various domains:
• expansion of the network of contributing archival institutions in Europe itself,
• substantial improvements in the interoperability with Europeana,
• stabilisation of the Archives Portal Europe portal infrastructure & hosting and improvement of its throughput capacity, availability of more standards & guidelines as well as tooling & support to the content providers to help them deliver more content,
• dissemination & training programmes to drive aggregation on the national level and raise awareness of archival content in Europe
• innovation in usability and Web 2.0 functionality to modernise content delivery
• sustainability of this effort.
In more detail APEX will take on board more European institutions (widening) and will help these institutions with aggregation on the national levels (deepening). APEX will work actively with the Europeana portal on interoperability of metadata formats and rights management of the archival material. All this will serve the main goal of preparing as much archival content of European institutions as possible to the Archives Portal Europe and channel the digitised and digital archival material therein to the Europeana portal.

A2:
List of Beneficiaries

Project Number [1]	297355	Project Acronym [2]	APEX

List of Beneficiaries

No	Name	Short name	Country	Project entry month[10]	Project exit month
1	NATIONAAL ARCHIEF*NANETH	NANETH	Netherlands	1	36
2	BUNDESKANZLERAMT DER REPUBLIK OESTERREICH	OStA	Austria	1	36
3	SERVICE PUBLIC FEDERAL DE PROGRAMMATION POLITIQUE SCIENTIFIQUE	ARA	Belgium	1	36
4	Archives State Agency Bulgaria	ASA	Bulgaria	1	36
5	Hrvatski državni arhiv	CSA	Croatia	1	36
6	RAHVUSARHIIV	NAE	Estonia	1	36
7	KANSALLISARKISTO	KA	Finland	1	36
8	MINISTERE DE LA CULTURE ET DE LA COMMUNICATION	SIAF	France	1	36
9	BUNDESARCHIV	BA	Germany	1	36
10	Ministry of Education, Lifelong Learning and Religious Affairs	GSA	Greece	1	36
11	NATIONAL ARCHIVES OF HUNGARY	NAH	Hungary	1	36
12	Department of Tourism, Culture and Sport	NAI	Ireland	1	36
13	DIREZIONE GENERALE PER GLI ARCHIVI	DGA	Italy	1	36
14	LATVIJAS REPUBLIKAS KULTURAS MINISTRIJA	LRKM	Latvia	1	36
15	Ressort Kultur	LI LA	Liechtenstein	1	36
16	Lietuvos vyriausiojo archyvaro tarnyba	LVAT	Lithuania	1	36
17	Ministère de la Culture	ANLux	Luxembourg	1	36
18	NATIONAL ARCHIVES OF MALTA	NAM	Malta	1	36
19	Kulturdepartementet - Ministry of Culture	NRA	Norway	1	36
20	MINISTERSTWO KULTURY I DZIEDZICTWA NARODOWEGO	NDAP	Poland	1	36
21	Secretário de Estado da Cultura	DGARQ	Portugal	1	36
22	Ministry of Interior of the Slovak Republic	OAMVSR	Slovakia	1	36

No	Name	Short name	Country	Project entry month[10]	Project exit month
23	Ministrstvo za solstvo, znanost, kulturo in sport	MESCS	Slovenia	1	36
24	Ministerio de Educacion, Cultura y Deporte	MECD	Spain	1	36
25	RIKSARKIVET	RA	Sweden	1	36
26	International Centre for Archival Research (ICARUS)	ICARUS	Austria	1	36
27	STATENS ARKIVER	RAD	Denmark	1	36
28	The National Archives of Iceland	NAIS	Iceland	1	36

A3:
Budget breakdown

| Project Number [1] | | 297355 | Project Acronym [2] | | APEX |

Participant number in this project	Participant short name	Personnel costs	Sub contracting	Other direct costs	Total costs	Max EU Contribution	Requested EU contribution
1	NANETH	1,149,330.00	0.00	33,000.00	1,182,330.00	945,864.00	945,864.00
2	OStA	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
3	ARA	91,350.00	0.00	12,000.00	103,350.00	82,680.00	82,680.00
4	ASA	21,000.00	0.00	12,000.00	33,000.00	26,400.00	26,400.00
5	CSA	218,400.00	0.00	12,000.00	230,400.00	184,320.00	184,320.00
6	NAE	244,331.00	0.00	27,000.00	271,331.00	217,064.00	217,064.00
7	KA	10,857.00	0.00	12,000.00	22,857.00	18,285.00	18,285.00
8	SIAF	463,960.00	0.00	30,000.00	493,960.00	395,168.00	395,168.00
9	BA	465,948.00	65,000.00	30,000.00	560,948.00	448,758.00	448,758.00
10	GSA	93,310.00	0.00	12,000.00	105,310.00	84,248.00	84,248.00
11	NAH	210,280.00	0.00	12,000.00	222,280.00	177,824.00	177,824.00
12	NAI	50,400.00	0.00	12,000.00	62,400.00	49,920.00	49,920.00
13	DGA	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
14	LRKM	15,122.00	0.00	12,000.00	27,122.00	21,697.00	21,697.00
15	LI LA	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
16	LVAT	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
17	ANLux	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
18	NAM	74,604.00	0.00	12,000.00	86,604.00	69,283.00	69,283.00
19	NRA	31,500.00	0.00	12,000.00	43,500.00	34,800.00	34,800.00
20	NDAP	54,250.00	0.00	12,000.00	66,250.00	53,000.00	53,000.00
21	DGARQ	48,695.00	0.00	12,000.00	60,695.00	48,556.00	48,556.00
22	OAMVSR	12,180.00	0.00	12,000.00	24,180.00	19,344.00	19,344.00

Participant number in this project	Participant short name	Personnel costs	Sub contracting	Other direct costs	Total costs	Max EU Contribution	Requested EU contribution
23	MESCS	24,640.00	0.00	12,000.00	36,640.00	29,312.00	29,312.00
24	MECD	766,960.00	0.00	331,000.00	1,097,960.00	878,368.00	878,368.00
25	RA	394,240.00	70,000.00	30,000.00	494,240.00	395,392.00	395,392.00
26	ICARUS	276,080.00	0.00	12,000.00	288,080.00	230,464.00	230,464.00
27	RAD	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
28	NAIS	0.00	0.00	7,000.00	7,000.00	5,600.00	5,600.00
TOTAL		4,717,437.00	135,000.00	710,000.00	5,562,437.00	4,449,947.00	4,449,947.00

1. Project number

The project number has been assigned by the Commission as the unique identifier for your project, and it cannot be changed. The project number **should appear on each page of the grant agreement preparation documents** to prevent errors during its handling.

2. Project acronym

Use the project acronym as indicated in the submitted proposal. It cannot be changed, unless agreed during the negotiations. The same acronym **should appear on each page of the grant agreement preparation documents** to prevent errors during its handling.

3. Project title

Use the title (preferably no longer than 200 characters) as indicated in the submitted proposal. Minor corrections are possible if agreed during the preparation of the grant agreement.

4. Starting date

Unless a specific (fixed) starting date is duly justified and agreed upon during the preparation of the Grant Agreement, the project will start on the first day of the month following the entry info force of the Grant Agreement (NB : entry into force = signature by the Commission). Please note that if a fixed starting date is used, you will be required to provide a detailed justification on a separate note.

5. Duration

Insert the duration of the project in full months.

6. Call (part) identifier

The Call (part) identifier is the reference number given in the call or part of the call you were addressing, as indicated in the publication of the call in the Official Journal of the European Union. You have to use the identifier given by the Commission in the letter inviting to prepare the grant agreement.

7. Activity code

Select the activity code from the drop-down menu.

8. Free keywords

Use the free keywords from your original proposal; changes and additions are possible.

9. Abstract

10. The month at which the participant joined the consortium, month 1 marking the start date of the project, and all other start dates being relative to this start date.

11. The number allocated by the Consortium to the participant for this project.

Workplan Tables

Project Number [1]	297355	Project Acronym [2]	APEX

LIST OF WORK PACKAGES (WP)						
WP Number [53]	WP Title	Lead beneficiary number [55]	Person-months [56]	Start month [57]	End month [58]
WP 1	Project Management	1	85.00	1	36
WP 2	Europeana Interoperability	9	107.57	1	36
WP 3	Infrastructure Development & Hosting	24	227.00	1	36
WP 4	Standards & Guidelines	9	156.20	1	36
WP 5	Tools & Support	8	133.90	1	36
WP 6	Usability & Web 2.0	6	142.16	1	36
WP 7	Dissemination & Training	25	154.50	1	36
WP 8	Sustainability	1	45.00	25	36
		Total	1,051.33		

Project Number [1]	297355	Project Acronym [2]	APEX

List of Deliverables - to be submitted for review to EC

Delive-rable Number [61]	Deliverable Title	WP number [53]	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D1.1	Project Handbook	1	1	9.00	R	PP	3
D1.2	First Annual Report	1	1	16.00	R	PP	12
D1.3	First Financial statements	1	1	12.00	R	CO	12
D1.4	Second Annual Report	1	1	16.00	R	PP	24
D1.5	Second Financial statements	1	1	12.00	R	CO	24
D1.6	Final Report and statement	1	1	20.00	R	PU	36
D2.1	First version APEX EAD – EDM conversion tool: central/local	2	9	23.38	P	PP	8
D2.2	Report on best practices regarding the administration of rights	2	9	14.13	R	PP	18
D2.3	APEX METS – EDM conversion tool: central/local	2	9	23.28	P	PP	30
D2.4	APEX EAC-CPF – EDM conversion tool: central/local	2	9	23.28	P	PP	30
D2.5	Final version Archives Portal Europe formats – EDM conversion tool: central/local	2	9	23.50	O	PU	34
D3.1	Specification for the release 1.1 of the Archives Portal Europe	3	24	21.00	O	PP	3
D3.2	Specification for the release 1.2 of the Archives Portal Europe	3	24	58.00	O	PP	12

Delive-rable Number [61]	Deliverable Title	WP number [53]	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D3.3	Specification for the release 2.0 of the Archives Portal Europe	3	24	87.00	O	PP	26
D3.4	Report on functional/ technical requirements implemented for user interface and dashboard	3	24	61.00	R	PP	36
D4.1	State of the art report on EAG + recommendations for implementation in Archives Portal Europe	4	9	28.74	R	PU	6
D4.2	Usability evaluation report for the release 1.1 of the Archives Portal Europe	4	9	15.09	R	PP	10
D4.3	First report on use cases and usability requirements	4	9	15.09	R	PP	11
D4.4	State of the art report on EAC-CPF + recommendations for implementation in Archives Portal Europe	4	9	28.75	R	PU	15
D4.5	Usability evaluation report for the release 1.2 of the Archives Portal Europe	4	9	15.09	R	PP	24
D4.6	Second report on use cases and usability requirements	4	9	9.60	R	PP	25
D4.7	State of the art report on METS + recommendations for	4	9	28.75	R	PU	26

Delive-rable Number [61]	Deliverable Title	WP number [53]	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
	implementation in Archives Portal Europe						
D4.8	Final evaluation report: Usability and Web 2.0 in archival applications	4	9	15.09	R	PU	36
D5.1	Report on functional/ technical specification of tools needed (central/local)	5	8	17.00	R	PP	6
D5.2	Data Preparation Tool to enable content providers to provide their content (central/local)	5	8	82.00	O	PU	8
D5.3	Manual to deliver the content using the Data Preparation Tool	5	8	18.00	R	PU	8
D5.4	Report on possible contributors / content /systems / formats per country	5	8	16.90	R	PP	10
D6.1	First Analysis report: Applying Web 2.0 solutions in archival applications	6	6	12.73	R	PU	9
D6.2	Acceptance test report for release 1.1 of the Archives Portal Europe	6	6	15.00	R	PP	9
D6.3	Usability evaluation report for the release 1.1 of the Archives Portal Europe	6	6	9.00	R	PP	10

Delive-rable Number [61]	Deliverable Title	WP number [53]	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D6.4	First report on use cases and usability requirements	6	6	12.73	R	PP	11
D6.5	Acceptance test report for release 1.2 of the Archives Portal Europe	6	6	21.00	R	PP	21
D6.6	Second Analysis report: Applying Web 2.0 solutions in archival applications	6	6	7.35	R	PU	24
D6.7	Usability evaluation report for the release 1.2 of the Archives Portal Europe	6	6	18.00	R	PP	24
D6.8	Second report on use cases and usability requirements	6	6	7.35	R	PP	25
D6.9	Acceptance test report for release 2.0 of the Archives Portal Europe	6	6	21.00	R	PP	35
D6.10	Final evaluation report	6	6	18.00	R	PU	36
D7.1	Project website release	7	25	19.50	O	PU	3
D7.2	Information and Dissemination Action Plan	7	25	25.00	R	PP	6
D7.3	Archives Portal Europe design release	7	25	19.00	O	PU	8
D7.4	Dissemination, Training and Educational Output Report	7	25	91.00	R	PP	36
D8.1	Sustainability Plan	8	1	9.00	R	PP	29

Delive-rable Number [61]	Deliverable Title	WP number [53]	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D8.2	Foundation Business Plan	8	1	19.00	R	PP	32
D8.3	Foundation first delivery	8	1	17.00	O	PU	36
			Total	1,051.33			

Project Number [1]	297355	Project Acronym [2]	APEX

One form per Work Package		

Work package number [53]	WP1
Work package title	Project Management
Start month	1
End month	36
Lead beneficiary number [55]	1

Objectives

Running the APEX project will be a complex operation because of the geographically and organisationally dispersed resources. Tight administrative control of the project management information is crucial to produce an integrated result. The objective of this work package is to run the overall project management: handle the planning, change management, quality control, risk management, administrative and financial tasks connected with the activities of the project.

Specific goals:
• provide a single point of contact for the European Commission
• provide coordination for the project and its constituent work packages during the full lifetime of the project
• align the activities and deliverables across the work packages
• maintain and update the overall Consortium Plan
• control the Consortium Budget
• coordinate the implementation of the work package plans
• monitor the project's progress and organise change management when needed
• report on progress, changes, and issues to the European Commission, the APEX Executive Steering Committee (ESC) and the APEX Project Board (PB)
• ensure quality control of project deliverables
• facilitate communications between project participants through regular telephone conferences, Skype sessions, email and "live" project meetings as necessary
• maintain a database of relevant project contacts, as well as the project risk register, and Consortium Plan
• establish the APEX office for coordination of (cross-WP) day-to-day operations
• organise the aggregation network on a political/strategic level (support for scenarios)

Expected Results:
ER1.1 – establish an APEX office for running day-to-day operations (M6)
ER1.2 – have periodic meetings with the European Commission (M12, M24, M36)
ER1.3 – have project reviews organised by the European Commission (to be decided by the European Commission)
ER1.4 – organise regular Project Board meetings (monthly/quarterly)
ER1.5 – organise regular Executive Steering Committee meetings (M1, M9, M18, M25, M36)
ER1.6 – organise testing and validating (focused on: WP interoperability, accurate reporting, monitoring of content aggregation, level of support to national aggregation, sustainability plan)

Description of work and role of partners

T1.1: Planning (M1 – M36)
Maintain and update the Project Plan: the Project Plan is dynamic, so as the project progresses and minor budget shifts become necessary, the Project Plan will be updated when needed.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.2: Administrative coordination (M1 – M36)

Ensure that partners are aware of reporting and audit requirements, coordinate diaries, ensure that partners are aware of planning standards.
This task will be performed by the Nationaal Archief – The Netherlands.

T1.3: Tracking and control (M1 – M36)
Make interpretations of the impact of variations reported by work packages on the critical path of the overall project. Make recommendations for remedial action where exception conditions occur. Output from this task will result in updates of the Project Plan (see T1.1).
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.4: Risk and issue management (M1 – M36)
Interpret incoming risk and issue information, and select and present key risks and issues to the appropriate level of project governance. This task will include: defining guidelines for work packages to identify, classify and submit risks and issues for project level attention and setting up a Risk Register with rolling update to register project level risks and issues ordered by impact and with clear management actions associated.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.5: Quality planning (M1 – M36)
Agree with the Project Board on the identity of key products/deliverables and on quality checking methods and responsibilities. Output from this task will include: a list of the key products/deliverables from each work package, showing the method for assuring their quality; an overall definition of project quality standards, methods, roles and responsibilities; setting up records of quality management activities and timely assessment of the impact of the outcomes of these quality management activities.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.6: Benefits planning and tracking (M1 – M36)
Agree with the Executive Steering Committee what the key benefits from the project will be and when to expect them. Monitor progress towards achieving these benefits and alert project steering to variations to the original plan for benefit delivery. Output from this task will include: a set of descriptions of benefits from the project showing: timings, success measures, dependencies, owners.
This task will be performed by the Nationaal Archief – The Netherlands

T1.7: Change control (M1 – M36)
Create the change control system and communicate/agree about it with the work package leaders. Manage all configurations of project-level deliverables. Maintain records of change requests resulting from project issues, and checking they have been assigned in a timely way by the correct change authority. Output from this task will be: establishing a change control procedure which will include setting up a system for registering identified changes to the scope of the project, for analysing their effects and for approving action to deal with them.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.8: Communications (M1 – M36)
Set and agree project communications strategy and standards with WP7 Dissemination & Training, check delivery of appropriate communications according to plan. Organise periodic meetings of the Executive Steering Committee (quarterly/bi-yearly) and the Project Board (monthly/quarterly).
This task will be performed by the Nationaal Archief – The Netherlands and all other partners.

T1.9: Financial management (M1 – M36)
Process member's cost statements & reimburse costs. Prepare consolidated cost statements for the Commission. Manage, update, and maintain the Project Budget and initiate redistribution of money allocation internally if necessary to use the project's budget as efficiently as possible.
This task will be performed by the Nationaal Archief – The Netherlands and all other partners.

T1.10: Project reporting (M1 – M36)
Define project reporting guidelines in consultation with the Commission, stakeholders and project steering committees. Produce consolidated reports on efforts, results, and resource consumption. Output from this task

will include: establishing a defined project reporting plan and regime that meets the needs of the project and Commission.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany and all other partners.

T1.11: Contact with the Commission (M1 – M36)
Manage communication with the Commission, including collating and preparing periodic reports and negotiating any changes that may be necessary. Monitor contracts and commitments to ensure that the project meets its obligations to the Commission.
This task will be performed by the Nationaal Archief – The Netherlands.

T1.12: Intellectual property (M1 – M36)
Maintain a register of Intellectual Property and give guidance on Intellectual Property Rights (IPR) issues, establish an IPR Register with rolling update.
This task will be performed by the Nationaal Archief – The Netherlands in close cooperation with Bundesarchiv Germany.

T1.13: Work package co-ordination (M1 – M36)
This task will result in the organisation and moderation of Project Board meetings and telephone conferences, the collation and submission of six-monthly progress reports, and the maintenance of the work package implementation plan. This task includes synchronising activities of the Project Coordinator (PC) with other work packages through informal communication channels. It also includes resolution of conflicts that may arise within the project organisation.

In case of conflicts the Project Board will advise the Project Coordinator a proper solution which he will endorse or escalate towards the Executive Steering Committee in case the Project Board cannot reach a unanimous decision or in case the solution will need extra (higher level) discussion and/or political support.
This task will be performed by the Nationaal Archief – The Netherlands

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	54.00
3	ARA	1.00
4	ASA	1.00
5	CSA	1.00
6	NAE	1.00
7	KA	1.00
8	SIAF	1.00
9	BA	9.00
10	GSA	1.00
11	NAH	1.00
12	NAI	1.00
14	LRKM	1.00
18	NAM	1.00
19	NRA	1.00
20	NDAP	1.00
21	DGARQ	1.00

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
22	OAMVSR	1.00
23	MESCS	1.00
24	MECD	4.00
25	RA	1.00
26	ICARUS	1.00
	Total	85.00

List of deliverables

Deliverable Number [61]	Deliverable Title	Lead beneficiary number	Estimated indicative person-months	Nature [62]	Dissemination level [63]	Delivery date [64]
D1.1	Project Handbook	1	9.00	R	PP	3
D1.2	First Annual Report	1	16.00	R	PP	12
D1.3	First Financial statements	1	12.00	R	CO	12
D1.4	Second Annual Report	1	16.00	R	PP	24
D1.5	Second Financial statements	1	12.00	R	CO	24
D1.6	Final Report and statement	1	20.00	R	PU	36
	Total		85.00			

Description of deliverables

D1.1) Project Handbook: A manual containing the description of how day-to-day operations within the APEX project are to be performed, covering all topics as described in the tasklist above, so including the output of those tasks, such as: the guidelines for identification of risks and the establishment of a risk register (T1.4), the list of key products and deliverables as well as the method for assuring their quality, plus an overall definition of project quality standards, methods, roles and responsibilities (T1.5), the set of descriptions of benefits from the project showing: timings, success measures, dependencies, owners (T1.6), the change control procedure and the description of a system for identification of changes to the scope of the project (T1.7), the project communications strategy (T1.8), the definition of the project reporting guidelines (T1.10), the definition of the IPR register (T1.12) and the procedure for dealing with conflicts within the project organisation (T1.13). [month 3]

D1.2) First Annual Report: Yearly report summarising the project's activities and achievements during the past year, related to the overall objectives of the project as well as to the tasks, deliverables and milestones of the individual work packages as described in the project plan per work package. [month 12]

D1.3) First Financial statements: Yearly report providing a detailed overview of what each APEX Consortium partner has spent during the past year as a result of its APEX efforts, thus generating a good overview of the financial status of the project in relation to its objectives in addition to the Annual reports, which will enable the Commission to audit the progress of the project in general and to grant and provide the yearly instalments to enable the APEX Consortium to proceed. [month 12]

D1.4) Second Annual Report: Yearly report summarising the project's activities and achievements during the past year, related to the overall objectives of the project as well as to the tasks, deliverables and milestones of the individual work packages as described in the project plan per work package. [month 24]

D1.5) Second Financial statements: Yearly report providing a detailed overview of what each APEX Consortium partner has spent during the past year as a result of its APEX efforts, thus generating a good overview of the

financial status of the project in relation to its objectives in addition to the Annual reports, which will enable the Commission to audit the progress of the project in general and to grant and provide the yearly instalments to enable the APEX Consortium to proceed. [month 24]

D1.6) Final Report and statement: Yearly report summarising the project's activities and achievements during the past year, related to the overall objectives of the project as well as to the tasks, deliverables and milestones of the individual work packages as described in the project plan per work package. This third Annual report – the Final report and statement – will not only summarise the results of the third year, but also provide a general report on the results reached by the APEX Consortium during the entire lifetime of the project. [month 36]

Schedule of relevant Milestones

Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS2	Establish an APEX office for running day-to-day operations	1	6	

Project Number [1]	297355	Project Acronym [2]	APEX

One form per Work Package

Work package number [53]	WP2	
Work package title	Europeana Interoperability	
Start month	1	
End month	36	
Lead beneficiary number [55]	9	

Objectives

The close collaboration between the APEnet project (running until January 2012) and Europeana has proven to be of benefit for both parts during the last three years. The APEX project will continue on this task and will work on substantially enhancing the interoperability between both projects and their portals. One objective in this for WP2 will be to stabilise and maintain the already developed technical interface between the Archives Portal Europe and Europeana and to turn the first into the centre of an aggregation network for all European institutions holding archival material. By this, the Archives Portal Europe will become an important pillar for the continuity and sustainability of Europeana.

Especially since APEX and the Archives Portal Europe will not only act as the aggregator for Europeana with regard to archival content, ie preparing as much digitised archival material of European institutions to be transferred to and presented within the Europeana portal as possible, but as well as an aggregator with regard to archival knowledge and expertise in order to assist in enhancing the cross-domain portal on Europe's cultural heritage.

In order to achieve the latter APEX will pursue the work on standardising metadata formats and on improving their interoperability and it will promote the establishment of a network of national aggregators in the Member States, thus intensifying the cooperation on providing rights-clarified digital content in the archives' domain in Europe, to the benefit of Europeana as the knowledge creating engine in and for Europe.

In both of these tasks WP2 will cooperate closely with WP4 regarding:

• the ongoing refinement of the uniform metadata format for describing archival material - APEnet EAD as being one result of the current APEnet project – and the definition of its conversion towards the Europeana Data Model (EDM);
Within the APEnet project the focus laid on ESE (Europeana Semantic Elements) while APEX will aim at the EDM which is envisaged to be the basis of all Europeana releases in the future. This not only results in re-doing the mapping between the standards used in both portals from a new angle, but as well in defining a more extended conversion taking into account all the benefits that the EDM can theoretically provide f.i. for displaying hierarchically structured information or cultural heritage objects represented by a set of images instead of a single image only. Since the definition and formulation of the EDM in itself as well as its concrete implementation in the Europeana portal are ongoing task, APEX will meet the challenge to continually adapt the mapping towards EDM to possible changes and additions of the data model in the back-end and to those of the related online presentations in the front-end of Europeana.

• the inclusion of a concise best practice guideline with regard to providing rights information concerning the digital archival objects themselves and concerning the accompanying descriptive information;
APEX is uniquely positioned to address one of the main obstacles in aggregating archival content to the Europeana level: specific national legislation and policies restricting the access and (re)use of archival content from that country versus Europeana's proposed contractual policy on the free and open (re)use of all content that is made accessible through Europeana. WP2 will therefore join forces with WP4 in evaluating the professional as well as the legal aspects of this question in order to include corresponding functionalities within the Archives Portal Europe's back-end to facilitate delivery of archival content towards Europeana already including rights information as needed by the cross-domain portal. The technical implementation will as well happen in collaboration with WP3 for the central instance and WP5 for the stand-alone version of the tools.

• the extension of archival metadata mapping towards the international standards EAC-CPF (Encoded Archival Context – Corporate Bodies, Persons and Families) for describing persons, families and corporate bodies as well as METS (Metadata Encoding and Transmission Standard) for providing administrative, technical and structuring metadata on images;
Including archival information encoded according to the international standards EAC-CPF and METS can be of specific benefit for Europeana with regard to the Linked Data approach followed in the cross-domain portal - especially when centred around the person as one of the main entities - as well as concerning the administration of rights, which might be different concerning the digital objects themselves (f.i. encoded or packed in METS) and concerning archival content apart from the digital objects as originally being made available in the Archives Portal Europe. APEX will therefore aim at defining uniform profile for EAC-CPF and METS as the APEnet project already has successfully done for EAD.

As already mentioned above WP2 will cooperate in the technical aspects of interoperability with WP3 for the central dashboard implementation and with WP5 for the further development of the mapping tool, that as well can be used locally. With regard to the organisational aspects of interoperability there will additionally be a close cooperation with WP6 on investigating the use of Linked Data. For this it is envisaged to collaborate f.i. with the OPF (Open Planets Foundation) which is currently leading a Linked Data initiative on a global Representation Information Registry eco-system to gain more knowledge on the subject and with the UK national EAD-based "Archives Hub" that has teamed up with the COPAC project to embark upon Linked Data .

Furthermore WP2 will work actively with WP7 and with Europeana on organising and conducting workshops and/or conferences with a special emphasis on bringing archival material into Europeana. These can reach from more general presentations on strategic level via presentations concentrating on one aspect of interoperability specifically to detailed workshops on how to map, how to convert or how to enrich archival information to be forwarded to Europeana.

All in all WP2 will be the link between APEX and Europeana with regard to technical and organisational interoperability, channelling and managing all activities being necessary in other work packages as well to ensure and enhance interoperability at all levels in order to have the metadata to be contributed to Europeana compliant with technical and licensing conditions and agreements in force, as agreed by the Europeana Foundation, i.e. the Europeana Data Exchange Agreement and its possible successors. Summarising the above mentioned, WP2 will have the following

specific goals:
• further specification/implementation of interoperability with Europeana by mapping archival standards (EAD, EAC-CPF, METS) to EDM (depending on Europeana's EDM implementation progress and in collaboration with WP3, WP4 and WP5) including cooparation with Europeana on new developments, f.i. displaying hierarchically structured content properly (taking into account Europeana's end users and Europeana's research hemisphere concept) or displaying cultural heritage objects represented by a set of images
• implementing rights strategy based on APEX's Content Provider Agreement and Europeana's Data Exchange Agreement (depending on WP4's efforts to align them and in close cooperation with WP3 for the integration in the dashboard of the Archives Portal Europe)
• investigating the use of Linked Data in cooperation with WP6, Europeana as well as other possible partners (Archives Hub, Open Planets Foundation)
• all this leading to delivering as much (metadata information on) digital archival objects as possible to Europeana, amounts to be revealed in the course of the project, depending on WP5's first task and in close cooperation with WP3 for the integration in the dashboard of the Archives Portal Europe
• informing and educating archival institutions about Europeana and participating in Europeana via documents, materials, handbooks and possibly workshops etc. (off- and online, the latter in cooperation with WP7)
• and generally keeping track of Europeana developments by participating in relevant Europeana v2.0 WP

Expected results:
• ER2.1 – realisation of interoperability with all Europeana v2.0 releases
• ER2.2 – integrated conversion tool for archival standards (EAD, METS, EAC-CPF) used in the Archives Portal Europe towards EDM (central installation and possibly also as a stand-alone tool to accommodate other Europeana related projects)
• ER2.3 – delivering as many cultural heritage objects from the archival domain to Europeana as possible

Description of work and role of partners

T2.1: Continuing the close collaboration with Europeana (M1 – M36)
This will be accomplished through the participation of APEX WP2 members within the work packages and working groups of Europeana, especially in WP7 of Europeana v2.0 that will take care of the further development of the EDM. The two projects' collaboration will additionally be supported by an organisational APEX office to be established in The Hague to ensure maximum interoperability as well on a strategic level. The close vicinity with the Europeana office will furthermore enable quick and efficient coordination on various aspects of the work to be performed. Together with the Federal Archives of Germany as the work package leader this task will mainly be carried out by the National Archives of the Netherlands, that will accomodate the APEX office at its premises.

T2.2: Further development and adaption of the implementation of interoperability to Europeana: organisational (M1 – M36)
Apart from collaboration with Europeana by representing the main aggregator of archival material at workshops, conferences etc organised by Europeana, WP2 will link to APEX' WP7 for cooperating in tasks of promoting content delivery to Europeana and of educating content providers in preparation of their data for this. The latter will specifically refer to implementing a rights strategy based on the APEX Content Provider Agreement and Europeana's Data Exchange Agreement and following the research on practices of rights assigment on local and national levels, which will be carried out by WP4 assisted by WP2.

While WP4 will cover the professional and legal evaluation, WP2 will then take on for the concrete implementation of a solution being able to cope with all possibilities, that content providers might already use on local level to assign rights information to their data. This should go for rights assignment on the digital objects themselves (currently kept in the ESE element <europeana:rights>) as well as for rights assigment on the descriptive information delivered together with them. Therefore, WP2 will additionally examine options like altering the APEX EAD (based on the elements <userestrict> and/or <accessrestrict>) or having an extra database field in the Archives Portal Europe (for CC and/or other rights info). Furthermore, the use of METS and its section for administrative metadata (<amdSec>) should be evaluated more thoroughly with this regard. This task as combining organisational as well as technical aspects of interoperability will be carried out by the Federal Archives of Germany as the work package lead supported by General State Archives of Greece, the National Archives of the Netherlands and the Ministry of Culture of Spain.

T2.3: Further development and adaption of the implementation of interoperability to Europeana: technical (M1 – M36)
With the EDM being integrated in future Europeana releases, WP2 will take care of defining, developing and implementing interoperability between the standards used in the Archives Portal Europe (EAD as short-time task, METS and EAC-CPF as long-time tasks) by enhancing the already existing conversion tool (central/local). Taking the EAD2ESE conversion currently in place one step further towards and EAD2EDM conversion will be the first stage in this process in order to ensure delivery of archival content to Europeana in general.

In addition to this, WP2 will as well meet the challenge of converting archival information encoded in EAC-CPF and of including information on digital objects encoded and packed in METS. While the first will possibly help to foster the Linked Data approach of Europeana with regard to persons as one of the main entities in this, the latter is aiming at providing structured administrative and technical information on digitial images.

With regard to defining the standards for their use within the Archives Portal Europe as well as for enhancing interoperability with the Europeana portal this task will be carried out in close cooperation with WP3, WP4 and WP5. It will cover
• research and evaluation of best practices,
• drafting and publishing best practice guides according to the outcomes of these studies,
• enhancing the already existing conversion tool in its central instance as integrated in the framework of the Archives Portal Europe and in its stand-alone version accordingly,
• testing the tool and evaluating its usability (together with WP6),
• drafting and publishing manuals on the tool
• as well as organising workshops for more detailed education of the content providers in how to use the tool to their best benefit.

While all members of WP2 will take part in the tasks of researching, evaluating and reporting, the technical implementation will be lead by the Bundesarchiv (as being the work package leader) supported by the Ministry of Culture, Spain, the Nationaal Archief, the General State Archives of Greece and the National Archives of Hungary.

