



Collection policy 2015–2020

Creation

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This is a revised version of the document discussed and annotated in the course of 2015 and 2016 by the Science Commission, the board of the International Institute of Social History (IISH) Foundation and with IISH employees at various meetings.

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1 Summary

1.1 Ambition

The IISH aspires to being (in addition to a first-class research institute) a world leading centre for making sources in the field of socioeconomic history available, in particular concerning the history of labour and industrial relations.

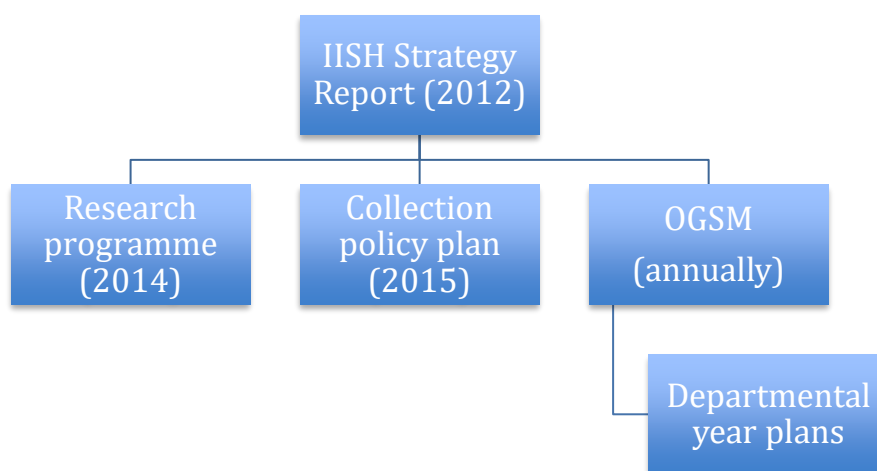
1.2 The ten main results in 2020

1. It is increasingly apparent from the results that the collection is being acquired with a sharper focus on the global history of labour and labour relations.
2. The organization is able to process incoming digital collections, ensure their long term preservation and make them available. The paper flow has shrunk by approximately 70 per cent, whereas the flow of born-digital collections has gotten underway.
3. The volume of analogue collections waiting for improved descriptions has been reduced from more than six to three kilometres.
4. All digital objects are stored in a certified *Trusted Digital Repository*.
5. We make metadata and digital objects available via open access and W3C standards and protocols, through APIs, as Linked Open Data and via delivery platforms.
6. The number of digitised collections and collection items has steadily grown. The most unique and valuable audio-visual collections have been digitised and stored in a sustainable manner for the future.
7. We are valued because of our active contribution to national and international organizational, technical and infrastructural developments in the heritage sector.
8. We have a thorough understanding of the wishes of our users and our public services are designed to meet them. We focus our efforts on new target groups and distribute proactive information about our collections and services.
9. All employees in the collection departments have the necessary up-to-date knowledge and skills required to perform their tasks well.
10. The organization is efficient, continuously renews itself and is also for that reason future-proof.

2 Essential background information

2.1 Embedding and implementation of this report

This is the first time that the IISH has written a specific policy plan for its collections. Until now, the collection policy formed part of the institute's overall strategy plans. In 2012, we nevertheless published an overall Strategy Report that deliberately only gave the main outlines. For that reason, it is now necessary for us to develop the general strategy into a more specific collection policy plan. From now on, it can also serve as a benchmark when evaluating the Collections Department. The following diagram is suitable for outlining the overall place of the collection policy plan.



We developed the compact overall Strategy Report (end of 2012)¹ as part of a revised research strategy (2014) and this policy plan for collections was written in 2015 and updated in 2018. At the same time, we introduced the OGSM method (*Objectives, Goals, Strategies, Measures*) in 2014.² This entails drafting concrete goals annually at institute level in a very succinct document, based on the policy that we draft at departmental level into operational plans and budgets. An evaluation will be made at the end of each year, in which we will examine to what extent the objectives have been reached.

This collection policy plan is primarily intended as an internal guideline to determine the annual plans.

2.2 Resources versus ambition

The Strategy Report of 2012 also formed the basis for a reorganization, which was necessary due to a structural annual shortfall of approximately EUR 800K. For the collections department, the reorganization involved a loss of 13 FTE. As a result, the tension observed in 2011 by the evaluation committee between the volume, significance and global reputation of the collection on the one hand and the volume of the available resources on the other has temporarily even increased. A one-off multi-year investment of EUR 2.6 million by the Royal Netherlands Academy of Arts and Sciences in the innovation of the Collections Department at the end of 2016 created scope to increase the capacity and to acquire expertise for the

¹ See annex 1 IISH_strategy_for_2013-2017

² <https://en.wikipedia.org/wiki/OGSM>

expected switch from acquiring analogue to digital material. In 2017 the FNV (Netherlands Trade Union Federation) was prepared to make a substantial investment (EUR 2 million) in the cataloguing and digitisation of its vast archive, while other donors to archives also increasingly contribute to providing access and storage.

However, it remains important to make smart choices.

With the objectives that we set ourselves in this policy plan, we start out from the existing fixed headcount plus the availability of temporary staff, which we think can be covered by further external fundraising. The main key to remaining a global leader lies in sharp, pragmatic and sometimes progressive choices, using cutting-edge technology, the high level of expertise of our employees and very purposeful action. This policy plan bears testimony to that.

2.3 Introduction to the IISH collection

The background of the IISH as a collecting institution lies in the Netherlands Economic History Archive (NEHA), founded in 1914. Apart from unique sources on economic history (such as a unique collection of official stock exchange lists), the NEHA also collected archives of trade unions and political parties. The activities of the NEHA were successful and became increasingly international. In the early 1930s, the NEHA extended its social history department and built up a network among the socialists, anarchists and other dissidents who had escaped from Germany and the Soviet Union, while discovering a large number of crucially important collections that were in need of a safe and reliable home. This led to the foundation of the IISH, with N.W. Posthumus as director, just as the NEHA, and from 1935 it was accommodated with the NEHA in Amsterdam.

The IISH collection is considered as one of the most important socioeconomic history collections in the world. With just under fifty kilometres of shelf space, it is vast even on a global scale; most material is unique and there are substantial cores of related material with a high ‘density’. The collection goes back to the early modern period and consists of archives, printed material, data, visual and audio material. In principle, the collection was created for the purpose of history research, but it simultaneously forms a socially valuable heritage collection of interest to a wider public. Much of the material would probably have perished without the Institute’s intervention. The emancipation movements that the IISH is interested in are sometimes politically sensitive and they tend to leave few traces in government archives. The IISH collection is therefore a private collection, owned by or given on loan to the IISH Foundation.

