

# CULTURELINK



## Connecting Croatia

The Public, Private and Civil  
Sector of Culture  
in Virtual Space



IMO

## CULTURELINK

Network of Networks for Research and Cooperation in Cultural Development was established by UNESCO and the Council of Europe in 1989.

Focal point of the Network is the Institute for International Relations, Zagreb, Croatia.

### Members

Networks, associations, foundations, institutions and individuals engaged in cultural development and cooperation.

### Aims of the Network

To strengthen communication among its members; to collect, process and disseminate information on culture and cultural development in the world; to encourage joint research projects and cultural cooperation.

### Philosophy

Promotion and support for dialogue, questioning and debating cultural practices and policies for cultural development.

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**Connecting Croatia**

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## **The Public, Private and Civil Sector of Culture in the Virtual Space**

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## PREFACE

The research project *Connecting Croatia* was conducted during 2007 with the aim of answering the question whether digital culture is opening up new prospects of cultural diversity and international cultural communication and cooperation in Croatia. Owing to the rapid changes taking place in all areas of human activity under the influence of information and communication technologies, the times we live in are called the digital age, the age of networking, the age of interactive communication... What does this mean for the development of Croatia, its culture and its international position?

The study *Connecting Croatia* analyses the state and development of the public, private and civil sector of culture in the virtual space. Since cultural content in the virtual space is developed in the public cultural sector and through initiatives of civil society and creative industries, the research project focused upon issues of (inter)relations between these three sectors in the creation of virtual cultural content.

The study's introduction defines digital culture, intercultural communication and their place in cultural policies. Within a broader context of reviewing the state of the Internet in Croatia, insight is given into official documents of the Republic of Croatia on strategies and national programmes of the development of digital culture in Croatia.

The first part of the study covers the public cultural sector in the virtual space. The web pages of eleven cities in Croatia were analysed, aiming to measure in what degree the cities make use of virtual platforms for the presentation of their cultural sector and in how far presentations of public institutions in the field of culture are open and conducive to the promotion of international cultural communication and cultural diversity. Three key elements of the communicational character of the presented digital contents and its ability to stimulate international communication and dialogue have been studied: the multilingual character of the presented content, interactive and multimedia content, and online services.

The second part of the study encompasses the private and civil cultural sector in the virtual space, and the role of virtual portals as public, private or civil structures of virtual communication. Creative industries figure at the centre of the private sector. The possibilities of positioning Croatian creative industries in the virtual space have been studied. The virtual presentation of civil society associations in the field of culture focused around the question of the degree of usage they make of the potentials offered by employing new technologies in developing international communication. The analysis of Croatian cultural portals as new structures coming into existence in the virtual space concentrated around the importance of a participatory approach. The study also explored the way in which portals become a place of dynamic creation of new cultural contents and new forms of virtual international cultural communication and dialogue.

The conclusion presents the results of the study and identifies the possibilities for intercultural communication created by making use of the virtual space within three sectors in the field of culture (public, private and civil). Recommendations are given for a strengthening of the virtual space and the stimulation of intercultural communication and dialogue of Croatia in a European and a global/globalizing environment. A better communicational positioning on the international level will help Croatia find answers to the challenges of new global communication. These experiences will also be significant to other countries of the region.

B.C.



# INTRODUCTION

## Culture and Intercultural Communication in a Digital Age

Intercultural communication in the last decade of the previous and the beginning of this century has been marked by the use of communication networks and information and communication technologies (ICT). Intercultural communication is defined as a dynamic process of interrelations, transfer and exchange of cultural values and specificities as well as an interaction of diverse cultures influenced by the information and communication technologies (Vertovec and Cohen, 2002). Rapid ICT innovations opened new possibilities for individuals and communities, institutions and associations of civil society, cities and regions in global communication. Under such circumstances, presence and use of ICT make a strong impact on a changing perception of culture. Particular culture cannot be interpreted as a clearly defined system which together with other similar or different cultural systems forms a 'cultural mosaic'. Instead, it has to be defined as an opened and dynamic process based on constant interactive relations. Cultures are formed through complex dialogues and interactions with other cultures: the boundaries of cultures are fluid, porous and contested (Benhabib, 2002). Internet has added a new dimension to these relations. Internet changes our attitude towards knowledge, deregulates circulation of cultural goods and services and changes our understanding of creativity (Le Glatin, 2007). Internet accelerates communication and exchange among cultures. Thus, it is defined as 'a platform for networking people' (Benkler, 2006)<sup>1</sup>.

Leading scholars use different terms referring to culture on the Internet. They use terms such as *cyberculture* (Levy, 1997; Lovink, 2003), *computer culture* (Johansson, 2005), *e-culture* (Dragojević, Dodd, Cyjetičanin, 2005), *Internet culture* (Porter, 1996). The most frequently used terms in literature are *digital culture* and *virtual culture* which denote convergence of culture, media and communication technologies and their impact on new ways of communication (Mercer, 2001; Castells, 2001; Jones, 2003; O'Reagan, 2004). 'Digital culture is a product of complex interactions of a set of heterogeneous elements' (Gere, 2002). In 2001 an on-line *Journal of Magazine and New Media Research* published a bibliography of books and articles about digital culture with 450 items which was an important list of publications confirming that a term 'digital culture' found its place in scientific literature<sup>2</sup>.