T2.4: Contributing resources to Europeana (M1 – M36)
The Archives Portal Europe is the aggregator for the archives domain for Europeana as the European cross-domain cultural heritage portal. The achievments reached with tasks 2.2 and 2.3 will enhance the ability of the Archives Portal Europe to deliver its content to Europeana on technical level and they will facilitate further contribution of cultural heritage objects from the archival domain to Europeana on organisational level. By this all APEX consortium members do become participants of WP2 to some extent by delivering as much archival content to Europeana as possible and by making the Archives Portal Europe the essential interface between Europeana and the archival domain.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	9.00
5	CSA	14.00
9	BA	36.00
10	GSA	16.00
11	NAH	9.00
14	LRKM	8.57
19	NRA	4.00
20	NDAP	2.00
24	MECD	9.00
	Total	107.57

List of deliverables

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D2.1	First version APEX EAD – EDM conversion tool: central/local	9	23.38	P	PP	8
D2.2	Report on best practices regarding the administration of rights	9	14.13	R	PP	18
D2.3	APEX METS – EDM conversion tool: central/local	9	23.28	P	PP	30
D2.4	APEX EAC-CPF – EDM conversion tool: central/local	9	23.28	P	PP	30
D2.5	Final version Archives Portal Europe formats – EDM conversion tool: central/local	9	23.50	O	PU	34
	Total		107.57			

Description of deliverables

D2.1) First version APEX EAD – EDM conversion tool: central/local: Based on a research on EAD as used within the Archives Portal Europe (as defined by WP4) in relation to EDM, this deliverable will include the definition of a mapping of EAD towards EDM, the implementation of an according conversion from EAD into EDM as well as the integration of the latter in the central dashboard (in collaboration with WP3) and in the local data

preparation tool (in collaboration with WP5). Furthermore, a manual will be part of the deliverable and usability testing of the tool and the manual will be carried out in cooperation with WP6. All developments will be aligned with future Europeana releases, so several iterations of the tool (and its manual) might be needed according to adaptions and changes on part of the Europeana portal (back-end and front-end). In addition, this deliverable will include a first draft on displaying hierarchically structured cultural heritage objects within Europeana. Concrete implementation of this will be subject to subcontracting to Europeana and will be included in D2.5. [month 8]

D2.2) Report on best practices regarding the administration of rights: Taking the results of the analysis on current practices in rights assignment at the local and national levels conducted in WP4 as a basis this report will additionally include the outcomes of a legal overview of copyright regulations and similar within the participating European countries (subject to subcontracting). Together with WP3, WP2 will in this course furthermore conduct a feasibility study including a concept for connecting the dashboard of the Archives Portal Europe with Euronomos (European archival legislation online, http://euronomos.ica.org/) in order to provide central access to this additional information for the Archives Portal Europe content providers and to make use of this for further transfer of data to Europeana. This as well will be done in cooparation with WP4, that will collaborate with EURBICA (and other European archival organisations) on the general framework settings. [month 18]

D2.3) APEX METS – EDM conversion tool: central/local: As for D2.1 this deliverable will include a research on METS as used within the Archives Portal Europe (as defined by WP4) in relation to EDM and define a mapping of METS encoded data towards EDM. It will further aim at implementing a conversion from METS into EDM and its corresponding integration in central dashboard (together with WP3) and in the local data preparation tool (together with WP5). A manual for the tool will be included in this deliverable as well as usability testing of the tool and the manual in collaboration with WP6. As for EAD, alignment of these developments with future Europeana releases will be essential, so several iterations of this tool (and its manual) might be needed. Furthermore, this deliverable will cover a collaboration with Europeana regarding the display of cultural heritage objects represented by a set of digital images (subject to subcontracting). [month 30]

D2.4) APEX EAC-CPF – EDM conversion tool: central/local: According to what has been said for D2.1 and D2.3, this deliverable as well will be based on a research on EAC-CPF as used within the Archives Portal Europe (as defined by WP4) in relation to EDM. It will, due to the specific nature of this standard, additionally include the results of an evaluation of the current use of Linked Data, which WP2 will carry out in cooperation with WP6, Europeana as well as other possible partners (such as Archives Hub or the Open Planets Foundation). A mapping of EAC-CPF towards EDM will be provided and used as basis for implementing a conversion from EAC-CPF into EDM, leading to the integration of the according fuctionalities in the central dashboard (in collaboration with WP3) and in the local data preparation tool (in collaboration with WP5). A corresponding manual will be drafted and the tool as well as the manual will be tested on their usability together with WP6. Once more alignment of developments with future Europeana releases is essential and might result in several iterations of the tool (and its manual). [month 30]

D2.5) Final version Archives Portal Europe formats – EDM conversion tool: central/local: This final deliverable of WP2 will merge the results from D2.1 to D2.4 including a final release and documentation (manuals, guidelines, final interoperability report) of the EDM conversion tool. Collaboration with WP3, WP5 and WP6 for finalisation will even more be essential to ensure full integration and usability. Furthermore, this deliverable will include the final outcomes of the collaboration with Europeana regarding the display of hierarchically structured cultural heritage objects and the display of cultural heritage objects represented by a set of digital images within Europeana (subject to subcontracting). [month 34]

Schedule of relevant Milestones

Milestone number [59]	Milestone name	Lead beneficiary number	Delivery date from Annex I [60]	Comments
MS3	Release Archives Portal Europe 1.1 including design and tools	24	8	
MS5	Release Archives Portal Europe 1.2 including design and tools	24	20	

Schedule of relevant Milestones				
Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS7	Release Archives Portal Europe 2.0 including design and tools	24	34	

WT3:
Work package description

Project Number [1]	297355	Project Acronym [2]	APEX

<div align="center">One form per Work Package</div>

Work package number [53]	WP3	
Work package title	Infrastructure Development & Hosting	
Start month	1	
End month	36	
Lead beneficiary number [55]	24	

<div align="center">Objectives</div>

The main objectives are to maintain the results of the APEnet Project (www.archivesportaleurope.eu), improve its functionalities, ingest more content from the different APEX content providers and, finally, submit the content of the APEX project to Europeana.

Specific goals:
• Maintain the existing technical infrastructure (hardware/software and functionalities) resulting from the APEnet project (Grant Agreement ECP 2007 DILI 517011) at www.archivesportaleurope.eu (the servers, front-end, back-end, statistics)
• Cooperate with WP6 (and other related work packages, such as WP5) to improve the above infrastructure, particularly the portal's front-end/user interface (user profile, web 2.0 facilities, virtual exhibitions) and the portal's back-end/dashboard (enhance data uploading/aggregating, software required for continuing the development process)
• Ensure the security of the infrastructure in Archives Portal Europe
• Cooperate with WP6 to guarantee the accessibility and usability of the Archives Portal Europe to the European citizens
• Facilitate free access to the technical information (source code, technical wiki, etc.) via the Internet
• Cooperate with WP5 to provide help to the content providers in order to manage the tools and interfaces of the Archives Portal Europe in the dashboard

Expected results:
• ER 3.1 Releases of two intermediate and one final versions of the portal
• ER 3.2 Technical ensurance of regular ingestion of content from the APEX content providers
• ER 3.3 Technical ensurance of regular transfer of data to Europeana

<div align="center">Description of work and role of partners</div>

While the first three tasks will mainly be conducted by the Spanish Ministry of Culture as being work package leader, the three other tasks will be followed jointly by all WP3 members. All WP3 tasks will be continuously carried out throughout the whole project lifetime (M1 – M36).

T3.1: Maintain the www.archivesportaleurope.eu existing technical infrastructure (hardware) resulting from the APEnet project (Grant Agreement ECP 2007 DILI 517011):
Hardware infrastructure: production server (for publishing the current version of www.archivesportaleurope.eu, this version will be upgraded accordingly with the releases defined in the milestones and expected results), pre-production server (for testing and accepting new functionalities before publishing them in www.archivesportaleurope.eu; this server has the same infrastructure as the production one in order to ensure the same behavior for tests as on www.archivesportaleurope.eu), development server (for developers to test their functionalities before uploading them to the test server; this server has to be updated almost daily) and test server (for testers to test bug fixing done by developers before uploading them to pre-production server; this server has to be updated almost daily)

T3.2: Maintain the www.archivesportaleurope.eu existing technical infrastructure (software) resulting from the APEnet project (Grant Agreement ECP 2007 DILI 517011):

Software required for continuing the development process: Apache Subversion (or SVN, for the software versioning and revision control system; SVN provides in addition to the current version, the historical version of the files: source code, web pages and also documentation of the project), project management and bug-tracking tool (Trac, for the task management, registering bugs and feature requests, opening wikis for topics discussion and to sum up, for supporting the development process and allowing other project members to participate in it), OAI-PMH repository for harvesting data from content providers and delivering it to Europeana, and the tools required for improving the development environment and encouraging project members to participate in the technical process.

T3.3: Maintain the www.archivesportaleurope.eu functionalities resulting from the APEnet project (Grant Agreement ECP 2007 DILI 517011):
Portal's front-end (public user interface): two kinds of search functionalities in addition to the simple search, including the possibility of refinement in both cases, and two ways of showing the search results.

Portal's back-end (internal dashboard) to enable the content providers to use the respective tool in order to create and upload the National Directory on Archives (EAD files), create and upload files according to the EAG format (EAG files), upload, convert, validate, index, link and re-link processes of content to the portal (EAD files) and, finally, update or delete the above data by the content providers when necessary (EAG/EAD files).

Convert of the above content to the Europeana formats and deliver it to the Europeana Portal.

Statistics, both referring to the front-end final users and back-end content.

Security of the infrastructure of the Archives Portal Europe as well as the data uploaded by the content providers and hosted in the servers.

T3.4: Improve of the above infrastructures (T.3.1. and T.3.2., in cooperation with other work-packages, particularly WP2, WP4, WP5 and WP6), with special attention to the portal's OAI-PMH repository:
Assuring its correct implementation, improving and maintaining it, in order to allow the content providers to deliver data to Europeana.

T3.5: Provision of new functionalities (in cooperation with other work-packages, particularly WP4, WP5, WP6 and WP7) in the portal's front-end / user interface: new user functionalities, new pages.
Search functionalities and their display: improving the search functionalities via additional ways of searching and showing the results (f.i. the inclusion of EAC-CPF), adding new refinement possibilities and adapting the display of the directory and navigated search facilities to them.

Web 2.0 facilities.

Virtual exhibitions.

Implementation of a CMS (Content Management System), or a similar application(s) adapted to the portal and its dashboard, to provide new functionalities which imply more user interaction and therefore more useful functionalities for them.

Study and implementation of the measures required for the accessibility and usability rules accomplishment to the European citizens.

Facilitate free access to the technical information (source code, technical wiki, etc.) via the Internet in order to make public the technical experiences of this project.

Provide presentations and/or documentation and show them in public (meetings, congress, etc.) about the dashboard and portal implementations for disseminating and helping people to use not only the internal tools for content providers, but also the Archives Portal Europe.

Revision and implementation of persistent identifiers for URLs to allow the user to easily identify the information displayed in the portal.

T3.6: Provision of new functionalities (in cooperation with other work-packages, particularly WP2, WP4, WP5 and WP6) in the portal's back-end/dashboard:
Enhance data uploading/aggregating via creating new functionalities either adapting the current infrastructure.

Help desk to the content providers, in cooperation with WP5, about the tools and the interfaces available in the dashboard.

To create new tools for other standards files (EAC-CPF) and source guides.

Installation and development of tools necessary for the METS implementation.

Implementation of dashboard functionality to assist content providers in optimising the quality of their data for their use within the portal. This functionality will detect omissions and inconsistencies in important parts of the provided content, which will help normalising the data in order to enhance the quality of their use in the portal.

To add new functionalities for the admin user, which allow supervising actions and providing more control to the dashboard status.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	14.00
6	NAE	6.00
9	BA	6.90
24	MECD	200.10
	Total	227.00

List of deliverables

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D3.1	Specification for the release 1.1 of the Archives Portal Europe	24	21.00	O	PP	3
D3.2	Specification for the release 1.2 of the Archives Portal Europe	24	58.00	O	PP	12
D3.3	Specification for the release 2.0 of the Archives Portal Europe	24	87.00	O	PP	26
D3.4	Report on functional/technical requirements implemented for user interface and dashboard	24	61.00	R	PP	36
	Total		227.00			

Description of deliverables

D3.1) Specification for the release 1.1 of the Archives Portal Europe: The deliverable will consist of the detailed description of all technical specifications that will have to be implemented in the host infrastructures during the development period of the first release (months 1 to 8). These specifications will be derived from the requirements established not only by WP3 but following the needs identified by other APEX work packages. The host infrastructures and its changes will be categorised in four environments: development, branch pre-production, trunk pre-production and production. [month 3]

D3.2) Specification for the release 1.2 of the Archives Portal Europe: Both D3.2 and D3.3 deliverables will consist of the detailed description of all technical specifications that will have to be implemented in the host infrastructures during the development period of the second and third releases (months 11 to 20 and months 26 to 34). These specifications will be based on a short report on the state of functional and technical requirements

already implemented at that time (including quantitative statistics) and they will be derived from the requirements established not only by WP3 but following the needs identified by other APEX work packages. The host infrastructures and its changes will be categorised in four environments: development, branch pre-production, trunk pre-production and production. [month 12]

D3.3) Specification for the release 2.0 of the Archives Portal Europe: Both D3.2 and D3.3 deliverables will consist of the detailed description of all technical specifications that will have to be implemented in the host infrastructures during the development period of the second and third releases (months 11 to 20 and months 26 to 34). These specifications will be based on a short report on the state of functional and technical requirements already implemented at that time (including quantitative statistics) and they will be derived from the requirements established not only by WP3 but following the needs identified by other APEX work packages. The host infrastructures and its changes will be categorised in four environments: development, branch pre-production, trunk pre-production and production. [month 26]

D3.4) Report on functional/technical requirements implemented for user interface and dashboard: Description of all the functionalities added and implemented in final Archives Portal Europe release (month 34). The functionalities will be the feature requests, ie new developments for this release and, finally, the bugs that have been fixed. The deliverable will include updated quantitative statistics about the content displayed at the Archives Portal Europe and about the final users of the portal. [month 36]

Schedule of relevant Milestones				
Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS3	Release Archives Portal Europe 1.1 including design and tools	24	8	
MS5	Release Archives Portal Europe 1.2 including design and tools	24	20	
MS7	Release Archives Portal Europe 2.0 including design and tools	24	34	

Project Number [1]	297355	Project Acronym [2]	APEX

Work package number [53]	WP4	
Work package title	Standards & Guidelines	
Start month	1	
End month	36	
Lead beneficiary number [55]	9	

Objectives

The APEnet project successfully established a common profile for the use of the international archival standard EAD (Encoded Archival Description) within the Archives Portal Europe network as basis for central conversion, validation, indexing and presentation facilities. APEX will build on this by maintaining the APEX EAD standard and possibly adapting it to new developments of the general EAD schema as well as further enhancing it in accordance with new developments of the Archives Portal Europe network and with regard to the interoperability to the EDM. While the first will follow the schedule set by the Technical Subcommittee on EAD (TS-EAD) of the Society of American Archivists (SAA), which plans to have a first draft of the revised EAD until the end of 2012 and an official new release by August 2013, the latter will be done in collaboration of WP4 with WP2. Concerning the EDM not only more options for a display of hierarchically structured display of cultural heritage objects within the Europeana portal will be taken into account for improvements on APEX EAD, but as well possible uses of Linked Data based on EAD. WP4 will monitor the according evaluation and implementation done in WP2 from the professional point of view.

The steps undertaken for EAD will furthermore be followed for the related archival standards EAG (Encoded Archival Guide), EAC-CPF (Encoded Archival Context – Corporate Bodies, Persons and Families) and METS (Metadata Encoding and Transmission Standard) in order to establish profiles for these formats as well. With regard to EAG, APEX will take advantage of its creators– the Spanish Ministry of Culture – being participating in the project as well as of the project's relations to the international archival organisation ICA and SAA maintaining EAD and EAC-CPF to establish an international EAG Working Group. WP4 will additionally act as APEX' link to other international archival bodies like the European Branch of the International Council on Archives (EURBICA) or the European Board of National Archivists (EBNA) and the European Archives Group (EAG).

All work on the standards will on the one hand be conducted in collaboration with WP5 based on the examples provided by the project partners as well as together with WP2 concerning the impacts on interoperability with Europeana and WP3 with regard to the impacts on functionalities and display of the Archives Portal Europe. Together with WP5 and WP7 workshops and/or conferences on providing material for the Archives Portal Europe will be organised and held. This will include further meetings of the Archives Portal Europe Liaison Group within EURBICA, which offers interested non-EU member states an insight on the developments of the project.

In cooperation with WP2, WP4 will additionally take care of organising agreements on the exchange of archival (meta)data and descriptions with a special focus on rights management as well as with an emphasis on aligning the content provider agreements of the Archives Portal Europe and Europeana. In the course of this an evaluation of current practices of rights assignment on local and national levels will be conducted, showing the professional archivistic approaches and guidelines and supplemented by a research on copyright regulations in the European countries involved in order to have a clear understanding of the legal frameworks within the enlarged European Union.

Besides standardisation, WP4 will closely cooperate with WP6 in providing combined reports on user evaluations with regard to the implementation of standards within the Archives Portal Europe which will include additional specifications of use cases and requirements derived from this. These evaluations will be conducted following with the releases 1.1 to 2.0 of the Archives Portal Europe and their results will be transformed into corresponding technical specifications in collaboration with WP3 and WP6 at least.

In summary this leads to the following

specific goals:
• working on further standardisation of archival standards to connect content / systems / formats, which includes further development of the APEX EAD along with the revision of EAD in general as well as the according creation of specific profiles of EAC-CPF, EAG and METS to be used within the Archives Portal Europe
• with regard to EAG this comes with leading the EAG Working Group
• setting the framework for these activities by keeping contact to and by participating in other international standard working groups (SAA, ICA, etc.)
• advising archival institutions and organisations on metadata and standards for building national portals in preparation of expanding the APEX network and on setting up national APEX contact points
• deepening the knowledge on international, national and local levels by conducting workshops and providing information material for archival institutions (in cooperation with WP7)
• organising agreements on (meta)data exchange, rights management, etc. based on a research on current practices and a study on copyright frameworks in the different European countries (starting at a local level and in cooperation with WP2, WP3 and WP5 for possible implementation strategies)
• further development of use cases and organisation of user evaluation/participation (in close cooperation with WP6 and to be used by WP3 for according specifications on technical implementation)

Expected Results:
• ER4.1 – enhancement of the standardisation of EAD for use in the Archives Portal Europe network
• ER4.2 – standardisation of EAG, EAC-CPF and METS for use in the Archives Portal Europe network (central and local)
• ER4.3 – guidelines for implementation of EAG, EAC-CPF and METS in the Archives Portal Europe network (WP3) plus functional/technical specifications for mapping and conversion (WP5)
• ER4.4 – assistance in mapping and converting standards towards EDM (WP2)

Description of work and role of partners

T4.1: Evaluation of the current use of archival standards EAD, EAG, EAC-CPF, and METS (M1 – M36)
Based on information on possible content to be delivered by content providers (gathered by WP5) as well as on concrete examples WP4 will identify and analyse the use of professional standards in the participating institutions and present the results in several state of the art reports. These will include specifications based on the outcomes of the analysis on how to implement the different standards in the Archives Portal Europe network (WP3 and WP5), i.e. including recommendations with regard to mapping archival standards towards the EDM (WP2).

Being adapted for a multilingual environment, these evaluations and recommendations will specifically include an analysis of the options provided with the archival standards to have information in several languages. So does f.i. the revision of EAD as planned by the Technical Subcommittee on EAD for 2012 and 2013 envisage a possible addition of the attribute xml:lang to encode parts of the information in more than one language in parallel. Furthermore, initiatives like the Social Networks and Archival Context Project will be analysed for possible adaption of the therein provided functionalities to connect several descriptions of the same entity in different languages.

The WP4 members will participate in the different subtasks going along with this in accordance to their knowledge on a certain standard and on its use as well as along with already existing bonds to the standards committees of the SAA. So,
• the National Archives of The Netherlands, the General State Archives of Greece and the National Archives of Sweden as being represented within the Technical Subcommittes on EAD and EAC-CPF will support the Federal Archives of Germany as work package leader in all tasks concerning the activities within and the relations to these international bodies,
• the General directorate for cultural heritage – Interdepartmental Service of French Archives, the General State Archives of Greece, the National Archives of Ireland, the Head Office of Polish State Archives, and the Spanish Ministry of Culture will join the Federal Archives of Germany - as being work package leader – in the EAG working group,
• the General directorate for cultural heritage – Interdepartmental Service of French Archives, the General State Archives of Greece and the National Archives of Sweden will be the main participants with regard to the development and definition of an EAC-CPF profile for the uses within the Archives Portal Europe,

• and the National Archives of Belgium, the National Archives of Sweden and the Federal Archives of Germany will – for the time being – take the lead in the development and definition of a METS profile for the Archives Portal Europe.

T4.2: Checking, validating and possibly recommend adaptations of the implementation (M1 – M36)
Since the definition of the use of the archival standards within the Archives Portal Europe as well as definitions with regard to further conversion towards EDM (to be conducted by WP2) has always an influence on – and is influenced by – the question how information encoded accordingly is displayed online or used to built specific functionalities, this will be an ongoing task with constant exchange between all concerned WP, i.e. WP4 in collaboration with WP2, WP3, WP5 and WP6. According to their participation as listed with task 4.1 the members of WP4 will work on this task, too. The actual technical implementation will be carried out by the Federal Archives of Germany as being the work package leader, the General directorate for cultural heritage – Interdepartmental Service of French Archives, the General State Archives of Greece, the National Archives of Hungary and the Spanish Ministry of Culture.

T4.3: Analysis of best practice models of rights management (M1 – M36)
In addition to the technical standards, WP4 will as well evaluate the professional standards with a special emphasis on the questions of rights management and exchange of (meta)data and archival descriptions. Initial information on this will be gathered as one part of the survey on content to be provided, executed by WP5. This will then be extended by an evaluation on current practices of rights assignment on local and national levels (to be carried out by WP4) and a study on the legal framework on copyright regulations in the different European countries (subject to subcontracting). WP4 will additionally keep track of the according activities of EBNA and the national archives and national archives administrations concerning the fourth basic requirement to reach an agreement on how to deal with public information which is digitised using public funding. WP4 will – in this course – furthermore be collaborating with EURBICA on the general framework settings with regard to a possible connection between the Archives Portal Europe and Euronomos (European archival legislation online, http://euronomos.ica.org/).
Since this task might require quite detailed research on systems, contents, guidelines etc, that might differ not only between the participating countries, but even between single institutions, the Federal Archives of Germany as work package leader will be supported by all WP4 members in this.

T4.4: Evaluation of user groups and user needs (concentrating in M9 – M10; M21 – M25; M35 – M36)
Going along with the planned releases 1.1 to 2.0 of the Archives Portal Europe, WP4 will provide reports on user evaluation to enhance the further developments. This task will be conducted in close cooperation with WP3 and WP6, at least, concerning general aspects of usability as well as possibilities of Web 2.0 implementations. Usability testing will as well be conducted for the tools to be (further) developed in WP2 and WP5 and the accompanying manuals and best practice guides. With this task being the direct link between WP4 and WP6 the Federal Archives of Germany as leader of the first and the National Archives of Estonia as leader of the latter will be joined in this by the majority of WP4 members, covering on the one hand those mainly active in WP4 (such as the General State Archives of Greece, the National Archives of Malta, the Portuguese Ministry of Culture – Directorate-General of the Archives) and on the other hand those being participating in user evaluation and usability testing in general (f.i. the National Archives of Belgium and the National Archives of Croatia).

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	3.00
3	ARA	7.20
5	CSA	8.00
6	NAE	6.00
7	KA	2.00
8	SIAF	3.00
9	BA	36.00

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
10	GSA	20.00
11	NAH	6.00
12	NAI	3.00
18	NAM	20.00
20	NDAP	4.00
21	DGARQ	15.00
22	OAMVSR	5.00
24	MECD	12.00
25	RA	6.00
	Total	156.20

List of deliverables

Deliverable Number [61]	Deliverable Title	Lead beneficiary number	Estimated indicative person-months	Nature [62]	Dissemination level [63]	Delivery date [64]
D4.1	State of the art report on EAG + recommendations for implementation in Archives Portal Europe	9	28.74	R	PU	6
D4.2	Usability evaluation report for the release 1.1 of the Archives Portal Europe	9	15.09	R	PP	10
D4.3	First report on use cases and usability requirements	9	15.09	R	PP	11
D4.4	State of the art report on EAC-CPF + recommendations for implementation in Archives Portal Europe	9	28.75	R	PU	15
D4.5	Usability evaluation report for the release 1.2 of the Archives Portal Europe	9	15.09	R	PP	24
D4.6	Second report on use cases and usability requirements	9	9.60	R	PP	25
D4.7	State of the art report on METS + recommendations for implementation in Archives Portal Europe	9	28.75	R	PU	26
D4.8	Final evaluation report: Usability and Web 2.0 in archival applications	9	15.09	R	PU	36
		Total	156.20			

Description of deliverables

D4.1) State of the art report on EAG + recommendations for implementation in Archives Portal Europe: Starting with a research on the current – and possible future – use of EAG in collaboration with the international standard committees this deliverable will present the first results of the EAG working group established within the Archives Portal Europe network. It will define and create an EAG profile to be used within the Archives Portal Europe and include recommendations for its integration in the data preparation tool (in collaboration with WP5) and in the dashboard (in collaboration with WP3) as well as recommendations for presenting EAG encoded information on the Archives Portal Europe (again in collaboration with WP3). Since standards' definition and refinement as well as their concrete use in display and functionalities might evolve during the project's lifetime it is likely to expect this being an ongoing task. Based on the D4.1 according best practice guides on the use EAG will be drafted and published and according presentations, workshops, etc will be held in collaboration with WP7. [month 6]

D4.2) Usability evaluation report for the release 1.1 of the Archives Portal Europe: While D4.3 and D4.6 are aiming at setting a framework for usability requirements to be taken into account for the further development of the Archives Portal Europe, D4.2 and D4.5 will evaluate the current state of their technical implementation and thereby include usability testing on the portal, the dashboard, the tools, the manuals and the guidelines being available at that time. Based on this, the deliverable will not only be able to show the current status of the development, but as well to conclude on next steps to be taken. [month 10]

D4.3) First report on use cases and usability requirements: Both deliverables will be carried out jointly with WP6 and will go along with the releases 1.1 and 1.2 of the Archives Portal Europe. While the part on use cases will be done in anticipation of the user groups of the Archives Portal Europe (front-end), the dashboard (back-end) and the stand-alone tools, the usability requirements will be based on a best-practice evaluation as well as on user surveys to be conducted (subject to subcontracting in order to get an "outsider's view"). D4.3 will lay the ground, while D4.6 will revise the actions undertaken so far and evaluate their outcomes at a later point of the project's lifetime. [month 11]

D4.4) State of the art report on EAC-CPF + recommendations for implementation in Archives Portal Europe: As mentioned with regard to D4.1, this deliverable will be based on a detailed research on the current use of EAC-CPF to be conducted along with new developments within the international standard committees. The deliverable will define and create an EAC-CPF profile to be used within the Archives Portal Europe and it will recommend on its integration in the data preparation tool (together with WP5) and in the dashboard (together with WP3). It furthermore will include recommendations on presenting EAC-CPF encoded information on the Archives Portal Europe respectively making use of it for specific functionalities (f.i. a search entry centred on persons and families) as collaboration with WP3 again. Additionally, the deliverable will provide recommendations for mapping and converting EAC-CPF towards EDM for use of archival information on persons, families and corporate bodies within Europeana. Based on the D4.4 best practice guides on the use EAC-CPF will be drafted and published and according presentations, workshops, etc will be held in cooperation with WP7. [month 15]

D4.5) Usability evaluation report for the release 1.2 of the Archives Portal Europe: While D4.3 and D4.6 are aiming at setting a framework for usability requirements to be taken into account for the further development of the Archives Portal Europe, D4.2 and D4.5 will evaluate the current state of their technical implementation and thereby include usability testing on the portal, the dashboard, the tools, the manuals and the guidelines being available at that time. Based on this, the deliverable will not only be able to show the current status of the development, but as well to conclude on next steps to be taken. [month 24]

D4.6) Second report on use cases and usability requirements: Both deliverables will be carried out jointly with WP6 and will go along with the releases 1.1 and 1.2 of the Archives Portal Europe. While the part on use cases will be done in anticipation of the user groups of the Archives Portal Europe (front-end), the dashboard (back-end) and the stand-alone tools, the usability requirements will be based on a best-practice evaluation as well as on user surveys to be conducted (subject to subcontracting in order to get an "outsider's view"). D4.3 will lay the ground, while D4.6 will revise the actions undertaken so far and evaluate their outcomes at a later point of the project's lifetime. [month 25]

D4.7) State of the art report on METS + recommendations for implementation in Archives Portal Europe: As for the other standards, D4.7 will present the results of a detailed research on the current use of METS and it will define and create a METS profile to be used within the Archives Portal Europe. It furthermore will include recommendations on its integration in the data preparation tool (in collaboration with WP5) and in the dashboard (in collaboration with WP3) as well as recommendations on presenting METS encoded information on the Archives Portal Europe (in collaboration with WP3 again). The deliverable will additionally recommend on mapping and converting METS towards EDM for presenting cultural heritage objects represented by a set of

images within Europeana (together with WP2). Based on the D4.7 best practice guides on the use METS will be drafted and published and according presentations, workshops, etc will be held in cooperation with WP7. [month 26]

D4.8) Final evaluation report: Usability and Web 2.0 in archival applications: Like D4.5 did at about mid-time of the project, this deliverable will evaluate the technical implementation of usability requirements as well as requirements deriving from user surveys at the end of the project. It will include usability testing on the portal, the dashboard, the tools, the manuals and the guidelines being available at that time. [month 36]

Schedule of relevant Milestones

Milestone number [59]	Milestone name	Lead benefi- ciary number	Delivery date from Annex I [60]	Comments
MS4	Evaluation of Release 1.1 of the Archives Portal Europe	6	10	
MS6	Evaluation of Release 1.2 of the Archives Portal Europe	6	25	

Project Number [1]	297355	Project Acronym [2]	APEX

Work package number [53]	WP5
Work package title	Tools & Support
Start month	1
End month	36
Lead beneficiary number [55]	8

Objectives

Based on a close cooperation between two work packages, the first one in charge of building the logical model of the portal that dealt with the standards to be used, and the second one that was in charge of the integration of content within the portal, the APEnet project successfully established:
• a common "European archival standard" based on an EAD schema specifically created,
• a Data Preparation Tool allowing the content providers to convert their local data into the new defined schema, available either as a stand-alone tool or as an integrated tool within the dashboard of the portal.

As a result, the holdings guides and finding aids of 14 countries were made fully interoperable, thus searchable together within the portal. This standardisation of the archival descriptions is a necessity to enable Europeana to deal only with one aggregator and only with one data model instead of the numerous actually existing in the Archives domain.

For the APEX project, the main responsibility of WP5 will be to maintain and further develop the Data Preparation Tool in order to:
• integrate all data of the new partners,
• implement the APEX profiles of the other standards chosen for the project such as EAG, EAC-CPF and METS, which will be established by WP4, in close cooperation with WP5.

Specific goals:
• gathering information on possible contributors / content / systems / formats per country, including studies on best practices regarding the administration of rights at the local level (to be used by WP4)
• developing tools (central/local) to connect content / systems / formats via standards, in collaboration with WP4 for the mapping, and WP3 for the integration in the dashboard
• cooperate with WP3 to enable the actual connections from a local level to the central framework in collaboration with each content provider

Expected Results:
• ER5.1 – information on targets for expanding the network and aggregating content towards the Archives Portal Europe
• ER 5.2 – realisation of the Data Preparation Tool (central and local)
• ER 5.3 – availability of tools for cascading aggregation, from a local level all the way up to the Archives Portal Europe

Description of work and role of partners

T5.1: Gathering reliable information from the partners and possible partners (M1 – M10)
gather all possible information from partners to have a clear overview of the archival landscape in Europe:
• key figures on possible first level contributors: institutions, archival content, systems in use (mainly databases or files), formats, possibility to export their data, existence of OAI-PMH repositories etc.
• samples of data that must be large enough to be representative of the whole sets that the institutions will provide.
• practices regarding the administration of rights at the local level in order to prepare the possible transfer of data to Europeana.

The Interdepartmental Service of French Archives as being work package leader will especially supported by the National Archives of Hungary and ICARUS in this task.

T5.2: Determining the scenario and workflow for each country (M1 – M36)
Depending on the local situation, the way to contribute to APEX will be different : export of data, transfer of data, conversion of data into xml files, etc. Each case has to be investigated to determine which is the best way to follow and ascertain the appropriate workflow accordingly.

The Interdepartmental Service of French Archives as being work package will be joined by all WP5 members in this task apart from the National Archives of Malta and the National Archives of Slovakia, who will concentrate their resources in tasks 5.4 and 5.5.

T5.3: Adapting the Data Preparation Tool (M1 – M36)
analyse the data provided and adapt the existing Data Preparation Tool accordingly, taking into account the possible requirements of WP2 for Europeana, of WP6 for APEX usability, of WP3 for integrating the tool within the dashboard.
• adapt or redevelop the conversion part of the tool
• enhance the editing part of the tool

The Interdepartmental Service of French Archives as being work package will be supported in the technical implementation by all WP5 members, of whom the National Archives of Malta and the National Archives of Slovakia will mainly be contributing on the part of manual creation and revision.

T5.4: Implementing the profiles and standards (M1 – M36)
Write the XML schemas of the new profiles of the archival standards established by WP4: EAG, EAC-CPFand METS and implement them in the tools.
In this task all WP5 members will participate.

T5.5: Providing help to the partners (M1 – M36)
In some cases, the partners could need specific support to prepare their data or set up the work flow for delivering them to the portal. This help will be based on the analyse of the contents and all information provided by the partner.

The Interdepartmental Service of French Archives as being work package will be mainly joined by the Federal Archives of Germany, the National Archives of Hungary and the National Archives of Slovakia in this task.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	8.00
6	NAE	3.00
8	SIAF	53.00
9	BA	6.90
11	NAH	32.00
18	NAM	3.00
20	NDAP	4.00
22	OAMVSR	6.00
24	MECD	6.00
26	ICARUS	12.00
	Total	133.90

List of deliverables

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D5.1	Report on functional/technical specification of tools needed (central/local)	8	17.00	R	PP	6
D5.2	Data Preparation Tool to enable content providers to provide their content (central/local)	8	82.00	O	PU	8
D5.3	Manual to deliver the content using the Data Preparation Tool	8	18.00	R	PU	8
D5.4	Report on possible contributors / content /systems / formats per country	8	16.90	R	PP	10
		Total	133.90			

Description of deliverables

D5.1) Report on functional/technical specification of tools needed (central/local): Based on the work done within the task 5.1, on the one hand, and on the demands and recommendations expressed by other WP: WP2, 3 and 4 (see D4.1, D4.4, D4.7 and D3.2, D3.3), and possibly WP6 and 7, this report will list the functional and technical specifications needed to develop the Data preparation tool. Later iterations will additionally be based on the D5.4. [month 6]

D5.2) Data Preparation Tool to enable content providers to provide their content (central/local): The WP5 will release different versions of the tools during the project, in order to gradually integrate the specifications provided by the other WPs. This f.i. refers to the integration of the EAG and EAC-CPF schemas, which will follow the according steps undertaken in WP4 for their definition, as well as all additional recommendations derived from WP2, 4 and 6 and the overall improvement of the userfriendlyness. The interface of the tools will be translated in English, German and French languages. [month 8]

D5.3) Manual to deliver the content using the Data Preparation Tool: The manual will describe each and every steps required for a content provider to deliver its data to the Archival Portal Europe, using either the standalone version of the Data preparation tool, either the central version integrated in the Dashboard. This manual will be translated at least in English, French and German languages. [month 8]

D5.4) Report on possible contributors / content /systems / formats per country: During the preparation of the call, a certain amount of possible content and providers has been listed. Based on this, and with the help of the different partners, this report will further explore, for each country, the existing contents (archival description, digitised images), the systems that the archival institutions use to publish them online (databases, XML files, other), the formats of these contents (compliant or not to the different archival international standards), how the archival institutions export their data or intend to do it (FTP server, OAI-PMH). [month 10]

Schedule of relevant Milestones

Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS3	Release Archives Portal Europe 1.1 including design and tools	24	8	

Schedule of relevant Milestones				
Milestone number [59]	Milestone name	Lead benefi- ciary number	Delivery date from Annex I [60]	Comments
MS5	Release Archives Portal Europe 1.2 including design and tools	24	20	
MS7	Release Archives Portal Europe 2.0 including design and tools	24	34	

Project Number [1]	297355	Project Acronym [2]	APEX

Work package number [53]	WP6	
Work package title	Usability & Web 2.0	
Start month		1
End month		36
Lead beneficiary number [55]		6

Objectives

WP6 groups several activities which were spread across multiple WP in the APEnet project. This work package expresses a new focus on the need to modernise access. The work will encompass researching and implementing a good use of Web 2.0-and-beyond functionality, also improving the whole user experience with the portal both its front-end and back-end.