The collection is the result of over eighty years of a carefully considered collection policy. The focus has always been on labour and labour relations, but since the 1960s, the collection has extended to document social movements in a broader sense. In the last decade, the collection-gathering has been more explicitly handled from the point of view of major research topics in socioeconomic history, probing into the global development of labour relations and inequality, as part of which the economic perspective of the collection has become more relevant. However, building up a collection is a long-term process: lines must be pursued for prolonged periods in order to obtain sufficient correlation and density. From a spatial perspective, the IISH collection has been built concentrically in terms of density and correlation. There are three circles, each with their own collection logic: The Netherlands, Europe and the world. As far as the Netherlands social history is concerned, the

IISH also fulfils a national role; a role for which many European countries have designated institutions. For that reason, a high level of density was pursued and achieved for the Netherlands, whereas for the rest of Europe, this only applied to specific topics, such as anarchism, international organizations or the German pre-war social democracy. As historians developed an interest in global developments and the correlation between them, the IISH also started to collect on a global scale. The international collection policy can perhaps best be described as *sampling*; by selecting significant elements of specific developments and structures. Increasingly often, this concerns data,³ for example annual series of wages, prices or trade union membership.

Since the IISH collection was in principle set up for research purposes, the main emphasis was on unicity and consistency, as well as the material's informative value for the researcher, regardless of its nature. Archives, books, periodicals and audio-visual material have therefore been gathered in one single information system, from which metadata and digital objects are made available through a website, but also openly accessible by the outside world. This also applies to data sets, which have increasingly come into focus since the 1980's when in acquiring collections.

2.4 Size of the collection available on 1 January 2018

The available collection can be retrieved through the standard IISH procedures and accessed over the Internet or in the reading room.

Category	Unit	Total available*
Archives (inventoried) ⁴	metres	12,473
Archives	metres	17,773
Books	quantities	827,688
Periodicals	metres	12,917
Document collection	metres	177
Visual material (still)	quantities	1,923,026
Audio and video	quantities	16,492
Digitally born collections	TB	24

*Excluding material still to be made accessible⁵

³ This refers to structured data in the form of series, data series and figures.

⁴ Inventoried archives are archives made accessible by an inventory or provisional list. The other available archives have at least a description at collection level (and a list in some cases).

⁵ When we refer to material still to be made accessible, we mean collections that cannot be retrieved and consulted using the standard IISH procedures. In a few cases, researchers can nevertheless still access and browse through

2.5 Size of the Collections Department

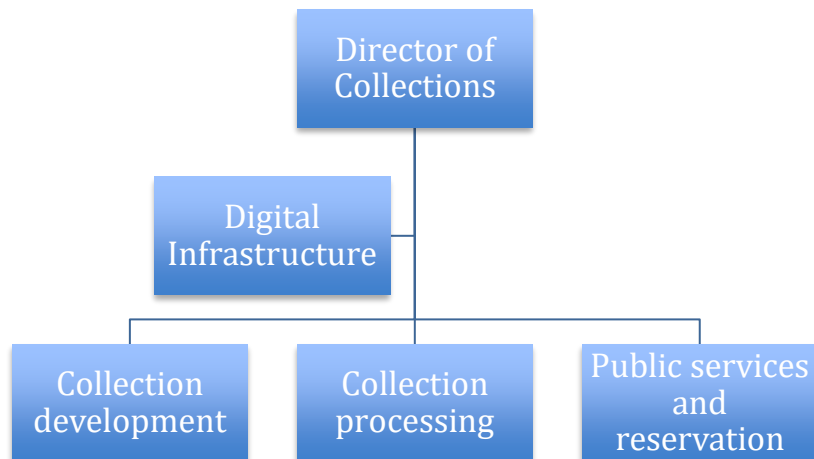
2.5.1 Size of the department in 2015 and 2017

Division	FTE in 2015	FTE in 2017
Director of Collections	0.8	0.8
Collection development	5.0	6.1
Collection processing	5.9	8.8
Public services and preservation	7.6	8.4
Digital infrastructure ⁶	5.5	5.5
Total	24.8	29.6

these collections by appointment; special arrangements need to be made in that case. See also page 17 and annex 4. Digitally born collections will be made available in the course of 2018.

⁶ The Digital Infrastructure Department does not work exclusively with the Collections Department, but with all departments within the IISH. The available capacity (size) of this department influences the feasibility of the goals set.

2.6 Organization of the Collections Department



2.7 Research and Collections

The collection departments work closely together with the IISH's research department. Researchers are involved in the acquisition policy and sometimes also make acquisitions themselves. The compilation and storage of data sets require a joint effort and there is only one single digital infrastructure. The research department successfully uses the IISH's collections. However, carrying out research and producing a collection have different dynamics and time lines. We do not collect specifically with IISH research projects in mind, because that would result in a fragmented and insufficiently dense collection. Accordingly, we build our collections for the benefit of labour history research in general and not exclusively for our own research programme.

3 Policy

3.1 General

The collection policy is based on the Evaluation in 2011,⁷ the Strategy Report of 2012⁸ and – naturally – the latest developments in the heritage sector, science, technology and society. The majority of the collection policy set out below has already been traditionally in force, such as the focus on scientific use, the resulting integral approach to types of material, or the acquisition policy based on unicity and coverage. Important new policy elements stem from the strongly increased need of researchers for quantitative data, the formation of digitally born archives and the option to make material available through APIs⁹ and as Linked Open Data. Account has also been taken of the problems (partly) signalled by the 2011 evaluation committee that require a solution, such as the unfavourable relationship between the quantity of incoming material and the personal capacity, the resulting six kilometres of shelf space of descriptions still due for improvement, the deterioration in audio-visual material and the insufficiently effective organization of the so-called regional desks.

3.2 Underlying principles

1. The IISH aspires to being (in addition to a first-class research institute) a world leading centre for preserving and making available sources in the field of socioeconomic history, in particular the world history of labour and industrial relations.
2. The collection is primarily formed, made accessible and made available for the purpose of scientific use, but it simultaneously forms a socially valuable heritage collection relevant to a broader public.
3. Highly decisive for realising the aforementioned ambitions are:
 - a. the volume and quality of the collection;
 - b. the dependability of safe storage, taking into account security, privacy and the trust of the archival creators.
 - c. the level of the archive's discoverability and findability;
 - d. the quality and openness of the services used in making the archive available (online);
 - e. the measures we take to maintain the collection;
 - f. the extent to which the IISH leads nationally and internationally in using cutting-edge methods.
4. In the last twenty years, the resources actually made available have increasingly dwindled, which also means that fewer employees are dealing with the collections. However, we maintain the above ambitions, bolstered by the 2011 evaluation committee, which ruled that the IISH collections are of utmost importance for global socioeconomic historical research.