Researches focused on development, use and impact of digital culture on intercultural communication indicate their interdependence. Gere points out that digital culture has completely transformed the world (Gere, 2002). Digital culture not only changes our world but also changes the way we see this world. Digital culture influence the changes of traditional cultural patterns, fields and communication. It embodies horizontal and simultaneous form of transmission placing 'tradition' into the synchronised ideal of virtual space (Levy, 1997). However, Manovich states that the technological shifts in cultural communication that happened in the 1990s imposed new ways of managing and manipulating

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<sup>1</sup> When stating this, it should be noted that approximately 20% of the world inhabitants make the 90% of Internet users; Benkler considers digital divide to be a transitional issue as the integrated information economy enables Internet access in all parts of the world.

<sup>2</sup> Abrahamson, David: 'An Evaluation Bibliography: Digital Culture, Information Technology, the Internet, the Web', *Journal of Magazine and New Media Research*, Vol. 3 No 1 Spring 2001.

information rather than creating new cultural forms (Manovich 2001). New types of communication are established, new communication channels introduced, participatory usage<sup>3</sup> developed and specific forms of cultural creativity promoted. Cultural creativity is radically transformed and 'de-territorialised', most specially music and film sector (Jenkins, 2006). Museum and galleries sector is also undergoing profound changes best demonstrated in the example of British Tate Modern considering their web pages as the 'fifth gallery' (Holden, 2007). Correspondingly, digital publishing, the growing status of independence among artists through own web pages and the re-direction of the broadcasting executives (both TV and radio) towards the Internet are also indicators of the great change that is occurring. Introduction of new software like Web 2.0 brings about slogans: there are no more passive users, we are all interactive now. In the participatory virtual environment, the content generated by the users gains additional meaning along with communication that takes centre stage. On the international level this is interpreted as transcultural diversity (Robins, 2006).

Challenges induced by change, from global interaction to new transcultural relations, raised a question of alternative approaches to cultural policies. The issue of digital culture positioning within cultural policy's structure is impending: is digital culture going to be placed on the priority agenda of intercultural communication? One of the possible outcomes could be that digital cultural and intercultural communication take their separate ways aside from cultural policy that will fail to recognize and understand them. Thus, it is very important for cultural policy to make all the necessary effort to incorporate new phenomenon like digital culture in its structure. This will considerably improve the functioning of the entire cultural sector, mostly so of cultural institutions that are facing the challenges of digital age in completely new conditions of producing and consuming cultural content.

Cultural institutions are becoming new types of hybrid institutions that develop digital resources. The creative potential and content of their work being the most valuable 'asset', they use ICT in two basic directions: the direction of effective and efficient content presentation for users and the direction of generating new knowledge that can be transferred and complemented in intercultural communication and cooperation. This means that cultural institutions can no longer continue to function with a digital 'add-on' or static on-line content display, but have to offer new communication modes for content usage, namely interactive approaches that enable users to manage their own interests and participation in the virtual space. On-line gathering and networking of artists, cultural professionals and practitioners defines the new and innovative methods of working among cultures. Communication and cooperation become principal modes of functioning.

Being aware of the meaning that digital culture has in the domain of cultural policy and cultural development strategy, in November 2007 the Council of the European Union has adopted first-ever European strategy for culture (2008-2010). This document lists digitalization as one of the five priority points in the context of intercultural communication and dialogue promotion. In order to answer to question whether digital culture in Croatia offers new perspective of cultural development and intercultural communication and dialogue, we should first address the topic of Internet state-of-art and development in Croatia.

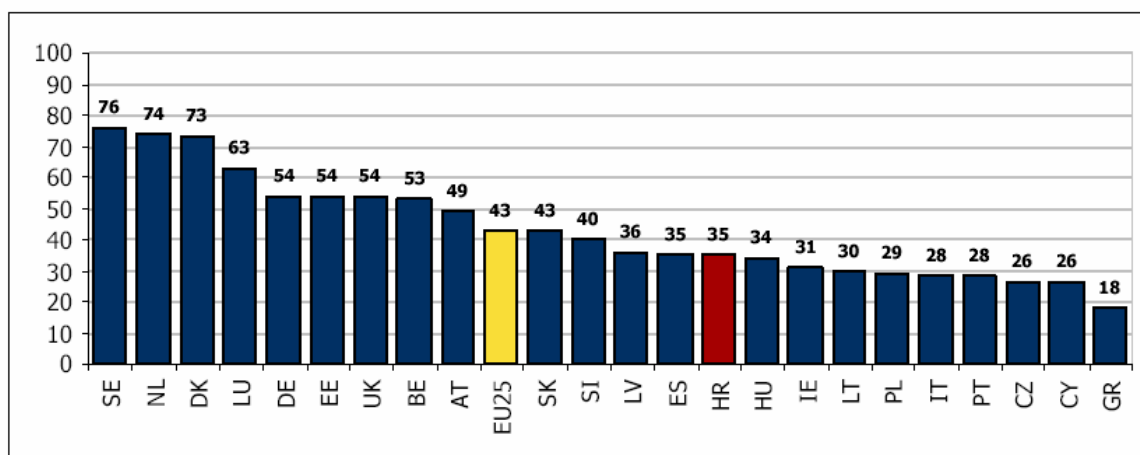
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<sup>3</sup> For example, at the beginning of 2007., there were 30 million Internet users in France, which is 40% more than in 2006., and 100% more than in 1997. