

CULTUREMAP

Mapping and evaluating existing platforms (websites) within the cultural sector aimed at stimulating debate and cross-border exchange of matters concerning European culture



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This brochure presents the main findings and conclusions of the the CULTUREMAP study carried out for the Education, Audiovisual and Culture Executive Agency (European Commission DG Education and Culture) coordinated by empirica with the partners P.A.U. Education and IBK Remscheid. Support has been provided through National Correspondents from the ENIR network (www.enir.org).

The objectives of this project are to map and analyse existing websites in Europe which are used as a means for exchange of information and debate on culture, artistic expression and as a space for an exchange of opinions on the European project, with a view to proposing recommendations on how to enhance the use of the internet as a means of information exchange and debate at the European level on cross-sector issues in the field of culture and artistic expression.

Results were released in March 2010.

This brochure presents the synthesis of the study results. More comprehensive reports are available in electronic format, together with access to an Online Knowledge Base of almost 400 cultural websites and portals at: www.culturemap.net.

empirica GmbH, Oxfordstr. 2, 53111 Bonn, Germany; Tel. (+49) 228 – 98530-0; e-Mail: info@empirica.com

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Imprint

This brochure has been prepared by empirica Gesellschaft für Kommunikations- und Technologieforschung mbH and on behalf of the European Commission, Education and Culture Directorate General. It is a publication of the CULTUREMAP study.

Editor: Werner B. Korte, empirica GmbH

■ Introduction

Websites and internet platforms for the exchange of information and dialogue already exist on the web and have been established by different cultural organisations and projects. The European Commission thinks “the time is ripe to map the existing online spaces for debate on cultural issues and on the European project”.

Little is known on how cross-border and cross-sector debate on European culture can be stimulated online in order to help the further development of a common European cultural area for those interested in European culture.

It can be expected that this virtual space and the debates taking place in it could contribute to citizens' awareness and understanding about Europe's culture, its rich cultural diversity and common cultural heritage and help to stimulate intercultural dialogue and develop mutual understanding. It is expected that it could also promote European art, artists, cultural organisations and those working in them.

This would lead to a further reinforcement of the European market for culture, by aiming at and reaching a broader public. In addition, the debates taking place should inspire and stimulate creativity, for example by highlighting exemplary projects and by offering a platform for the exchange of experiences.

It is against this background that the present study was commissioned by the European Commission DG Education and Culture and a study contract concluded with empirica GmbH. The objective of this study is to carry out research into existing websites in Europe for the online dissemination of information on cross-sector issues in the cultural field and for online debate with a view to promoting the exchange of views, artistic expression and helping to reach out to the citizens with regard to the European project. The study is supposed to also propose recommendations on how to enhance the use of the internet as a means of information exchange and debate at the European level on cross-sector issues in the field of culture and artistic expression

Enjoy reading this brochure summarising the results!

Werner B. Korte

*Study Manager
Director, empirica Gesellschaft für Kommunikations- und
Technologieforschung mbH*

Objectives

The objective of this study was “to map and analyse existing websites in Europe which are used as a means for exchange of information and debate on culture, artistic expression and as a space for an exchange of opinions on the European project, with a view to proposing recommendations on how to enhance the use of the internet as a means of information exchange and debate at the European level on cross-sector issues in the field of culture and artistic expression.”

With this mapping study the Commission wants to get an “overview of the existing websites in Europe aimed at the exchange of information and debate on the European project between artists of all art disciplines, cultural



workers, practitioners, cultural organisation managers, producers, promoters, researchers, journalists, operators in the cultural area, mentors, teachers, art students, distributors, theatres, museums, cultural heritage organisations, etc and the broader public”.

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Website Selection

Altogether 388 cultural websites and platforms have been selected and analysed. In order to be selected the cultural websites had to meet a set of criteria derived from the study objectives. First precondition was that websites should have a truly European dimension (coverage of at least several countries).

Secondly they should be frontrunners in terms of website functionality offered and reach beyond just the presentation of information.

Thirdly they should be interactive and allow for communication with visitors through blogs, forums and further ways of user contribution.

Thus, websites not having a clear European dimension were only allowed to be described in case they were outstanding national frontrunners which had the potential of becoming easily extended beyond national borders. Websites with a significant European dimension were allowed to be described without having interactive Web 2.0 functionalities. Altogether 388 cultural websites were selected and further analysed distributed across the European countries as depicted in the following figure.