⁷ https://www.knaw.nl/shared/resources/instituten/bestanden/rapport_evaluatiecommissie.pdf

⁸ See annex 1 *IISH_strategy_for_2013-2017*

⁹ Application Programming Interface. A collection of definitions on which basis a computer program can communicate with another program.

3.3 Acquisition

3.3.1 Collection profile

3.3.1.1 Contents

Having fewer resources inevitably leads to a need for smarter choices. Building the collection has therefore concentrated more on material relating to labour, workers and labour relations, which has been the main area of expertise since 1935. The focus lies on contemporary *labour related network organizations* and people active in them. There is no need to start from scratch: the identification of a number of ‘best fits’ between our existing archival creators and the strategic focus can produce results. The concentration on *labour* means less attention to the ever broadening range of social movements and themes that has been accommodated at the IISH since the 1970s, although we will not abruptly break off any existing relationships with archival creators. Also with books and periodicals, the continued concentration on the IISH’s key areas will go at the expense of literature in the field of broader social themes and movements, but also of widely distributed and usually valuable Western academic publications of a more general nature.

3.3.1.2 Coverage

Subsets that have reached a specific size and coverage must have the opportunity to retain or increase that coverage. The coverage largely determines to what extent it would be useful for researchers to consult the IISH. We will continue the existing policy.

3.3.1.3 Type of material

We also decided on containment in this respect. The burgeoning availability of digital and digitised publications elsewhere makes it possible to focus even more on primary and unique material. However, a large and consistent library collection in a specific field can also grow into an almost primary and unique resource. The IISH library is precisely that in several respects and the users value that.

Without shifting the substantive focus, we will collect as much material as possible in digital format, which serves to reduce the inflow of paper. We have started to enter into a dialogue with our main archival creators about the digital delivery of their archives, also based on our assumption that we will need to receive digital archives (including emails, social media and internal websites) at a fast pace, because of the risk that material may otherwise get lost. We endeavour to reach agreements with our permanent archival creators about the submission of digitally born material, and make the process of selection, transfer, processing and storage occur in close collaboration. The collection of digital *publications* is restricted to the key areas and to gathering material that is either not available elsewhere or difficult to access. Paying for merely *accessing* digital publications seems rather pointless for the IISH, given the high costs, the relatively small user group and the alternatives via universities and services such as JSTOR that are widely available. We aim to achieve access to a number of the most relevant services at the level of the Netherlands Academy of Arts and Sciences.

The greater focus will be precisely on building up and acquiring data collections. The IISH is systematically devoted to building up and acquiring data collections. The collaboration between collection development and research is crucial in this respect. IISH researchers distinguish three level of data:

- Meta: e.g., about migration, wages, prices, population censuses;
- Meso: e.g., about organizations and ‘actions’ such as strikes;

- Micro: about individuals, e.g., biographies.

Such data can be collected in analogue or in digital form, or can be accumulated through digitisation and processing of sources already held by the IISH. Apart from structured data that can be incorporated in databases, work is also needed on text corpora that can be searched with state-of-the-art tools for text mining.

Building up and gathering structured data sets mainly takes place in the context of research projects and are carried out by researchers. They have the necessary expertise and contacts. The gathered data must be considered as part of the IISH collection and therefore stored, and made accessible and available within the existing infrastructure.

The presence of data relevant to research within collections will play a role in acquisition and also in the decision of which collections will be digitised. We will aspire to include digitisation (and further processing of digitised material) in research projects. A modest part of the acquisition budget will be spent on digitising material in the IISH collections that is relevant for research: ‘seed money’ to obtain results that can be used to get bigger projects off the ground.

3.3.2 Regions

The IISH collection policy has a global scope but is naturally unable to achieve the same coverage across the entire world. We will continue to apply the current logic. Coverage is highest for the Netherlands, followed by Europe and countries and regions where the IISH has already been active for some time, such as Turkey and South East Asia, and ‘the rest of the world’. Where the coverage ratio is highest, we apply a broader interpretation of the collection profile, whereas we narrow it down in areas with a low coverage ratio. Globally, it is primarily about collecting significant elements for the trends, processes and movements that are important in *Global Labour History*. We concentrate mainly on data in this respect.

3.3.3 Reappraisal

In order to refine our collection policy, we are also looking at options for reappraisal for possible relocation of collections. Local branches of trade unions or parties is one example. They are often consulted by local (amateur) historians and it is probably more appropriate to store them in a regional historical museum.

3.3.4 Volume

We will bring the volume of the collection development more in balance with the available capacity to make material available, as part of which we aim for a rapid turnaround to digitally born material, which requires less processing capacity and physical storage space, due to the use of automation. Since the archival creators still have a large volume of paper material in the pipeline, this policy will probably not immediately have the desired effect, but will only achieve a balance in a term of approximately five or six years.

3.3.5 Method

Approximately ten years ago, the collection development department consisted of a group of subject specialists with their own collection areas and themes, operating relatively individually within policy frameworks. In 2010, six so-called regional desks were introduced, headed by a senior researcher and employees based in the region. The desks were responsible for gathering collections in those regions and for inventorying material in IISH systems.

Activities in Europe were curbed in favour of the ‘Global South’. The collection policy continued to cover a broad content, with a strong emphasis on collaboration with local partners, digitisation and ‘rescue operations’.

The organizational complexity of this set-up was underestimated. The available financial and personal resources were not in proportion with the ambitions, and insufficient support could be given at the central level (in Amsterdam). Too little progress was made on the internal consistency between the activities of various desks and the desired correlation between collection development and research.

The position of senior researcher/collections manager was therefore discontinued. We are no longer imposing the formula of regional desks. Instead, we are growing into a team based in Amsterdam, collaborating intensively, and carrying out and managing various activities and projects. This fixed team safeguards the realisation of the general IISH policy, for embedding the collection development activities into the overall organization and for the coordination with other departments. The team is supported by a diverse, flexible group of employees, based in Amsterdam or elsewhere, specialised in subjects or geographical regions, or associated with a specific project. In a few regions, we have permanent branches or representations. They are in turn supported by a group of people who are not IISH employees: specialists, volunteers, researchers, users of and visitors to the IISH, members of social organizations, activists in movements and fellow collectors. More than ever, we must actively approach this group to try and involve them in developing the collections (with advice, helping us to trace collections, networking, and collecting in a specific field).