WP6 will explore the state of the art of user interface design, including novel approaches such as social bookmarking, personal databases, collaborative content enrichment/crowdsourcing, virtual exhibitions, mash-ups with geographic data etc. On the basis of this knowledge, WP6 will – in close cooperation with WP4 – develop requirements for the user interface and corresponding back-end tools for APEX infrastructure. The tandem of WP6 and WP4 will operate a client/supplier relationship with WP3 and WP5 on usability and accessibility issues which includes also testing and evaluating the outcomes of WP3 and WP5 both internally and externally.

Specific goals:
• Developing and maintaining an overview on the international and cross-sectoral best-practice of innovative access methods and tools
• Developing use cases and business requirements to be implemented in the APEX infrastructure by WP3 (in cooperation with WP4)
• Organising acceptance testing and user evaluation for software developed in WP3 and WP5 (in cooperation with WP4)
• Disseminating research and best-practice about innovative access methods and tools into European archival institutions and Europeana (in cooperation with WP2 and WP7)

Expected Results:
• ER6.1 – Best-practice overview on novel access methods applied at archival applications
• ER6.2 – The development effort undertaken in WP3 is driven by solid best-practice research and wide-spread evaluation

Description of work and role of partners

T6.1: Best-practice and state of the art analysis (M1 – M8; M19 – M25)
The purpose of Task 6.1 is to gather information on the available best practice and state of the art in the areas of Web 2.0 and in general novel methods and tools for accessing and sharing digital information. The task will analyse methods and tools implemented by the partner organisations as well as other memory institutions and other sectors. The research outcomes are evaluated based on their potential value if applied in the archival sector. The task will be executed twice during the project, first during the initial start phase of the project (M1 – M8) and is also starting the second half of the project (M19 – M25). The task will deliver crucial input for developing novel data preparation, access and sharing solutions in WP2, WP3, WP4 and WP5 in the form of use cases and usability requirements (D6.4 and D6.8, in collaboration with WP4) as well as publish the outcomes of the analyses to the general public (D6.1 and D6.6). The outcomes of this task are also communicated to Task 6.3 and used to create a final report on usability issues and using Web2.0 in archival applications (D6.10, again in collaboration with WP4).

Task 6.1 will include most of the WP6 participants with the following roles: the lead countries for the analysis are Estonia, Spain and Belgium; other partners (Netherlands, Bulgaria, Germany, Hungary, Portugal, Slovenia, ICARUS) will participate in an consultant and advisor roles.

T6.2: Development monitoring and acceptance testing (M1 – M36)
The purpose of Task 6.2 is to take the Client / Product Owner role during the development of the front-end and back-end interfaces in WP3 in regard to use cases and usability requirements developed in Task 6.1. One of the most crucial roles of this task is to organise acceptance tests to approve the front-end and back-end interfaces developed in WP3 to ensure the quality and conformance of those. Task 6.2 will also produce three acceptance test reports (D6.2, D6.5 and D6.9) after the end of each development cycle.

The lead country in this Task is Estonia; major contribution in the form of quality ensurance and testing is delivered by Hungary, Portugal and Germany; Spain will participate in an advisory and consultant role. The contribution of the Netherlands is to fill the special Development Coordinator role.

T6.3: Usability evaluation (M9 – M10; M21 – M25; M35 – M36)
The purpose of Task 6.2 is to monitor continiously the use and uptake of both the internal back-end interfaces as well as external front-end user interface. The task will make use of multiple feedback gathering methods including user questionnaires, focus group workshops and individual interviews with most important stakeholders to gather practical end-user feedback and recommendations. This task has the important role to summarise and evaluate the feedback and communicate all necessary information into Task 6.1, WP2, WP3, WP4 and WP5. This task will also generate three major deliverables. The first deliverable (D6.3) will summarise all relevant findings based on release 1.1 of the APEX portal and tools, the second deliverable (D6.7) will summarise major feedback on release 1.2 to form additional input for the second iteration of Task 6.1/D6.8; the third deliverable (D6.10) will summarise the findings of T6.1 and T6.3 into a final report on usability issues and using Web2.0 in archival applications.

All evaluation initiatives will be undertaken in close cooperation with WP4 which will mainly evaluate the use and uptake of archival standards in different countries and archives.

This task includes all WP6 partners with Estonia being the task leader and coordinator and all others (Belgium, Bulgaria, Germany, Hungary, Latvia, Portugal, Slovenia, Spain, Sweden and ICARUS) contributing and organising evaluation in their respective countries or among member organisations. The contribution of the Netherlands is to fill the special Development Coordinator role.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	21.00
3	ARA	8.30
4	ASA	4.00
6	NAE	36.00
9	BA	12.00
11	NAH	17.00
14	LRKM	3.86
21	DGARQ	15.00
23	MESCS	4.00
24	MECD	12.00
25	RA	3.00
26	ICARUS	6.00
	Total	142.16

List of deliverables

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D6.1	First Analysis report: Applying Web 2.0 solutions in archival applications	6	12.73	R	PU	9
D6.2	Acceptance test report for release 1.1 of the Archives Portal Europe	6	15.00	R	PP	9
D6.3	Usability evaluation report for the release 1.1 of the Archives Portal Europe	6	9.00	R	PP	10
D6.4	First report on use cases and usability requirements	6	12.73	R	PP	11
D6.5	Acceptance test report for release 1.2 of the Archives Portal Europe	6	21.00	R	PP	21
D6.6	Second Analysis report: Applying Web 2.0 solutions in archival applications	6	7.35	R	PU	24
D6.7	Usability evaluation report for the release 1.2 of the Archives Portal Europe	6	18.00	R	PP	24
D6.8	Second report on use cases and usability requirements	6	7.35	R	PP	25
D6.9	Acceptance test report for release 2.0 of the Archives Portal Europe	6	21.00	R	PP	35
D6.10	Final evaluation report	6	18.00	R	PU	36
		Total	142.16			

Description of deliverables

D6.1) First Analysis report: Applying Web 2.0 solutions in archival applications: The aim of D6.1 is to summarise the findings of Task 6.1 and therefore to give a detailed overview of the state-of-the-art and beyond of solutions in use to access and contribute to archival institutions. [month 9]

D6.2) Acceptance test report for release 1.1 of the Archives Portal Europe: The aim of D6.2 is to give a concise overview of the test procedures and results based on the acceptance test undertaken on the tools developed in the APEX 1st development cycle. [month 9]

D6.3) Usability evaluation report for the release 1.1 of the Archives Portal Europe: The aim of D6.3 is to describe and extract recommendations out of the 1st APEX usability evaluation phase. This deliverable will be prepared in collaboration with WP4. [month 10]

D6.4) First report on use cases and usability requirements: The aim of D6.4 is to summarise the findings of Task 6.1 and the first evaluation phase (Task 6.3) in the format of use cases and usability requirements so that these can be used for further specification and development in WP2, WP3, WP4 and WP5. This deliverable will be prepared in collaboration with WP4. [month 11]

D6.5) Acceptance test report for release 1.2 of the Archives Portal Europe: The aim of D6.5 is to give a concise overview of the test procedures and results based on the acceptance test undertaken on the tools developed in the APEX 2nd development cycle. [month 21]

D6.6) Second Analysis report: Applying Web 2.0 solutions in archival applications: The aim of D6.6 is to update D6.1 with additional state-of-the-art analyses (second iteration of T6.1) and to include main findings out of the two previous evaluation phases. [month 24]

D6.7) Usability evaluation report for the release 1.2 of the Archives Portal Europe: The aim of D6.7 is to describe and extract recommendations out of the 2nd APEX usability evaluation phase. This deliverable will be prepared in collaboration with WP4. [month 24]

D6.8) Second report on use cases and usability requirements: The aim of D6.8 is to update D6.2 with additional findings out of the second iteration of T6.1 and the previous two evaluation phases. The outcome will be formalised in the format of use cases and usability requirements and delivered to WP3 for further specification. This deliverable will be prepared in collaboration with WP4. [month 25]

D6.9) Acceptance test report for release 2.0 of the Archives Portal Europe: The aim of D6.9 is to give a concise overview of the test procedures and results based on the acceptance test undertaken on the tools developed in the APEX 3rd development cycle. [month 35]

D6.10) Final evaluation report: The aim of D6.10 is to give a final overview about WP6 findings in the areas of innovative archival tools and usability requirements. This deliverable will be prepared in collaboration with WP4. [month 36]

Schedule of relevant Milestones				
Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS4	Evaluation of Release 1.1 of the Archives Portal Europe	6	10	
MS6	Evaluation of Release 1.2 of the Archives Portal Europe	6	25	

Project Number [1]	297355	Project Acronym [2]	APEX

One form per Work Package

Work package number [53]	WP7	
Work package title	Dissemination & Training	
Start month	1	
End month	36	
Lead beneficiary number [55]	25	

Objectives

The main goals of the APEX-project is widening and deepening the functionalities and the usability of the Archives Portal Europe, and to make the portal known to potential users. Comprehensive activities in dissemination and training are thus crucial for the project's success. The involvement of ICARUS as a network of more than 100 archival and archive-related institutions in Europe will contribute to these aims and provides the opportunity to foster synergies with other projects and gain new partners for APEX.

WP7 will drive the promotion of Archives Portal Europe to encourage institutions to join the network; edit and publish information about the project and the portal in relevant online/offline media and about the content on the portal itself (editorial parts of the Archives Portal Europe). Through WP7 the project will take part in conferences, seminars etc to promote the use of the portal. Educate institutions to use the network's framework/tools/standards (conferences/workshops) in cooperation with the corresponding work packages and contact suppliers of archival data management systems/software to get them involved. Another important task is to develop and align branding and lay-out design for the project website, for the Archives Portal Europe Foundation, and for the archivesportaleurope.eu. Last but not least WP7 will encourage and enable knowledge building and exchange among partner organisations and especially towards a wide variety of institutions outside the consortium including our main user group societies.

WP7 is to a certain degree dependent on all other WP to be able to disseminate and reach out to project partners and to the wider archival communities in conferences, workshops and tutorials. Some WP:s are of course of greater importance in this process: especially the WP in charge of standards applications and technical developments such as tools for conversion and interoperability of data (WP3, WP4, WP5 and WP6). The active participation of key personnel from within the project is indispensable for the success of the dissemination and the pedagogical mission of the project.

Specific objectives:
In order to accomplish a cost effective dissemination model and at the same time make concrete contributions to the Archives Portal Europe, emphasis will be put on the implementation of a learning environment management system – a LMS such as Moodle (www.moodle.org) or Olat (www.olat.org).

The LMS will serve as a collector for streamed and recorded presentations, workshops, training sessions, guidelines and seminars.

This documentation and reuse of dissemination activities collected throughout the project lifetime, which will be performed by partners in all work packages, allows the project to minimize numerous costly repetitions of general presentations and tutorials under a constraint budget. It will make it possible to concentrate the efforts on key-event presentations where breaking news in project development are released.

The accumulated dissemination activities harboured in the LMS will, together with the development of collaborative web2 tools, make up the components of a knowledge building environment – a virtual Archives Portal Europe Academy.

A knowledge building tool – an Archives Portal Europe Academy, can be considered to become an important part of the long time sustainability of the Archives Portal Europe concept.

Description of work and role of partners

The central goals of WP7 is to drive and support the aggregation of content on the national and on the central level, to enhance the use of the portal by an extended programme of dissemination and training activities and to keep in close contact with our main user groups.

WP7 aims to reach the following target groups:
• Archives and archivists
• Researchers and students
• Wider Public.

The dissemination strategy is focused on these target groups and levels of action, aiming to reach each target group in the most appropriate way and to deliver the right information to the right place.

It has to be taken into consideration that different target groups need different information; for example, archivists need professional information on providing content, while users have to be informed about useful tools and updates concerning novelties, search methods and other developments within the APEX. WP7 will also act as a bridge between our users and WP6 by contacting and involving them in validation processes such as questionnaires and user tests.

Firstly, strategies will be developed that answers the following questions: What information should be communicated to whom and how should it be phrased in order to reach the target and to be understood? Subsequently a variety of channels will be deployed to deliver the APEX message across Europe.

In more specific detail WP7 will undertake the following work throughout the project's whole lifetime (M1 – M36):

T7.1: APEX website, communication structure and Learning Management System (LMS)
• Create the APEX project website at www.apex-project.eu and maintain it on a regular basis.
• Validate choose, and implement a Content Management System for the project website
• Validate, choose, and implement tools for inter-project communication (Wiki, forum etc)
• Create social networking accounts for the project and broadcast information to the public via those accounts (Facebook, Twitter, LinkedIn, YouTube channel, etc.) and start an editorial blog to attract blog readers and the public.revise the Archives Portal Europe website at www.archivesportal.eu and update its front page to match with the project website.
• Validate choose, and implement a Learning Management System (LMS)

The National Archives of Sweden as work package leader will mainly be supported by the National Archives of The Netherlands, the National Archives of Estonia and the Head Office of Polish State Archives in this task.

T7.2: Branding with logos and lay-out design
• Create an easily recognizable logo together with a graphic profile, which will be specified in brand guidelines.
• Implement an intuitive, clear and appealing design of the Archives Portal Europe, following the brand guidelines, while putting emphasis on user experience to enable an intuitive usage.
• Apply the brand guidelines to any media output from the project, such as printed material and online material.
• Create a branding and corporate marketing design for the Archives Portal Europe Foundation in line with the APEX project website and the archivesportaleurope.eu graphical guidelines
The work package leader, the National Archives of Sweden, will join forces in this task with the Federal Archives of Germany, the General State Archives of Greece, the National Archives of Hungary, the National Archives of Ireland and ICARUS.

T7.3: PR-materials and newsletters
• Produce a general multilingual APEX presentation template to be used by all partners.
• Publish target group oriented guidelines for content providers and user groups in the LMS with printed résumé hand-outs for conferences and workshops.
• Publish target group oriented newsletters in line with relevant development and milestones achievements throughout the project lifetime

Apart from the National Archives of Sweden as being the work package leader, the National Archives of The Netherlands and the Federal Archives of Germany will be the main participants in this task.

T7.4: Presentations, training and scientific output
• Ensuring the presence of APEX at important national (e.g. conferences of national archivist associations) and international conferences (e.g. CITRA) by providing lectures on APEX

• Organisation of international workshops in order to promote APEX on an international level and to enable current and future partners to share their best practice (experiences & expertise)
• Launching scientific articles on APEX in professional media on national and on international level, encouraging project partners to write and deliver articles on topics concerning APEX.
• Publish an anthology of the collected scientific articles, digitally and in print at the end of the project
• Develop one or two types of training workshops that can be downloaded or steamed from the APEX website LMS.
• Investigate the implementation of - for the European market – a novel training and documentation model in the line of the Significance 2.0 (http://www.mhpillawarra.com/docs/Significance20.pdf)
• Arrange two or three main conference events aimed at the European cultural domains where the participants will have the possibility to share their experiences theoretically and practically on a wider level. These will take place approx. in the middle and at the end of the project's running time and will, in cooperation with the APEX Project Officer at the European Commission, coincide with the planned project evaluation occasions.
• In synergy with other educational activities in related fields, such as national archive schools and initiatives launched by ICA, provide activities, information material and professional lectures to be made available in the APEX website LMS.
• Mass media: for launching APEX´s outcomes by printed or online mass media, TV or radio it is necessary to act on a national level; project partners will act as ambassadors of APEX in their countries and contribute in disseminating the outcomes of APEX.
• In close cooperation with Europeana and WP2, provide partners with well prepared press releases for reuse and adaption within their countries.

The National Archives of Sweden as work package leader will be joined by all WP7 members in this.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	8.00
5	CSA	3.00
6	NAE	3.00
8	SIAF	1.00
9	BA	12.00
10	GSA	6.00
11	NAH	9.00
12	NAI	5.00
14	LRKM	2.00
18	NAM	8.00
20	NDAP	4.50
23	MESCS	3.00
24	MECD	6.00
25	RA	48.00
26	ICARUS	36.00
	Total	154.50

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D7.1	Project website release	25	19.50	O	PU	3
D7.2	Information and Dissemination Action Plan	25	25.00	R	PP	6
D7.3	Archives Portal Europe design release	25	19.00	O	PU	8
D7.4	Dissemination, Training and Educational Output Report	25	91.00	R	PP	36
		Total	154.50			

Description of deliverables

D7.1) Project website release: The project website will serve as a hub for the project partners, interested parties and stakeholders for exchanging information and gathering feedback, informing about the project's activities, and encouraging further dissemination of the product, the portal at archivesportaleurope.eu, by the users themselves. This will be made possible by creating a website that has an appealing GUI, is intuitive in its layout, and provides a good UX (user experience: how it is perceived, learned and used). It will be based on a CMS for easy updating and maintenance. The choice of CMS will be based on a series of assessments of the available Open Source-solutions, evaluating which one is the most suitable for the project's needs. The website will be disseminated through the available channels such as the websites and intranet sites of the partners, social sites like Facebook and Twitter, and at fora relevant to the area of interest such as archive conferences, user hubs, etc. On the website itself there will be facilities to share news and articles etc in the social media cloud, thus encouraging a further dissemination of the project through word-of-mouth. [month 3]

D7.2) Information and Dissemination Action Plan: The Information and Dissemination Action Plan aims to charter how to get professionals and novices alike interested in the project and its product at archivesportaleurope.eu and how to act on both a national and an international level. The Action Plan sets the representation at all major events and conferences such as CITRA and Europeana releases, how project partners will act as ambassadors of APEX in their countries and contribute in disseminating the outcomes of APEX. The deliverable aims to plan the provision of materials for reuse and adaption within their countries. The deliverable will also describe a strategy for social media: how to create social networking accounts for the project and what information will be broadcasted to what channels, how to interact via those accounts (Facebook, Twitter, LinkedIn, YouTube channel, etc.). The report will also draw up the lines for an editorial blog with the purpose to attract blog readers and the public. [month 6]

D7.3) Archives Portal Europe design release: The design for the web portal at archivesportaleurope.eu will originate from a graphic profile created to cover all visual output for the project – from the website to printed and digital dissemination material like brochures and newsletters. Archives Portal Europe will have a distinct graphic presence that is easily recognisable. The graphic profile will tie in with the look of APEX to show the relation, but Archives Portal Europe will have its own unique image. As for the web portal, the focus is the same as in D7.1 – to create an appealing and easily understandable graphic look that is easily navigated. This will be perhaps even more important in D7.3, since the appeal has to be to a broad audience. The aim is to make a complex and diverse subject easily approached and handled by people who not necessarily have a background in archives. [month 8]

D7.4) Dissemination, Training and Educational Output Report: This deliverable will sum up the dissemination outcome of the project and thereby serve as an important input to the long-time sustainability of the Archives Portal Europe. In close cooperation with WP6 and WP8 the report will: • Plan the transformation process of the APEX website to the Archives Portal Europe Foundation website. • Evaluate the use of the LMS and its components and what functionalities that have been and will be transferred to the Archives Portal Europe as a part of the portal's help-functions, Web2.0 solutions and educational tools. • Plan a sustainable and cost efficient dissemination strategy for the Archives Portal Europe through its Foundation. • Report on the findings

of the investigations in the creation of an Archives Portal Europe Academy, to be the basis for decisions in the Archives Portal Europe Foundation • Evaluate the training and educational dissemination activities as a part of a sustainability model. • Report on and evaluate the investigations of a documentation model (eg. Significance 2.0) • Evaluate the outcomes of the scientific publishing and propose a sustainable model for this to the Foundation [month 36]

Schedule of relevant Milestones

Milestone number [59]	Milestone name	Lead benefi-ciary number	Delivery date from Annex I [60]	Comments
MS1	Project website release	25	3	
MS3	Release Archives Portal Europe 1.1 including design and tools	24	8	
MS5	Release Archives Portal Europe 1.2 including design and tools	24	20	
MS7	Release Archives Portal Europe 2.0 including design and tools	24	34	

WT3:
Work package description

Project Number [1]	297355	Project Acronym [2]	APEX

<div align="center">One form per Work Package</div>

Work package number [53]	WP8
Work package title	Sustainability
Start month	25
End month	36
Lead beneficiary number [55]	1

<div align="center">Objectives</div>

The APEX consortium members will commit themselves to reach an agreement about the sustainability and the continuity of the infrastructure of the Archives Portal Europe after this project's lifetime and to establish an Archives Portal Europe Foundation for guaranteeing this. The nature of such a Foundation will be that of a non profit organisation and its governance will have strong ties with the cultural administrations of the EU member states involved, in order to align the policies and objectives in cultural and scientific matters as much as possible on a national as well as a European level.

WP8 will handle as major task to research and design a transformation of the APEX project office in The Hague into an Archives Portal Europe Foundation by the end of the project.

For this WP8 will cooperate with other European sustained project organisations such as PrestoCentre (which is currently being developed within the Presto Prime project) and the Open Planets Foundation (which was established as a membership-organisation by several partners from the PLANETS project) to learn from their experiences.

WP8 will take all the necessary steps to build a new organisation to sustain the Archives Portal Europe and its aggregator role towards Europeana, and will prepare its legal basis, organisational structure and business plan, which will include a financial plan, a marketing plan and a communications & dissemination strategy. Finally, the WP8 team will prepare for the practical implementation of the envisaged Archives Portal Europe Foundation, such as organising housing, facilities, staff, etc., in order to make the transition from APEX Consortium to Archives Portal Europe Foundation to run the Archives Portal Europe and its connection with Europeana as smoothly as possible.

Specific goal (ER8.1):
Realisation of an Archives Portal Europe Foundation able to sustain the Archives Portal Europe after the APEX project's lifetime.

<div align="center">Description of work and role of partners</div>

T8.1: Setting up an Archives Portal Europe Foundation (M25 – M36)
WP8 will handle as major task to research and design a transformation of the APEX project office in The Hague into an Archives Portal Europe Foundation at the end of the project.
This task will be performed by the Nationaal Archief – Netherlands in close cooperation with all other WP8 partners.

T8.2: Defining the Archives Portal Europe Foundation's organisational needs (M25 – M36)
WP8 will take all the necessary steps to build a new organisation to sustain the Archives Portal Europe and its aggregator role towards Europeana, and will prepare its legal basis, organisational structure and business plan, which will include a financial plan, a marketing plan and a communications & dissemination strategy.
This task will be performed by the Nationaal Archief – Netherlands in close cooperation with all other WP8 partners.

T8.3: Preparing the Archives Portal Europe Foundation's take over for after-project (M25 – M36)
Finally, WP8 will prepare for the practical implementation of the envisaged Archives Portal Europe Foundation, such as organising housing, facilities, staff etc. in order to make the transition from APEX Consortium to

Archives Portal Europe Foundation to run the Archives Portal Europe and its connection with Europeana as smoothly as possible.
This task will be performed by the Nationaal Archief – Netherlands in close cooperation with all other WP8 partners.

Person-Months per Participant

Participant number [10]	Participant short name [11]	Person-months per participant
1	NANETH	18.00
6	NAE	3.00
8	SIAF	3.00
9	BA	9.00
24	MECD	3.00
25	RA	6.00
26	ICARUS	3.00
	Total	45.00

List of deliverables

Delive-rable Number [61]	Deliverable Title	Lead benefi-ciary number	Estimated indicative person-months	Nature [62]	Dissemi-nation level [63]	Delivery date [64]
D8.1	Sustainability Plan	1	9.00	R	PP	29
D8.2	Foundation Business Plan	1	19.00	R	PP	32
D8.3	Foundation first delivery	1	17.00	O	PU	36
		Total	45.00			

Description of deliverables

D8.1) Sustainability Plan: Report on the research performed by the WP8 team to investigate possible scenarios for transforming the APEX Consortium into an Archives Portal Europe Foundation, including an advise on which scenario will be suitable the most and a summarisation of the actions needed to follow up on this, preferably as a detailed roadmap for further WP8 activities. [month 29]

D8.2) Foundation Business Plan: Report containing a full-scale Archives Portal Europe Foundation business plan, based on the concept of the Sustainability plan and including a financial plan, a marketing plan and a communications & dissemination strategy. [month 32]

D8.3) Foundation first delivery: First implementation of the Archives Portal Europe Foundation, based on a legal concept as a result of the actions performed after the approval of the Sustainability plan, with (minimum) housing, facilities and staff already taken care of in order to start the take over of the APEX Consortium responsibilities after this ceases to exist. [month 36]

Schedule of relevant Milestones				
Milestone number [59]	Milestone name	Lead benefi- ciary number	Delivery date from Annex I [60]	Comments
MS8	Foundation final delivery	1	36	

Project Number [1]	297355	Project Acronym [2]	APEX

List and Schedule of Milestones

Milestone number [59]	Milestone name	WP number [53]	Lead beneficiary number	Delivery date from Annex I [60]	Comments
MS1	Project website release	WP7	25	3	
MS2	Establish an APEX office for running day-to-day operations	WP1	1	6	
MS3	Release Archives Portal Europe 1.1 including design and tools	WP2, WP3, WP5, WP7	24	8	
MS4	Evaluation of Release 1.1 of the Archives Portal Europe	WP4, WP6	6	10	
MS5	Release Archives Portal Europe 1.2 including design and tools	WP2, WP3, WP5, WP7	24	20	
MS6	Evaluation of Release 1.2 of the Archives Portal Europe	WP4, WP6	6	25	
MS7	Release Archives Portal Europe 2.0 including design and tools	WP2, WP3, WP5, WP7	24	34	
MS8	Foundation final delivery	WP8	1	36	

Project Number [1]	297355	Project Acronym [2]	APEX

Tentative schedule of Project Reviews			
Review number [65]	Tentative timing	Planned venue of review	Comments, if any
RV 1	12	tbd	Cycle 1 evaluation
RV 2	24	tbd	Cycle 2 evaluation
RV 3	36	tbd	Cycle 3 evaluation

WT6:
Project Effort by Beneficiary and Work Package

Project Number [1]	297355	Project Acronym [2]	APEX

Indicative efforts (man-months) per Beneficiary per Work Package

Beneficiary number and short-name	WP 1	WP 2	WP 3	WP 4	WP 5	WP 6	WP 7	WP 8	Total per Beneficiary
1 - NANETH	54.00	9.00	14.00	3.00	8.00	21.00	8.00	18.00	135.00
2 - OStA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3 - ARA	1.00	0.00	0.00	7.20	0.00	8.30	0.00	0.00	16.50
4 - ASA	1.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	5.00
5 - CSA	1.00	14.00	0.00	8.00	0.00	0.00	3.00	0.00	26.00
6 - NAE	1.00	0.00	6.00	6.00	3.00	36.00	3.00	3.00	58.00
7 - KA	1.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	3.00
8 - SIAF	1.00	0.00	0.00	3.00	53.00	0.00	1.00	3.00	61.00
9 - BA	9.00	36.00	6.90	36.00	6.90	12.00	12.00	9.00	127.80
10 - GSA	1.00	16.00	0.00	20.00	0.00	0.00	6.00	0.00	43.00
11 - NAH	1.00	9.00	0.00	6.00	32.00	17.00	9.00	0.00	74.00
12 - NAI	1.00	0.00	0.00	3.00	0.00	0.00	5.00	0.00	9.00
13 - DGA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
14 - LRKM	1.00	8.57	0.00	0.00	0.00	3.86	2.00	0.00	15.43
15 - LI LA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16 - LVAT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
17 - ANLux	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
18 - NAM	1.00	0.00	0.00	20.00	3.00	0.00	8.00	0.00	32.00
19 - NRA	1.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	5.00
20 - NDAP	1.00	2.00	0.00	4.00	4.00	0.00	4.50	0.00	15.50
21 - DGARQ	1.00	0.00	0.00	15.00	0.00	15.00	0.00	0.00	31.00
22 - OAMVSR	1.00	0.00	0.00	5.00	6.00	0.00	0.00	0.00	12.00

WT6:

Project Effort by Beneficiary and Work Package

Beneficiary number and short-name	WP 1	WP 2	WP 3	WP 4	WP 5	WP 6	WP 7	WP 8	Total per Beneficiary
23 - MESCS	1.00	0.00	0.00	0.00	0.00	4.00	3.00	0.00	8.00
24 - MECD	4.00	9.00	200.10	12.00	6.00	12.00	6.00	3.00	252.10
25 - RA	1.00	0.00	0.00	6.00	0.00	3.00	48.00	6.00	64.00
26 - ICARUS	1.00	0.00	0.00	0.00	12.00	6.00	36.00	3.00	58.00
27 - RAD	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
28 - NAIS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	85.00	107.57	227.00	156.20	133.90	142.16	154.50	45.00	1,051.33

1. Project number

The project number has been assigned by the Commission as the unique identifier for your project. It cannot be changed. The project number **should appear on each page of the grant agreement preparation documents (part A and part B)** to prevent errors during its handling.

2. Project acronym

Use the project acronym as given in the submitted proposal. It cannot be changed unless agreed so during the negotiations. The same acronym **should appear on each page of the grant agreement preparation documents (part A and part B)** to prevent errors during its handling.

53. Work Package number

Work package number: WP1, WP2, WP3, ..., WPn

55. Lead beneficiary number

Number of the beneficiary leading the work in this work package.

56. Person-months per work package

The total number of person-months allocated to each work package.

57. Start month

Relative start date for the work in the specific work packages, month 1 marking the start date of the project, and all other start dates being relative to this start date.

58. End month

Relative end date, month 1 marking the start date of the project, and all end dates being relative to this start date.

59. Milestone number

Milestone number:MS1, MS2, …, MSn

60. Delivery date for Milestone

Month in which the milestone will be achieved. Month 1 marking the start date of the project, and all delivery dates being relative to this start date.

61. Deliverable number

Deliverable numbers in order of delivery dates: D1 – Dn

62. Nature

Please indicate the nature of the deliverable using one of the following codes

R = Report, **P** = Prototype, **D** = Demonstrator, **O** = Other

63. Dissemination level

Please indicate the dissemination level using one of the following codes:

• **PU =** Public

• **PP =** Restricted to other programme participants (including the Commission Services)

• **RE =** Restricted to a group specified by the consortium (including the Commission Services)

• **CO =** Confidential, only for members of the consortium (including the Commission Services)

• **Restreint UE =** Classified with the classification level "Restreint UE" according to Commission Decision 2001/844 and amendments

• **Confidentiel UE =** Classified with the mention of the classification level "Confidentiel UE" according to Commission Decision 2001/844 and amendments

• **Secret UE =** Classified with the mention of the classification level "Secret UE" according to Commission Decision 2001/844 and amendments

64. Delivery date for Deliverable

Month in which the deliverables will be available. Month 1 marking the start date of the project, and all delivery dates being relative to this start date

65. Review number

Review number: RV1, RV2, ..., RVn

66. Tentative timing of reviews

Month after which the review will take place. Month 1 marking the start date of the project, and all delivery dates being relative to this start date.

67. Person-months per Deliverable

The total number of person-month allocated to each deliverable.

PART B

Table of Contents of part B

Project Profile

APEX (Archives Portal Europe network of eXcellence) will be the follow-up of the APEnet project that will terminate on the 15th of January 2012. The APEnet project grouped national archival institutions from 14 European countries that – in collaboration with Europeana – together have realised the Archives Portal Europe (www.archivesportaleurope.eu), providing the first version of a much-needed internet portal for documents and archives in Europe.

APEX will extend on the APEnet project by widening and deepening, improving and sustaining the delivery of archival content to a central European portal. Furthermore APEX will drive and facilitate the transfer of the (digitised and digital) archival material to Europeana. This enables Europeana's end users to access it as part of the common European cultural heritage of libraries, museums, archives and audio-visual institutions, thus making the Archives Portal Europe an important domain aggregator for Europeana.

This goal comprises actions in various domains:

- expansion of the network of contributing archival institutions in Europe itself,

- substantial improvements in the interoperability with Europeana,

- stabilisation of the Archives Portal Europe infrastructure & hosting and improvement of its throughput capacity, availability of more standards & guidelines as well as tooling & support to the content providers to help them deliver more content,

- dissemination & training programmes to drive aggregation on the national levels and raise awareness of archival content in Europe,

- innovation in usability and Web 2.0 functionality to modernise content delivery,

- sustainability of this effort.

In more detail APEX will take on board more European institutions (widening) and will help these institutions with aggregation on the national levels (deepening). APEX will work actively with the Europeana portal on interoperability of metadata formats and rights management of the archival material. All this will serve the main goal of preparing as much archival content of European institutions as possible to the Archives Portal Europe and channel the digitised and digital archival material therein to the Europeana portal.

As a follow-up to the current APEnet project, the work in APEX centres around two main processes: widening of the network (get more countries, more institutions involved) and deepening of the network (organise all activities necessary for facilitating effective connection of institutions to the network: development of tools, coaching, training and education, informing, communicating, lobbying, etc.).

In addition, the APEX consortium members will commit to maximising the production of digital content, in close cooperation with their national governments. They also commit themselves to reach an agreement about the sustainability and the continuity of the infrastructure of the Archives Portal Europe after this project's lifetime and to establish an Archives Portal Europe Foundation for guaranteeing this.

Substantial effort is needed to establish an infrastructure which is able to meet the needs of the goals to be realised. This encompasses stabilising and expanding the existing technical infrastructure of the Archives Portal Europe as well as innovating the portal software (front-end and back-end) itself.

Also much effort will be put in engineering the tooling that helps archival institutions to aggregate their content on a national level and from there upload it to a European level to the Archives Portal Europe and Europeana. This will be achieved by establishing a network of national aggregators in the archives

communities of the EU Member States, or – where applicable – joining and fostering already existing national archival respectively Europeana aggregators.

The APEX consortium consists of the national archives or national archives administrations of 27 European countries plus a trans-European knowledge partner: the International Centre for Archival Research (ICARUS). The consortium will furthermore continue the cooperation with EURBICA, the European Branch of ICA (International Council on Archives). EURBICA created an APEnet liaison group with financial support from ICA aiming at helping those European countries who are not EU members to integrate information on their holdings into the Archives Portal Europe.

All consortium partners – except ICARUS – will act as content providers. Six participants (no.'s 1, 6, 8, 9, 24 and 25) will act as work package leaders (WPL) and all other participants – except seven (no.'s 2, 13, 15, 16, 17, 27 and 28) – will actively participate in one or more of the eight work packages.

The European Board of National Archivists (EBNA) and the national archives in Europe are increasingly joining forces in a common digital agenda. This is witnessed among others by their cooperation in the current APEnet project which aims to provide joint access to European archives through a common portal and to provide means to make information on digitised and digital archival material available in Europeana.

APEX will be the follow-up of the current APEnet project which has recently released the pilot of the Archives Portal Europe. The Archives Portal Europe will allow citizens, researchers, governments and businesses to browse through archival material of 14 national archives through one online access point.

The expected impact of APEX is that it takes all key indicators of the APEnet project to the next higher level whilst also taking measures to guarantee the sustainability of this effort. APEX will work to provide access to as much archival material of as many institutions holding archival content in EU Member States as possible, for as many users as possible, in the easiest possible way and to aggregate as much digitised content as possible to Europeana.