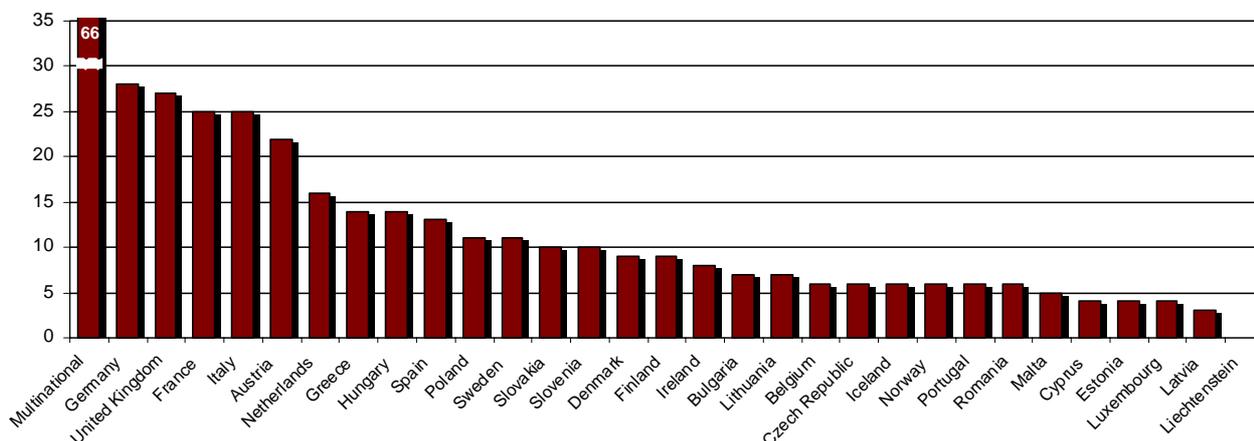
Results

Website Operators

89% of the 388 websites analysed come up with a truly European approach and information offer, 45% even have an offer of a global nature.

The vast majority of 68% is operated by non-profit organisations followed by 15% run by public authorities. Only 7% are profit-oriented and are operated by private organisations. There are hardly any differences on this indicator across the different disciplines.

These results clearly confirm the assumption that the cultural sector in Europe is predominantly characterised by players and actors from non-profit institutions also when it comes to the operation of cultural websites. Cultural Websites originating from the younger EU Member States tend to frequently and more often be operated and maintained by public authorities, whereas cultural websites from the older Member States tend to more



frequently be operated by non-profit-organisations. One can only guess as to the reasons for this but it appears not unlikely that at an early stage of development and operation cultural websites only get established when operated and funded by public authorities. Only at later stages other organisations step in as operators and start finding other sources of funding making them more independent from public subsidies.

Artistic Disciplines, Cultural Domains and Target Groups of Websites

Around 35% of all websites analysed provide offers relating to the three disciplines performing arts, visual arts and music / audio production (note: one website can provide offers for more than one discipline; the results shown are based on multiple responses). These are followed by a group of disciplines with internet offers on around 20-25% of the websites and include the disciplines: film, cultural and architectural heritage, literature, cultural policy and cultural science and research. All other disciplines remain at much lower levels between 10% and 20%.

The major target groups of cultural websites are cultural organisation managers, addressed by 66% of the websites and artists (62%). The broader public is mentioned as target groups by 40% of the websites.

The most striking differences between those websites run by non-profit organisations as

typical service types offered to the broader public include e-Commerce (60%) and training (45%), services for which payments are more likely to be expected