A matrix that maps out the value of collections for the IISH helps us to make decisions, which facilitates greater consistency in those decisions.¹⁰

3.4 Discovery and accessibility

3.4.1 Open data

In order to make collection descriptions and digital objects as discoverable as possible, the IISH makes them accessible¹¹ as Open Data as much as possible. The IISH’s descriptive metadata available under a Creative Commons Zero (CC0) licence will also become available as Linked Data in this policy period. The objective is to tie in with general schemes, such as schema.org and Dublin Core, and frequently used vocabularies such as Geonames and VIAF. In addition, we will continue to improve and distribute our source data in EAD and MARC21. In the (inter)national research infrastructures and associated projects such as CLARIAH,¹² publishing and using Linked Open Data is still developing rapidly. Participating in CLARIAH enables the IISH to also publish its collection descriptions as Linked Open Data in an innovative manner and to link them up to other structured research data. This connection between research data and collection descriptions in the Big Data infrastructures is precisely what enables researchers to utilise new research methods and to apply new search technologies.

¹⁰ See annex 2 IISH Decision Matrix

¹¹ Exceptions to the Open Access policy are made in some cases, including when material is protected by copyright and/or when different agreements have been made with donors of the archive.

¹² CLARIAH: Common Lab Research Infrastructure for the Arts and Humanities, a project granted a twelve million euro fund by NWO to build a nationally distributed research infrastructure that will make digital applications and data available to researchers in humanities and social sciences in a sustainable and user-friendly way, facilitating innovative humanities research. The IISH is one of the partners in the project.

Since the IISH forms part of the KNAW Humanities Cluster (HUC), the new digital humanities tools and techniques are also within reach for the IISH collections. The available capacity of developers and in-depth expertise has increased significantly thanks to the set-up of a joint Digital Humanities Lab and the HUC's Digital Infrastructure department (2018). Furthermore, we make as much use as possible of discovery services and aggregation platforms such as Apex (Archives Portal Europe network of excellence),¹³ Worldcat,¹⁴ Europeana,¹⁵ the Social History Portal,¹⁶ ArchiveGrid¹⁷ and Adamnet. In addition, the IISH is actively working towards making its collection available via Wikipedia and Wikidata where possible. Also, the IISH is actively involved at various levels through the KNAW (Royal Netherlands Academy of Arts and Sciences) in the Network Digital Heritage (NDE) and contributes to the development of an innovative architecture of a distribution network of heritage information in the context of the National Strategy for a Digital Heritage. In AdamNet, the Amsterdam heritage network, the IISH has taken the initiative in collaboration with organizations such as the Amsterdam University Library, the Amsterdam Public Library, the Municipal Archive and the Amsterdam Museum to link up all pre-existing information held by Amsterdam heritage institutions about the history of the City of Amsterdam using Open Linked Data. In the context of this 'Story of Amsterdam', the IISH will participate in the first pilot to trial the NDE architecture.¹⁸

A good Open Data policy is not only a matter of open access, but also determined by whether information is available on how the data can be used and the persistency of the references. We will inform users of the APIs and the protocols used that are offered by the IISH and about using data with the help of digital humanities tools. Each description of collection items and every digital object that the IISH makes available via the Internet is assigned a Persistent Identifier,¹⁹ which guarantees long-term access to the material.

3.4.2 Standards

The level of discoverability and interoperability of collection items is highly dependent on the use of standards and optimisation of the metadata. We are therefore making the IISH collections accessible using the most commonly used international (metadata) standards. Archives and mixed collections are described in Encoded Archival Description (EAD). For cataloguing printed materials and visual materials at item-level, we use MARC21, the descriptive metadata standard library, in conformity with the Library of Congress guidelines. In correlation with EAD and MARC21, we use the Metadata Encoding and Transmission Standard (METS) as well as PREMIS,²⁰ in order to manage and present digital collections

¹³ The Archives Portal Europe (Apex) <http://www.apex-project.eu>

¹⁴ In the first half of 2015, more than 1.2 million IISH records became available in Worldcat www.worldcat.org

¹⁵ Europeana <http://www.europeana.eu/portal>

¹⁶ Social History Portal <http://www.socialhistoryportal.org> The Social History Portal was one of the main project results of the Heritage of the People's Europe project, performed in relation to the International Association of Labour History Institutes (IALHI) and financed by Europe (HOPE, 2010-2013). The portal brings together important collections of IALHI institutes, amounting to 900,000 digital objects and over 2 million collection descriptions.

¹⁷ ArchiveGrid: <https://beta.worldcat.org/archivegrid/>

¹⁸ See also http://www.den.nl/art/uploads/files/NDE_Whitepaper_NetwerkHeritageInformation%20EN%20v2.pdf

¹⁹ A persistent identifier (PID) is a permanent reference and unique label for a digital object, separate from the location where it is stored. The unique label ensures that the digital object can always be traced on the Internet, even if the name of the digital object or storage place changes. Digital objects can therefore always be easily found from anywhere, based on their PID. This is important for the sustainable storage (archiving) of digital objects in the rapidly changing world of the Internet.

²⁰ <http://www.loc.gov/standards/mets/> and <https://www.loc.gov/standards/premis/>

well. For the delivery of collection descriptions and digital objects via the API, we use the standard protocols, OAI-PMH or SRU/SRW, and we will also offer the Linked data via a Sparql endpoint. Descriptions of research data are produced by using Data Documentation Initiative (DDI),²¹ the international metadata standard for social, behavioural and economic sciences.

Also as far as digitisation is concerned, the IISH underwrites globally accepted open standards and file formats.²² For our own unique and vulnerable collection items, we choose a high-spec quality sustainable standard; the derivative may differ depending on the required presentation.

In the next policy period, we will make a few more improvements:

- For the optimisation of metadata, the focus in future years will lie on improving the authority files (personal names and organizations) and the link between own entities and national or international networks of terms (NTA,²³ VIAF²⁴).
- We will look closely into the role of our Image and Sound thesaurus. In the 1990s, the IISH largely ceased indexing the content, and terms relating to the content are only added for visual material. The thesaurus is not supported by a software system, the terminology is obsolete and the user cannot make optimal use of it in the online catalogue.
In order to improve the quality of the authority files and the thesaurus, we are examining alternative options: linking up to third party index lists via linked data (Cultuurlink), or direct integration of external thesaurus systems such as FAST,²⁵ the LOC subject headings²⁶ and AAT thesaurus²⁷ in our systems.
- For the semantic enhancement of collection descriptions, the IISH will use language technology to recognise and mark entities (such as personal names, organization names and geographical names) in collection descriptions and to link them to authority files and external data such as VIAF.
- Research into the standard Metadata Object Description Scheme (MODS)²⁸ should indicate whether this will offer the IISH more options for the presentation of items such as digitised periodicals.
- In libraries, the international standard for bibliographic description (ISBD) is being abandoned in favour of Resource Description and Access (RDA²⁹). The IISH will decide in the coming policy period whether, how and when it will introduce this library standard. For archives, we will look at new standards, such as EAD3 and RIC.
- We are enriching archives and collections with more content-related attributes, such as topic, country, type of material, organization or person. Retroactive adjustments will be made to older archive descriptions to provide them with these content-related characteristics.
- We will experiment with new techniques, such as image recognition, artificial intelligence and virtual reality, to examine how they can contribute to automatic indexing, enrichment and presentation, potentially also for other types of users.

²¹ <http://www.ddialliance.org/>

²² See annex 3 *IISG_standards_and_file_formats*

²³ National Thesaurus for Author Names (NTA) <https://www.oclc.org/support/services/ggc/nta.en.html>

²⁴ Virtual International Authority file (VIAF) <http://viaf.org>

²⁵ FAST (OCLC) <http://fast.oclc.org>

²⁶ Library of Congress Subject Headings <http://id.loc.gov/authorities/subjects.html>

²⁷ Art & Architecture Thesaurus (AAT) <http://www.getty.edu/vow/AATSearchPage.jsp>

²⁸ <http://www.loc.gov/standards/mods/>

²⁹ Resource Description and Access (RDA) <http://www.rdatoolkit.org/about>

3.5 Cataloguing

3.5.1 Comprehensive approach

A comprehensive approach is key to processing the IISH collections. We will apply the same principles and operating processes to all collections and types of material, both analogue and digital. The same applies to data sets, which are increasingly becoming included in the IISH collections and which need to be processed and stored in a sustainable manner.

3.5.2 Descriptions at collection level

The IISH aims to inform users as soon as possible of the presence of the collections at the IISH. This can be done by producing descriptions at the collection level, as part of which we give a very global description of what each collection contains. In addition to archival collections, we also describe (mixed) collections of other types of material in EAD rather than in the traditional format as part archive, partly individual collection items. With this approach, we retain the context of a collection and can approach the collections in a less labour-intensive manner, allowing us to process more collections.

We consider a collection as accessible if it can be found via the catalogue and if physical access can be provided to reasonably manageable units. The fact that researchers are sometimes given boxes with material, with only a rough description of the content, is the result of a deliberate choice. We assume that users prefer this option over not having any access to the material at all.

3.5.3 Item level descriptions

Item level cataloguing is still required in many cases for books, visual material such as pictures and posters, films and audio material, although it is a labour-intensive method. Developments in the field nevertheless show that cataloguing books is increasingly being carried out by third parties, after which libraries only need to make small adjustments before inserting the descriptions in their own catalogue. We are considering whether it would be useful to catalogue (partly) directly using Connexion or Worldcat³⁰ for deriving information from existing descriptions. However, the IISH also collects a lot of unique material of which descriptions cannot be derived. Crowdsourcing, which is increasingly applied in heritage institutions to provide visual material, audio and film recordings with descriptive metadata, can be a solution for cataloguing this material. We will run pilot projects in that respect in the next few years.

3.5.4 Digitally born collections

Digitally born collections are offered in a multiplicity of formats, structures and descriptive data. Every archival creator (organizations and people) uses the systems that are most appropriate for their own situation. In contrast to the requirement for government archives, the IISH is not under a statutory duty to store archive material and it cannot impose demands regarding the format and structure in which material is provided by archival creators. However, we will hold consultations to understand and document the formats and structure of any collection provided, and to receive collections in a platform-neutral format and in widely supported file formats when possible. In this period, we started a multi-year project to produce technical provisions and an organizational set-up compliant to the Open Archival Information System (OAIS), an internationally accredited reference model, for receiving and

³⁰ <http://www.oclc.org/connexion.en.html>

storing digitally born archives, and for making them available. In 2017, we opted for the open source system Archivematica, for the sustainable storage of digital collections.

The IISH aims to make the material in digitally born collections automatically available; the descriptions will largely be generated and assembled from the content using text and data mining tools. Contextual metadata can be obtained, with a description of how the collection relates to the environment, by means of a pattern recognition tool for text and image, which uses pre-existing field-specific authorities and ontologies. Audio-visual collections will become more accessible than ever, by opening them up through language and speech recognition and transcription tools. In addition, we aim to apply algorithms to prevent large collections degenerating into *Dark Archives*: extensive digital archives that are in fact wholly impenetrable and likely to remain so for a long time to come. This indexation data is crucial for accessibility and consequently for the discoverability of the collections. The main objective is to make collections optimally suitable for research. Furthermore, these collections will not be subjected to a manual appraisal and selection.

3.5.5 Improving accessibility

The IISH will ensure that as much material as possible comes with a basic description. The main concern is to ensure that the acquired collections can be retrieved and consulted through the standard procedures.³¹ The extended collection profile and the increasing acquisition of digital material in comparison with analogue material is expected to stem the increase in the number of collections still to be indexed and collection descriptions awaiting improvement. In order to reduce the number, we have opted to open up material in bulk, on a project basis – informing the user of the material’s availability takes precedence. Our first priority is therefore to produce metadata records, containing a global description of (parts of) the collections. A more detailed description may follow at a later stage, but for the time being, collection sections are considered accessible if they are findable and can be supplied to the reading room. Collections and archives that meet the set IISH collection profile are given priority. Apart from that, an enquiry from researchers or financial donations from archival creators may constitute a reason to prioritise processing collections. The volume of descriptions still awaiting improvements spanning six kilometres of shelf space will be reduced by at least half by 2020.³²

3.5.6 Processing of existing digital collections

Not all the digital collections of the IISH have been properly processed yet, but we are well on the way.³³ Digitally obtained collections, digitised collections and collection items that were digitised over the last few years have been sustainably digitised as a result of digitisation on demand are being stored in the Shared Object Repository.³⁴ The files, including brochures,

³¹ Collections still awaiting processing and collection descriptions awaiting improvement can often already be found in the catalogue under a global description, but the material will not yet have been broken down into retrievable units that can be delivered to the reading room. The IISH aims to maximise the opportunities for researchers to consult even those collections that only come with a basic registration; appointments can be made to view unsorted material that may be stored in removal boxes.