B1. Project description and objectives

B.1.1 Project objectives

Europe's heritage of political, scientific, economic, artistic and religious culture is recorded in documents and books, paintings and objects, films and broadcastings and is held in trust by Europe's archives, libraries, museums and audio-visual institutions. Europeana is a central expression of the continent's digital heritage and will be developed as the reference point for European cultural content online. It reflects the ambition of Europe's cultural institutions to make our common and diverse cultural heritage accessible to all. Europeana will take its place in a wider European information space, collaborating with other aggregators of content.

An important and unique part of Europe's cultural and scientific heritage is held by Europe's archives. Archival institutions can be considered 'the memory of the government and the society'. They preserve records and documents produced during the conduct of business and make them available to whoever wants and needs them for their cultural value, for proving personal rights as well as for providing authentic and trustworthy sources for the retrospective accountability of administrations, thus re-enforcing democracy.

The European Board of National Archivists (EBNA) and the national archives in Europe are increasingly joining forces in a common digital agenda, which connects European ambitions with national ambitions and efforts, following the objectives of the Report on Archives in the Enlarged European Union drafted by the European Archives Group (EAG) and accepted by the commission in 2005. In addition, EBNA's

recent Brussels Declaration on Digital Access to Archives underlines the intention to further enhance their cooperation and make the fullest possible use of digital technologies to promote open access to their holdings. This is witnessed among other by their cooperation in the European APEnet project which aims to provide joint access to European archives through a common portal and to provide means to make information on digitised and digital archival material available in Europeana.

APEX (Archives Portal Europe network of eXcellence) will be the follow-up of the current APEnet project[1] which has recently released the pilot of the Archives Portal Europe[2]. Development is underway to deliver a reliable production version in January 2012. The Archives Portal Europe will allow citizens, researchers, governments and businesses to browse through archival material of 14 national archives through one online access point. Moreover, the portal connects the (digitised and digital) archival material from these institutions to Europeana, enabling Europeana's end users to access it as part of the common European cultural heritage of libraries, museums, archives and audio-visual institutions, thus making the Archives Portal Europe an important domain aggregator for Europeana.

The development of the Archives Portal Europe is an important first step, but that alone is insufficient. To draw an analogy with a highway:

*There soon will be a highway (Archives Portal Europe) that links 14 locations (national archives) with an important destination (Europeana), but there is no network of secondary roads to connect **all** locations (**all** institutions with archival content) yet, there is not much heavy traffic (digital content) yet, and there is still no consensus about all traffic regulations.*

So there is still work to be done. The objective is and remains to give access to as much archival material of institutions holding archival content in EU Member States as possible, for as many users as possible, in the easiest possible way.

APEX therefore aims at stabilising, maintaining and extending the already developed Archives Portal Europe, continuing the work on standardising metadata formats and establishing a network of national aggregators in the Member States, thus intensifying the cooperation on providing digital content in the archives' domain in Europe, to the benefit of Europeana as the centre of the European information space.

By turning the Archives Portal Europe into the centre of an aggregation network for all European institutions holding archival material, it will become an important pillar for the continuity and sustainability of Europeana, not only in the capacity of the de facto aggregator for the European archives domain, but also as a catalyst for delivering standardised archival descriptions and metadata to Europeana. In this respect: at present a very important result of the current APEnet project is already the realisation of a uniform metadata format for describing archival material - APEnet EAD - which puts Europeana in the comfortable position that it will only receive one metadata format from the European archives and does not have to worry about converting a variety of other (national, regional, local) formats itself.

The follow-up programme consists of two main processes: widening of the network (get more countries, more archival institutions involved) and deepening of the network (organise all activities necessary for facilitating effective connection of archival institutions to the network: development of tools, coaching, training and education, informing, communicating, lobbying, etc.). In addition, the APEX consortium members will commit themselves to maximise the production of digital content, in close cooperation with their national governments.

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[1] The current APEnet project is funded by the *e*Content*plus* programme (ECP 2007 DILI 517011); see: http://www.apenet.eu.

[2] See at www.archivesportaleurope.eu.

All these activities can be summarised in five basic conditions to be met:

- the existing technical infrastructure has to be extended to be able to connect **_all_** institutions holding archival material with the Archives Portal Europe and Europeana;

- digital content must be available, and particularly the showcases from the archival institutions and items from important interrelated or cross-border collections;

- archival institutions must be convinced to provide their archival material and to succeed in this it must be as easy as possible for them to provide it;

- there must be an agreement on how to deal with public information which is digitised using public funding;

- there is a need for an agreement amongst the partners of the Archives Portal Europe about the sustainability and the continuity of the infrastructure of the Archives Portal Europe.

This proposal for a follow-up on the current APEnet project focuses on the first, third and fifth basic conditions (see chapter B2.1a for details), while the second and fourth basic conditions will be pursued thanks to the project's close relation to the European national archivists, united in EBNA, who will commit to drawing up a plan, as part of a common European digital agenda, to prioritise digitising archival material and to make this (and already existing) digital content available via the Archives Portal Europe and Europeana, and at the same time to agree on how to handle different types of information (metadata, digital content), which has been collected and digitised using public funding.

The above will all serve the main goal of preparing as much content of the national, regional, local and other archival institutions as possible, in order to be able to provide it to the Archives Portal Europe and to channel the digitised and digital part of it to Europeana.

B.1.2 Contribution to the European Digital Library Initiative

With the completion of the stable version of the Archives Portal Europe in January 2012 the national archives will make an important contribution to the development of a coherent European digital infrastructure, which unlocks the common European cultural heritage of libraries, archives and museums for all European citizens in the best possible way. When the Archives Portal Europe is delivered as a full operational service in January 2012, it will act as:

- one online access point to the archival material of 14 national archives,

- presenting it within its original context, i.e. showing the archival units with detailed descriptions and together with the structures of the complete finding aids as well as in most cases leading to digital representations of the archival units

- the Europeana aggregator for the European archives community

- a catalyst for delivering standardised archival metadata to Europeana

Furthermore, the five basic conditions as listed in chapter B1.1 will have been met at least partially after the completion of the Archives Portal Europe in January 2012 and it is important to continue this effort to not only ensure the best possible return on investments already made but also to finalise the shaping of the digital European archives landscape and to expand it to its full extent into a reliable and indispensable service for providing online access to (digital) archival material, to the benefit of the European archives community as well as Europeana and all European citizens. This proposal for a follow-up on the current APEnet project focuses on the first, third and fifth basic condition.

One of the efforts to be continued and actually to be intensified according to the widening network of APEX is the close cooperation with Europeana. This does not only include the joint activities in

aggregating existing digital archival content to be available through the Archives Portal Europe and the Europeana portal, but as well the therefore needed collaboration in aligning archival metadata, that come along with the digital archival objects, with the specifications of Europeana. While the current APEnet project is focused on the set of Europeana Semantic Elements (ESE) as being implemented as metadata format in the Rhine release of Europeana in late summer 2010, APEX will aim at the Europeana Data Model (EDM) which is envisaged to be the basis of all Europeana releases in the future.

Since the definition and formulation of the EDM – as being the case for most metadata formats – is an ongoing task, the challenge for APEX with regard to improving the interoperability between Europeana and its archival content providers will on the one hand be to take an active part in these developments and to act as an "aggregator" as well knowledge-wise concerning the feedback from the archives domain on the EDM and its implementation. On the other hand, it will be needed to adapt to possible changes and additions of the EDM as well as to those of the related online presentations not only with regard to the definitions of EAD and related archival standards to be used within the Archives Portal Europe, but also with regard to the tools provided by APEX to facilitate the delivery of archival materials to Europeana.

As a kind of prerequisite to maintain and extend the amount of archival material being available via the two central European portals – the Archives Portal Europe and Europeana – the European national archives being represented in APEX and closely linked to EBNA will additionally aim at a joint policy statement on creating digital versions of archival material and making these available online for work, study or leisure as well as preserving them for future generations. Along with this an agreement on how to handle different types of information (metadata, digital content), which has been collected and digitised using public funding is envisaged.

The basic principle in both approaches will be that the archival institutions involved in a follow-up on the current APEnet project will join efforts with their respective national governments to make digital content available through their finding aids. These activities will not formally be part of this request for the funding for a follow-up on the current APEnet project, but will be performed in parallel with the APEX project. This digitisation plan and the accompanying agreements will be delivered together with the results and products of the APEX project, which means that a coherent and structured approach will be developed, leading to the availability of as much archival material as possible for those interested in European cultural heritage, via one access point: Europeana, powered by the Archives Portal Europe.

B2. Impact

B.2.1a Target outcome and expected impact

This proposal for APEX will focus on two main processes:

- **Widening**: the network of participating institutions will have to be extended in order to be able to connect not only all national archives, but also other institutions holding archival material in the EU Member States, such as: regional, local, religious and private archival institutions; archives of universities, libraries, companies; etc.; we can *organise* all this by turning the national archives into national APEX community centres, supported by an international APEX office, to be established in the vicinity of the Europeana office in The Hague, to ensure maximum interoperability on a technical as well as on a strategic level.

- **Deepening**: this process will have to combine a variety of activities to ensure that each individual institution can connect to the network easily and will be able to provide access to its archival material via a fully working and sustainable connection, based on archival standards[3]. Such activities will

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[3] In addition to this: next to promoting the use of APEX EAD, the APEX project will also foster the use of APEX EAC-CPF, which will make it possible to establish 'authority files' of persons, families and corporate bodies, the

include: developing the necessary tools to establish the connections in the easiest possible way and training/education in using them, informing and communicating in favour of the *connecting* concept, supervising the realisation of the actual connections and lobbying of the concept, taking into account varying starting points within the archives network in a Member State.

This process can take advantage of the knowledge built within the current APEnet project and can use its aggregation concept, as developed in connecting national archival institutions on a European level, thus providing a blueprint for possible national and regional scenarios.

To make the needed widening and deepening of the organisational and technical structure as easy as possible, it is important to avoid that every Member State, or national archive acting as a national coordinator, will have to find out by itself how to *aggregate* to Archives Portal Europe / Europeana. Therefore project surveys will be conducted in an early stage of the project to assess the situation in each Member State in terms of institutions, content and systems/formats to be connected, and possible aggregation scenarios with accompanying roadmaps (and corresponding tools) will be drafted, and guidance will be provided for each Member State in choosing the most appropriate scenario for aggregating/publishing its archival material via the Archives Portal Europe / Europeana.

The following picture shows a number of scenarios that already can be distinguished, but of course it has to be investigated whether these scenarios will be relevant enough to cover the different situations in the archives network of the Member States and a mix of these scenarios could also be possible.

Both main processes – widening and deepening – are to serve the main goal of preparing as much content from all institutions holding archival material in the Member States as possible, in order to provide and forward it to Archives Portal Europe / Europeana. Therefore the slogan for APEX activities is: "organise, connect, aggregate". And we can add to that: "and innovate!".

In terms of organisation the proposal will be to make use of the valuable knowledge and experience from the APEnet project (f.i. on standardisation of metadata formats) and to establish an APEX office in the vicinity of the Europeana office (The Hague). This will foster close cooperation between APEX and Europeana and will enable quick and efficient coordination on various aspects of the work to be performed.

Technically speaking, there will be two strands. One is to maintain the existing Archives Portal Europe infrastructure and to establish a robust operational service. The other is to create added values for the service by investing software research and development. The tasks of the former include scale-up of servers, elaboration of the existing aggregation workflow, and search engine optimisation, whereas the latter consists of building a user friendly design and interface, adding new innovative functionalities such as Web 2.0, multilingualism, and semantic web.

Close collaboration with Europeana will be beneficial for both the APEX project and Europeana. In particular implementation of EDM and hierarchical display in the Europeana portal will catch the users attention and a considerable amount of traffic can be diverted to the Archives Portal Europe and/or its content providers. EDM and hierarchical display will be able to bring context to the user, therefore, it is extremely important to the archives community. The meaningful data linkage between Europeana and the Archives Portal Europe should be defined by WP2. The presentation of additional contextual information to cultural heritage objects will enormously contribute to the potentials of the storytelling and deep understanding of European history.

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use of EAG to standardise the descriptions of the archival institutions and the use of METS. About the EAD standard see: http://www.loc.gov/ead/ and about the EAC-CPF standard see: http://eac.staatsbibliothek-berlin.de/; an interesting result of implementing the EAC-CPF standard is provided by the demo of the SNAC project, which can be found over here: http://socialarchive.iath.virginia.edu/xtf/search.

B.2.1b Underlying content

Content

At the start of the APEX project a survey will be carried out to investigate per country how many archival institutions could be connected, how much content they could deliver and what their metadata formats and systems are. This will enable not only an accurate estimation of the efforts required for expanding the technical infrastructure and establishing effective connections, but also the collection of normative indicators for results in the short- and long-term (short-term: project results, long-term: insight in real amounts of archival content yet to be digitised).

At the moment[4] the pilot of the Archives Portal Europe already provides access to content of 49 archival institutions of fourteen European countries. Via finding aids, describing archival fonds or collections, users get access to 8.241.374 descriptions of archival objects, which link to at least 5.232.203 digital images as representations of these objects, guiding users to about 25 million digital images on the content providers' websites.

This information is a good indication of the possible amount of content the new APEX project consortium could provide. A quick – but by no means exhaustive – survey among the partners of the new consortium proves this.

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[4] Status of the 12th of October 2011

Table on underlying content[5]

Quantity and Quality of the Content							
Provider[6]	Type	Quantity & Definition	Format & Quality	IPR	Current Use	Existing Metadata	Language[7]	Additional Comments
NANETH	Text	219 descriptions of institutions with archival holdings	EAG	Public domain	At the institutions own websites and via national and regional portals	EAG/XML	Dutch	displayed on the Archives Portal Europe with multilingual headers/labels
NANETH	Text	158.922 finding aids containing 155.313.877 descriptions of archival units	EAD	Public domain	At the institutions own websites and via national and regional portals	EAD/XML	Dutch	
NANETH	Image	572.770 photos 8.185 maps/drawings 683.434 documents 17.000 medieval charters 37.900 ship journals	JPEG	Public domain	At the institutions own websites and via national and regional portals	EAD/XML (METS/XML)	Dutch, Latin, German and French	figure for documents includes Archive of Hugo Grotius (1583-1645) with 12.000 scans
OstA	Text	95 descriptions of institutions with archival holdings	EAG	National Archives copyright	Partly online via monasterium.net, partly via archival database	Archival database	German	
OstA	Text	11.850 finding aids containing 7.920.000 descriptions of archival units	EAD	National Archives copyright	Partly online via monasterium.net, partly via archival database	Digital finding aids in the archival database	German	
OstA	Image	40.000 photos 15.000 maps/drawings 100.000 charters 15.000 manuscripts	JPEG	National Archives copyright	Partly online via monasterium.net, partly via archival database	Digital finding aids in the archival database	German	manuscripts mainly refer to church registers

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[5] For a more detailed description of the underlying content please refer to Annex A.

[6] Note: The project partners named as provider in this table are in most of the cases additionally acting as representatives of their countries. Therefore the figures stated not only refer to the content as provided by the project partners as constituent archival institutions, but as well to content probably provided by other archival institutions of the countries they are representing.

[7] Note: Since there could be archival units in different languages belonging to and therefore being presented in the same context, ie within the same finding aid, it is not feasible to specify quantity distinguished by language. For this reason, there are different languages stated commonly in one row of the table where applicable.

				Quantity and Quality of the Content				
Provider[6]	Type	Quantity & Definition	Format & Quality	IPR	Current Use	Existing Metadata	Language[7]	Additional Comments
ARA	Text	20 descriptions of institutions with archival holdings	ISIL code + ISDIAH	Free access	At the National Archives institution's own website	HTML	Dutch and/or French and/or German	
ARA	Text	22.000 finding aids containing 6.000.000 descriptions of archival units	EAD	Free access	At the National Archives institution's own website	EAD/XML	Dutch and/or French and/or German	
ARA	Image	25.000 masterpieces	TJP and JPEG2000	Free access (reproduction not allowed)	At the National Archives institution's own website	EAD/XML and METS	Dutch and/or French and/or German and/or Latin	f.i. matricles of the University of Leuven, unique collection of seals, historical maps, photos
ASA	Text	34 descriptions of institutions with archival holdings	EAG	Public domain	At the institutions and via national an regional portals	Word/Excel	Bulgarian	
ASA	Text	65.153 finding aids	EAD	Public domain	At the institutions and via national an regional portals	Word/Excel	Bulgarian	
ASA	Image	2.000 masterpieces	JPEG	Public domain	At the institutions and via national an regional portals	Word/Excel	Bulgarian	early nation state history (late 19th century) and history of the communist party (1944-1989)
CSA	Text	21 descriptions of institutions with archival holdings	EAG	Public domain	At the national portal	EAG/XML	Croatian	
CSA	Text	15.000 finding aids containing 150.000 descriptions of archival units	EAD	Public domain	At the national archival information system	ISAD(G)-based	Croatian	
CSA	Image	120.000 documents	JPEG, PDF	Public domain	At the national archival	EAD	Croatian	f.i. „Diplomata et acta", „Acta

				Quantity and Quality of the Content				
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
					information system			Turcarum" from the Archives of the Republic of Ragusa, medieval charters before 1102, historical records of the Parliament, Gla-golitic collection
NAE	Text	4 descriptions of institutions with archival holdings	EAG	Non-existent or owned by NAE	At the institutions websites or per authorised request (for records including protected personal information)	EAG	Estonian/German/ Russian	
NAE	Text	17.000 finding aids containing 10.000.000 descriptions of archival units	EAD	Non-existent or owned by NAE	At the institutions websites or per authorised request (for records including protected personal information)	EAD	Estonian/German/ Russian	Genealogical materials, government institutions, important public institutions-
NAE	Image	416.000 photos 10.000 maps 43.000 paper records (6.500.000 images)	JPEG Tiff JPEG, PNG	Non-existent or owned by NAE	At the institutions websites or per authorised request (for records including protected personal information)	EAD	Estonian/German/ Russian	Historical events, journalistic photos, artistic photos, old glass-negatives, political collections etc General maps (since 16th century), city maps, manor maps, agricultural maps, maps of

				Quantity and Quality of the Content				
Provider[6]	Type	Quantity & Definition	Format & Quality	IPR	Current Use	Existing Metadata	Language[7]	Additional Comments
								farming houses, maps of forests Genealogical materials, government institutions, important public institutions
NAE	Movie	2.000 films and videos (700 hours)	AVI	Non-existent or owned by NAE	At the institutions websites or per authorised request (for records including protected personal information)	EAD	Estonian/German/ Russian	National chronicles (1920-1940), old black-and-white artistic films (1920-1940), Soviet chronicles (1944-1990), documentaries
KA	Text	8 descriptions of institutions with archival holdings	EAG	Public domain	At the National Archives own website	EAG	Finnish, Swedish, English	
KA	Text	50.000 finding aids	EAD	Public domain	At the National Archives own website	EAD	Finnish, Swedish	
KA	Image	10.000.000 digital archival objects	JPEG, TIFF	Public domain	At the National Archives own website	EAD	Finnish, Swedish	
SIAF	Text	733 descriptions of institutions with archival holdings	EAG	Public domain	Avaible on the SIAF website	HTML	French	
SIAF	Text	26.000 finding aids	EAD	Public domain	Will be available on the national archives website and on the SIAF website at the end of 2012 – beginning of 2013	EAD/XML	French	

Quantity and Quality of the Content							
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
BA	Text	49[8] descriptions of institutions with archival holdings	EAG	Public domain	Within a German thematic archives portal[9] and within the Archives Portal Europe	EAG	German	displayed on the Archives Portal Europe with multilingual headers/labels
BA	Text	50.000 finding aids containing 50.000.000 descriptions of archival units	EAD	Public domain	At the institutions own websites	EAD, XML	German	
BA	Image	5.000.000 digital archival objects	Jpg, Tiff, png	Public domain	At the institutions own websites	METS, EAD	English/French/ German/Latin/ Russian	f.i. administrative records after 1945, accoun-tancy books from the 18th century, collections of maps, posters, photographs, medieval charters
GSA	Text	1 descriptions of institutions with archival holdings	EAG	Public domain	Within the Archives Portal Europe	EAG	Greek	
GSA	Text	27.000 descriptions of archival units	EAD	Public domain	At the institution's own website	EAD (partially)	Greek	
GSA	Image	345.000 digital archival objects	JPEG	Public domain	At the institution's own website	EAD (partially)	German/Greek/ Ottoman	
NAH	Text	82 descriptions of institutions with archival holdings	Text	Public domain	At: http://www.mol.gov.hu/kapcsolatok/magyarorszagi_leveltarak/nev-	-	Hungarian	

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[8] Note: The current figure includes descriptions for the Federal Archives of Germany as well as for the regional archives. Local and other archives are not yet included, but possibly will be joining the Archives Portal Europe to some extent as well.

[9] http://www.bundesarchiv.de/sed-fdgb-netzwerk/

				Quantity and Quality of the Content				
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
					_es_cimjegyzek.html			
NAH	Text	65.412 finding aids	Text	Public domain	In analogue form	-	Hungarian	
NAH	Image	1.091.082 digital archival objects	JPEG	Free for non-commercial use	At a special website of the NAH: http://www.digitarchiv.hu/	In a relational database	Hungarian/Latin	Libri Regii – The Royal Books (1527-1918), records of the National Census of 1715, records of the Hungarian Communist Party (1948-1989)
NAI	Text	1 description of an institution with archival holdings	EAG	National Archives copyright	At the institution's own website	HTML	English/Irish	Description of the National Archives, its legal mandate and acquisition activities
NAI	Text	1.000.000 descriptions of archival units	EAD	National Archives copyright	At the institution's own website	electronic format	English/Irish	Archival records of departments and offices of central government in Ireland generated by the performance of administrative functions
DGA	Text	136 descriptions of institutions with archival holdings	EAG	DGA copyright	At the institution's websites or SIAS, national database	ISDH based metadata	Italian	
DGA	Text	25.000 finding aids	EAD	DGA copyright	At the institution's websites or SIAS and SIUSA,	ISAD(G), ISAAR and CPF based metadata	Italian	

Quantity and Quality of the Content								
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
					national databases			
DGA	Image	3.000.000 documents	PDF, JPEG, TIFF	Copyright of the Ministerio per i beni e le attività culturali (free use for non-commercial purposes)	At the institution's websites	EAD, METS	Italian/Latin	Archivio di Stato di Firenze (8th-14th century), Archivio di Stato di Firenze: Medicea avanti il Principato (1373-1557), Archivio di Stato di Torino (16th-19th century seals, maps and drawings), Archivio di Stato di Roma (13th –20th century maps, charters and seals)
LRKM	Text	1 description of an institution with archival holdings	EAG	Public domain	At the institution's website	ISDIAH	Latvian	Institutions names also in English, German (partly)
LRKM	Text	25.000 finding aids containing 1.221.000 descriptions of archival units	EAD	Public domain	At the institution's website	ISAD(G)	Latvian	Collections names also in English, German (partly)
LRKM	Image	35.557 digital archival objects	JPEG, Tiff	Public domain	At the institution's website	EAD (partly)	German/Latvian/ Russian	Parchment collection, maps, Census records (19th century), Church books (with 1.000.000 images in total), house registers, Revision list, documents of the

				Quantity and Quality of the Content				
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
								43rd Latvian Guard Riflemen Division of the Workers and Peasants Red Army
LA	Text	1 description of an institution with archival holdings	EAG	National Archives copyright	At the institution's own website	EAG	German	
LA	Text	400 finding aids containing 500.000 descriptions of archival units	EAD	National Archives copyright	At the institution's own website	EAD	German	
LA	Image	To be determined	JPEG, TIFF, PDF	National Archives copyright	At the institution's own website	EAD	German	
LVAT	Text	16 descriptions of institutions with archival holdings	EAG	Public domain	At the institution's websites	EAG	Lithunian	
LVAT	Text	49.884 finding aids containing 10.244.315 descriptions of archival units	EAD	Public domain	At the institution's websites	EAD	Lithunian	Medieval documents including parchments, maps, acts, as well as photos
LVAT	Image	20.000 digital archival objects	JPEG, TIFF	Public domain	Digitisation work in progress	EAD	Lithunian, Latin, Polish, Russain	
ANLux	Text	1 description of an institution with archival holdings	EAG	N/A	N/A	ISDIAH	French	
ANLux	Text	5 finding aids	EAD	Public domain	Institutions website and archive management system	ISADG	French	

				Quantity and Quality of the Content				
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
ANLux	Image	104 masterpieces	JPEG	Public domain	Digitisation work in progress	-	French (finding aids) Latin, French and German (documents)	Weimar fonds (charters from Echternach, Marienthal and Grevenmacher, 762-1688)
ANLux	Image	3000	JPEG	Public domain	Digitisation work in progress	-	French	Treaties and conventions (1816-)
ANLux	Image	7651	JPEG	Public domain	Digitised, but not yet made public	-	French	Collection of photographs of the former Governmental Board of Economic Expansion & Tourism (1950-1970)
ANLux	Image	767	JPEG	To be clarified	Digitisation work in progress	-	French	ARBED maps and plans
ANLux	Image	219	JPEG	To be clarified	Digitisation work in progress	-	French	ARBED photographic archives
NAM	Text	1 description of an institution with archival holdings	EAG	Free access	Digitisation work in progress	EAG	English/Maltese	
NAM	Text	85.000 descriptions of archival units	EAD	Free access	Digitisation work in progress	EAD	English/Maltese	
NAM	Image	191.100 digital archival objects	TIFF, PDF	Free access	Digitisation work in progress	EAD	English/Italian/Latin	Ordinance Department Drawings, Works Department (drawings), Letter Patent and Warrants, Royal

		Quantity and Quality of the Content						
Provider[6]	Type	Quantity & Definition	Format & Quality	IPR	Current Use	Existing Metadata	Language[7]	Additional Comments
								Opera House designs, Des-patches (GOV fonds), Consolato del Mare
NRA	Text	145 descriptions of institutions with archival holdings	EAG	Free access	At the institutions websites and the national archival portal	EAG	Norwegian	
NRA	Text	79.000 finding aids containing 6.000.000 descriptions of archival units	EAD	Free access	At the institutions websites and the national archival portal	ISAD(G)	Norwegian	
NRA	Image	50.000 photos 50.000 maps and drawings 40.000.000 digitised document pages	JPEG	Free access	At the institutions websites and the national archival portal	ISAD(G)	Norwegian	the digitised document pages mainly refer to Church records, censuses, probate, court and land registry records
NDAP	Text	34 descriptions of institutions with archival holdings	EAG	Free access	At the National Archives own website	EAG	Polish	
NDAP	Text	1.000.000 descriptions of archival units	EAD	Free access	At the National Archives own website	EAD	Polish	
NDAP	Image	300.000 documents	JPEG	Free access	At the National Archives own website	ISAD(G)-based	German/Latin/ Polish/Russian	
DGARQ	Text	1 description of institutions with archival holdings	EAG	Public domain	Available at http://digitarq.dgarq.gov.pt and http://portal.arquivos.pt	EAG	Portuguese	
DGARQ	Text	1.000.000 descriptions	EAD	Public domain	Available at	ISAD(G) and EAD	Portuguese	

					Quantity and Quality of the Content			
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
		of archival units			http://digitarq.dgarq.gov.pt and http://portal.arquivos.pt			
DGARQ	Image	3.500.000 documents	JPEG	Public domain	Available at http://digitarq.dgarq.gov.pt and http://portal.arquivos.pt	ISAD(G) and EAD	Portuguese	
OAMVSR	Text	47 descriptions of institutions with archival holdings	EAG	Public domain	Will be available at website	EAG	Slovakian	
OAMVSR	Text	100.000 descriptions of archival units	EAD	Public domain	Analogue form	---	Slovakian	
OAMVSR	Image	50.000 documents	JPEG, TIFF	Public domain	---	XML	Latin	medieval charters, maps (scanned recto and verso)
MK	Text	7 descriptions of institutions with archival holdings	EAG	Public domain	At the institutions own websites and via regional archives portal	ISAD(G) based data converted to EAG	Slovenian	National Archives of Slovenia and six slovenian regional archives - ARS/ZAL/PAK/PANG/ZAC/ZAP/PAM
MK	Text	35.000 descriptions of archival units	EAD	Public domain	At the institutions own websites and via regional archives portal	ISAD(G) based data converted to EAD	Slovenian	
MK	Image	35.000 documents	JPEG, PDF	Copyright by national archives and single regional archives	At the institutions own websites and via regional archives portal	ISAD(G) based	German/Slovenian	medieval charters, postcards, manuscripts

					Quantity and Quality of the Content			
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language**[7]	**Additional Comments**
MECD	Text	12 descriptions of institutions with archival holdings	EAG	Public domain	public at http://censoarchivos.mcu.es/CensoGuia/portada.htm and http://pares.mcu.es	EAG/XML	Spanish	
MECD	Text	2.787.278 descriptions of archival units	EAD	Public domain	public at http://pares.mcu.es	EAD/XML	Spanish	
MECD	Image	15.000.000 digital archival objects	JPEG	Public domain	public at http://pares.mcu.es	EAD/XML	Spanish	f.i. medieval charters, maps and drawings from modern times, photographs until 1950, international treaties, Euroean related documents (13th-18th century), American, Asian and Oceanian related documents (16th-18th century)
RA	Text	100 descriptions of institutions with archival holdings	EAG	Public domain	Public at: www.nad.ra.se	EAD/EAC	Swedish	
RA	Text	100.000 finding aids containing 10.000.000 descriptions of archival units	EAD	Public domain	Public at: www.nad.ra.se	EAD/EAC	Swedish	
RA	Image	90.000.000 digital archival objects 130.000.000 digitised document pages	TIFF, DjVu	Undersubscription	registered users at: www.svar.ra.se	EAD/EAC	English/French/ German/Latin/ Swedish resp. Swedish transcript	f.i. the Alfred Nobel archive (UNESCO World Heritage), National Publication of Early Maps, Diplomatarium Sue-

				Quantity and Quality of the Content				
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
								canum: The collection of Swedish charters, the Eriksberg Archive (European nobility correspondence)
RAD	Text	90 descriptions of institutions with archival holdings	Own description standard	Public domain	At http://www.danpa.dk/	Own description standard	Danish	Private institutions, companies and individual citizens
RAD	Text	1.007.496 finding aids, containing an unknown amount of descriptions of archival units	Own description standard	Public domain	At http://www.danpa.dk/	Own description standard	Danish	Private institutions, companies and individual citizens
RAD	Text	Approximately 4.000.000 descriptions of archival units	Own description standard	Public domain	At http://www.sa.dk/content/dk/daisy/daisy_forside	Own description standard	Danish	Government institutions, public institutions, private institutions, companies and individual citizens
RAD	Text	14.000.000 transcriptions of entries in archival records	Own description standard	Public domain	At http://www.ddd.dda.dk	Own description standard	Danish	Parish registers, censuses, etc.
RAD	Image	11.000.000 digitised document pages	JPEG, TIFF	Public domain	At: http://www.sa.dk/ao/	Own description standard	Danish	Parish registers, censuses, etc.
NAIS	Text	Approximately 200 descriptions of archival institutions	EAG	Public domain	At the website of the National Archives of Iceland:	ISAAR-based	Icelandic	Government institutions, public institutions and private

					Quantity and Quality of the Content			
Provider[6]	**Type**	**Quantity & Definition**	**Format & Quality**	**IPR**	**Current Use**	**Existing Metadata**	**Language[7]**	**Additional Comments**
					http://skjalaskrar.skjalasafn.is			parties
NAIS	Text	Approximately 500.000 descriptions of archival units	EAD	Public domain	At the website of the National Archives of Iceland: http://skjalaskrar.skjalasafn.is	ISAD(G)-based	Icelandic	Material of Governement institutions, public institutions and private parties
NAIS	Images	6.610 images of maps; approximately 1900 digitised document pages	JPEG	Public domain	-	ISAD(G)-based	Icelandic	Hayfield maps (1916-1929) and the Census of 1703
SFA	Text	Ca. 30 descriptions of institutions with archival holdings	EAG	Free access	None	None	French/German/ Italian/Romansh	Will be compiled in 2012
SFA	Text	2.000.000 descriptions of archival units	EAD	Free access	At the institution's website	ISAD(G)	French/German/ Italian/Romansh	Quantity will be constantly increasing
SFA	Image	ca. 5.000 digital archival objects	TIFF, PDF	Public domain	At the institution's website	ISAD(G)-based	English/French/ German/Italian	Quantity will be constantly increasing

Content Provider Agreement

Providing content to the Archives Portal Europe will be following the agreement as specified below:

Definitions

Content Provider Agreement: forthwith referred to as the agreement.

Project: The Archives Portal Europe is the result of the APEnet project and will be developed further within the APEX project, the latter forthwith referred to as the project.

Content providers: for the duration of the project, the members of the project consortium as well as other legal entities accepted by the project as partners.

Host: for the duration of the project, MECD, which – as leader of the corresponding project workpackage – is responsible for building the required infrastructure of the Archives Portal Europe and for preparing its maintenance after the project's liftetime.

Dashboard: technical facility offering all functions for content providers for online use and tools for download and offline use.

National contact point: archival or administrative institution responsible for the coordination of archival institutions participation to the project, including the task of monitoring the amount of content provided in accordance with the respective statements in the present Grant Agreement.

Preamble

The Archives Portal Europe was created following an initiative of EBNA (the European Board of National Archivists), the Report on Archives in the enlarged European Union, the resolution on archives in the Member States (OJ 2003/C113/2) by the Council of the European Union, 6 May 2003, and the recommendation from 14 November 2005 of the Council on priority actions to increase cooperation in the field of archives in Europe (OJ 2005/L312/55).

Its purpose is to enhance cross-border search and investigation in as well as publication of archival holdings across Europe by offering a joint publication platform for descriptive information to all European holders of archival material as described in the Report on Archives in the enlarged European Union.

Article 1   Rights and obligations of the content providers

1. All European institutions responsible for archival material can use the portal for the publication of information on their holdings and their institutions, registered via the national contact point of their country, to accomplish the figures of data estimation per country reflected in the present Grant Agreement. During the project, the national contact point of their country registers as a country manager and will grant other archival institutions access to the dashboard on their request. It is also possible for the national contact point to act on behalf of other archival institutions of their country, provided prior agreement on this exists between the institutions concerned, subject to notification of the host. Registered content providers obtain access to the dashboard and the tools provided by the project for the preparation of the data.

2. The registration to the dashboard must be made by an authorised person acting as a representative or on behalf of the content provider. This person will not transfer the registration information to non-authorised persons or third parties.

3. The content provider can upload, update, overwrite or delete content manually (via HTTP and FTP) or automatically (via OAI-PMH) whenever desired. The host provides the necessary technical interface through which the content provider has full control over his own data or the data that he manages on behalf of other institutions that he represents. The result of the deletion operation will be visible on the web presentation after the delay indicated. Any data that the content provider wants to have deleted will not be included in back-up operations and will be completely erased from the host server.

4. The content provider can use the functionality provided by the host to automatically transfer selected data or all data to third parties. The host has no responsibility for the data delivered to third parties. Content providers also wishing to make their data available via Europeana will need to sign the special agreements provided for this purpose by Europeana and are recommended to act accordingly with regard to other third parties having separate agreements. The content provider can also stop the order of transferring data with the technical functionality provided by the host. The host has no responsibility whatsoever for data that already have been transferred by the content provider using the dashboard.

5. No data transferred to the Archives Portal Europe can be reused without the explicit authorisation of the content provider. Each registered content provider is responsible for the legal accessibility of and the rights to re-use the data uploaded by himself to the Archives Portal Europe and optionally transferred to third parties using the technical functionality provided for this in the dashboard.

Article 2   Rights and obligations of the host

1. The main priority of the host is to accomplish the present Grant Agreement, particularly to guarantee that the figures established herein are available in the webservices of the Archives Portal Europe during the lifetime of the contract.

2. The host is only obligated to publish and maintain the quantity of content established in the present Grant Agreement.

3. The host operates the webservices of the Archives Portal Europe developed in accordance with the project and following the decisions of its governing bodies as well as the workpackage responsible for the development and maintenance of the portal infrastructure.

4. The host is not entitled to use the data for purposes other than for the Archives Portal Europe and is not entitled to transfer the data to a third party on his own. Only the registered content provider is entitled to initiate such a transfer of data by using the corresponding function of the dashboard provided for this purpose. Any transfer of data to a third party as well as all communications concerning those data will be documented and notified to the content provider.

5. The host guarantees that any conversion of data performed at the central dashboard conforms to the published rules and manuals. The host furthermore guarantees that the preview functionalities offered to evaluate how the data will be presented in the Archives Portal Europe accurately reflect the final display.

6. The host will provide the content provider with the tool for processing the delivered data, including their complete deletion from the Archives Portal Europe. The host will not delete any data himself, since it will be the content providers only who will have to use this functionality.

Article 3   Termination of this agreement

Termination of this agreement shall be provided in writing. It shall take effect on the date agreed by the parties.

Article 4   Modification of this agreement

This agreement may be amended only by approval by the project's consortium. No amendment of this agreement shall be binding unless it is in writing and conforms to the rules communicated by the Commission.

Article 5   Termination of rights

The rights granted both by the content provider to the host and by the host to the content provider end when either party terminates this agreement. Termination of this agreement will also end data transfer made by the host to third parties.

Article 6   Applicable law and jurisdiction

1. This agreement is drawn up in English, which language shall govern all documents, notices, meetings, arbitral proceedings and processes relative thereto. This agreement shall be construed in accordance with and governed by the terms of the project's Grant Agreement, the relevant European Union acts, the Financial Regulation applicable to the general budget of the European Union and its Implementing Rules, other European Community and European Union law and, on a subsidiary basis, the law of Luxembourg.

2. All disputes arising out of or in connection with this agreement which cannot be solved amicably, shall be referred to mediation. The outcome of the mediation process will be binding on the parties. The place of mediation shall be Luxembourg if not otherwise agreed by the conflicting parties.

3. The project reserves its rights to take necessary mediating actions in case of disputes arise between constituent content providers f.i. due to unauthorised and/or controversial material being published or privacy regulations (in other countries) being violated. There will be a negotiation process started in such cases in which the project will advise to the content provider. In case of user complaints the host will refer them to the content provider concerned.

Article 7   Final clause

This agreement shall enter into force on the day of the entry into force of the APEX Grant Agreement.

IPR issues

APEX is uniquely positioned to address one of the main obstacles in aggregating archival content to the Europeana level: specific national legislation and policies restricting the access and (re)use of archival content from that country versus Europeana's proposed contractual policy on the free & open (re)use of all content that is made accessible through Europeana.

A promising route out of this dilemma would be preview technology within the Europeana portal's interface. When next to the finding aid entry there is also a digital object available, a user of Europeana should be able to study that object by means of a good quality preview. The previews are not downloadable but provide a good user experience in line with other offerings in Europeana. When the user wants more access to the material the user can follow a link to the portal of the institution which holds a better quality digital object. There access and (re)use of the object can be handled according to the respective national legislation, policies and practice.

It will be a major activity of WP2 (Europeana Interoperability) to find solutions on IPR issues along the following lines:

- Activities to align the APEX Content Provider Agreement and the Europeana Data Exchange Agreement in close cooperation with WP4 for the professional aspects in this question. In addition: it is important to reach an agreement on how to deal with public information which is digitised using public funding. The APEX consortium, as well as the European Board of National Archivists, agrees in principle that public information that has been digitised with public funding should be made as widely available as possible for access and use or re-use, respecting of course specific national legislation/policies. That would entail, amongst other things, that the descriptions and the finding aids of archival material should be made freely available.

- Investigate in cooperation with WP6 (Usability and Web 2.0) and with Europeana the use of Linked Data. For this WP2 will cooperate with the OPF (Open Planets Foundation) which is currently leading a Linked Data initiative on a global Representation Information Registry eco-system to gain more knowledge on the subject. Furthermore WP2 will seek collaboration with the UK national EAD-based "Archives Hub" that has teamed up with the COPAC project to embark upon Linked Data[10].

- Preview solutions as described above, in cooperation with WP6

IPR clearing methods for content and tools

In accordance with the activities of the European archival organisations like EBNA regarding an agreement on how to handle different types of information (see fourth basic requirement in chapter B1.1) as well as in cooperation with WP4 (Standards & Guidelines) and WP5 (Tools & Support) WP2 will undertake studies into best practices regarding the administration of rights at the local level in the context of aggregation to an European level. These might be different concerning the digital objects themselves as being in the centre of interest when exchanging data with Europeana (see above) and concerning archival content apart from the digital objects as being made available in the Archives Portal Europe. In general, the following can be stated as basis for further evaluations:

1. In the archival world content providers are the ones who take care of their data and its rights, thus it is essential for them to work and assign rights information by themselves. Regarding the assignment of rights information at local level (before uploading data to the Archives Portal Europe) some providers may have a system to manage and store rights information outside a finding aid. APEX cannot influence such local situation, therefore, it should prepare a solution for all possibilities. If a content provider uses their database system etc, defining details of rights information for different types of data, that information needs to be transferred to/synchronised with the corresponding finding aids. This is the responsibility of content providers and it is probably wise to do it locally as the Archives Portal Europe may not be as flexible as the local system. The big question is that such right information may not (exactly) correspond to what the Archives Portal Europe and Europeana need. The content provider may use local legal standards, which may require "translation" or "mapping" -

especially with regard to the Europeana rights information concerning the digital objects directly. Such data manipulation should be ideally done in the local environment respectively when converting local data into the data formats used within the Archives Portal Europe, before sending it to the Archives Portal Europe.

2. It is theoretically more likely that content providers would like to manage rights information according to the data delivery channels. For example, what Europeana requests for right information is especially for digital objects described in ESE (isShownBy, isShownAt, and Object) respectively in the according elements of the EDM. This is one particular case. It is possible to imagine that content providers also want to share data with other organisations and initiatives. In such a case, data they provide may vary (for instance, high resolution images instead of thumbnails, watermarked objects, thumbnails out of video file, etc.) and the content provider may have different policies for the use of such data (for instance, CC-BY for Europeana, while CC-BY-NC for Flickr etc.). If this is true, it is most likely they would manage rights information within their local system and export data with different rights information for different data dissemination purposes. Thus, rights information is best to be added locally (not centrally at the the Archives Portal Europe). This kind of scenarios should be examined for the best practice of the sustainability of data management in general.

3. With regard to rights information on the archival content it should be examined whether it is possible to alter the APEX EAD (based on the elements <userestrict> and/or <accessrestrict>) or to have an extra database field in the Archives Portal Europe (for CC and/or other rights info). The advantage of this is that the Archives Portal Europe can also show the license information on the website. The most apparent benefit is to refine search results by it and to satisfy end users by explicitly clarifying how they can use the data[11]. That could also trigger more involvement of the public for the portal in the near future when social functionalities will be added. For instance, one could think of functionalities to offer the users the possibility to add translations, to point to other (related) objects to enrich the data, or to create f.i. completely new collections for a specific research topic using existing archival material, etc. These kind of added-value activities can be done only when the rights are very clear to the end users.

4. The same approach – already including the rights information in the conversion from local data to the data formats used within the Archives Portal Europe – could be followed with regard to the digital objects specifically. For this again the elements <userestrict> and/or <accessrestrict> on the lowest levels could become handy. Furthermore, the use of METS and its section for administrative metadata (<amdSec>) should be examined more thoroughly. If content providers could insert rights information locally and APEX EAD respectively METS could include such information properly, it would become rather easy for the Archives Portal Europe to handle it. There would probably be no need for mapping nor conversion with regard to <europeana:rights> anymore, and the conversion tool would not have to do anything but automatic data processing (i.e. map info to <europeana:rights>). Nevertheless, it might be suitable to have <europeana:rights> editable per ESE record in the tool, which is not the case yet in the pilot of the Archives Portal Europe. Assigning the rights information per ESE record (or selected ESE records) should be possible in the future. Preferably this should also involve a preview function to check the outcome of the conversion. Apparently one main challenge is to persuade content providers of the Archives Portal Europe to add precise – and level-related – rights information locally, distinguishing analogue resources from digital resources.

These strategies are recommended as best practice by the current APEnet project which has accumulated substantial expertise on the IPR issues. The strategies need to be revised as the

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[10] see: http://archiveshub.ac.uk, http://copac.ac.uk and http://blogs.ukoln.ac.uk/locah/2011/05/09/archives-hub-linked-data-release/
[11] see http://www.flickr.com/creativecommons/

consortium expands, however, it provides an excellent basis for the discussion and the proof of concept is required in the APEX project.

IPR issues summary

In summary of the above, APEX will undertake much needed action on IPR issues in a twofold strategy:

- Explore together with Europeana the benefits of quality preview solutions with access to digital objects at the national level, align the data agreements of Europeana and APEX and, finally, work on the implementation of Linked Data technology for archival content

- Undertake studies into best practices regarding the administration of rights at the local level in the context of aggregation to an European level in cooperation with EBNA and other European archival organisations

Multilingual and/or multicultural aspects

Europe is multi-cultural and multi-lingual and any initiative on the European level must have solutions in this domain at the core of the process. There are actually two aspects to the multi-lingual challenge:

- on the application level
- on the content-search level

Application level

In addition to making it possible to search the holdings of public and private archival repositories in dozens of European countries, the interface of the Archives Portal Europe already is (to the extent of the languages of countries represented by the current partners) and will continue to be multilingual, and thus allows users to choose the language in which they navigate the portal.

APEX will ensure the basic level of interface translation in all official languages of the participating EU countries. Content providers will be asked to help with this task. Ideally APEX will implement a new Content Management System to manage the multilingual interface of the portal. Content providers will be encouraged to describe holdings guides at least in two languages: English and their official language(s). Each participant will assign a contact person to translate new respectively change labels and texts for the query interface and the main information of the unique access point to its national language. Archival descriptions are drafted in several countries in the language of the material described even though it is not an official language of their respective countries. Archival documents themselves will not be translated, but might as well be provided in several languages depending on their original creation, the traditions and practices of the participating countries. The portal interface will need to be adapted to this possibility.

APEX will furthermore explore available methods such as Multimatch and Trebleclef, and also use results, knowledge and experiences made in other European projects like Michael / MichaelPlus and EUROPEANA. The APEX technical team will also evaluate the possibility of integrating some open source online translation services into the Archives Portal Europe in order for the users to have an option to use them.

Content-search level

Disambiguation of query terms is very difficult even for the library sector and for Europeana in general. It poses even more of a challenge for the Archives Portal Europe as its service, as a research platform, relies on EAD finding aids and the corresponding Solr index files. EAD files are very often monolingual and the percentage of EAD files containing (links to) digital objects (e.g. images) are still very limited, implying that the users will often work with text (i.e. textual information in EAD)

without digital objects. If users can only read in their native language it will be extremely hard to understand the information they find. This is even true for professional archivists and researchers. Therefore APEX will further evaluate the possibilities to use certain, repeatable EAD elements, f.i. the <unittitle> with an attribute to indicate the language of the element's content and by this provide an opportunity to include the same information in several languages in the EAD files. In addition to this, the options will be checked to keep respectively include this added-value in the Solr index files also. In any case the structured contexts shown together with the descriptive units and the browsing possibilities offered through the display of the finding aids allow to learn how certain terms were used when the documents were created in a foreign language as well as in the own language.

Semantic web as a solution?

Semantic web, as being envisaged for the future Europeana releases, might be a solution with regard to disambiguation issues, but it is under the premise that the vocabularies will be controlled and multilingual thesauri will be created and deployed. It is not very likely that such a big leap will happen in the near future. Therefore, it is necessary to prepare for parallel strategies. The project will follow the new initiatives stated by the Library of Congress for the exploration of RDF technologies to enhance MARC and see if it can learn from it for archival descriptive needs[12].

Impact on search functionalities and display of results?

From the users' point of view, it probably is as important to know in what languages their search results are, as it is to know from what countries and content providers they are. Therefore, language constraints should be taken into consideration when offering search methods as well as when presenting search results to the users, unless some state-of-the-art multilingual functionalities such as query and metadata translation become available. For this, enhancements of the current tools will be needed in order to be able to provide consistent language information for all different levels of archival description and to begin actively using the related search options and search results refinement and sorting functionalities.

Specific suggestions

- images may be a great help to satisfy users

- enhance the display of search results by language/country

- multilingual (English at least) summary descriptions of fonds/EAD files (f.i. with regard to the short descriptions of fonds/collections that could be edited for the holdings guides or in the finding aids <archdesc>)

- multilingual lists of places and persons derived from the archival material provided and made available in the Archives Portal Europe may be a great help as a first step, even if they are not directly integrated in the search

General suggestions

- rework the interface from a current best practice (testbed)

- test data from as many countries as possible

- look out for or develop newer best practices for a multilingual archival portal

- semantic web with multilingual thesauri may be a solution, but it will take a long time; a collection of needs and requirements might be established and documented throughout the project

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[12] cf.: http://www.loc.gov/marc/transition/news/framework-051311.html

The work outlined above will be an important task for WP6 (Usability & Web 2.0), together with WP2 (Europeana Interoperability), WP3 (Infrastructure Development & Hosting), WP4 (Standards & Guidelines) and WP5 (Tools & Support).

B.2.2 Long term viability

As a follow-up to the current APEnet project, the work in APEX centres around two main processes: widening of the network (get more countries, more institutions involved) and deepening of the network (organise all activities necessary for facilitating effective connection of institutions to the network: lobbying, informing, communicating, coaching, training and education, development of tools, etc.).

In addition, the APEX consortium members will commit to maximising the production of digital content, in close cooperation with their national governments. They also commit themselves to reach an agreement about the sustainability and the continuity of the infrastructure of the Archives Portal Europe after this project's lifetime and to establish an Archives Portal Europe Foundation for guaranteeing this.

WP8 will handle the major task to research and design a transformation of the APEX project office in The Hague into an Archives Portal Europe Foundation at the end of the project.

For this the work package will cooperate with other European sustained project organisations such as PrestoCentre (which is currently being developed within the Presto Prime project) and the Open Planets Foundation (which was established as a membership-organisation by several partners from the PLANETS project) to learn from their experiences. Furthermore the ICARUS-network will be used to lobby and communicate the need of an Archives Portal Europe Foundation on a very wide base, this means not only on the level of national archives, but also of other types of archives and archive-related institutions such as universities and research institutes.

WP8 will take all the necessary steps to build a new organisation including organisational structure, business plan, financial plan, marketing plan, communications & dissemination (the two latter in cooperation with WP7). Finally the work package will prepare for the practical implementation of an Archives Portal Europe Foundation including all legal activities involved, staffing, housing, facilities etc.

By examining the actual operation of the APEX project activities, WP8 will try to establish the most suitable sustainable plan in close collaboration with the other WP.

B.2.3 Wider deployment and use

An important benefit of the APEX concept is that it can also be used to drive the national, regional and local levels of aggregation. In addition to this, other Europeana related projects can benefit from the total package that will be made available by the project. This offering includes a technical infrastructure template, standards and best practice guidelines for their implementation, tools & support (for uploading, converting and harvesting data), innovation activities, dissemination & training programmes and the general support of a sustained organisation that groups a wide community of European archives.

The results of the current APEnet project in this domain show that there is a solid basis for further growth. The APEnet project website provides open source software tools and manuals for download and the current APEnet consortium is organising workshops on using and implementing these tools as

well as the central framework behind the Archives Portal Europe on a regularly basis[13]. These efforts have helped raising interest for the current APEnet tools such as the Data Preparation Tool (for turning any local XML/EAD implementation into APEnet EAD) and the APEnetEAD2ESE tool, which turns APEnet EAD into the current Europeana metadata format ESE. The Europeana related projects Judaica[14] and HOPE[15], as well as local projects like "Netwerk Oorlogsbronnen" of the Dutch NIOD (Institute for War, Holocaust and Genocide Studies)[16] have shown interest in these tools.

Also the concept of a commonly used finding aid format, i.e. establishing a common APEnet EAD format, based on the comparison of all EAD implementation guidelines of the APEnet project participants, is being adopted on national levels, which is clearly demonstrated by the forthcoming publication of the Dutch/Belgian cooperation to establish national EAD implementation guidelines (the "BENE" EAD guideline)[17]. In Germany the Netzwerk SED-/FDGB-Archivgut is also based on EAD and the forthcoming national archival portal inside of the German Digital Library will use it too.

Having the International Centre for Archival Research with its wide-spread network of institutions all over Europe within the consortium opens the possibility to accompany the building of portal infrastructure with complimentary activities and support for archives in creating content especially concerning medieval archives.

In summary, rather than helping to grow a plethora of solutions in a bottom-up manner, an investment in APEX translates into an efficient best practise concept that can be rolled out in potentially all of the EU member states. This greatly improves efficiency, interoperability, sustainability and throughput in the total aggregation chain from the local level right up to the Archives Portal Europe and Europeana.

Target user description	Needs
Family historians	Experienced users, searching for specific types of archives relevant for their search such as census, birth, death etc. certificates. They are particularly looking for digitised archives on line
Local historians	Experienced users too, they need to have the possibility to search for place names or geographic areas
Academic searchers	Experienced users, they need a global as well as a detailed view on the archives held in the different countries to be able to prepare further search or comparisons
University students	Same needs as the former, plus online tools on how to search in the archives and use resources of the portal, help/aid and tutorials
Journalists	Archival research for journalistic purposes is often concentrated to modern materials, related to legal and political information often on living persons and contemporary issues
School groups/teachers	Small, transcribed, preferably thematic collections that correspond to and underline subjects or issues that are taught on a regular basis at school. The archives should be presented together with problem based work assignments that encourage creativity and independent thinking
Professional users (records and information managers as well as civil servants and researchers at cultural heritage institutions)	They use archival information as a part of their day to day work to document or compare their own work.

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[13] In the last week of June 2011 there has been a series of workshops, focusing on the use of EAC-CPF, OAI-PMH and METS, organised by the Riksarkivet APEnet team in Stockholm.

[14] http://www.judaica-europeana.eu/

[15] http://www.peoplesheritage.eu/content/about_hope.htm

[16] http://www.niod.knaw.nl/default.asp, http://www.netwerkoorlogsbronnen.nl/

[17] http://www.promead.nl/nationaal-archief-ead-richtlijnen/concept-bene-ead-richtlijnen

B3. Implementation

B.3.1. Consortium and key personnel

The consortium

Participant number	Participant short name	Country	Expertise	Role
1	NANETH	Netherlands		Coordinator WP 1 leader and WP8 leader Member of WP 2, 3, 4, 5, 6, 7
2	OStA	Austria		Content provider
3	ARA	Belgium		Member of WP 1, 4, 6
4	ASA	Bulgaria		Member of WP 1, 6
5	CSA	Croatia		Member of WP 1, 2, 4, 7
6	NAE	Estonia		WP 6 leader Member of WP 1, 3, 4, 5, 7, 8
7	KA	Finland		Member of WP 1, 4
8	SIAF	France		WP 5 leader Member of WP 1, 4, 7, 8
9	BA	Germany		WP 2 leader and WP 4 leader Member of WP 1, 3, 5, 6, 7, 8
10	GSA	Greece		Member of WP 1, 2, 4, 7
11	NAH	Hungary		Member of WP 1, 2, 4, 5, 6, 7
12	NAI	Ireland		Member of WP 1, 4, 7
13	DGA	Italy		Content provider
14	LRKM	Latvia		Member of WP 1, 2, 6, 7
15	LA	Liechtenstein		Content provider
16	LVAT	Lithuania		Content provider
17	ANLux	Luxemburg		Content provider
18	NAM	Malta		Member of WP 1, 4, 5, 7
19	NRA	Norway		Member of WP 1, 2
20	NDAP	Poland		Member of WP 1, 2, 4, 5, 7
21	DGARQ	Portugal		Member of WP 1, 4, 6
22	OAMVSR	Slovakia		Member of WP 1, 4, 5
23	MK	Slovenia		Member of WP 1, 6, 7
24	MECD	Spain		WP 3 leader Member of WP 1, 2, 4, 5, 6, 7, 8
25	RA	Sweden		WP 7 leader Member of WP 1, 4, 6, 8
26	ICARUS	Austria trans-European		Member of WP 1, 5, 6, 7, 8
27	RAD	Denmark		Content provider
28	NAIS	Iceland		Content provider
	SFA	Switzerland		Associated partner

The key personnel

1 National Archives of the Netherlands - Nationaal Archief

- *Gerrit de Bruin,* works since many years in the field of paper conservation and restoration at the Nationaal Archief. He has worked for the Nationaal Archief's TANAP and Surinam project (providing conservation/restoration training and advise for the new archive building). He was also involved in the MATRA project in Croatia. He was a member of the European projects InkCor, MIP, SurveNIR and PaperTreat. He is a member of the National Committee of the Blue Shield.

- *Jasmijn Bus,* graduated in History at the University of Leiden and joined the Nationaal Archief in 2002. She has a lot of experience in international cooperation within the archives community due to her involvement in international projects, such as TANAP project and the Mutual Cultural Heritage Programme. Since 2010 she has assisted the Dutch National Archivist in his work as ICA-President and now she is staff member international cooperation at the Nationaal Archief.

- *N.N, WP1 project assistent (to be hired)*

- *N.N, WP8 leader (to be hired)*

- *N.N, WP8 project assistant (to be hired)*

- *Bastiaan Verhoef,* holds a Master degree in Computer Sciences and has worked as a Java developer on several websites and portal projects since 2004. Early 2010 he joined the APEnet project team of the Nationaal Archief and became responsible for implementing the APEnet EAD to ESE conversion in the Archives Portal Europe. In addition he played an important role in the international technical APEnet team, by improving search facilities and display of search results.

- *Go Sugimoto,* has a wide range of international experience in making cultural heritage information available, obtained two Master degrees in the UK and has held fellowships in Italy and Japan. He is currently the interoperability manager of the APEnet project and has previously worked for the Europeana project. During the last years he has been heavily involved in the technical group of Europeana projects (including assisting in defining the ESE and EDM schemas).

- *N.N, archivists (to be designated)*

2 Austrian State Archives - Österreichisches Staatsarchiv

- *Thomas Just*, Head of department "Haus-, Hof- und Staatsarchiv", holds a Master of Advanced Studies in Archival Sciences, joined the Austrian State Archives in 2001. He is Vice-President of Icarus, Member of the several Austrian historic commissions and institutes as well as of the executive commission for the German-Austrian project "The Files of the Imperial Aulic Council" which is sponsored by the Union of the German Academies of Sciences and Humanities.

- *Hannes Kulovits,* Head of Digital Archive Division at the Austrian State Archives where he is responsible for the long-term preservation. He has also been actively involved in several research projects in the field of Digital Libraries and Digital Preservation such as DELOS, DigitalPreservationEurope, and PLANETS[18]. His research focuses on preservation planning and recommender systems and he has been a key developer of the preservation planning tool Plato.

3 National Archives of Belgium - Algemeen Rijksarchief en Rijksarchief in de Provinciën – Archives / Archives générales du Royaume et Archives de l'État dans les Provinces

- *Lucie Verachten,* Head of Section 2 at the State Archives in Belgium responsible for Digitisation, digital preservation and digital reading room. Holds a Master in History and has been working in in a project on retro conversion of finding aids at the State Archives, in the projects DIGIT03[19] and Demogen[20] and in the APEnet project. She is furthermore chair of the DLM Forum foundation and has knowledge on Archival sciences (descriptive standards), digitisation and preservation.

- *Annelies Coenen,* holds a Master in History and an Advanced Master in Archives and Record Management. Has been working at the State Archives (Section 2) since 2009 and has knowledge on archival sciences (descriptive standards) and digitisation (description, quality control, workflow control). She participated in the project DIGIT03 and monitored the Demogen project.

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[18] Preservation and Long-Term Access Through Networked Services
[19] Project at the State Archives in Belgium that resulted in 138 mio images digitised.
[20] Project on social tagging with volunteers - Belgian e-gov award 2009

- *Lardinois Yves,* holds a diploma as civil engineer electromecanics option electronics. Has been working at the State Archives (Section 2) since 2008. Has experience in standards and interoperability (OAIS, Moreq2, EAD, METS et al.), software management and development for archiving (Piraeus), search robots for OCR text in archives, web services for archives and GIS and management and development of GIS applications (participation in different European projects).

4 Archives State Agency Republic of Bulgaria - Държавна Агенция Архиви

- *Margarita Karamihova,* holds a PhD in Ethnography (Bulgarian Academy of Sciences. Currently Head Expert for Documental Management at the Archival Policy Chief Directorate. Has experiences in strategy development, project management and development for archiving. She has participated in different national and European projects concerning Archives promotion in wider society.

- *Mariya Popova,* holds a diploma as engineer on computing (Technical University, Sofia, Bulgaria) and on post graduated study of RDBMS/relational data base management systems (Technical University, Sofia, Bulgaria). Works as system administrator at the Archives State Agency and is responsible for administering the Microsoft Active Directory.

- *Nikolay Raikov Markov,* holds a Master in Philosophy (Sofia University "St. Kliment Ohridski") and has been working at the Archives State Agency since 1995. Since March 2010 he is Head of the IT & Digitisation Department. His main activities and responsibilities are the creation and development of the Archives State Agency Digital Archive, the creation and elaboration of methodology, quality control, education and training of personnel as well as archival automation.

- *Orlin Iliev,* holds a diploma a Bachelor in History (South-West University "Neofit Rilski", Blagoevgrad, Bulgaria) and has been working at the Archives State Agency since 2006. He is working as senior expert in Department "Information technologies and digitalization" responsible for digitalization and quality control.

- *Nadya Nikolova,* holds a Master in History (New Bulgarian University). Has been working at the Archives State Agency since 2003 as a major expert, mainly for developing within the Meta Data Project.

5 Croatian State Archives - Hrvatski državni arhiv

- *Jozo Ivanović*, assistant director of the CSA responsible for professional standards and development, co-author of the national archival information system ARHiNET, co-ordinator of the national project of digitisation of cultural heritage (archives, libraries, museums) 2007-2009, also active in professional training and education.

- *Vlatka Lemić*, Head of Department for Information and Communication and Registry, Development and Documentation Service. Leads project of informatisation of Croatian archival service as coordinator of development and implementation of ARHiNET system and member of ENArC project team.

6 National Archives of Estonia – Rahvusarhiiv

- *Toivo Jullinen,* Head of the development bureau of the National Archives of Estonia since 2000, responsible inter alia for building and implementing the digital preservation system (2005 to 2007). He is a co-author of several Estonian legal acts in the field of cultural heritage and documents and archives management and has been representing Estonia at the European level. He furthermore was a member of several committees of the DLM Forum between 2005 and 2010.

- *Kuldar Aas*, Deputy Head of the digital preservation bureau of the National Archives of Estonia. Holds a Master in Information Technology and is actively involved in developing national records management and cultural heritage metadata standards and the description and preservation of

national datasets and electronic records from EDRM systems. He is a member of the Estonian semantic interoperability task force and was work package lead in the PROTAGE project.

- *Lauri Leht*, Head of the NAE's digital preservation bureau since 2008. Holds a degree in business administration and business IT systems as well as the degree of Certified Internal Auditor (CIA) and has passed the Estonian certification as an archivist. Worked previously as internal auditor and advisor to the state archivist and top management of NAE. He is involved in the development of digital preservation systems at NAE and is responsible for several major digitisation projects.

7 National Archives of Finland – Kansallisarkisto

- *Markus Merenmies.* Development manager. Responsible for the projects related to the electronic long-time preservation and IT-service development.

8 General directorate for cultural heritage - Interdepartmental Service of French Archive – Direction générale des Patrimoines - Service Interministériel des Archives de France

- *Hervé Lemoine*, director. Hervé Lemoine has been running the Service interministériel des Archives de France since February 2010.

- *Sébastien Studer*, curator. Sébastien Studer is an archivist, graduate of the Ecole Nationale des Chartes in 2003, and is working for the ministry of Culture since 2010. He is in charge of archivistical rules and intellectual treatment of archives, and works particularly on the international standards EAD, EAC-CPF (co-responsible for the translation of the last version of the EAC-CPF).

- *Yoann Moranville*, technical developer. Studied Network and Tele-communications followed by Computer Sciences in both France and Finland. He started as a Technical Developer in helping with maintaining The European Library portal and bringing in new partners for their various projects. Since 2009, Yoann is working for the APEnet project with the major task of insuring the integration of the content provided by the partners via the tool that he developed for this purpose.

- *Lucile Grand*, curator. Lucile Grand is an archivist, graduate of the Ecole Nationale des Chartes in 1995, and is working for the ministry of Culture since 2004. She was involved in different national website and portal projects, particularly Collections, the national portal for heritage, acting as national aggregator for Europeana. She has been part of the APEnet project.

- *Philippe Barbat*, deputy director. Philippe Barbat is a jurist, member of the Conseil d'Etat, and particularly in charge of the re-use of public and archival data issues.

9 Federal Archives of Germany – Bundesarchiv

- *Angelika Menne-Haritz*, Vice president of the Federal Archives of Germany since 2001. Holds a PhD in German Literature and History and a professorship for administrative sciences. She is the author of several publications in archival and administrative sciences, appraisal, description, use of Internet technologies for access to archives and has led several projects on the latter subject. She furthermore is a member of the TS-EAD of the Society of American Archivists (SAA).

- *Kerstin Arnold*, holds a Master in Communication Sciences as well as in Library and Information Management). She has been working at the Bundesarchiv since 2005 and has been a member of the APEnet project since 2009, where she actively participated in the developments of the archival standards to be used in the Archives Portal Europe, in technical as well as in organisational tasks. Since 2011 she is a member of the TS-EAC of the Society of American Archivists (SAA).

- *Susanne Reick*, holds a Master in History and completed the postgraduate courses at the Archives School Marburg and the internship in the Federal Archives of Germany in 2010. Since May 2010, she has been employed by the Federal Archives in the department "Foundation Archives of parties

and mass organisations of the GDR" with her main responsibilities in the competence network retro conversion and digitisation as well as in the APEnet project team.

- *N.N*, technical staff member (to be hired)

- *N.N*, archivistic staff member for organisational tasks f.i. with regard to aggregating German archival content (to be hired)

10 General State Archives of Greece - Γενικά αρχεία του κράτους

- *Dr. Nikolaos Karapidakis,* President of the GSA Advisory Council since 2010. Studied Classical Philology and holds a diploma in Archival Studies and Palaeography. Has worked previously at the Historical Archives of Corfu, the General Archives of the Commission of the European Community and the General Archives of the Hellenic State (director). He furthermore has been holding a professorship for Medieval History since 1990.

- *Dr. Marietta Minotos, GSA Director.* General Director of the General State Archives of Greece, President of the International Committee of Archivists and Archives of Parliaments and Political Parties (SPP) and member of the International Council Archives' Executive Board. She is also lecturer in the Department of Archives and Library Science at the Ionian University, where she teaches since 2002.

- *Mrs. Anastasia Dikopoulou,* Archivist. Studied Archival and Library Sciences and holds a Master of Business Administration. She currently works in the Planning, Coordination and Studies Department of the National Archives Agency in Greece (Athens). She had been elected President of the Association of Archivists – Librarians in Greece since 2001 and from June 2010 she is serving the Association as General Secretary.

- *Mrs. Lina Bountouri,* Archivist. Works as an Archivist-Librarian in the General State Archives of Greece (Planning, Coordination and Studies Department) and s also a Lecturer of Library Science & Information Systems of the Technological Institute of Education. Holds a Master in Information and currently is a PhD student in Archives & Library Sciences. She furthermore participates in the CIDOC CRM SIG and the TS-EAC of the Society of American Archivists (SAA).

- *Dr. Anna Koulikourdi,* Archivist. Holds a Master in Library Management and Organisation and a PhD in Information seeking behaviour of People with Disabilities and Assistive Technologies in Libraries for People with Disabilities. She worked in the Department of Archival Acquisition and Appraisal Department of the General State Archives of Greece from 2008 to March 2011. Since March 2011 she has been working in the Library of the General State Archives.

- *Mrs. Efstathia Vamvaka,* Administration staff. Has a degree in Business Administration from Athens University of Economics and Business. She worked from 1984 to 2004 in the Prefecture of Athens and from 2004 till today in the General State Archives. She participated in European projects (Information Society and APEnet) and she is currently employed in the Secretariat and Accounting Department.

11 National Archives of Hungary - Magyar Országos Levéltár

- *Zsófia Komlósi-Gera,* graduated as an archivist in 2006 has worked in the National Archives of Hungary since then with the main responsibilities in the communication both on national and international levels, in sharing of knowledge and interpretation to the public. She has experience in reporting and in coordination and management of archives' projects: Night of Museums, exhibitions, European Union related conferences (EBNA, EAG, DLM, EHC).

- *Lajos Körmendy PhD*, Head of preservation. He is representing Hungary in the European Archives Group and was a member and secretary of the several committees and round tables of the International Council on Archives. Has been employed by the National Archives of Hungary since

1975 with his main responsibilities being electronic repository assessment and risk management. He holds a Master in History, French and archival sciences and a PhD in archival science.

- *Zoltán Lux,* holds Master in mathematics and philosophy and has been working in the 1956 Institute as Head of the database since 1990. His main responsibilities are the development and maintenance the institute's hompage (www.rev.hu), editing and developing multimedia CD-ROMs, managing and developing Oracle-based databases. He has joined the NAH recently as an IT head of the Department of Electronic Records.

- *Zsuzsanna Mikó*, senior archivist, Head of Government Records Service, deputy director-general of NAH. She holds a bachelor in History and Library science and a Master in Archival sciences and Law. She has been employed by the NAH since 2004. Her main responsibilities are managing electronic databases, electronic legal records, the development of the central record keeping system and the NAH electronic archives project.

- *Zoltán Szatucsek,* senior archivist, Head of the Department of Electronic Records. Holds a Master in History with his professional fields currently being records, archival appraisal and acquisition. Member of several professional working groups and committees both national and institutional level. Leader of the NAH electronic archives project, and representative of the NAH in the DLM Forum. Teaches regular records management and archival assistant courses of the NAH.

- Other contributors are: *Endre Rába* software engineer, *Zsolt Záros* software engineer, *Krisztina Badari* local project coordinator, *Ágnes Lőrincz* accountant.

12 National Archives of Ireland - An Chartlann Náisiúnta

- *Elizabeth* McEvoy is a graduate of Trinity College Dublin (BA in History, 1997 and MPhil in Medieval History, 1999) and University College Dublin (Higher Diploma in Archival Studies, 1999) and has worked as an archivist in the National Archives, Ireland since 1999. She performs the core functions of Duty Archivist and Reader Services Archivist, manages the website of the NAI, directs the office's internship programme and has represented the National Archives of Ireland in the APEnet project since 2009. She is a member of the National Archives APEnet taskforce and participates in the current Dissemination and Awareness Work Package led by Sweden.

- *Micheál Ó Conaire* holds a Master in Litt. History and has completed the Masters in Archives and Records Management course. He worked for Unilever Archives and Records Management service in the UK and has been employed by the NAI since 2008. His main responsibilities are the development of the NAI electronic catalogue, records management and electronic records. He is a member of the NAI APEnet taskforce and also represents the institution at the DLM Forum.

13 Directorate-General of Archives - Direzione generale per gli archivi

- *Patrizia Ferrara* is the Head of the Servizio III (Studies and Research Division) of the Italian Directorate-General of Archives (DGA). She started working as an archivist in 1978. From 1979 through 2002, she worked at the Archivio centrale dello Stato, where she headed the "Archives of the Facist regime" unit. She then headed the State archives of Frosinone and in 2003 she joined the DGA as Head of Division.

- *Giulia Barrera* is an archivist who worked for ten years at the Archivio centrale dello Stato and for about fifteen years at the Directorate-General of Archives (DGA), holding different positions. Currently she works in the Servizio III (Studies and Research Division) of the DGA and is in charge of international relations.

14 Ministry of Culture of the Republic of Latvia - Latvijas Republikas Kultura Ministrija

- *Andra Abolina,* senior officer, works in the area of information system development, experience in standards

- *Janis Siders,* head of department, works in area of information systems technical support

- *Reinis Grigs,* head of department, works in area of electronic documents supervision and preserving, experience in standards

- *Haralds Krumins,* IT systems adminstrator, knowledge in databases and networking.

15 National Archives of Liechtenstein - Liechtensteinisches Landesarchiv

- *Paul Vogt*, director, is a graduate of the University of Zurich and has worked in the archives since 1981.

16 Office of the Chief Archivist of Lithuania - Lietuvos vyriausiojo archyvaro tarnyba

- *Virginija Cijunskiene,* Director of Lithuanian State Historical Archives

- *Dziuginta Stankeviciene,* Head of Division of Public Relations of Lithuanian Central State Archives

17 National Archives of Luxemburg - Archives Nationales de Luxembourg

- *Mrs. Josée Kirps,* Director (since 2003). Studied Literature and History and was in charge of arts and international cultural concerns at the Luxembourg Ministry of Culture from 1990 to 2003. She is a member of the Section historique de l'Institut grand-ducal, the Board of directors of the CVCE21, the Board of directors of IEIC22, the Board of directors of the Luxembourg cultural Radio 100,7 and of the National UNESCO-commission.

- *Mrs. Corinne Schroeder,* Curator, responsible for the contemporary and administrative sections at the National Archives. Graduated in History and is currently finishing her PhD concerning Luxembourg's after war foreign policy. Has been involved in the projects "Histoire interne de la Commission européenne (1957-1973)" and "Histoire interne de la Commission européenne (1973-1986)" among others. She is member of the ALBAD23.

- *Mrs. Nadine Zeien,* Curator. Graduated in History and holds a DEA degree in Medieval history. Works at the National Archive since 2003 for the section of medieval, modern and Ancien Regime documents. Her main tasks are writing finding aids, guiding researchers and working on exhibitions and publications in her area of expertise. Furthermore, she is a member of the "Commission héraldique de l'Etat", of CLUDEM24 and of ALBAD.

- *Mr. Philippe Nilles,* Curator in charge of modern history and iconographic documents at the National Archives. He graduated in History and has been working in various cultural institutions such as the Gaspar Museum in Arlon (Belgium) and the "Centre Virtuel de la Connaissance sur l'Europe", an interdisciplinary centre dedicated to the European integration process. He has also been working as an archivist for the Catholic Church of Luxembourg.

- *Mr. Gilles Regener,* Curator in charge of economic history at the National Archives, where he initially started working as an expert on Arbed records. He graduated in History and has been working as a teacher prior to joining the National Archives. He is a member of the committee of the Luxemburgish Librarians', Archivists' and Documentalist' Association (ALBAD), where he is representing the National Archives.

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[21] Centre virtuel des connaissances sur l'Europe
[22] Institut européen des itinéraires culturels
[23] Association Luxembourgeoise des Bibliothécaires, Archivistes et Documentalistes
[24] Centre luxembourgeois de documentation et d'études médiévales

- *Mr. Joel Thill,* Head of IT. Has been working as a Chief Information Officer in the financial sector in Luxembourg, as a senior manager in IT consulting with Ernst & Young and Andersen, and as an analyst and project manager at the Public Research Center Henri Tudor. He has graduated in Information Technology and in Applied Computer Science. He is a Certified Information Systems Auditor (CISA), ITIL Foundations certified and a member of the Project Management Institute.

18 National Archives of Malta - L-Arkivji Nazzjonali

- *Mr Charles J. Farrugia,* holds a Master in History and in Archives and Record management plus a Post Graduate diploma in Records management. He has been head of the NAM for twelve years and Malta's National Archivist since 2005, steered the reforms in the national archives sector and manages the NAM in its entirety. He has represented the NAM in the APEnet project, serves on the several European archives groups and lectures in Archives and Records Management.

- *Dr. Joseph Bezzina,* holds a PhD in History and a Diploma in Archivistics. He has been at the helm of the Gozo Section for the last 18 years. He participated in a number of EU funded projects, in particular in a Leonardo da Vinci mobility project which resulted in the publication 'Preserving Digital Archival Content' which he edited. Dr. Bezzina lectures on Methodology at the University of Malta and also published a number of works related to methodology and standardisation.

- *Mr. Etienne Ferrito*, trained in the social sciences and specialised in training. He worked for over five years in training and training management apart from other positions held in a variety of industries in administration and finance. He was employed in 2010 at the National Archives in the and is responsible for the HR / administration of the archives. He has vast experience in EU funded projects and is actively participating in the administration of the APEnet project.

19 National Archival Services of Norway – Arkivverket

- *Olav Hagen Sataslåtten* is assistant director and head of the Section for Digital Repository in the National Archives of Norway. Sataslåtten studied religion history and got a Bachelors degree at the University of Oslo. He worked previously as head of records management at The Norwegian Labour and Welfare Service.

- *NN,* project coordinator at The Repository Department at the National Archives of Norway. The person has not yet been decided.

- *Ole Gausdal* is director and head of the Repository Department at the National Archives of Norway. He has got a masters degree in history from the University of Oslo. He has previously worked as a records manager, but has since 2007 been at the National Archives.

20 Head Office of Polish State Archives - Naczelna Dyrekcja Archiwow Panstwowych

- *Barbara Berska,* historian and archivist, PhD. Holds the post of the Deputy Director of the State Archives since 2007 and is responsible for the coordination of activities within the fields of granting access to documents, organisation of the network of state archives, international cooperation etc. She represents the General Director at the meetings of several international archival organisations since 2007 and is responsible for the APEnet project coordinated by the NDAP.

- *Anna Krochmal,* historian and archivist, PhD. Works in the Head Office of Polish State Archives – since 2000 first in Department of Information (responsible for archival data bases created by state archives), since 2006 in Department of International Cooperation. Presently, main specialist in Department of Education and International Cooperation. Coordinator of several international archival projects. Participant and contact person in APEnet project.

- *Hubert Wajs,* historian and archivist, PhD. Has worked at the Central Archives of Historical Records in Warsaw since 1983 and became Head of the institution in 1998. Since 1993 he has participated in projects and working groups concerning automatisation, standards for archival

description and electronic records. He has translated ISAD(G) into Polish and introduced ISAD(G) and EAD as the standards for description and presentation of archival inventories.

- *Nikodem Bończa Tomaszewski,* historian, journalist, PhD. Was the director of the Archives of Audio-Visual Records and supervised its transformation into the National Digital Archives where he holds the post of the director. Advisor of the General Director of the State Archives by 5 years. He has also been plenipotentiary in the field of informatisation and digitalisation of the State Archives and a member of collegial bodies of a number of prestigious institutions.

- *Wojciech Woźniak,* politologist, archivist, academic teacher, PhD. Has worked as deputy director of the National Digital Archives since 2009. Member of Informatics and Archives Board who translated the Tag library of EAD into Polish and prepared its publication. Participant of the APEnet project. Since 2008 he has been involved in the project of building the Integrated Archival System "ZoSIA" to maintain all Polish archive collections and make them accessible online.

- *Rafał Magryś,* archivist, IT and open source specialist. Chief of the Project of building of Integrated Archival System (ZoSIA) and project of building portal http://szukajwarchiwach.pl[25]. Chairman of the Informatics and Archives Board. Has been technical expert in EURIDICE Project and in CALIMERA Project. In APEnet responsible for Polish participation on technical field: data migrations and conversion, standards (EAD, EAG, OAI-PMH).

21 Ministry of Culture - Directorate-General of the Archives – Ministéro da Cultura - Direcção-Geral de Arquivos

- *Francisco Barbedo*, is a senior archivist that represented DGARQ in the APEnet project. Currently deputy director of DGARQ

- *Lucília Runa*, is a senior archivist that participates in APEnet WP 4. She has a large experience in archival description and standards namely: ISAD(G), ISAAR (CPF) and EAD.

- *Luis Corujo*, is a senior archivist who has large experience in technological tools for access and communication. He worked intensively in Web 2.0.

22 Department of Archives - Ministry of Interior of the Slovak Republic – Odbor archívov - Ministerstvo vnútra Slovenskej republiky

- *Monika Péková* (state councilor), Department of Archives, Ministry of Interior, archivist, coordinating digitisation projects in Slovak Republic

- *Peter Vígľaš* (senior archivist), Archives of the Capital of the Slovak Republic Bratislava, archivist, participating in digitisation projects, digitisation of medieval charters

- *Robert Maretta* (archivist), Slovak National Archives, participating in digitisation, ENARC projects in Slovak Republic, digitisation of medieval charters, preparation of metadata for medieval charters

23 Ministry of Culture - Ministrstvo Za Kulturo

- *Daniela Juričič Čargo,* holds a Master in History and has been working in the Archives of the Republic of Slovenia (ARS) since 1990. Since 2008 she is Head of the Department responsible for keeping the main register of all archival holdings of the ARS and chief of an expert group for processing and describing the archival material. She leads the in-house scopeArchiv users group and is active in professional training/education within the field of international archival standards.

- *Alenka Hren*, graduated in Library Science and English and has been working at the ARS as a Librarian and translator since 2000. By contributing bibliographic records for the Archives' library

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[25] Biggest online collection of digitised archival materials in Poland containing more than 2.200.000 scans

collection, she is involved in the building of the Slovenian library information system[26]. She was also the editor of the Archives' webpage contents. She has experiences in online cooperative systems and web page content design.

- *Vanja Pfajfar,* graduated in History and has been working in the ARS' Department of Information, Documentation and Records Preservation since 2010. He has experiences in processing and describing archival material, providing information on the role and activities of archival institutions and archival holdings to our users and interested public in general as well as in educational activities with the purpose to familiarise the public with the scope of archival services.

- *Aleš Matijevič,* holds a Bachelor in Computer Science and has been a member of the Department for electronic archives and IT support since 2011. He has experiences in the fields of software engineering, system administration and project management.

- *Boris Domajnko,* holds a Master in Computer Science and has been a member of the Department for electronic archives and IT support in the Archive of the Republic of Slovenia since 2008. He has experiences in the areas of preservation of electronic records, OAIS, Moreq2, etc as well as in software engineering, project management, quality management. He has been a member of the APEnet project since 2009 and is the project leader of the e-Archive project.

24 Ministry of Education, Culture and Sports – Ministerio de Educación, Cultura y Deporte

- *Rogelio Blanco Hernández* (General Director of Books, Libraries and Archives): responsible for the Spanish State Archives and Libraries.

- *Severiano Hernández Vicente* (national archivist): responsible for the Spanish State Archives and its dissemination on the web, both in archives and libraries platforms. Project Coordinator of APEnet.

- *Luis R. Enseñat Calderón* (State senior archivist): head of the International Cooperation Service at the Spanish State Archives. Deputy Project Coordinator of APEnet.

- *Alfonso-Sanchez Mairena (State senior archivist*): head of the Spanish Archives Portal called PARES; available at http://pares.mcu.es/.

- *Maria José Villanueva Toledo (State senior archivist*): head of the "Centro de Información Documental de Archivos" (CIDA) and its archival information in EAD, EAC and EAG; available at http://en.www.mcu.es/archivos/MC/CIDA/index.html.

- *Juan José Ballesteros Arjona*. (State senior IT): resposible for the dissemination on the web of the data from the Ministry of Culture (archives, museums, libraries, among others) including Hispana and Europeana Local Spain.

- *Javier García Carvajo* (State senior IT): responsible for the technical implementation of EAD, EAC, and EAG in the Census-Guide and PARES Portal.

25 National Archives of Sweden – Riksarkivet

- *Dr. Maria Gussarsson Wijk*, has a PhD in History at Stockholm University 2001. Archivist at the Military Archives, Stockholm from 2006; from 2011 archival pedagogy and exhibition coordinator. Lecturer at Stockholm University and Södertörn University College, Stockholm, 2001-2006. Writer of two books and articles in European integration history, and has published several articles on Swedish military cartographic history.

- *Susanne Danelius* is international project coordinator at ICT Department at the National Archives, Sweden. Danelius studied History of Art and got a Bachelors degree in Archaeology. She worked previously at the Swedish Film Institute as a web designer. She has worked as the National

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[26] COBISS.SI Co-operative online bibliographic system and services

Archives coordinator for international training programmes and is currently the web master and designer for the APEnet project.

- *Sanja Halling* is international project coordinator at ICT Department at the National Archives, Sweden. Halling studied Curatorship and got a Masters degree in History of Art. She worked previously at museums and cultural organisations, and taught courses in fine arts and history of art. She has worked as the National Archives coordinator for international training programmes and has now the same position for the EU financed projects DC-NET and Linked Heritage.

- *Dr. Börje Justrell* is director and head of the ICT Department at the Swedish National Archives since 1989. He has been a member of international committees since 1990 and since 2003 worked in EU projects like Minerva, DC-NET, Linked Heritage, Europeana and PROTAGE. He is representing Sweden in the European Commissions expert groups on digitisation (MSEG), has taught archival science since the 1990s and has published on archival science and technical issues.

- *Martin Bjersby* is senior archivist and head of the Unit for Archival Information Systems (ICT department) at the Swedish National Archives. He has worked as an archivist since 1985 and been one of the key persons in building up a Swedish National Archival Database on the Internet. Bjersby is a national expert on issues related to the coordination of information in Swedish archives, libraries and museums. He has also been active in international projects like Europeana.

- *Birger Stensköld* is senior archivist. He has been one of the key persons in building up the Swedish National Archives archival information system (ARKIS) and its unit for audiovisual. He is also engaged in the Linked Heritage project.

- Gd. *Björn Jordell*, National archivist (policy involvement)

26 International Centre for Archival Research (ICARUS)

- *Thomas Aigner* is president of ICARUS and director of the St. Pölten Episcopal Archives. He holds a PhD in History and is a member of the Institute for Austrian Historical Research and the commission for codicology at the Austrian academy of sciences. He is the founder of the Monasterium-Plattform and head of several Austrian IT-projects and international EU-funded projects[27]. He has published on Austrian history, archival sciences and information technologies.

- *Karl Heinz* is the manager for foreign affairs and head of the Monasterium-project within ICARUS. He is responsible for cooperation and communication of partners in- and outside of ICARUS. He holds a PhD in History, is a member of the Institute for Austrian Historical Research and author of several historical books on central-European history. He has been the coordinator of the Monasterium-project since 2002 and leads it since 2010.

- *Georg Vogeler* is responsible for technical development within ICARUS and research assistant at the Centre for Information Modelling in the Humanities at the Karl-Franzens-Universität Graz. He studied Historical Auxiliary Sciences and holds a PhD in History. He is member of the Institut für Dokumentologie und Editorik[28], organised several scholarly conferences and held courses in and has published about the application of metadata-standards in university and professional training.

- *Tomislav Ćepulić* is an expert for theory and implementation of descriptive archival metadata standards. He took part in developing the Croatian archival information system ARHiNET[29], worked as an advisor for its implementation all over Croatia and also carried out the translation of several archives and records management related standards and specifications into Croatian. He studied history and Latin language and has rich educational experience as teaching assistant.

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[27] like www.matricula-online.eu, www.archivnet.at and theEU-Culture-project "European Network on Archival Cooperation (ENArC)" (2010-2015)
[28] http://www.i-d-e.de
[29] arhinet.arhiv.hr

27 Danish National Archives – Rigsarkivet Danmark

- *Asbjørn Hellum* is director general and head of the Danish State Archives. Hellum has an MA in History and Social Science from Aalborg University and has formerly been director of Vejle Municipal Archives. Hellum is also founder and the inaugural president of The Organization of Danish Archives (ODA).

- *Anders Sode-Pedersen* is senior archivist at the Danish National Archives, Unit of Research and Communication and head of the Section for System Development. Sode-Pedersen has an MA in History from the University of Copenhagen and has been a lecturer at the Faculty of Law at University of Copenhagen.

- *Poul Olsen* is senior adviser at The Danish State Archives. Olsen has an MA in history from the University of Copenhagen. He has done extensive research on Danish colonial history and is an expert in the history of the Danish Virgin Islands.

- *Jeppe Bjørn* is assistant director at The Danish State Archives and head of the Research and Communication Unit. Jeppe Bjørn has an MA in history and Religion from the University of Copenhagen and has formerly worked as director of Archives and New Media at the Danish Broadcasting Corporation.

- *Jesper Thomassen* is senior archivist at the Danish State Archives and head of the Regional Archives of Northern Jutland (Landsarkivet for Nørrejylland). Thomassen has a PhD in history from the University of Southern Denmark and he has been employed as a project manager at The University of Southern Denmark.

- *Karl Peder Pedersen* is senior archivist at The Danish State Archives, Unit of Research and Communication. Pedersen has a PhD in the history of law from the University of Copenhagen. He is an expert on Danish history of law and crime.

28 National Archives of Iceland - Þjóðskjalasafn Íslands

- *Hrefna Róbertsdóttir* is director of acquisition and preservation at the National Archives of Iceland. She participates in the projects through policy involvement. She has a Dr.phil. in history, and has previously worked at the National Museum of Iceland, amongst other things with registers and policy making within a national database for museums.

- *Unnur Karlsdóttir* is a project manager and an archivist in the acquisition and preservation department at the National Archives of Iceland. She has a Ph.D. in history, and has worked at the National Archives of Iceland for the last few years, amongst other things with registers and policy making within the information architecture sphere.

- *Brjánn Fransson* is a system administrator at the National Archives of Iceland. He is a development manager and responsible for projects related to the electronic long-time preservation, information architecture and IT-service development.

B.3.2.a. Chosen approach

The work in the project will be organised according to Prince II principles and guidelines, supervised by a yet to be established APEX office in The Hague.

It is broken down into work packages that have tasks, milestones, expected results and deliverables. Below you will find general overview of the work packages with their overall scope and objectives.

APEX Work packages:

WP1 – Project Management

- scope: organisational, responsible for:

- running the overall project management

- establishing the APEX office for coordination of day-to-day operations

WP2 – Europeana Interoperability

- scope: organisational and technical, responsible for:

- further specification/implementation of interoperability with Europeana by mapping archival standards (EAD, EAC-CPF, METS) to EDM (depending on Europeana's EDM implementation progress and in collaboration with WP3, WP4 and WP5) including cooparation with Europeana on new developments, f.i. displaying hierarchically structured content properly (taking into account Europeana's end users and Europeana's research hemisphere concept) or displaying cultural heritage objects represented by a set of images

- implementing rights strategy based on APEnet's Content Provider Agreement and Europeana's Data Exchange Agreement (depending on WP4's efforts to align them and in close cooperation with WP3 for the integration in the dashboard of the Archives Portal Europe)

- investigating the use of Linked Data in cooperation with WP6, Europeana as well as other possible partners (Archives Hub, Open Planets Foundation)

- all this leading to delivering as much (metadata information on) digital archival objects as possible to Europeana, amounts to be revealed in the course of the project, depending on WP5's first task and in close cooperation with WP3 for the integration in the dashboard of the Archives Portal Europe

- informing and educating archival institutions about Europeana and participating in Europeana via documents, materials, handbooks and possibly workshops etc. (off- and online, the latter in cooperation with WP7)

- and generally keeping track of Europeana developments by participating in relevant Europeana v2.0 WP

WP3 – Infrastructure Development & Hosting

- scope: technical, responsible for:

- maintaining the existing technical infrastructure (hardware/software and functionalities) resulting from the APEnet project (Grant Agreement ECP 2007 DILI 517011) at: www.archivesportaleurope.eu (the servers, the software required for continuing the development process, front-end, back-end, statistics)

- cooperating with WP6 (and other related work packages, such as WP5) to improve of the above infrastructure, particularly the portal's front-end/user interface (user profile, web 2.0 facilities, virtual exhibitions) and the portal's back-end/dashboard (enhance data uploading /aggregating)

- ensuring the security of the infrastructure in Archives Portal Europe

- cooperating with WP6 to guarantee the accessibility and usability of the Archives Portal Europe to the European citizens

- facilitating free access to the technical information (source code, technical wiki, etc.) via internet

- cooperating with WP5 to provide help to the content providers in order to manage the tools and interfaces by Archives Portal Europe in the dashboard

WP4 – Standards & Guidelines

- scope: scientific and technical, responsible for:

- working on further standardisation of archival standards to connect content / systems / formats, which includes further development of the APEX EAD along with the revision of EAD in general as well as the according creation of specific profiles of EAC-CPF, EAG and METS to be used within the Archives Portal Europe

- leading the EAG Working Group

- setting the framework for these activities by keeping contact to and by participating in other international standard working groups (SAA, ICA, etc.)

- advising archival institutions and organisations on metadata and standards for building national portals in preparation of expanding the APEX network and on setting up national APEX contact points

- deepening the knowledge on international, national and local levels by conducting workshops and providing information material for archival institutions (in cooperation with WP7)

- organising agreements on (meta)data exchange, rights management, etc. based on a research on current practices and a study on copyright frameworks in the different European countries (starting at a local level and in cooperation with WP2, WP3 and WP5 for possible implementation strategies)

- further development of use cases and organisation of user evaluation/participation (in close cooperation with WP6 and to be used by WP3 for according specifications on technical implementation)

WP5 – Tools & Support

- scope: technical, responsible for:

- gathering information on possible contributors / content / systems / formats per country, including studies on best practices regarding the administration of rights at the local level (to be used by WP4)

- developing tools (central/local) to connect content / systems / formats via standards, in collaboration with WP4 for the mapping, and WP3 for the integration in the Dashboard

- cooperating with WP3 to enable the actual connections from a local level to the central framework in collaboration with each content provider

WP6 – Usability & Web 2.0

- scope: scientific and organisational, responsible for:

- developing and maintaining an overview on the international and cross-sectoral best-practice of innovative access methods and tools

- developing use cases and business requirements to be implemented in the APEX infrastructure by WP3 (in cooperation with WP4)

- organising acceptance testing and user evaluation for software developed in WP3 and WP5 (in cooperation with WP4)

- disseminating research and best-practice about innovative access methods and tools into European archival institutions and Europeana (in cooperation with WP2 and WP7)

WP7 - Dissemination & Training

- scope: organisational, responsible for:

- promoting the Archives Portal Europe to encourage institutions to join the network

- editing and publishing information about the project and about the portal in relevant online/offline media, on the portal (editorial parts of the Archives Portal Europe), and in conferences, seminars etc

- educating institutions to use the network's framework / tools / standards (conferences/workshops)

- contacting suppliers of archival data management systems / software to get them involved

- encouraging and enabling knowledge building and exchange among partner organisations and especially towards a wide variety of institutions outside the consortium including our main user group societies

- developing branding and lay-out design for the project website as well as for the Archives Portal Europe itself

WP8 - Sustainability

- scope: organisational, responsible for:

- handling the major task to research and design a transformation of the APEX project office in The Hague into an Archives Portal Europe Foundation at the end of the project

- cooperating with other European sustained project organisations to learn from their experiences. WP8 will take all the necessary steps to build a new organisation to sustain the Archives Portal Europe and its aggregator role towards Europeana, and will prepare its legal basis, organisational structure and business plan

- preparing for the practical implementation of an Archives Portal Europe Foundation, such organising housing, facilities, staff, etc.

B.3.2.b. Work plan

The different work packages of the APEX project as briefly summarised with their specific goals in chapter B3.2a above are directly connected with each other in their constituent tasks. This is shown in:

- the deliverables of one work package forming the basis for the work carried out by others,

- the tasks of two or more work packages lining up to jointly meet one overall project objective,

- and even two or more work packages joining forces on certain tasks, approaching them from different angles, may it be technical, scientific/professional or organisational ones.

The GANTT-Chart below illustrates these interrelations in terms of project planning and timing.

Legend:
- = Project management (internal) — *blue*
- = Project communication (external) — *green*
- = Technical specifications and requirements — *grey*
- = Tools — *yellow*
- = Testing, evaluation and general reporting — *orange*

Task	Active months (category)
APEX Project	M1–M36 (project management)
APEX Office established	M6 (project management)
Executive Steering Committee meetings	M1, M8, M18, M24 (project management)
Meetings with the European Commission	M11, M23 (project management)
Final reporting phase	M35 (project management)
Foundation final	M36
T6.1	M1–M8 (testing/reporting)
1st development	M2–M8 (technical specs)
Release APE 1.1	M8 (technical specs)
D1.1	M3 (project management)
D3.1	M3 (technical specs)
D7.1	M3 (communication)
M7.1	M3 (communication)
D4.1	M6 (testing/reporting)
D5.1	M6 (technical specs)
D7.2	M6 (communication)
D2.1	M8 (tools)
D5.2	M8 (tools)
D5.3	M8 (testing/reporting)
D7.3	M8 (communication)
T6.3 (1st iteration)	M9–M10 (testing/reporting)
D6.1	M9 (testing/reporting)
D6.2	M10 (testing/reporting)
D4.2/D6.3	M10 (testing/reporting)
D5.4	M10 (testing/reporting)
2nd development	M11–M20 (technical specs)
Release APE 1.2	M20 (technical specs)
D4.3/D6.4	M11 (testing/reporting)
D3.2	M12 (technical specs)
D1.2	M12 (project management)
D1.3	M12 (project management)
D4.4	M14 (testing/reporting)
D5.1	M15 (technical specs)
D2.2	M17 (testing/reporting)
D2.1	M19 (tools)
D5.2	M19 (tools)
D5.3	M19 (testing/reporting)
D7.3	M19 (communication)
T6.1 (update)	M19–M23 (testing/reporting)
T6.3 (2nd iteration)	M20–M23 (testing/reporting)
D6.5	M20 (testing/reporting)
D1.4	M24 (project management)
D1.5	M24 (project management)
D6.6	M22 (testing/reporting)
D4.5/D6.7	M22 (testing/reporting)
D4.6/D6.8	M25 (testing/reporting)
3rd development	M25–M34 (technical specs)
Release APE 2.0	M34 (technical specs)
D3.3	M25 (technical specs)
D4.7	M26 (testing/reporting)
D5.1	M27 (technical specs)
D8.1	M28 (project management)
D2.3	M30 (tools)
D2.4	M30 (tools)
D5.1	M32 (technical specs)
D8.2	M33 (project management)
D2.5	M34 (tools)
D5.2	M34 (tools)
D5.3	M34 (testing/reporting)
D7.3	M34 (communication)
T6.3 (3rd iteration)	M35 (testing/reporting)
D6.9	M35 (testing/reporting)
D1.6	M36 (project management)
D3.4	M36 (testing/reporting)
D4.8/D6.10	M36 (testing/reporting)
D7.4	M36 (testing/reporting)
D8.3	M36 (project management)

Project management and communication / General project achievements

Legend:
- ▉ = Project management (internal) — light blue
- ▉ = Project communication (external) — green
- ▉ = Technical specifications and requirements — grey
- ▉ = Tools — yellow
- ▉ = Testing, evaluation and general reporting — orange

Task	Highlighted month(s) / colour
APEX Project	M1–M36
APEX Office established	M6 (blue)
Executive Steering Committee meetings	M1, M9, M18, M25, M36 (blue)
Meetings with the	M12, M24 (blue)
Final reporting phase	M35–M36 (blue)
Foundation final	M36 (blue)
Release APE 1.1	M8 (grey)
D1.1	M3 (blue)
D7.1	M3 (green)
M7.1	M3 (green)
D4.1	M6 (orange)
D7.2	M6 (green)
D7.3	M8 (green)
D6.1	M9 (orange)
D5.4	M10 (orange)
Release APE 1.2	M20 (grey)
D1.2	M12 (blue)
D1.3	M12 (blue)
D4.4	M15 (orange)
D2.2	M18 (orange)
D7.3	M20 (green)
D1.4	M24 (blue)
D1.5	M23 (blue)
D6.6	M26 (orange)
Release APE 2.0	M34 (grey)
D3.3	M25 (grey)
D4.7	M25 (orange)
D8.1	M29 (blue)
D8.2	M32 (blue)
D2.5	M34 (yellow)
D5.2	M34 (yellow)
D5.3	M34 (orange)
D7.3	M34 (green)
D1.6	M36 (blue)
D3.4	M36 (orange)
D4.8/D6.10	M36 (orange)
D7.4	M36 (orange)
D8.3	M36 (blue)

1st development cycle

(light blue)	= Project management (internal)	
(green)	= Project communication (external)	
(grey)	= Technical specifications and requirements	
(yellow)	= Tools	
(orange)	= Testing, evaluation and general reporting	

	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
APEX Project	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
APEX Office established						▣				
Executive Steering Committee meetings	▣								▣	
Meetings with the European Commission										
T6.1	▣	▣	▣	▣	▣	▣	▣	▣		
1st development iteration	▣	▣	▣	▣	▣	▣	▣	▣		
Release APE 1.1								▣		
D1.1			▣							
D3.1			▣							
D7.1			▣							
M7.1			▣							
D4.1						▣				
D5.1						▣				
D7.2						▣				
D2.1								▣		
D5.2								▣		
D5.3								▣		
D7.3								▣		
T6.3 (1st iteration)									▣	▣
D6.1									▣	
D6.2									▣	
D4.2/D6.3										▣
D5.4										▣

2nd development cycle

Legend:
- 🟦 = Project management (internal)
- 🟩 = Project communication (external)
- ⬜ (gray) = Technical specifications and requirements
- 🟨 = Tools
- 🟧 = Testing, evaluation and general reporting

	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24	M25
APEX Project	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦	🟦
Executive Steering Committee meetings	🟦									🟦							🟦
Meetings with the European Commission				🟦												🟦	
T6.3 (1st iteration)	🟧	🟧															
D6.1	🟧																
D6.2	🟧																
D4.2/D6.3		🟧															
D5.4		🟧															
2nd development iteration			⬜	⬜	⬜	⬜	⬜	⬜	⬜	⬜	⬜	⬜					
Release APE 1.2												⬜					
D4.3/D6.4			🟧														
D3.2				⬜													
D1.2				🟦													
D1.3				🟦													
D4.4							🟧										
D5.1								⬜									
D2.2										🟧							
D2.1												🟨					
D5.2												🟨					
D5.3												🟧					
D7.3												🟩					
T6.1											🟧	🟧	🟧	🟧	🟧	🟧	🟧
T6.3 (2nd iteration)													🟧	🟧	🟧	🟧	🟧
D6.5													🟧				
D1.4																🟦	
D1.5																🟦	
D6.6																🟧	
D4.5/D6.7																🟧	
D4.6/D6.8																	🟧

3rd development cycle

(blue)	=	Project management (internal)
(green)	=	Project communication (external)
(gray)	=	Technical specifications and requirements
(yellow)	=	Tools
(orange)	=	Testing, evaluation and general reporting

	M21	M22	M23	M24	M25	M26	M27	M28	M29	M30	M31	M32	M33	M34	M35	M36
APEX Project	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue	blue
Executive Steering Committee meetings					blue											blue
Meetings with the European Commission				blue												blue
Final reporting phase															blue	blue
Foundation final delivery																blue
T6.1 (update)	orange	orange	orange	orange	orange											
T6.3 (2nd iteration)	orange	orange	orange	orange	orange											
D6.5	orange															
D1.4				blue												
D1.5				blue												
D6.6					orange											
D4.5/D6.7					orange											
D4.6/D6.8						orange										
3rd development iteration						gray	gray	gray	gray	gray	gray	gray	gray	gray		
Release APE 2.0														gray		
D3.3						gray										
D4.7						orange										
D5.1								gray								
D8.1									blue							
D2.3										yellow						
D2.4										yellow						
D5.1												gray				
D8.2												blue				
D2.5														yellow		
D5.2														yellow		
D5.3														orange		
D7.3														green		
T6.3 (3rd iteration)															orange	orange
D6.9															orange	
D1.6																blue
D3.4																orange
D4.8/D6.10																orange
D7.4																orange
D8.3																blue

Note: update of D5.1 in M32 if necessary for the final release of the tool due to additional input from partners

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APEX will take all key indicators of the APEnet project to the next higher level whilst also taking measures to guarantee the sustainability of this effort. These key indicators can be summarised as follows: APEX will work to provide access to

- as much archival material

- of as many institutions holding archival content in EU Member States as possible,

- for as many users as possible,

- in the easiest possible way and

- to aggregate as much digitised content as possible to Europeana.

Indicator No.	Objective/ expected result	Indicator name	Expected Progress[30]		
			Year 1	Year 2	Year 3
1		European countries connected to the Archives Portal Europe aggregation network	18	22	25
2		Archival institutions connected to the Archives Portal Europe aggregation network	300	750	1.800
3		Descriptions of archival fonds and collections made available via the Archives Portal Europe	100.000	325.000	750.000
4		Descriptions of archival units made available via the Archives Portal Europe	35 million	110 million	250 million
5		Digital archival objects made available via the Archives Portal Europe	50 million	120 million	290 million
6		Digital archival objects made available in Europeana via the Archives Portal Europe[31]	15 million	25 million	100 million
7		Number of requests to the Archives Portal Europe	200.000	300.000	400.000
8		Number of registered users in the Archives Portal Europe	0	0	2.000 to 3.000

The following table identifies significant risks and states their possible impact on the APEX project. Furthermore, the probability of the risks' occurrence is indicated and remedial actions are described. An additional note below the table provides some more information on risk assessment with regard to the framework of the APEX project as a Best Practice Network.

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[30] Note that these indicators are based on the quick survey conducted via an online questionnaire among the participants of the APEX project. It is envisaged to perform a more thorough investigation (see D5.4) which will provide more precise detailed information during the first development cycle of the project, then there will be a more solid basis to provide exact indicators.
[31] Note that this indicator is additionally subject to the IPR issues/national laws etc and cannot be precised until the Europeana DEA has been accepted by the different partners and countries. It is part of the APEX project to evaluate this (WP5) and to take the according actions (WP4 with regard to standards definition, WP2 with regard to technical implementation).

As one of the most important quality assurance activities a risk analysis with necessary actions will be done during the three first months of the project. This will include all leading executives and representatives from all partners. Risks will be identified, quantified, and analysed, resulting in risk mitigation actions, including contingency plans. The Project Board (PB) will monitor and address the highest-rated risks, as part of its periodic meetings and will maintain the project's Risk Register.

The Description of Work (DoW) in this project proposal may be updated when there are necessary changes due to external or internal circumstances. Any changes will typically be proposed to the Commission when sending Annual Reports. The Executive Steering Committee and the Commission have to approve any new DoW.

An agreed risk containment plan for each high-priority risk will typically be assigned to a work package leader, or if it is affecting multiple work packages, the Project Manager.

Description of possible risk	Impact	Probability of occurrence (low, medium, high)	Remedial Actions
Communication difficulties between participants	Delay of Deliverables	High	Use web tools to share information. TRAC to be a central place for requirements and progress monitoring (WP1, WP3)
Good business model not found in the project lifetime	Maintain the sustainable service after the project	High	Work with other EU projects to learn from each other (WP8) Get professional advice from the commercial sector (WP7) Formulate a foundation as a legal body (WP8)
Obsolete technology loses audience	Users always seek something new to try	Medium	Create a task in WP3 and WP6 for research Or sub-contract with innovative companies and/or research universities to develop a plug-in
24/7 service	Service stops	High	Make a proper legal contract with maintenance agencies (WP1) Choose trusted agencies and equipments (WP1, WP3)
Scalability of the Portal	Huge amount of Internet traffic Huge amount of contents	Low	Formulate the server, network, and storage strategies according to the figures and deploy the most suitable machines (WP3) 24/7 maintenance and support (WP3)
Security	Hackers, attackers to damage the Portal service Loss of private user information Loss of project information	Medium	Consult the security expert and make security plans (WP3)

Description of possible risk	Impact	Probability of occurrence (low, medium, high)	Remedial Actions
Personnel	Personnel leave

Find the suitable personnel to run the project | Medium | Start recruitment early and keep seeking (WP1)
Member training and documentation (WP1) |
Lack of content	Expected amount of content is not achieved	High	WP1 have a regular contact with national community centres
Unbalanced contribution of content	Content is not aggregated evenly from various countries	Medium	Prioritise aggregation from countries with less contribution (WP5)
Lack of interoperability with Europeana	Not fully compliant with ESE/EDM	Low	Communicate with Europeana (WP2)
Copyright clearance	Content aggregation will be limited	Medium	WP2 and 4 create strategies for copyright
Lack of interoperability between content providers and APEX	Content aggregation will take long time to achieve	Medium	Content, technology and standards research by WP4 and 5 Prioritise aggregation (WP5)
Data loss	Loss of content	Low	Backup data regularly and use several methods (WP3)
Will be further defined in first quarter of the project, see explanatory text below			

Note on risk assessment within APEX:

The Description of Work (DoW) in this project proposal may be updated when there are necessary changes due to external or internal circumstances. Any changes will typically be proposed to the Commission when sending Annual Reports. The Executive Steering Committee and the Commission approve any new DoW.

As one of the most important quality assurance activities a risk analysis with necessary actions will be done during the three first months of the project. This will include all leading executives and representatives from all partners. Risks will be identified, quantified, and analysed, resulting in risk mitigation actions, including contingency plans. The Project Board will monitor and address the highest-rated risks, as part of its periodic meetings.

An agreed risk containment plan for each high-priority risk will typically be assigned to a work package leader, or if it is affecting multiple work packages, the Project Manager.

Note that risk management is a specific task of work package 1 (T1.4).

B.3.3. Project management

The APEX project structure will combine individual roles for coordinating and overall project management tasks as well as governing bodies for organising the day-to-day work in the work packages, for reporting and for preparing and taking the decisions needed to achieve the project's objectives. These roles and their accompanying responsibilities and wanted interactions are described

in the parts A and B of this chapter, whereas part C will briefly explain the main principles for the APEX consortium agreement. Part D contains some thoughts on in-project communication and describes the methods used for this within the current APEnet project, which can be inherited.

A. Individual roles

Project Coordinator (PC)

The Project Coordinator (PC) is the executive officer of the project. He/she is responsible for the overall coordination of the project and is the contact person for the European Commission. The PC is appointed by the country that leads the consortium.

Project Manager (PM)

The Project Manager (PM) has a controller/administrator role. As WPL for WP1 he/she assists the PC in the overall coordination of the project. The PM takes care of the project planning and monitoring, progress reports, milestone reports, cost statements, audit certificates, budgetary overviews and reviews of the organisation. Each partner will appoint a contact person for the PM.

Technical Coordinator (TC)

The Technical Coordinator (TC) is nominated by the Project Board (PB) and appointed by the Executive Steering Committee (ESC). He/she is responsible for monitoring, validation of the project's work, quality control and providing assistance and cross-coordination for the Work Package Leaders (WPL). Key functions for TC are the overall monitoring and management of the project's technical work, ensuring the technical consistency and achievement of technical objectives, assistance and cross-coordination for the WPL and technical progress reports and proposals to the PB.

Development Coordinator (DC)

The Development Coordinator (DC) is nominated by the Project Board (PB) and appointed by the Executive Steering Committee (ESC). He/she works in close cooperation with the Technical Coordinator (TC), but takes a broader "outsider's overview" than the TC. The main responsibility of the DC is to monitor the APEX software development process in WP2, WP3, WP4, WP5 and WP6. Key functions for DC are:

- approving software development related deliverables and documentation (methodologies for software analysis, development, testing and evaluation; business and technical requirements; prototypes; testing and evaluation reports) to ensure their quality and coherence with best-practice approaches;

- monitoring development efforts by participating in regular development meetings. This will allow to include an independent development expert into the development process and therefore have an unbiased addition to daily development decisions;

- (if necessary) initiating an auditing of the software development process and/or partners. That will be the authoritative mandate of the DC which allows for timely action if misconduct in development practices is suspected.

While employed within WP6 by one of the project partners the DC remains independent of both the WP6 leader as well as any single project partners or WPLs by reporting directly to the PB. DC has also the obligation to provide regular development reports to the TC and PB.

Scientific Coordinator (SC)

The Scientific Coordinator (SC) is nominated by the PB and appointed by the ESC (see below). He/she is responsible for assistance and cross-coordination for all members in relationship with the

standards. Key functions for the SC are the correct implementation of the standards decided by WP4 in WP2 and WP3 and the relationships with international standards bodies.

B. Governing bodies

Work packages (WP) and Work package leaders (WPL)

The project work is done in work packages (WP) holding a group of staff from various institutions, which is coordinated by a WP leader (WPL).

The WPL are appointed by the institutions who have applied for the WP leadership effort, except for the Project Manager who is the WP1 leader automatically. The WPL provide monthly reports for the PB detailing the evolution of the work and the achieved results, and any problems or risks identified. The PB, SC and TC handle coordination between work packages. The WPL are responsible for the timely completion of deliverables and man-hours/person-months used. They are also responsible for handling quality control of the deliverables. Details of the planning and progress within the WP will be passed on to the PB for consideration and support. The WPL shall assign work groups for different tasks, plan and control activities within their work packages, prepare deliverables, collect contribution from partners participating within the work package, check results of different partners working on their tasks, identifying any possible problem, control costs and budget in the scope of the work package.

The work packages will have internal telephone/online conference calls every week and will meet face to face on a regular basis, chaired by the WPL.

Project Board (PB)

Day-to-day management of the project is the responsibility of the Project Board (PB). It consists of all 8 WPL and the TC & SC and is chaired by the Project Coordinator.

The PB is responsible for the management, work and directions of the whole project, the work packages progress, and supervises the technical and scientific work with responsibility for decisions concerning the overall project management.

The PB tasks are: (A) internal review of the project results with regard to the deliverables and milestones, analysis of the commission reviewers' comments at the operative level and initiating necessary actions, (B) monitoring technical progress, (C) ensuring coherence of the overall project objectives, arranging review meetings, identifying dependencies between work packages, agreeing on technical issues concerning two or more partners, assigning cross-work package monitoring tasks to work package leaders, assigning tasks for review meeting preparation. The PB proposes to the ESC any necessary changes in WPL assignments and budget reallocations. The PB will when needed establish taskforces for project coordination, technical and scientific coordination, and coordination concerning the consortium agreement, IPR, conflict resolution, and standardisation issues.

The PB will have telephone/online conference calls every month and will meet face to face on a regular basis.

Executive Steering Committee (ESC)

The steering group for the project activities is the Executive Steering Committee (ESC) and is the highest authority of the project. All institutions in the consortium are represented by one delegate, usually the director of the institution or the head of department involved have a mandate for decisions. Institutions that also lead work packages are to delegate to the ESC a different person than their WPL.

The ESC is the steering group for the whole of the project. It will be chaired by the PC, assisted by the PM and has a more formal character as the body that signs off general reports and major changes in all the activities brought forward by the PB. These include monitoring and harmonising the activities,

progress of the project activities and the content aggregation, deciding on (re)allocation of resources or redefinition of work packages, deciding on changes in partner participation. It will review the plans for the remaining phases and will resolve conflicts based on the principles agreed in the consortium agreement, for example IPR issues within the project. Each member institution has one vote and majority resolves conflicts.

The ESC will have telephone/online conference calls every three months (or incident-driven) and will meet face to face at least every six months.

C. Consortium

The APEX Consortium has defined the following main principles for the Consortium agreement:

Decision-making

The ESC is responsible for the overall direction of the project and will decide on questions that will have a major impact on the project. It approves the main project deliverables and approves the decisions taken by the PB.

The PB will make all decisions needed to carry out the project work as approved by the ESC.

Payment

The Coordinator will transfer funding from the Commission according to the rules in the Contract with the Commission.

APEX makes a distinction between members that provide content only and members that also participate in the work packages. The first do not receive funding but can claim travel costs for meetings the Project Board invites them to – a similar arrangement as used by Europeana. Another incentive is full and dedicated support from the work packages.

The project part is a best practise network with 80/20 funding. Participants employ or hire staff to do the work they indicated to do in the project. They will make other costs that can be eligible for funding. Of these costs (proven by monthly time-sheets, quarterly reports and yearly audit certificates) the EC will reimburse 80%. In practice this is arranged in the project plan, that receives from the EC a grant with payments (an advance and then payments after a yearly review) which is paid to the coordinating partner who will arrange for the division of that money towards all participants, based on their monthly timesheets, quarterly reports and yearly audits.

Joint Ownership

If, in the course of carrying out work in the project, a joint invention, design or work is made (and more than one partner is contributor to it), and if the features of such joint invention design or work are such that it is not possible to separate them for the purpose of applying for, obtaining and/or maintaining the relevant patent protection or any other intellectual property right, the partners concerned agree that they may apply jointly to obtain and/or maintain the relevant right.

The partners concerned shall seek to agree between them arrangements which apply for obtaining and/or maintaining such right on a case-by-case basis. Unless otherwise agreed during the period any such right is in force, the partners concerned shall be entitled to use and to license such right without any financial compensation to or the consent of the other partners concerned.

D. In-project communication

Since the project participants are located in different countries, in-project communication can be quite tricky for this pan-European project. The APEnet project has developed a complex yet efficient communication environment which enables the project members to share information, discuss

technical issues, and monitor the progress of the project. In particular it has an excellent software development workflow using TRAC, an open source bug tracking system[32].

It is, however, obvious that the APEX project will require an even more complex system because it will substantially expand its network and the in-project communication is one of the most important factors of the success of such a big project. As a follow-up project, APEX can re-use the existing tools and enjoy the best practice expertise of the APEnet project communication. Due to the swift knowledge transfer, it is planned at the early phase of the project to install a project management system where people can store documents and files, exchange information and ideas, discuss and decide various issues, and share the project calendar.

In terms of software development communication, APEX can also inherit the TRAC system and take it to the next level in order to meet the needs of the large-scale development environment. What is needed is the integration of various tools such as TRAC, dotProject[33] and the project website Joomla! Content Management System (CMS)[34], to enable the software development to become a significant part of the entire project management eco-system.

Taking advantage of the APEnet project expertise and recycling the APEnet project tools will enable the new APEX project management team to make a quick and strong start.

B.3.4. Security, privacy, inclusiveness, interoperability; standards and open-source

The paragraphs below describe in short the APEX approach towards interoperability (especially between the Archives Portal Europe and Europeana), standards, security and open source software, mainly based on the experience and knowledge built in the current APEnet project.

Interoperability between the Archives Portal Europe and Europeana

The main objective of WP2 of APEX is to establish, extend and sustain interoperability between the Archives Portal Europe and Europeana on a strategic level and on a technical level.

The Archives Portal Europe is the aggregator for the archives domain for Europeana, the European cross-domain cultural heritage portal. The APEX project works to enhance the ability of the Archives Portal Europe to deliver its content to Europeana. That interoperability between the Archives Portal Europe and Europeana is complex because of two main differences between the two portals:

1. Europeana focuses on digital objects only and puts these digital objects and their descriptive information in the centre of their display, while the Archives Portal Europe is based on presenting the archival institution's finding aids. This has two aspects to it: the Archives Portal Europe will also display information on archival material that is not yet digitised and it will always show digital objects that are available in their full context.

2. The Archives Portal Europe uses the archival standards for publishing information online, among which Encoded Archival Description (EAD) is the most important one, while Europeana currently uses a basic data model derived from Dublin Core (DC), called Europeana Semantic Elements (ESE).

Within their next project phase, Europeana will step by step move from ESE to the Europeana Data Model (EDM), which is promising to be capable of dealing better with the different approaches followed by the Archives Portal Europe on the one hand and Europeana on the other, but still needs to prove itself in practice. For the time being, the challenge for technical interoperability between Archives Portal Europe and Europeana is to extract information about digital objects from the EAD finding aids and to deliver this information together with the links to those objects to Europeana, but in

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[32] See: http://trac.edgewall.org/
[33] See: http://www.dotproject.net/
[34] See: http://www.joomla.org/

the ESE format. So, when delivering content from the Archives Portal Europe to Europeana the EAD information on digital archival objects (structured bottom-up) has to be flattened into ESE (structured top-down) without losing too much contextual information in the process.

The current APEnet project has developed a conversion tool which automatically transforms information on digital objects of APEnet EAD finding aids into ESE records (EAD2ESE v1.2), incorporating as much context information from the EAD hierarchy on these digital objects as possible. This tool has been used to contribute digital archival objects and their metadata from APEnet partners to the first Europeana production release, the Rhine release.

APEX will take this work further. Since the Europeana team is – as stated above – already working on a new and more elaborate data model for the next production releases, the EDM, which in principle could deal with hierarchical structures, APEX will redevelop the APEnetEAD2ESE mapping tool to make it compatible with EDM and to accommodate the rich hierarchical structure of EAD finding aids towards EDM, thus improving the way in which digital archival object information will be displayed in Europeana.

Interoperability with Europeana is not static. The Europeana team is still improving the ESE (f.i. in May 2011 ESE v3.4 was published) and at the same time working on the first implementation of the EDM in the next production release, Danube, which is due for June 2011. Although EDM will be backwards compatible with ESE, the advantages of EDM will by far outrank those of ESE, especially for the archives domain. Therefore it is important that APEX starts on the EAD to EDM mapping as soon as possible. This prospect of a future major change between Europeana data models on the one hand (EDM replacing ESE) and changes within the future data model on the other hand (the EDM development and forthcoming decisions on when and what part of it to implement in future Europeana releases) - makes it a dynamic process.

Also within the Archives Portal Europe itself APEX will further the work on good conditions for interoperability feasibility. The project will continue the standardisation of APEnet (APEX) EAD and stress the importance of data normalisation in an early stage of data ingestion in the Archives Portal Europe.

Other interoperability issues including ingestion workflow and digital object presentation will also be addressed. APEX will also work to establish a Foundation to turn content delivery and the necessary tooling into a sustained effort.

The total, integrated APEX package will guarantee interoperability with Europeana and other systems directly from the start of the project onto a sustained future.

International archival standards

Being a best practice network the APEX project does not – like the APEnet project – aim at establishing or identifying new standards, but it will continue on implementing a common framework across Europe that uses existing global archival standards targeted for a European context. By this, the acceptance of trans-national standards will be supported and promoted as well as their use will be encouraged in order to secure interoperability with the various national and institutional archives portals.

Participation in the Archives Portal Europe will be open to all European archival repositories that can contribute descriptions of their holdings that are structured in accordance with the appropriate international archival standards (either in EAD, EAC-CPF, EAG and METS format or in a format that can be converted into EAD, EAC-CPF, EAG and METS, preferably by themselves with the tools delivered by the project).

Security

Security is not a product but an integral process, also it is not bought but rather is managed. Security can be expensive and it is implemented day by day. As resources will be limited it is important to establish an appropriate threshold of security in the project's context. Concepts like the "proportionality principle" will be at the bias of defining that desired and feasible level of security.

The systems and technologies must maintain the integrity of the data, contribute to the project goals and use the resources efficiently. The level of security that APEX will have to realise for the Archives Portal Europe and for the tooling will therefore have to strike a balance between risks, costs, possibility for audits as well as impact on productivity, quality and derived operability. It shall be evaluated in a continuous process the exposures, to the risk referred to the government, operations and information system of the organisation, with relationship to the reliability and integrity of the information, the effectiveness and operations efficiency, the protection of assets and the compliance of laws, regulations and contracts.

Aggregating (more) content (in a sustainable way) is the primary objective of APEX. Currently the registration, ingest and upload process from the content provider to the portal has already been identified as a risk that needs to be addressed. Special attention will be paid along two lines: to both the quality of the content at ingest and to the upload and ingest process on a technical level. The responsibility for the reliability of the aggregated content lies with the content providers but the role of an ingest manager / service could help to evaluate and authorise the ingest of the content into the system. At the technical level security would be reinforced through the use of digital certificates.

Open source

All software developed in APEX for the Archives Portal Europe will be developed under a project funded by the European Commission. It is submitted to a European Union Public License[35].

B.3.5. Resources to be committed

The resources overview below is complementary to the summary of staff effort (see WT6 Summary effort table) with regard to the personnel costs, which are identified and substantiated as one of the major cost items. Furthermore it describes how the totality of the necessary resources will be mobilised, including any resources that complement the EC contribution.

The overview consists of two parts: part A lists the indicative costs specification per participant, based on person month efforts and hourly wages rates as given by the participants themselves (plus costs specified for subcontracting, travels or other specific costs) and part B provides an overview of the total indicative costs per participant (the totals of part A) plus the consequences in funding according to the Best Practice Network project regulations (80/20).

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[35] You can find the general terms of this license here: http://www.osor.eu/eupl/european-union-public-licence-eupl-v1.1

Part A – Indicative costs specification per participant[36]

Partner no.:	Partner country:	Partner acronym:	Personnel costs 3 year total:	Subcontracting costs:	Total of other costs: (AT + AU + AV)	Travel costs:	Other specific costs:	Mandatory Audit costs:
1	**Netherlands**	**NANETH**	1.149.330	-	33.000	25.000	2.000	6.000
2	Austria	OSta	-	-	7.000	5.000	2.000	
3	Belgium	ARA	91.350	-	12.000	10.000	2.000	
4	Bulgaria	ASA	21.000	-	12.000	10.000	2.000	
5	Croatia	CSA	218.400	-	12.000	10.000	2.000	
6	**Estonia**	**NAE**	244.331	-	27.000	25.000	2.000	
7	Finland	KA	10.857	-	12.000	10.000	2.000	
8	**France**	**SIAF**	463.960	-	30.000	25.000	2.000	3.000
9	**Germany**	**BA**	465.948	65.000	30.000	25.000	2.000	3.000
10	Greece	GSA	93.310	-	12.000	10.000	2.000	
11	Hungary	NAH	210.280	-	12.000	10.000	2.000	
12	Ireland	NAI	50.400	-	12.000	10.000	2.000	
13	Italy	DGA	-	-	7.000	5.000	2.000	
14	Latvia	LRKM	15.122	-	12.000	10.000	2.000	
15	Liechtenstein	LA	-	-	7.000	5.000	2.000	
16	Lithuania	LVAT	-	-	7.000	5.000	2.000	
17	Luxemburg	ANLux	-	-	7.000	5.000	2.000	
18	Malta	NAM	74.604	-	12.000	10.000	2.000	
19	Norway	NRA	31.500	-	12.000	10.000	2.000	
20	Poland	NDAP	54.250	-	12.000	10.000	2.000	
21	Portugal	DGARQ	48.695	-	12.000	10.000	2.000	
22	Slovakia	OAMVSR	12.180	-	12.000	10.000	2.000	
23	Slovenia	MK	24.640	-	12.000	10.000	2.000	
24	**Spain**	**MECD**	766.960	-	331.000	25.000	300.000	6.000
25	**Sweden**	**RA**	394.240	70.000	30.000	25.000	2.000	3.000
26	ICARUS	ICARUS	276.080	-	12.000	10.000	2.000	
27	Denmark	RAD	-	-	7.000	5.000	2.000	
28	Iceland	NAIS	-	-	7.000	5.000	2.000	
A1	Switzerland	SFA						
			4.717.437	**135.000**	**710.000**	**335.000**	**354.000**	**21.000**

☐ = *content provider only*

Note that the Project Coordinator will – as being responsible for proper financial management as well as efficient use of the project's budget – closely monitor the spending of the travel costs per partner in order be able to initiate timely redistribution of the above mentioned total in cooperation with the Project Board when necessary (cf. T1.9).

Subcontracting costs as mentioned in the table above for the participants 9 (Germany) and 25 (Sweden) have been specified with regard to achieving the following tasks:

- Germany: Collaboration with Europeana (T2.3), Legal expertise on copyright questions (T4.3), User evaluation and usability tests (T4.4 and T6.3)

  There will be a concrete collaboration with Europeana on the technical implementation of the outcomes of the APEX project's results in experimenting with ways to display hierarchically structured data as well as cultural heritag objects related to a set of digitial images within the Europeana portal. The planning and evaluation will be done jointly with Europeana, while the experiments will happen within the framework of APEX first and afterwards will be implemented within the framework of Europeana v2.0.

  For some tasks in WP4, it is planned to cooperate with external project partners having expertise in planning, organising and conducting large-scale user surveys on the one hand and to get a legal expert on board for a broader overview on copyright questions in the participating European countries with regard to the task of setting up a framework for administring rights statements .

- Sweden: Promotion activities and material to be used with these (T7.3 and T7.4, T7.1)

  This refers to the actual production of flyers, roll-ups and posters as well as that of other

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[36] Note: Please refer to the table on page 63 for a detailed cost breakdown on the other specific costs for participant 24 (MCU).

promotion material like bags, pens, writing materials, etc. and the use of external experts in conferences, workshops, tutorials, etc. Furthermore, Sweden (as WP7 leader) and the Netherlands (as WP8 leader) will cooperate on setting up a LMS (see above) and ensuring its sustainability for after the APEX project's lifetime.

Other specific costs as mentioned for each partner are meant to include the costs needed for registration of the corresponding country domains for archivesportaleurope.eu (i.e. .nl, .at, etc.). Within the course of the APEnet project it is already envisaged that the constituent partners will take care of this registration for their country and this will be carried on – and extended with regard to the new partners – for the APEX project. In addition to this, for the five partners (Netherlands, France, Germany, Spain, Sweden) being obliged to do one repectively two audits during the project's lifetime (see Art. II.4, 7 of the present Grant Agreement) a budget of 3000 € per audit has been included as other specific costs.

Cost breakdown for Other eligible costs – Participant 24 (MECD)[37]

Environment	Category	Service	Unity	Quantity	Monthly unit cost	Monthly const	Annual cost	Annual cost Infrastructure (Hosting)	Annual cost Infrastructure (Development/ testing)
Development	Storement Data Center	CPU	CPU	4	102,00 €	408,00 €	4.896,00 €		4.896,00 €
Development	Storement Data Center	Disc	GB	100	0,60 €	60,00 €	720,00 €		720,00 €
Development	Storement Data Center	Memory	GB	8	51,00 €	408,00 €	4.896,00 €		4.896,00 €
	Total Storement data center				*153,60 €*	*876,00 €*	*10.512,00 €*		
Total Development					**153,60 €**	**876,00 €**	**10.512,00 €**		
Preproduction Branch	Storement Data Center	CPU	CPU	15	102,00 €	1.530,00 €	18.360,00 €		18.360,00 €
Preproduction Branch	Storement Data Center	Disc	GB	1300	0,60 €	780,00 €	9.360,00 €		9.360,00 €
Preproduction Branch	Storement Data Center	Memory	GB	15	51,00 €	765,00 €	9.180,00 €		9.180,00 €
	Total Storement data center				*153,60 €*	*3.075,00 €*	*36.900,00 €*		
Total Branch preproduction					**153,60 €**	**3.075,00 €**	**36.900,00 €**		
Preproduction Trunk	Storement Data Center	CPU	CPU	2	102,00 €	204,00 €	2.448,00 €		2.448,00 €
Preproduction Trunk	Storement Data Center	Disc	GB	150	0,60 €	90,00 €	1.080,00 €		1.080,00 €
Preproduction Trunk	Storement Data Center	Memory	GB	8	51,00 €	408,00 €	4.896,00 €		4.896,00 €
	Total Storement data center				*153,60 €*	*702,00 €*	*8.424,00 €*		
Total Trunk preproduction					**153,60 €**	**702,00 €**	**8.424,00 €**		
Production	Storement Data Center	CPU	CPU	15	102,00 €	1.530,00 €	18.360,00 €	18.360,00 €	
Production	Storement Data Center	Disc	GB	1300	0,60 €	780,00 €	9.360,00 €	9.360,00 €	
Production	Storement Data Center	Memory	GB	20	51,00 €	1.020,00 €	12.240,00 €	12.240,00 €	
	Total Storement data center				*153,60 €*	*3.330,00 €*	*39.960,00 €*		
Production	Backups	Storement backups	GB	1001	0,35 €	350,35 €	4.204,20 €	4.204,20 €	
	Total Backups				*0,35 €*	*350,35 €*	*4.204,20 €*		
Total Production					**153,95 €**	**3.680,35 €**	**44.164,20 €**		
Total					**614,75 €**	**8.333,35 €**	**100.000,20 €**	**44.164,20 €**	**55.836,00 €**

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[37] Note: In addition to the costs specified in this table, the budget for other eligible costs of participant 24 (MCU) includes two times 3000 €for audits.

Part B – Overview of indicative total project costs and funding division

Partner no.:	Partner country:	Partner acronym:	Total project costs:		EU contribution 80%		Partner contribution 20%	
1	**Netherlands**	**NANETH**	€	1.182.330	€	945.864	€	236.466
2	Austria	OSta	€	7.000	€	5.600	€	1.400
3	Belgium	ARA	€	103.350	€	82.680	€	20.670
4	Bulgaria	ASA	€	33.000	€	26.400	€	6.600
5	Croatia	CSA	€	230.400	€	184.320	€	46.080
6	**Estonia**	**NAE**	€	271.331	€	217.064	€	54.267
7	Finland	KA	€	22.857	€	18.285	€	4.572
8	**France**	**SIAF**	€	493.960	€	395.168	€	98.792
9	**Germany**	**BA**	€	560.948	€	448.758	€	112.190
10	Greece	GSA	€	105.310	€	84.248	€	21.062
11	Hungary	NAH	€	222.280	€	177.824	€	44.456
12	Ireland	NAI	€	62.400	€	49.920	€	12.480
13	Italy	DGA	€	7.000	€	5.600	€	1.400
14	Latvia	LRKM	€	27.122	€	21.697	€	5.425
15	Liechtenstein	LA	€	7.000	€	5.600	€	1.400
16	Lithuania	LVAT	€	7.000	€	5.600	€	1.400
17	Luxemburg	ANLux	€	7.000	€	5.600	€	1.400
18	Malta	NAM	€	86.604	€	69.283	€	17.321
19	Norway	NRA	€	43.500	€	34.800	€	8.700
20	Poland	NDAP	€	66.250	€	53.000	€	13.250
21	Portugal	DGARQ	€	60.695	€	48.556	€	12.139
22	Slovakia	OAMVSR	€	24.180	€	19.344	€	4.836
23	Slovenia	MK	€	36.640	€	29.312	€	7.328
24	**Spain**	**MECD**	€	1.097.960	€	878.368	€	219.592
25	**Sweden**	**RA**	€	494.240	€	395.392	€	98.848
26	ICARUS	ICARUS	€	288.080	€	230.464	€	57.616
27	Denmark	RAD	€	7.000	€	5.600	€	1.400
28	Iceland	NAIS	€	7.000	€	5.600	€	1.400

A1	Switzerland	SFA						
			€	*5.562.437*	€	*4.449.947*	€	*1.112.490*

[green box] = *content provider only*

Overview of indicative total project costs and funding per month

Partner no.:	Partner country:	Partner acronym:	Partner Personnel costs 3 year total:		Partner Person months 3 year total:	Partner Average monthly personnel costs:	
1	**Netherlands**	**NANETH**	€	1.149.330	135,00	€	8.513,56
2	Austria	OSta	€	-	-		-
3	Belgium	ARA	€	91.350	16,50	€	5.536,36
4	Bulgaria	ASA	€	21.000	5,00	€	4.200,00
5	Croatia	CSA	€	218.400	26,00	€	8.400,00
6	**Estonia**	**NAE**	€	244.331	58,00	€	4.212,60
7	Finland	KA	€	10.857	3,00	€	3.619,00
8	**France**	**SIAF**	€	463.960	61,00	€	7.605,90
9	**Germany**	**BA**	€	465.948	127,80	€	3.645,92
10	Greece	GSA	€	93.310	43,00	€	2.170,00
11	Hungary	NAH	€	210.280	74,00	€	2.841,62
12	Ireland	NAI	€	50.400	9,00	€	5.600,00
13	Italy	DGA	€	-	-		-
14	Latvia	LRKM	€	15.122	15,43	€	980,04
15	Liechtenstein	LA	€	-	-		-
16	Lithuania	LVAT	€	-	-		-
17	Luxemburg	ANLux	€	-	-		-
18	Malta	NAM	€	74.604	32,00	€	2.331,38
19	Norway	NRA	€	31.500	5,00	€	6.300,00
20	Poland	NDAP	€	54.250	15,50	€	3.500,00
21	Portugal	DGARQ	€	48.695	31,00	€	1.570,81
22	Slovakia	OAMVSR	€	12.180	12,00	€	1.015,00
23	Slovenia	ARS	€	24.640	8,00	€	3.080,00
24	**Spain**	**MCU**	€	766.960	252,10	€	3.042,28
25	**Sweden**	**RA**	€	394.240	64,00	€	6.160,00
26	ICARUS	ICARUS	€	276.080	58,00	€	4.760,00
27	Denmark	RAD	€	-	-		-
28	Iceland	NAIS	€	-	-		-

A1	Switzerland	SFA					
			€	*4.717.437*	*1.051,33*		

[green box] = *content provider only*

B.3.6. Dissemination / Use of results

Promotion activities

Design of printed promotion material:

- Flyers in two versions: 1. general, 2. national (all languages) with general information on the Archives Portal Europe, enriched by national information

- Roll ups: to be set in workshops, meetings and conferences

- Posters: posters to be displayed in the reading rooms and used at conferences and workshops (multilingual)

- Other: Bags, pens, writing materials, etc.

Presence at national and international conferences

- Presentations, posters, stands and demonstrations at national (e.g. national archive days) and international conferences (e.g. CITRA conferences) and expert exchange events

- Presence and active participation in Europeana work groups and at international archival policy meetings

Public relations activities

- Newsletters: Target group oriented newsletters in line with relevant developments and milestones' achievements throughout the project lifetime

- Articles: 2 – 3 scientific articles per year by members of the dissemination staff or consortium members (min. 6 articles)

- One edited anthology to be published at the end of the project

- One monthly publication on the Archives Portal Europe: e.g. one certain masterpiece with some detailed information (preferably representing each partner)

- Press releases in conjunction to Portal development iterations and Europeana highlights

Tutorials and educational activities

Training workshops (on demand for partners and in collaboration with the related work packages 2, 3, 4 and 5)

- Standards workshops: how to model archival metadata (EAD, EAG, EAC-CPF and other evolving standards). How to convert and deliver it into APE

Content production workshop

- how to produce digital content in order to deliver it to the Archives Portal Europe and EUROPEANA, how to plan and finance it and how to find synergies with other international partners and initiatives

Conferences:

- Two international conferences to be arranged, one in year two, the other at the end of the projects running time

List of Events & Meetings

Meeting	Date (Project month)	Participants
WP1 Kick-off / Project Kick-off[38]	M1 (before mid-March 2012)	WP members / all project members
WP2/3/5 Kick-off	M1 (before mid-March 2012)	WP members
WP4/6 Kick-off	M1 (before mid-March 2012)	WP members
WP7 Kick-off	M1 (before mid-March 2012)	WP members
WP8 Kick-off	after M25	WP members
WP meetings (face-to-face)	On a regular basis, ideally combining related WP (as seen for Kick-off meetings)	WP members
PB meetings (face-to-face)	Every three months (if feasible, in combination with WP or ESC meetings)	WP members
ESC meeting (face-to-face)	Every six months	WP members
Evaluation 1st development cycle: release 1.1 of the Archives Portal Europe	M9	WP2, 3, 4, 5 and 6 members
1st Technical review (EC)	M12	
Evaluation 2nd development cycle: release 1.2 of the Archives Portal Europe	M21	WP2, 3, 4, 5 and 6 members
2nd Technical review (EC)	M24	
Evaluation 3rd development cycle: release 2.0 of the Archives Portal Europe	M36	WP2, 3, 4, 5 and 6 members
3rd Technical review (EC)	M36	
Training workshop (standards)	to be decided	WP2, 3, 4, 5 and 6 members in collaboration with WP7
Content production workshop	to be decided	WP2, 3, 4, 5 and 6 members in collaboration with WP7
APEX conference 1	Year 2	all
APEX conference 2	End of the project	all
EBNA conferences	Twice a year	international
CITRA conferences	Once a year	international

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[38] The APEX project will have its Kick-off meeting in The Hague.

Appendix A: Description of underlying content

At the start of the APEX project, a survey will be carried out to investigate how many archival institutions per country could be connected, how much content they could deliver and what their metadata formats and systems are. This will enable not only an accurate estimation of the efforts required for expanding the technical infrastructure and establishing effective connections, but also the collection of normative indicators for results in the short- and long-term (short-term: project results; long-term: insight into the real amounts of archival content yet to be digitised).

At the moment, the pilot of the Archives Portal Europe already provides access to the content of 48 archival institutions of fourteen European countries. Via 60.624 finding aids describing archival fonds or collections, users have access to 8.174.102 descriptions of archival objects, of which 762.024 link to one or up to 500 digital images as representations of these objects ie providing access to about 25 million digital images on the content providers' websites.

This information is a good indication of the possible amount of content the new APEX project consortium could provide. A quick – but by no means exhaustive – survey among the partners of the new consortium proves this.

1. Netherlands

Archival institutions / archival fonds / possible content

The Netherlands has one national archival institution (Nationaal Archief) and about 218 other archival institutions. Based on rough estimations, it is safe to say that the average Dutch archival institution contains approximately 700 archival fonds which are described in finding aids, and the average fonds/finding aid combination contains approximately 1.000 descriptive units (= archival objects varying from 1 piece of paper to a bunch of papers and complete volumes of books covering hundreds of pages). Including the current 6.322 archival fonds of which all finding aids are available via the pilot of the Archives Portal Europe and containing 2.713.877 descriptive units in total, this would make a total of 158.922 archival fonds/finding aids and 155.313.877 descriptive units for the Netherlands.

Strategy in the Netherlands

More and more people in the Netherlands are becoming interested in history and culture. A study by the Netherlands Institute for Social Research (SCP) demonstrated that the Netherlands is one of the front runners in Europe when it comes to interest in cultural heritage. An important and unique part of Dutch history and culture can be found in the collections managed by the archival institutions, which together form the archives sector. These collections contain various types of – often unique – materials: texts, images, film, photos, music, drawings and videos. This includes both digitised materials and – to an increasing extent – digitally born materials. The broadly supported motto in the Netherlands is: ensuring sustainable access to as wide a public as possible. Internet services offer significant possibilities for this. In addition to opportunities, the advent of the internet also creates questions and problems for individual archival institutions. The transition "from paper to digital" had a huge impact on the organisations and requires new skills, knowledge, tools and changes to work processes. The smaller archival institutions in particular must not be forgotten especially as these often lack the resources and knowledge to set up robust and sustainable digital services. Strengthening partnerships and cooperation is essential in this process in the archives sector (for instance, the larger municipal archives, the Regional Historical Centres and the Nationaal Archief) and the government bodies (central government, provinces and municipalities), BRAIN (the sector association for archival

institutions in the Netherlands), KVAN (Royal Dutch Society of Archivists) and DEN (Digital Heritage Netherlands). At the initiative of the Dutch Ministry of Education, Culture and Science, a roadmap of a Dutch national network of domain aggregators is being developed for increasing the content, accessible through Europeana. One of these domains is the archives sector. This roadmap, and in particular the part concerning the archives sector, will be linked to this APEX proposal. As part of this the involvement and active participation of the parties in the archives sector will be called upon as this project is in fact a project of the archives sector.

Content: digital objects / masterpieces

As a result of the APEnet-Europeana interoperability efforts within the current APEnet project, the Nationaal Archief has at the moment 555.370 digital objects available in Europeana. With an average of 5 digital images (scans) per archival object, this means that 4% of the Nationaal Archief's material is digitised at the moment. In case this percentage is also valid for other Dutch archival institutions, then it would be possible to provide 6.1 million digital objects (scans) to the Archives Portal Europe and to Europeana. The Nationaal Archief is at the moment putting a lot of effort in digitisation projects. It is envisaged that at the start of the APEX project 1.252.389 digital images (scans) will be available:

photos	572.770
documents	671.434
maps and drawings	8.185
	1.252.389

Among those 671.434 documents are 8.699 scans of so called "masterpieces" which cover a variety of important archival records. These examples will give an idea of their content:

- "Remissorium Philippi", a fifteenth century index to the archival records of the counts of the house ofHolland

- The most important treaties concluded between the Dutch Republic (Republic of the Seven United Netherlands) and other European countries during the 17th and 18th century, among which the peace treaty of Munster of 1648

- Important documents of the Dutch East Indian Trading company – Vereenigde Oostindische Compagnie (VOC) which employed many European citizens during the 17th, 18th and 19th century and which concluded a lot of commercial treaties with countries outside Europe

The ongoing Nationaal Archief digitisation projects will deliver more digital "masterpieces", such as the following:

- More than 7000 medieval charters from the government, the nobility (most famous families) and monasteries of Holland: about 17.000 digital objects (scans)

- Ships journals of the Dutch West and East Indian Trading companies (WIC/VOC): about 37.900 digital objects (scans)

- The entire archive of Hugo de Groot (Hugo Grotius, 1538–1645), the famous Dutch jurist who laid the foundations for international law based on natural law: about 12.000 digital objects (scans)

2. Austria

Archival institutions / archival fonds / possible content

In the case of Austria, the following amount of archival institutions, archival fonds/finding aids and descriptive units can be distinguished:

- 1 State Archive: about 6.000 archival fonds/finding aids, containing an average number of 1.000 descriptive units, so approximately 6 million descriptive units

- 9 provincial archives with an average number of 300 archival fonds/finding aids, containing an average number of 500 descriptive units, so approximately 1,35 million descriptive units

- 50 municipal archives with an average number of 30 archival fonds/finding aids, containing an average number of 50 descriptive units, so approximately 75.000 descriptive units

- 5 episcopal archives with an average number of 150 archival fonds/finding aids, containing an average number of 300 descriptive units, so approximately 225.000 descriptive units

- 30 monastic archives with an average number of 30 archival fonds/finding aids, containing an average number of 300 descriptive units, so approximately 270.000 descriptive units

All this makes a possible total of 11.850 archival fonds/finding aids, containing about 7.9 million descriptive units.

Content: digital objects / masterpieces

The estimated amounts of objects Austria could provide are as follows:

photos	40.000
maps and drawings	15.000
medieval charters	100.000
manuscripts (mainly church registers)	15.000
	170.000

Austria will provide all "masterpieces" dating mainly from the era of the Habsburg empire, which are of great importance for European history. Among these are important pieces of the State Archives, such as 100 medieval manuscripts, the "Goldene Bulle" of emperor Charles IV (1356), important treaties like the

- "Augsburger Religionsfriede" (1555), the "Westfählischer Friede" or peace treaty of Munster (1648), the

- "Friedensverträge" or peace treaties of Ryswick (1697), Utrecht (1713) and Rastatt (1714) and the final act of

- the Congress of Vienna (1815),

but also masterpieces from Austrian monasteries and provincial and municipal archives which are of a supra-regional importance and European value. It is estimated that all digital content that Austria already could provide (including the "masterpieces") will total 170.000 digital objects.

3. Belgium

Archival institutions / archival fonds / possible content

The State Archives in Belgium, located in Brussels, are responsible for 19 repositories or archival institutions throughout Belgium. In total they contain approximately 22.000 archival fonds and the finding aids describing them have an average of 300 descriptive units, which could provide a total amount of 6.6 million descriptive units.

Content: digital objects / masterpieces

The State Archives in Belgium do not have a fixed list of "masterpieces" preserved in their different repositories. A good starting point is the exhibition "The Archivist's Selection". In order to prepare this, each repository had to identify their most valuable and most precious documents. All documents were digitised and a book was published with a selection of the most interesting documents. The total amount of digital objects is 2.500 (scans). The State Archives in Belgium have recently started a procedure to define criteria for the identification of more "masterpieces" and a short list is being drafted at the moment. These documents are not available in digital format yet but they will be put on the priority list for digitisation projects, so they are likely to become available during the course of the APEX project. Apart from the "masterpieces" the Belgian State Archives have a collection of several millions of digitised documents (photos, manuscripts, maps, drawings etc). The total number of documents which may be interesting for a wider European audience and which can be made available via the Archives Portal Europe is at least 250.000 (for example, matricels of the university of Leuven, a unique collection of seals, historical maps, photos etc).

4. Bulgaria

Archival institutions / archival fonds / possible content

The Archives State Agency of the Republic of Bulgaria located in Sofia, is responsible for a network of 27 local and 6 regional branches throughout Bulgaria as well as the Regional State Army Archive. In total they preserve approximately 65.153 archival fonds which comprise a total amount of 81.659 linear metres.

Content: digital objects / masterpieces

The Archives State Agency of the Republic of Bulgaria will provide its "masterpieces" concerning the early history of the Nation (late 19th century) and the Communist Party archives (1944–1989). They contain approximately 2.000 digital objects (scans).

5. Croatia

Archival institutions / archival fonds / possible content

Croatia has one national archive (i.e. the Croatian State Archives), 18 regional and two special archives. These archives preserve approximately 100.000 metres of records in 15.000 archival fonds and collections. In total they can contribute about 150.000 descriptive units.

Content: digital objects / masterpieces

Based on a rough estimation Croatia could contribute 120.000 digital images (scans), among which the following can be distinguished as "masterpieces":

• Collection of medieval charters before 1526 – 1.000 pieces

- "Diplomata et acta", "Acta Turcarum" from the Archives of the Republic of Ragusa – 200 pieces

- Privileges of the Kingdoms of Dalmatia, Croatia and Slavonia – 197 pieces

- Collection of medieval charters before 1102 – 11 pieces

- Historical records of the Parliament – 1.000 pages

- Glagolitic collection – 1.500 pages

6. Estonia

Archival institutions / archival fonds / possible content

The National Archives of Estonia (NAE) incorporates all the state-owned archives into a centralised government agency also including the Film Archives. There are 3 municipal archives in Estonia who operate independently but where digital archives and catalogue systems are concerned, the municipal archives use the same systems as NAE. Consequently, the systems, descriptive metadata and digital assets of all archival institutions are highly integrated via the Estonian archival information system (AIS) developed and maintained by NAE. Thus the participation of NAE allows APEX to incorporate all existing descriptions of archival records and digital images in Estonia. There are approximately 17.000 archival fonds in Estonian archives comprising about 10 million archival units. On average, each archival unit consists of 100 pages which means the potential total size of archival content in Estonia is about 1 billion images.

Content: digital objects / masterpieces

Approximately 8.8 million of the aforementioned 10 million archival units of Estonia are preserved at the National Archives. All archival fonds of NAE are described in finding aids (AIS) in an ISAD(G)-compliant hierarchical manner down to record level. The online reading system Saaga contains about 6.5 million digital images of about 43.000 archival units and these figures are growing steadily. In addition to that, 700 hours of video, 10.000 maps and over 400.000 photos are digitised and available online. At the start of the APEX project, there are 471.000 digital objects available online:

Photos	416.000
Maps	10.000
Paper records	43.000
Films and videos	2.000
	471.000

Parchments from the 12th to the 17th century (4.000 items, all digitised), medieval charters, various maps, early photonegatives and nitrate films can be regarded as masterpieces in the context of the APEX project.

7. Finland

Archival institutions / archival fonds / possible content

The National Archival Service of Finland consists of the National Archives and seven provincial archives. Together they hold around 50.000 archival fonds (about 190 kilometres). Most of these fonds are described in an ISAD(G)-compliant hierarchical manner. The National Archival Service also coordinates the operation of 11 state-funded private archival institutions. Together these institutions hold over 46.000 kilometres of archival material. Their digitised collections hold about 880.000 data

files and about 28.000 hours of audio and video material. The National Digital Library of Finland provides a common user interface that integrates the metadata resources of all archival institutions.

Content: digital objects / masterpieces

At the start of the APEX project, the National Archival Service of Finland has 10.471.000 digital objects available online and these figures will grow steadily:

Photos	2.100
Maps	70.000
Paper records	10.400.000
	10.472.100

The National Archival Service has not defined its "masterpieces", but it holds all the most important records of the Finnish nation dating back to 14th century.

8. France

Archival institutions / archival fonds / possible content

In France there are 3 national archives, 26 regional archives, 104 departmental archives and 600 city archives. From the regional and city archives only a few have websites with guides to holdings, finding aids and digital content online, so the target for the APEX project would be only the national and departmental archives. All together these contain about 2.500 kilometres of archival material and the majority (70 institutions) have a website with digitised content online, they follow international standards in the description of their holdings and have digitisation plans. According to rough estimations there are about 250 archival fonds/finding aids per department.

Content: digital objects / masterpieces

In France there are in total approximately 175 million digitised pages and 1 million digitised images online but the content of the national archives is only a small part of this. It's not possible to give an exact amount of what portion of this could be delivered of this to the portal. The departmental archives are administered by the local authorities and not all of them will want to/are in the position to join the APEX project. However, many of them already showed interest in delivering their content to the Archives Portal Europe and tests have been conducted that are promising. At the moment the national archives are totally absorbed with the construction of their new building, which is scheduled for completion by the beginning of 2012 and which will open to the public in 2013. The relocation of the collections will start at the end of 2011. At the same time the national archives are building a new data information management system, including conversion and encoding of legacy finding aids and merging of a variety of database systems, etc. However, within the framework of the APEX project – 2012–2014 – the national archives will provide some digitised "masterpieces" such as the records of the French Royal Chancellery, the different constitutions of France, the edicts of tolerance and laws regarding religion, the collections of posters of the Second World War etc.

9. Germany

Archival institutions / archival fonds / possible content

Germany has one Federal Archive, 48 state archives in the 16 Länder, and more than 2.000 regional, local and other archives, of which some have their content accessible via websites and regional portals. Based on the federal political structure in Germany, the Federal Archives of Germany has been

responsible for the records of the central government of Germany since the 19th century, while many important documents from the times before which are needed for the understanding of German history, are preserved and made accessible by the regional state archives in the Länder. The Federal Archives has started a comprehensive retro conversion programme for finding aids prior to the digitisation to have a presentation network available for making digital reproductions online. It published its digitisation strategy on its website in 2006 and currently has about 2.000 finding aids with nearly two million descriptive units online. 19 finding aids are linked to two million digitised pages. A further two million will be added in the months to come. All of these could easily be integrated into the Archives Portal Europe in the future, since the descriptions are already available in EAD format. The digitised pages are combined to digital objects relating to the corresponding descriptive units by using METS and are presented inside the research platform for finding aids ARGUS, which has a constantly increasing use rate of 100% per year (www.argus.bundesarchiv.de). Furthermore the Federal Archives offer online access to 246.000 of their 11 million photos and present 6.000 news reels from the film archives. The content of the 48 regional archives have an average of 1.000 finding aids each, totalling 50.000 online finding aids or descriptions of archival fonds. Based on a rough estimation those finding aids/archival fonds contain approximately 1.000 descriptive units each, so the possible amount of content to be contributed by Germany in terms of descriptive units is about 50 million.

Content: digital objects / masterpieces

Based on a rough estimation the German archives may possibly contribute at least 5 million digitised pages from their holdings (scans). "Masterpieces" or the most consulted parts among the digitised fonds of the Federal Archives are for example the records documenting the censorship activities of the of the Ministry of Culture in the former GDR as well as the records from the office of the East-German socialist party (SED) leader Walter Ulbricht from the 1950ies until the early 1970ies. These digital reproductions have already been used for remote drafting of scientific publications. They are important sources for the Cold War period in Europe. Also heavily used are the more than 150 galleries on the website of the Federal Archives, each including up to 100 digital reproductions from the holdings and explaining important moments of German history. See more at the website of the Federal Archives at:

http://www.bundesarchiv.de/oeffentlichkeitsarbeit/bilder_dokumente/index.html.de.

The regional state archives have digitised many medieval charters dating back to the 10th century, in addition to important documents like their constitutions, treaties ending wars and founding documents of important institutions. They are available on their websites or in regional portals and might be delivered as well to the Archives Portal Europe.

10. Greece

Archival institutions / archival fonds / possible content

In the case of Greece only the General State Archives will be able to contribute to the project.

Content: digital objects / masterpieces

The General State Archives will contribute approximately 27.000 descriptive units (either files or archival items) and about 345.000 digital objects during the APEX project; in terms of "masterpieces", the GSA will contribute digitisations of:

- Archival items concerning the Hellenic Independence War,

- The Cartographic Masterpiece of Hellenic Enlightenment: Righas Charta,

- Certificates of membership in the "Philiki Etairia",

- Patriarchical Sigils and Letters,

- Religious manuscripts, Gospel of the 10-11th century,

- Ottoman Firmans

11. Hungary

Archival institutions / archival fonds / possible content

Hungary has one national archival institution (National Archives of Hungary - Magyar Országos Levéltár) and 81 other archival institutions. According to statistics as of the 31st of December 2009, these institutions have 65.412 archival fonds with 388.576 linear metres of records. Using 6.000 pieces of paper per linear meter as a calculation, this will total 2.331 millions of pages from the 11th century to 2011.

Content: digital objects / masterpieces

The National Archives of Hungary will contribute its "masterpieces", described in 4 EAD finding aids, in total containing in total more than 30.000 descriptive units :

- Libri Regii – 1 EAD finding aid, 73 descriptive units

- 1715 census – 1 EAD finding aid, 41 descriptive units

- Communist Party Records – 2 EAD finding aids, approximately 30.000 descriptive units.

The description of the above mentioned "masterpieces" is as follows:

- Libri Regii – The Royal Books 1527–1918: The Royal Books (Libri Regii) contain copy samples of important and significant documents issued in the name of the King. They were kept between 1527 and 1867 by the former Hungarian Royal Chancellery and between 1867 and 1918 by the Ministry of Royalty. The 73 volumes of the Royal Books have around 38.000 notices, among them hundreds of copies of medieval charters and around 3.000 coloured signets. They also include official and private documents of private individuals and communities in connection with the social and legal status of the donee, and portrayals with significance in the history of art. For that reason this collection relies on the interest of scientists', family researchers and all those who have an interest in history.

- National Census of 1715: The relatively accurate censuses based on the first national wide-ranging data acquisition in Hungary in the age of feudalism were created in the 18–19th centuries (1715, 1720 and 1828; due to its fragmentary nature, the census ordered by Joseph II will not be involved in the project). The census increased primarily the efficiency of levying taxes, but the disciplines of certain sciences (economics, statistics etc) which gained ground in the 18th century also had an influence on them too. The enlightened, absolutistic measures of economics and statistics employed these disciplines affected remarkably the history and the further economical and social relations of the country. The censuses give a relatively clear picture about economics and feudal society; in addition, they provide significant data for researchers of local and family history.

- Hungarian Communist Party Records 1948–198: The database and digitised images of the Documents of MDP/MSZMP Party (Working People's Party (MDP) and the Hungarian Social Workers' Party (MSZMP)) records consist of minutes of the leading bodies of the former Hungarian Communist Parties. These documents are important resources for Cold War history and the 20th century Europe. More than 1 million pages of the documents will be available in layered PDF format.

12. Ireland

Archival institutions / archival fonds / possible content

The National Archives of Ireland is the repository for the archives of central government in the Republic of Ireland, including the courts. It also acquires archives of private individuals, institutions and organisations where these are deemed to be of national significance. It is envisaged that, in the initial stages, the National Archives of Ireland will be the key institution participating in the APEX project. It is intended that the scope will be later extended to include other participant archival institutions in Ireland. The National Archives of Ireland expects to be able to provide 1 million descriptive units.

Content: digital objects / masterpieces

The National Archives of Ireland will not be making accessible digital objects/masterpieces as part of the APEX project. Its focus will be on the provision of descriptive information as indicated above.

13. Italy

Archival institutions / archival fonds / possible content

The Directorate-General of Archives (DGA) is subordinate to the Ministry of Cultural Assets and Activities. It controls a vast network of State Archives and nineteen Archival Supervision Agencies (Soprintendenze Archivistiche). Currently, the DGA is developing a portal which will act as a common gateway to access Italian archives' web resources. The core application of the portal will be a catalogue (or union list) of the fonds held in Italian archival institutions or owned by public or private corporate bodies, private persons and families. The DGA is responsible for the following State archival institutions:

- The Central State Archives (Archivio centrale dello Stato)
- 100 State Archives (Archivi di Stato)
- 35 local Sections (Sezioni di Archivi di Stato)

As a whole, the Italian State Archives preserve over 1.5 million linear metres of documents, including 2 million charters. All archival fonds preserved in the Italian State Archives comprise approximately 25.000. There is already online a guide that describes all of these archival fonds at a fonds level online. Also online are about 1.000 finding aids (inventories) describing individual archival fonds.

Content: digital objects / masterpieces

Apart from the guide to the State Archives Archival Fonds and the inventories as mentioned above, the Directorate of Archives can deliver at least 3 million digital objects (archival documents that have been digitised by different State Archives). Italy has already digitised and made available online a large number of documents that qualify as "masterpieces", and could be contributed of course for example:

- Archivio di Stato di Firenze (State Archives of Florence): 85.000 charters (8th – 14th century)
- Archivio di Stato di Firenze (State Archives of Florence): Mediceo avanti il Principato (the most ancient papers of the Medici family): 65.000 documents (1373–1557)
- Archivio di Stato di Torino (State Archives of Turin): 3.700 seals and more than 30.000 maps and drawings (16th – 19th century)

- Archivio di Stato di Rome (State Archives of Rome): 30.000 maps and volumes (13_{th} – 20_{th} century) 64.237 charters and seals from other State Archives

14. Latvia

Archival institutions / archival fonds / possible content

The National Archives of Latvia are the central archives for all records from the government and municipal offices, as well as private persons, popular organizations and enterprises of national importance. A total of approximately 140.500 metres of material is stored in its repositories, covering about 25.000 fonds and 1.221.000 descriptive units.

Content: digital objects / masterpieces

The National Archives of Latvia expects to be able to deliver the digitisations of the following items:

- Parchment collection 3.000 items

- Old maps 2.000 items

- Census records (19_{th} century) 257 items

- Church books[39] 15.000 items

- House registers 1.300 items

- Revision list 2.000 items

- Documents of the 43_{rd} Latvian Guard Riflemen

- Division of the Workers and Peasants Red Army 9.000 items

15. Liechtenstein

Archival institutions / archival fonds / possible content

The Liechtenstein National Archives or Liechtensteinisches Landesarchiv are the central archives for all records from government offices, the parliament and the courts in the Principality of Liechtenstein. The archives incorporate archival holdings from private sources and assembled collections (photos, films etc). A total of approximately 9.000 metres of material is stored in the Archives (about 400 fonds), representing an important part of Liechtenstein's cultural heritage.

Content: digital objects / masterpieces

The potential contribution of the Liechtenstein National Archives includes about 500.000 descriptive units. Most of the archives are represented in a database system to give access to the material. The Liechtenstein National Archives will contribute as "masterpieces", several digitised examples of objects in its collection.

16. Lithuania

Archival institutions / archival fonds / possible content

The state archival system of Lithuania consists of the Office of the Chief Archivist of Lithuania, 5 state archives (Lithuanian State Historical Archive, Lithuanian Central State Archive, Lithuanian State Modern Archive, Lithuanian Special Archive, Lithuanian Archive of Literature and Art) and 10

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[39] The digitisation of the church books comprises approximately 1 million images (scans).

regional (county) archives. The total number of archival fonds is 22.509, the total number of finding aids is 49.884 and the amount of descriptive units is 10.244.315. The average number of finding aids per archive is 3.325 and the average number of descriptive units per archive is 682.954.

Content: digital objects / masterpieces

The Office of Chief Archivist of Lithuania can contribute 20.000 scans (images), among which the following can be regarded as "masterpieces":

- the oldest medieval documents including parchments of the Grand Duchy of Lithuania and Commonwealth

- maps, acts documenting the most important events of Lithuanian history dating 1795–1990

- photos from the mid of the 19th century until now

17. Luxemburg

Archival institutions / archival fonds / possible content

The Archives Nationales de Luxembourg will try to make available descriptive units as well as digitised assets, from the following fonds:

- Weimar fonds - charters from Echternach, Marienthal and Grevenmacher (762–1688)

- Treaties and conventions (1816–)

- Collection of photographs of the former Governmental Board of Economic Expansion and Tourism (1950-1970)

- ARBED maps and plans

- ARBED photographic archives

Content: digital objects / masterpieces

See above.

18. Malta

Archival institutions / archival fonds / possible content

The collection held by the National Archives of Malta covers over 15 kilometres and includes records dating from the 1530s up to the current day. In recent years, a substantial effort has been made to initiate the digitisation of complete record-groups forming part of the collections held and to create finding aids to assist researchers. The National Archives are planning to increase the investment in the digitisation process in the near future.

Content: digital objects / masterpieces

The National Archives of Malta expect to contribute the following digital content:

- Ordinance Department Drawings 10.000 images (A0 drawings)

- Works Department 30.000 images (A drawings)

- Letter Patent and Warrants 100 images

- Royal Opera House designs 1.000 images

- Despatches (GOV fonds) 10.000 images

- Consolato del Mare (selected series) 140.000 images

The main "masterpieces" held by the National Archives of Malta are the collection of drawings related to the ex-Ordinance department, the Royal Warrants, designs for the reconstruction of the Royal Opera House, drawings from the Works Department, the dispatches between Malta and London for the 20th century and the 'Consolato del Mare' documents.

19. Norway

Archival institutions / archival fonds / possible content

In the case of Norway, the amount of archival institutions, archival fonds/finding aids and descriptive units can be distinguished as follows:

- 1 national archive with about 6.000 archival fonds/finding aids, containing approximately 2.5 million descriptive units.

- 8 regional state archives with a total number of approximately 16.000 archival fonds/finding aids, containing approximately 1.5 million descriptive units.

- 21 municipal archival institutions with a total number of approximately 27.000 archival fonds/finding aids, and approximately a total of 1.5 million descriptive units.

- 115 other institutions (libraries and museums) with a total number of approximately 30.000 archival fonds/finding aids, containing approximately 500.000 descriptive units.

All this makes a possible total of approximately 79.000 archival fonds/finding aids, containing about 6 million descriptive units. At the moment, 29 archival institutions, including the National Archives of Norway, have published their finding aids on the Archives Portal of Norway. In total about 3 million descriptive units are available on the portal.

Content: digital objects / masterpieces

The National Archives of Norway have digitised approximately 40.000 units resulting in about 34 million

pages, which cover about 2% of the total holdings of the National Archives. This covers church records, censuses, probate records, court records, land registry records and more. The National Archives of Norway can also contribute 30.000 maps and 20.000 photos. Other archival institutions have digitised approximately 700.000 pages and 400.000 photos.

20. Poland

Archival institutions / archival fonds / possible content

The Head Office of the Polish State Archives is at the moment responsible for 34 state archives, which use databases in their activity. The content of 7 of these state archives is already available in the pilot of the Archives Portal Europe and it is envisaged that ten more could contribute during the course of the APEX project. A total amount of 1 million descriptive units can be added in the framework of the new project.

Content: digital objects / masterpieces

The Polish State Archives expect to be able to contribute approximately 1 million data from inventories in XML (descriptive units) and 300.000 documents (scans) and a description of "masterpieces" that could be contributed as follows:

The most valuable documents in Polish State Archives consist of: parchment documents of the Polish kings and European rulers, records from ducal and royal chancelleries, the acts of towns and villages dating back to the Middle Ages, documents illustrating the activities of Polish public institutions (among them concerning the existence of the Polish-Lithuanian Commonwealth from XVI till XVIII centuries), acts documenting national uprisings in the 19th century, aristocratic family records, cartographic collections (maps and plans), photographs illustrating the most important events in the state. Some of them were inscribed on the international list of UNESCO Program "Memory of the World", for example: the Warsaw Confederation Act of 1573, which guaranteed the religious tolerance for all confessions in Poland. In addition, the most valuable documents concerning important and interesting facts of Polish history, taken from two central national repositories – the Central Archives of Historical Records and the Archives of Modern Records – are accessible online. The collection comprises medieval treaties between Poles and the Teutonic Order, the first constitution in Europe – the Constitution of the Third of May – and the radio transmission on the events of the Warsaw Rising in 1944. The pictures of the archives are accompanied by detailed commentaries, depicting the content and the historical context in which the documents arose (see for example: http://www.poland.pl/archives/index.htm).

21. Portugal

Archival institutions / archival fonds / possible content

The Directorate-General of the Archives of Portugal expects to be able to contribute 1 million descriptive units.

Content: digital objects / masterpieces

The Directorate-General of the Archives of Portugal will provide 3.5 million digital objects and the "treasures" of the National Archives. The so-called "treasures" is a collection traditionally and institutionally identified as held by National Archives that contains documents considered representative of Portuguese history, culture and society. They are mainly from the middle ages to the 18th century and are fully digitised.

22. Slovakia

Archival institutions / archival fonds / possible content

The Department of Archives, Ministry of Interior of the Slovak Republic is the highest archival authority in Slovakia. The system of States Archives comprises of two central archives: the Slovak National Archives in Bratislava and the State Central Mining Archives in Banská Štiavnica, seven state archives with regional territorial competence and their 37 branches and Archives of the Capital of the Slovak Republic Bratislava. The State Archives keep 28.415 archival fonds in total comprising 188.000 running metres from the 12th century until nowadays.

Content: digital objects / masterpieces

The Slovak Archives will provide for the APEX project their "masterpieces" from different archives, mostly drawn from the Slovak National Archives in 25.000 descriptive units: 25.000 medieval charters and maps, which will be provided as 50.000 digital objects (scans, recto and verso).

23. Slovenia

Archival institutions / archival fonds / possible content

Slovenia has 7 archival institutions: the Archives of the Republic of Slovenia and 6 regional archives (Pokrajinski arhiv Koper, Pokrajinski arhiv Maribor, Pokrajinski arhiv v Novi Gorici, Zgodovinski arhiv Celje, Zgodovinski arhiv Ljubljana, Zgodovinski arhiv na Ptuju.). These archival institutions plan to contribute 35.000 descriptive units.

Content: digital objects / masterpieces

The Archives of the Republic of Slovenia expects to deliver 35.000 digital objects: medieval charters,

postcards, photos and cadastral maps.

24. Spain

Archival institutions / archival fonds / possible content

The Subdirectorate-General of the Archives of the Spanish Ministry of Education, Culture and Sports expects to at least contribute the content of 12 archival institutions, which can provide a total of 2.787.278 descriptive units.

Content: digital objects / masterpieces

As a result of the above mentioned contribution, links to at least 15.000.000 images will be provided, among which the following "masterpieces", are included:

- The oldest documents (medieval charters), maps and drawings from modern times, photographs until 1950 and international treaties

- Medieval documents from the "National Historical Archives" and "Crown of Aragon Archives", mainly charters and maps

- European related documents from the $13_{th} - 18_{th}$ century from the "National Historical Archives", "Nobility Section of the National Historical Archives", "Simancas General Archives" and ""Crown of Aragon Archives", mainly maps and drawings

- American, Asian and Oceanian-related documents from the $16_{th} - 18_{th}$ century from the "National Historical Archives" and "Indias General Archives", mainly maps, drawings and travelers diaries of expeditions all over the world

- Photographic documents from the "General Administration Archives" and "Historical Memory Documentary Center"

- International treaties at the "Crown of Aragon Archives", "Simancas General Archives" and "National Historical Archives"

25. Sweden

Archival institutions / archival fonds / possible content

The Riksarkivet will contribute about 100.000 finding aids of 100 Swedish archival institutions, covering approximately 10 million descriptive units.

Content: digital objects / masterpieces

As a result of the above mentioned contribution digitisations of 200.000 objects will be provided which will cover 90 million images and approximately 130 million pages. As with most archival institutions around Europe the actual "masterpieces" of archival institutions are the long series of archival material, that mirror the common history, for example records for taxes, persons, estates and central government, so the most valuable documents (to be rescued in case of fire) measure hundreds of shelf kilometres. However, in Europeana terms of "masterpieces", the Riksarkivet will provide:

- The Alfred Nobel archive (declared World Heritage by UNESCO)

- The Eriksberg Archive (European nobility correspondence ca. 25.000 objects)

- The National Publication of Early Maps (12.000 maps drawn between 1630 and 1655)

- Diplomatarium Suecanum: The collection of Swedish charters (ca. 40.000 letters)

26. Denmark

Archival institutions / archival fonds / possible content

The Danish National Archives expect to be able to contribute the content of 90 Danish archival institutions to the APEX project. Together they can deliver 1.007.496 finding aids. The total amount of descriptive units they contain is unknown, but at least 4.000.000 descriptions of archival units of Danish government institutions, public institutions, companies and individual citizens will find their way to the Archives Portal Europe.

Content: digital objects / masterpieces

The most important content the Danish National Archives will provide consists of 11.000.000 digitised document pages and 14.000.0000 transcriptions of entries in archival records, mainly from Parish registers and censuses.

27. Iceland

Archival institutions / archival fonds / possible content

In Iceland, the amount of archival institutions, archival fonds/finding aids and descriptive units can be distinguished as follows: One national archive with about 2.500 archival fonds/finding aids, containing approximately 500,000 descriptive units. Iceland has 20 regional archives, but the total approximate number of their archival fonds/finding aids, and how many descriptive units they contain, has not yet been estimated and is therefore not included here.

Content: digital objects / masterpieces

The National Archives of Iceland expects to contribute the following digital objects / masterpieces:

- The Icelandic Census of 1703

The Census of 1703 is a unique document. It is preserved in full, in all about 1700 pages, with the complete Icelandic population registered, totalling 50,366 persons in all. It is the first, preserved, national census in the world that counts all households and all inhabitants throughout the country with name, age and social position of every inhabitant.

The decision to carry out a national census in Iceland 1703 came about because of hardship and poor economic situation in Iceland in the last quarter of the seventeenth century. In order to be able to understand/comprehend the situation in Iceland the King of Denmark ordered a census to be taken. The census was taken during the period December 1703 to June 1703. All families and members of all households in each community were counted. All indigent persons were registered specially and

vagrants were registered on the Saturday before Easter so that they would not be counted more than once. Shortly after the census-taking, the census reports were sent to the government offices in Copenhagen as Iceland was at the time a part of the Danish state. The census reports were returned to Iceland in 1921. The census was published by Statistics Iceland in 1924-1947.

- The Hayfield maps

The National Archives of Iceland has digitised its total collection of "hayfield maps". The total number is approximately 6400 digital objects/images, which it will be able to deliver.

In the period 1916-1929 hayfields in Icelandic farms were systematically mapped. These maps show land boundaries, geographical position of hayfields, farmhouses, vegetable gardens, and such for almost all farms in Iceland, as well as scale and legend for each map. These maps are valuable sources on topology and organization of cultivated rural areas in Iceland. These maps were made by people who knew the areas they drew. Some of the maps are in black and white while others are coloured.

Associated Partner: Switzerland

Archival institutions / archival fonds / possible content

In Switzerland there are 50 to 60 archival institutions (including the Swiss Federal Archives (SFA), the state archives and the archives of international organisations etc). The potential contribution of the Swiss Federal Archives includes about 5 million descriptive units. Since the SFA uses a database system to give access to ist material, it can not indicate the number of finding aids it could contribute. Also the potential contribution of the state archives, the archives of international organisations, etc. is at the moment still unknown.

Content: digital objects / masterpieces

The Swiss Federal Archives expect to contribute 15.000 digital archival objects per year (as from 2014/15). The possible digital content to contribute from the state archives, the archives of international organisations etc is at the moment still unknown. The expected contribution in terms of "masterpieces" will consist of treaties and conventions, wherefrom Switzerland acts as a depositary state (eg Geneva Conventions etc) and records (not documents) selected as a result of the digitisation programme (in cooperation with the Swiss Historical Society and the Swiss Academy of Humanities and Social Sciences), for instance records which document the legislation in banking law etc.