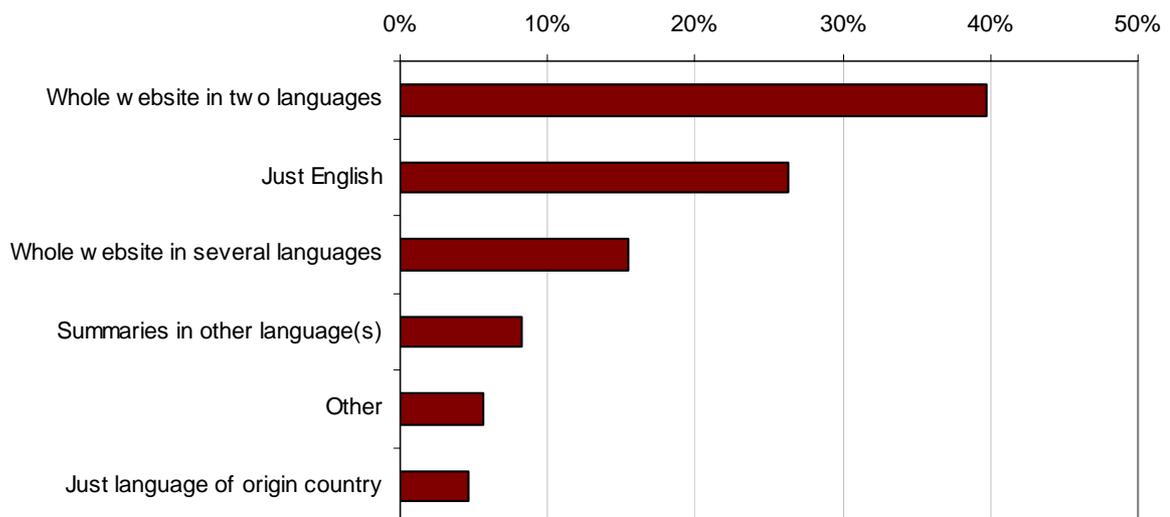
especially when comparing these to services like 'social networking' or 'exchange'.

Purpose and activities of websites

The vast majority of 97% of the selected websites see their main task in providing information to their audience to attract interest. 57% are already active in the use of social networking services for communication and information sharing purposes while 34% provide artist mobility support, 28% training and capacity building services. 'Intercultural dialogue and understanding' comes first as cultural value being promoted (64%) followed by 'artistic expression' (51%).

Website language and strategy for tackling the language issue

The website analysis clearly reveals that English is by far the most prominent language through which the cultural websites in Europe communicate and provide their offers and services. This is the case with 94% of the



opposed to private organisations are that the latter (commercial websites) are much stronger oriented towards the broader public and citizens which they probably see as the key target group from whom they can expect revenues through paid services they offer. The

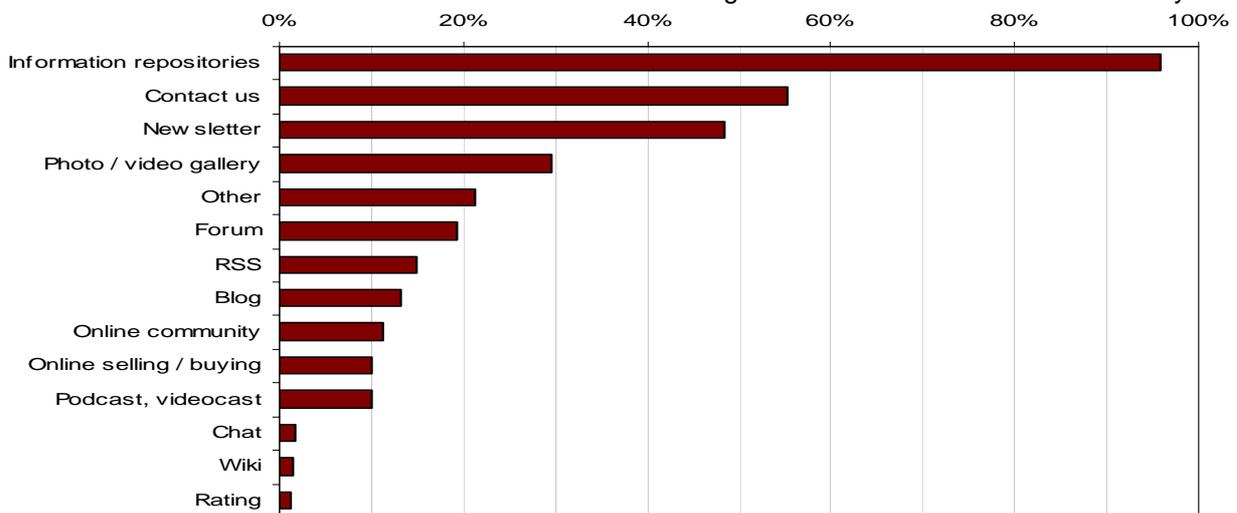
websites which in absolute numbers are 365 out of 388 websites. The followers are French with 97 and German with slightly more than 70 websites providing offers in these languages. All other languages are of less importance.

Cultural website owners and operators address the 'language issue' mainly by way of developing their websites in two languages. This applies to almost 40% of the websites analysed. Typically these are the language of the country of origin of the website and English. About 26% provide their offers and services on their websites just in English (not only websites from the United Kingdom or Ireland), a language well spoken and understood by an increasing number of individuals from the target groups and of citizens. Still more than 15% have implemented their website only in their language (language of the country of origin; not English). Very few provide at least summaries of the website content in English or other foreign languages.

option), followed by 'music / audio production' websites (52%). Among the 'laggards' are 'cultural creativity industries' (only 28% allow for user contributions) and 'cultural policy' websites (34%) followed by 'literature' (28%) and 'community arts' (39%).

Functionalities offered by cultural websites

'Information provision' (news, events, documents, downloads etc.) is still the by far most prominent website functionality and offered by basically all cultural websites. Interactive website features are only offered by rather few websites. In the vast number of cases users are still limited to the passive viewing of information. Web 2.0 has not yet



Options for user contributions to cultural websites

53% of the 388 cultural websites do not yet offer any option for website users and visitors to contribute content to the website. Only 47% of them do so. However, most of the contributions allowed for are simple texts and comments typed into templates provided on the website, text contributions in forums, some allow for blogging. Only very few allow for an uploading of photos, pictures or audio-visual material. Expressing an opinion on a website (through voting, rating, polling or e-surveys) is also not very popular.

It appears that European cultural websites are still quite some distance away from allowing users to actively contribute to the information offer on a website and more sophisticated forms of interactivity.

'Online media' websites are most advanced in offering user contribution possibilities (60% of the websites in this discipline offering this

arrived in the cultural scene. Functionalities like for instance 'Forum', 'Blog', 'Chat' and 'Wiki' (listed in a sequence of increasing interactivity) allowing users to interact with other users or to change website content, can only be found in a minority of cultural websites. This is particularly the case with high intensive interactivity features like 'Wiki' and 'Chat' but also even for 'Blogs'.

Again, 'Online media' is the frontrunner discipline in offering these features, followed by 'Film' and 'Music'. 'Museums / archives', 'Cultural policy' and 'Cultural science' are the laggards.

Cultural website updating frequency and technique

Most of the websites identified and analysed have a rather short updating frequency. One third of them is updated daily, another third weekly. The vast majority of website owners (93%) is able to update the website content themselves using their own content

management system or other software tools. Only a small number of 7% rely on their IP provider or an external agency.

Financing and financing security of cultural websites

The internet and world-wide-web related cultural sector activities are characterised by the dominance of activities financed by the public sector and non-profit activities. The majority (34%) of cultural websites is financed

Rank	Financing security	Number of occurrence	Percentage
1	Next year	49	37.98%
2	More than 3 years	39	30.23%
3	Next 3 years	23	17.83%
4	Not at all	18	13.95%
Multiple response possible: NO			N=129

through a mix of sources. 13% are only financed on a project-base and therefore likely to only operate for a rather limited duration.

Around half of the cultural websites seem to have a solid financing which secures their operation for the next three years (18%) or even beyond (30%). However, the majority of cultural websites are in a solid financial basis. 38% of them will run out of the necessary financing capabilities in a year's time while 14% completely lack a financial basis for the continuation of their websites.

Profit-oriented and privately run cultural websites appear to have a more solid financial basis compared to others. 44% are financially secure for more than three years. They are only outperformed by fully publicly funded cultural websites where 55% state to possess

Financing security according to website operator type				
Type of Organisation:	More than 3 years	Next 3 years	Next year	Not at all
Mixed (e.g. joint venture, public-private partnership)	33.33%	0.00%	33.33%	33.33%
Non-profit organisation (e.g. association, foundation, NGO)	26.04%	17.71%	42.71%	13.54%
Other	30.00%	20.00%	30.00%	20.00%
Private company (profit oriented)	44.44%	22.22%	11.11%	22.22%
Public authority (e.g. municipality, ministry, public agency)	54.55%	18.18%	27.27%	0.00%

a financial security reaching beyond the coming three years. None, of the latter fall into the category "not at all secure", whereas still a

significant 22% of the private company ones do.

When it comes to 'funding types' project-based initiatives are the most financially insecure cultural website operations with around 2/3 of them with a financial base only for the next year. These are followed by those with an international funding.

Recommendations

The study team has developed practical recommendations on how to best close existing gaps identified in the area of websites and platforms aimed at stimulating debate and cross-border exchange of matters concerning European culture. The aim of the study was to propose "recommendations on ways to enhance the use of internet as a means of information exchange and debate on cross-sector issues in the field of culture and artistic expression, bearing in mind the aim set out in the agenda for culture to pursue a structured dialogue with the cultural sector which should provide a framework for the regular exchange of views and best practices, input into the policy-making process, follow-up and evaluation. Attention should also be paid to the question of how to reach out to citizens in the cultural field and to enhance a dialogue on the European project via the use of internet."

The research has concluded that only few such sites currently exist and that many cultural websites aim at offering information and do not offer space for user contributions and interactivity. The majority of the 388 cultural websites does not yet or only to a very small extent make use of Web 2.0 features and (social) networking options available and does not yet offer any option for website users and visitors to contribute content to the website.

Those allowing for user contributions and interactivity mostly only allow for simple texts and comments typed into templates provided on the website, some offer an option for text contributions in forums. Only very few allow for an uploading of photos, pictures or audio-

visual material. Expressing an opinion on a website (through voting, rating, polling or e-surveys) is also not very popular.

The higher intensive interactivity features and functionalities - 'Forum', 'Blog', 'Chat' and 'Wiki' (listed in a sequence of increasing interactivity) allowing users to interact with other users, change website content, and exchange artistic expressions, debate with others and collaborate towards the achievement of a common goal or product can be found in a minority of cultural websites.

However, contemporary European cultural projects and websites should also reach beyond the provision of an information offer and other standard features and also provide cutting-edge online facilities for communication, collaboration, networking, dialogue and debate aiming at a crossborder/European exchange of cultural expressions (text, images etc.) and the dialogue and debate about these. The use of Web 2.0 functionalities should go further than what can currently be observed in many cultural websites and portals where Web 2.0 and networking features like for instance blogs



which are now often used for advertising events, posting news and comments. Ideally cultural

virtual spaces should provide room for more than an exchange of views or opinions (like fora), for example by dedicating virtual space for artists to present their work or intellectuals to express themselves on line and offer and support dialogue between them as well as give public access to this dialogue. To achieve this in an innovative and collaborative way different actors in communities will need to work towards a common goal and they will need to provide for means in order to adequately facilitate the moderation of these online activities by the blog or wiki owner or initiator.

Our research shows that many European cultural websites do not yet have the capacity to support more sophisticated forms of interactivity, debate and collaboration. The use of Web 2.0 functionalities for debate, collaborative use and networking are still at an early stage within this sector in Europe. Where these have been implemented these are often not used to support online collaboration, dialogue and debate between actors and

consequently they cannot yet provide space to involve the general public in this.

A main challenge is providing for multilingual dialogue on these sites. It is clear that maintaining multilingual websites is extremely costly and complex, as effective websites need continual updating. However, new web technology is enabling 'crowdsourcing', a distributed problem-solving and production model, which could be a cost-effective, bottom-up solution to this problem. In 'crowdsourcing' members of an online community - also known as the crowd - submit solutions, i.e. translations which in this case could help to further develop cultural websites step by step to truly multilingual websites. In the cultural scene 'crowdsourcing' could be used, for example by the agreement that artists or cultural managers belonging to the online community and wishing to upload their artistic digital content on to the cultural website - as members of this community agree to translating information on content already on the website into their language. 'Crowdsourcing' is still in its infancy and there is a lot of room for experimentation and learning. It could be considered to look into ways of supporting such activities for example through future EU programmes.

Skills development in web communication is another challenge facing actors and stakeholders in the cultural scene. With regard to cultural organisations more generally, the reason many of them do not offer the space for virtual exchange and collaboration is at least partly due to the fact that they lack skills in web communication.

There is therefore a need for capacity-building in this area since most of the existing cultural websites have so far not been successful in addressing aspects such as 'exchange', 'community building', 'debate' and 'collaboration' and this limits their scope to connect cultural professionals and involve new and younger audiences. The necessary capacity building is likely to include and require a wide range of activities enabling the different cultural actors to:

- Develop, implement and properly operate new and enhance existing cultural websites with Web 2.0 functionalities supporting the above functionalities by using latest development and collaboration support tools,
- Make intensive and appropriate use of networking platforms to also attract the younger generation,

- Ensure that cultural websites meet the standards required to be truly user friendly.

Research also shows that – although virtual communities and networks are a rather recent phenomenon – they are especially used by young people. 70% of young people are now regularly using this kind of technology and creating content. Statistics show that 64% of teens online are content creators. 39% have shared their creations online, and more than 25% keep blogs or personal pages. This makes them potential active contributors to different cultural domains since they often are familiar with the software tools needed to construct and further develop them. The cultural scene could have an opportunity here to attract and further develop not only a new audience but also highly active contributors. These figures also suggest, that as these organisations begin to actively involve the younger generation, the situation may evolve naturally on its own accord, at least to some extent.