³² See annex 4 *Processing backlog January 2015*

³³ Collections that will be processed include the digitised collections on the Dutch websites Five Centuries of Migration (Vijf Eeuwen Migratie), Trade Unions in the war-time period (Vakbeweging in de Oorlog) and the Historical Visual Archive of Migrants (Historisch Beeldarchief Migranten - HBM), the collection Rote Armee Fraktion (RAF), digitised brochures (Kashnor collection and the Memory of the Netherlands).

³⁴ The Shared Object Repository (SOR), a storage facility for digitised collection items, was the outcome of the Heritage of the People’s Europe (HOPE, 2010-2013) project, carried out within the International Association of

visual material, film and audio files are being linked to the descriptive metadata, enabling us to make this material available online to researchers.

3.5.7 Metadata optimisation

Not all existing collection descriptions meet the standards for interoperability and availability via platforms. These collections are consequently not optimally accessible. We are therefore providing the different elements of metadata in line with prevailing standards. This concerns lists of pamphlet collections, film lists, book collections, card index boxes, lists of special objects or lists that can be approached via special websites, such as het Staatsarchief.

3.5.8 Language technology

For the enrichment of collection descriptions, the IISH will use language technology to recognise and mark entities (such as personal names, organization names and geographical names) in collection descriptions and to link them to authorities and external data such as VIAF. The expertise of the Digital Humanities Lab of the KNAW Humanities Cluster will help us to develop a toolset that will make this possible.³⁵

3.5.9 Methodology

More than ever, we are adopting a project-based, systematic approach to the processing activities. Work previously performed on a daily basis is now scheduled periodically. This planning enables the IISH to determine when we can get started on larger collection processing projects, for which we can deploy teams of employees (and volunteers with the appropriate expertise). We are also planning the import of the descriptions and location of accompanying material in the warehouses.

Data sets are usually produced and collected by the research department. This means that we need to organize the work processes at a cross-departmental level, in a manner that supports the research data life cycle.

A quarterly record is kept of acquisition and processing figures, which facilitates a proper insight into the growth of the collection and potential occurrence of backlogs. The figures form the basis for our decisions regarding what materials or collections we wish to prioritise. This will be supported by the future implementation of ArchiveSpace, a system for registering collections and managing physical storage.

3.6 Digitisation

We discern three flows of digitisation: project-based digitisation, digitisation on demand and digitisation as part of cataloguing.

3.6.1 Digitisation projects

Our choice of collections to digitise is based on the following criteria: unicity of the material, physical condition (vulnerability), interest from users (own researchers and others), options to raise (additional) funds, the prospect of publication (copyright restrictions) and social value. In the years before 2015, a total of approximately 400 metres of material was prioritised in

Labour History Institutes (IALHI) and funded by Europe. The IISH supervises the development and management of the SOR, in collaboration with the IALHI partner, the AMSAB Institute for Social History (AMSAB-ISG) based in Ghent, Belgium.

³⁵ At the end of 2017, the NWO awarded us a project to commercialise the results obtained in the HITIME project (2011-2012). The expected outcome is a set of tools that recognise entities in a text, making it possible to evaluate, edit, authorise and link the recognised data. The end product is a user interface with functionality using those tools.

the context of projects,³⁶ that were primarily funded by the Metamorfoze programme and with support from SNS Reaal. We will endeavour to maintain the current annual growth of digitised IISH collections and to increase it where possible. The audio-visual collection has the highest priority, given the vulnerability of the material. In 2015–2017 we carried out a number of projects in which we digitized over 50% of the most vulnerable and unique audio material in the IISH collections. Furthermore, we particularly want to make rare foreign periodicals, which are not eligible under the Metamorfoze programme, digitally available. We will incorporate these specific digitisation plans in the annual plans of the Collections Department in the coming policy period.

3.6.2 Digitisation on demand

For digitisation on demand, the user's request obviously takes precedence. Dependent on the requested material, we will choose between sustainable digitisation (and storage) and a rapid delivery of the order (without sustainable storage). The delivery of files to clients is automated. The costs are to be paid by the client, but in some cases, the institute pays part of the costs.

Archival records, books, brochures, periodicals, photographs and posters are digitised at the IISH, where microfilms and microfiches are also scanned (or printed).³⁷ We arrange for audio-visual material to be digitised externally by accredited and reliable partners in sustainable file formats, because the IISH opted not to invest in maintaining AV equipment and expertise. For large quantities and projects we also rely on external digitisation. The number of requests for digitisation on demand has been increasing in the last few years, which also has a positive effect on the extent of the available digital collection of the IISH, because collection items sustainably digitised on request are also immediately made available to all future users.

3.6.3 Digitisation as part of cataloguing

In line with the cataloguing, we have digitised photographs, posters and prints with itemised descriptions. We will continue this policy. Old low-resolution scans will be rescanned and replaced by high resolution, high-quality files. This work is not yet complete, but we have decided not to prioritise it in the following period.

3.7 Availability

3.7.1 Users

When making material available, the IISH firstly targets researchers and secondly the broader public with a (professional) interest.

In order to align our public services even better with our users, we are taking measures to obtain more information about how our collections are used, while taking our high standards regarding to privacy protection into account. In 2017, we took part in the quality monitoring (Kwaliteitsmonitor) of Dutch Archives. In almost all categories, the IISH scored significantly higher than average.

³⁶ See annex 5 *Overview of IISH digitisation projects*

³⁷ Currently we supply high-resolution files in TIFF format and low-resolution files as JPG files. It is also possible to provide PDF files.

In 2020, we will have an optimal insight into the wishes of our users and we will structure our services accordingly.

In addition to existing users, we would like to focus on groups of potential users in the next few years. This includes future researchers, i.e., the current students of alpha and gamma sciences. We would like to give this group more support with the first steps they take working with the archives and at the same time draw their attention to our collections and to our institute's research.

3.7.2 Online consultation

As set out above, the policy aims to create open access to collection data; our own website will be one of the main access gateways to the collections. In 2018 we will give the website a drastic overhaul. Instead of the current split between a collection section on the IISH website – with lists, guides, projects, highlights, virtual exhibitions, item of the day and new acquisitions – and the separate section for the online catalogue (search.socialhistory.org), all the information about the IISH collections will be presented and be searchable in an integrated way.

For the period 2015–2020, the presentation and availability of digital material is a major priority. The storage and presentation of digitised books, brochures, texts from archives, audio and video (film) material has already been completed. The time has now come to present OCR files and periodicals. Since far more sources (digitally born archives, OCR of publications and research databases) will be available online, we will need to extend and refine the search options. We intend to enrich our metadata, which will improve any searches for persons. We will also include references to other external portals, for example, automatic links to other catalogues (Worldcat) and digitised versions available elsewhere.

In the coming years, there will be a joint workflow for archiving and making digitally born material as well as digitised material available. In 2020, the digital collections – digitised as well as digitally acquired – will be easy to consult online. Adequate presentation options (viewers and players) will be available for every type of material. We will do this by using presentation/viewers via IIF,³⁸ which has become a standard in its own right in the last few years. It is possible to optimally browse and visualise this digital material with the help of state-of-the-art techniques.

3.7.3 Consultation in the reading room

The IISH's reading room remains open to researchers five days a week. If possible, the material is made freely available to the public without charge, within the boundaries set by agreements with donors and depositors and by statutory provisions. The underlying principle for the services in the reading room is as much self-service and self-reliance as possible. The retrieval procedure is currently fully electronic, which means that all material (books, periodicals and archives) available for consultation in the reading room can be requested in advance through the catalogue. Reading room staff will continue to provide individual support in the future, as required.

Visitors are allowed to take pictures of the material and to use facilities, such as a book scanner. A different regime applies to vulnerable pieces and collections subject to limited access, as part of which the IISH can supply copies for private use and research for a small charge. These copies can already be requested for and ordered via the catalogue at this stage.

³⁸ International Image Interoperability Format

3.7.4 Exhibitions

Encouraging the (re-)use of the collections also includes carrying on with the existing policy to supply material for exhibitions. It is a good way to make a wider public aware of the collection and its social relevance. Exhibitions also offer an opportunity to showcase the collection in a different context, to emphasise new meanings of our objects and to rediscover our own collections. Setting up our own exhibitions is not a priority for the IISH.

3.7.5 Copyright and privacy legislation

The policy to make the collections available online where possible is currently seriously impaired by the legislation relating to copyright. Showing collection items in the online catalogue is legally considered as a publication that requires the author's consent. In the past, the IISH applied an opt-out arrangement: if the creator of visual material objected to inclusion in the online catalogue, the material was immediately screened off and made invisible. This arrangement was no longer satisfactory and the risk of claims for damages following an unwarranted disclosure became too high. Following a dispute between the IISH and a photographer, and the ensuing court case³⁹ about showing visual material in the online catalogue, the display of images in the catalogue (the visual metadata) has been limited since March 2014 to users of the online catalogue within the perimeters of the IISH. The ruling (20 May 2015) did not provide a legal solution. In June 2016, the IISH entered into an agreement with Pictoright, a collective management organization of authors' rights for visual creators in the Netherlands, which served to (partially) lift the restriction.

Copyright also applies to the publication of texts and letters from the archives. It is necessary for us to review the current policy in this respect and to rephrase it. Lastly, we must bear in mind that the publication of the inventories on the Internet can sometimes be construed as breaches of the provisions under the Personal Data Protection Act (WBP). In the past, complaints about this only arose occasionally and we always managed to find a good ad-hoc solution. In anticipation of the Data Protection Directive (Directive 95/46/EC or Algemene Verordening Gegevensbescherming (AVG)) coming into effect in May 2018, we are mapping out the work processes that involve personal data and any measures that need to be put in place.

In 2020, the systems and metadata will be organized in a manner that will give us accurate and efficient control over what is published, depending on national and international developments in relation to copyright and privacy legislation.

In the meantime, we will (continue to) raise the issues faced by heritage institutions around copyright on relevant national and international forums and conventions. The regulations in force in this respect must be urgently revised.

3.8 Maintenance and preservation

3.8.1 Prevention and curative treatment

The IISH's preservation policy is firstly focused on prevention, particularly in terms of providing sound, climate-controlled storage and effective packaging during processing.

³⁹ The damages levied for showing 221 images in the online catalogue as visual metadata with the description was EUR 50,000. For further information about the court case and the ruling, see also: https://socialhistory.org/sites/default/files/pressreleases/persbericht_rechter_wijst_schadeclaim_fotograaf_tegen_IISH_af.pdf

Remedial measures can only be taken to a limited extent and they largely depend on external fundraising or on voluntary work. In that respect, the priority lies:

- On digitising the most important, unique and vulnerable parts of the collection, such as the audio and video collection. This is carried out by external parties (through outsourcing);
- On the comprehensive (re)packaging in acid-free material and (re)placement of the most poorly packaged collections, such as brochures and collections of photos and negatives.

3.8.2 Analogue storage

Following the renovations of the fifth floor of the building, the storage capacity for analogue collections appears to be adequate for the next five years. The growth in analogue material will probably only significantly slow down by the end of the next policy planning period (in 2020), due to an increase in incoming digital collections. Conversely, as a result of the formation of the Royal Netherlands Academy of Arts and Sciences' Humanities Cluster in 2016 and 2017, part of the collection of the Meertens Institute is accommodated in the IISH, which affects the available storage capacity of the IISH collections.

Some collections pose a practical problem for service delivery, because they are not in a convenient location.⁴⁰ These problems will be resolved at the end of the policy planning period by means of a project-based approach per collection.

The mobile cabinets on a number of floors are old (from 1989) and are starting to show signs of wear. With additional attention to maintenance, they are expected to last another five years, but a budget must be set aside in time for replacement.

3.8.3 Digital storage

3.8.3.1 *Trusted Digital Repository*

Since 2014, files have been sustainably stored in the Shared Object Repository (SOR).⁴¹ In the next policy period the IISH wants to develop this into a fully functioning Trusted Digital Repository (TDR), designed in line with the Open Archival Information System (OAIS), a globally accredited reference model that provides a framework for the sustainable long-term archiving of digital information. The IISH will endeavour to get the technical facilities accredited with the Core Trust Seal by the end of this policy period. For this accreditation, it is necessary to thoroughly document the work processes and to account for the policy used, including a preservation plan.

The digital repository must enable the IISH to store and manage the digital collections sustainably and securely in accordance with international standards.

3.8.3.2 *Authenticity*

The ability to guarantee the authenticity of digital material is crucial for scientific research. The role and value of collection management organizations such as the IISH will become increasingly focused on guaranteeing the authenticity and integrity of data, and being able to provide contextual information. It is therefore important to use accredited procedures that record every movement of the digital file, from the time of its first entry into the IISH until

⁴⁰ This applies to the Academy Library, the holdings of periodicals on microfilm.

⁴¹ The Shared Object Repository (SOR), a storage facility for digitised collection items, was the outcome of the Heritage of the People's Europe (HOPE, 2010-2013) project, carried out within the International Association of Labour History Institutes (IALHI) and funded by Europe. Together with IALHI partner AMSAB, the Institute for Social History in Ghent (AMSAB-ISG), the IISH supervises the development and management of the SOR.

the last time the file is moved to the storage media of the TDR. Technical protocols safeguard the integrity of the entire original file.⁴²

The digital collections will therefore be stored and made available in their original format, but the IISH will eventually prioritise safeguarding the access to the *information* contained in the digital collections.⁴³ This means that the original digital objects may be migrated to a new file format (referred to as a *preservation copy*) for as long as it can be guaranteed that the information in the object is retained.⁴⁴ The IISH prefers to use open and standardised file formats for that purpose. The collections may be made available in different file formats, which also facilitates using *digital humanities* tools for analysis and visualisation. For the time being, we have chosen not to invest in the technology to reproduce the original digital file in the original operating systems and applications (through emulation), but users are given the option of downloading the original document and emulating it elsewhere. In contrast to a large number of other institutions,⁴⁵ the IISH has made a deliberate choice in favour of *migration* instead of *emulation* as strategy for digital preservation.

3.8.3.3 Management

Given the diverse nature of the material, ownership issues and the relationship of trust between the collection developer and archival creator and the ensuing need to control access to the material, the IISH discerns different forms of storage and management. Part of the information can be stored on servers outside the building, although we only opt to use companies that are completely subject to European legislation. It is preferable for a small proportion of the information to remain stored on in-house servers, under our own management. Part of this is held on servers not connected to the Internet.

3.9 Condition creating policy

3.9.1 Collaboration

More than ever, we will focus on international and national collaboration. First of all, our open data policy makes it a necessity, but we also are aware that heritage institutions have joint interests that must be pursued, and that active sharing of expertise is hugely important in order to remain informed of the latest technical and methodological developments. The IISH is a member of the most relevant national and international networks of archives and libraries and it wishes to play an active role in them.

Globally speaking, the Institute would like to retain its leading role in its own discipline, for example in the International Association of Labour History Institutions (IALHI)⁴⁶ and among the institutions that collect data in the field of socioeconomic history. In global trade associations such as the International Council of Archives (ICA) or the International

⁴² These protocols are described in the Digital Preservation Policy. Digital preservation software called Archivematica, which the IISH introduced in 2017, ensures that the protocols are applied in the work processes.

⁴³ This is sometimes also referred to as the 'preservation intent'. See paragraph 5.2 of the Digital Preservation Policy.

⁴⁴ See the IISH file format policy (IISH Digital Preservation Policy).

⁴⁵ See also the strategy of the National Library of the Netherlands: <https://www.kb.nl/en/organisation/research-expertise/research-on-digitisation-and-digital-preservation>

⁴⁶ The International Association of Labour History Institutions (IALHI), founded in 1970, is a global organisation of collection-holding institutes and research centres in terms of the history and theory of the labour movement. The main collections of IALHI institutes have been assembled on the Social History Portal (900,000 digital objects and over 2 million metadata records).

Federation of Library Associations (IFLA), the IISH is naturally a modest member, but it is prepared to play a more active role in the next few years compared with the previous decade. At the national level, the IISH is able and willing to become a significant knowledge centre in the field of archives and heritage. Efforts in recent years have ensured that the IISH as a heritage institution has raised its profile in the context of initiatives and organizations such as Archief2020, the Royal Association of Archivists in the Netherlands (KVAN), the Dutch knowledge centre for digital heritage and culture (DEN) and Adamnet. What makes our position unique, is not only that we are gathering a gigantic *private* archive, but also our comprehensive approach to types of material, our direct link to the scientific world and our close involvement in initiatives in terms of digital humanities and with research infrastructures such as CLARIAH and DARIAH.

With Image & Sound, the IISH is in a close collaboration to manage the Press Museum collection, whereas it meets up with the Amsterdam Municipal Archive to exchange knowledge. In 2017–2018, the IISH was intensely involved as an advisor in an organization restructuring project in the NIOD.

3.9.2 Systems

Since commercial providers nearly always offer a solution from start to finish, custom adaptations work is expensive and openness is problematic, the IISH has made a balanced choice for its library and archive systems between the acquisition of proprietary systems and whenever possible, a set-up based on open-source components, which we can continue to develop in collaboration with other parties if necessary.⁴⁷ An important starting point for selecting systems, whether open-source or commercial, is the extent to which the IISH controls its own data, stored or processed by the system, and the freedom it has to use it for other objectives and systems.

3.9.3 Fundraising

Realising our ambitions requires a sound financial basis. Presently, the structural contribution with the one-off multi-year investment of the KNAW is solid, but not sufficient for us to remain a globally leading centre in our field in terms of its collections. We will need to make greater efforts to raise resources with a view to digitisation for the purpose of preservation and availability. In the last few years, a number of archival creators have already proved willing to make structural and occasional contributions, while we are also fairly successful at raising funds for digitisation projects.

3.9.4 Knowledge development

In the next few years, we will take systematic steps to increase the knowledge of (permanent) employees and to keep it up to date. The digital revolution has brought about major changes in all aspects of the work; collecting, managing, cataloguing and making material available is subject to new requirements that entail new work processes, systems and a different organizational structure, requiring other specialist knowledge and skills. The Collections Department must undergo a transformation in order to deal with the impact of the *digital turn* and will be even more than usual a constantly learning organization. The KNAW's

⁴⁷ An example: The IISH uses the open source Evergreen ILS as a basis for its catalogue, organised with IISH templates for different types of material. For the purpose of the authorities, an authority module has been developed in collaboration with the Evergreen community and integrated in the core of the Evergreen software.

investment budget gives us room to make the desired turnaround. In the following policy period, we will invest in employees with new skills. We are able to fill the vacancies created by impending retirements (10.8 FTE of the 20.4 FTE) before the actual retirement date, in order for knowledge to be transferred. This will set the wheels in motion for a renovated, well-structured and digitally skilled department in ten years' time.

With a view to skills development, we have reserved a budget and time for training and courses, but also for visiting conferences and participating in workshops. In annual appraisals and progress meetings, much attention will be paid to increasing knowledge and skills. A deliberate choice has been made in favour of developing the knowledge of employees on how to perform and support projects by themselves and to give them priority over tasks like producing an in-depth description of collections. The fact that the IISH can count on a large pool of expertise and capacity for development thanks to the creation of the Digital Infrastructure department of the KNAW Humanities Cluster, in addition to collaborating with IT specialists and *digital humanists* on the construction of research infrastructures such as CLARIAH, means that a lot of knowledge is flowing towards the institute that the Collections department can benefit from.