It also became apparent in the present study that there is a need for capacity-building on issues such as 'copyright'. The 'copyright' topic has repeatedly been mentioned as the first and foremost issue requiring further information, exchange of experience and knowledge since many cultural stakeholders have difficulties in understanding how best to deal with it in their domain and under different circumstances. It may be worthwhile for the European Commission, Member States and the sector to explore ways of stimulating a greater awareness about 'copyright'

In the meantime, what could or should be done to stimulate this process? And what are the underlying assumptions? The basic assumption is that to be effective, virtual spaces for debate and artistic expression need to be developed in a bottom-up, sector-based way, rather than 'parachuted' top down from the European institutions. This is also the case when it comes to stimulating a multilingual approach by these websites. Responsibility for having modern websites offering the above features for the online and virtual exchange of cultural expressions, debate and collaboration lies with cultural organisations themselves (in this sense they are identical to other organisations, including non-profit-making ones).

The question is to how to provide voluntary incentives for these cultural organisations to develop state-of-the art websites facilitating an exchange of cultural expressions and debate in the field of European culture.

There are two main dimensions to this. First, how can cultural websites with this specific aim be stimulated? The second is how modern web 2.0 functionalities and interactive possibilities offered through Web 2.0 and (social) networking technologies could be more generally incorporated and mainstreamed into cultural organisations websites, without limiting their freedom to decide if they wish to do this and how they wish to achieve their aim.

During the workshop held on 19 March 2010 in Brussels, which was attended by more than 70 people representing Cultural Contact Points and cultural websites, it was stressed that website development is strongly determined by the needs of the organisation developing the website and the public it is targeting. In this sense websites are seen as tools which can in some cases include interactivity and artistic expression, but these are not requirements which cultural websites should meet in all cases.

Furthermore it was stressed that the Culture Programme is aimed at cultural cooperation and that the current budget for such cooperation at EU level is limited. A number of those present underlined that within the Programme the main emphasis should be laid on stimulating cooperation. Measures aimed at stimulating a greater visibility of such cooperation, at supplying information, at underpinning network activities and involving the broader public could be part of such projects and in this sense could be funded within the current programme.

Furthermore some participants underlined that the EU funding of project's website activities should take account of the possible sustainable future of such websites. Where these are a fundamental part of the project plan their sustainability should be determined.

Recommendations

Recommendation 1: Support virtual platforms and on-line initiatives aiming at exchanging cultural expressions (text, images etc.), inviting artists to present their cultural and artistic expressions and intellectuals at a cross-border / European level and supporting dialogue and debate open to the public reaching beyond the mere exchange of views or opinions. In the design of its future Culture Programme, the European Commission could explore the appropriateness of funding such virtual platforms intended to promote dialogue and exchange about cultural expressions which could complement the stakeholder platforms which exist.

Recommendation 2: Stimulate capacity building in website development with the aim of making the best use of web-based applications using Web 2.0 or Web 3.0 technology and innovative solutions to ensure multilingualism and to stimulate peer coaching on website technology (including copyright issues, etc). This could also include the use of cost-effective, bottom-up solutions to support and ensure multilingualism of cultural websites for example

through models like 'crowdsourcing'. Stakeholders are encouraged to make use of existing support schemes for ICT training within other EU programmes, such as "Information and Communication Technologies" – one of the four key activities of the Lifelong Learning Programme's transversal actions. Numerous projects with a clear cultural link are supported under this scheme annually.

■ Acknowledgements

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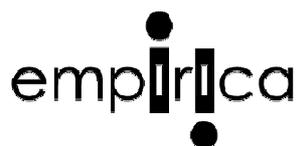
Information and Contact

For more information visit the CULTUREMAP website at: <http://www.culturemap.net>

Or contact the European Commission or study coordinator:



European Commission
Directorate General for Education and Culture
Directorate C - Culture, Communication and Multilingualism
Culture Programme and Actions Unit
Fax: +32-2-29.21954
http://ec.europa.eu/comm/dgs/education_culture/index_en.htm



empirica GmbH
c/o Werner B. Korte
Oxfordstr. 2
53111 Bonn, Germany
e-Mail: culturemap@empirica.com; info@empirica.com
Web: www.eskills-monitor.eu

Study partners:

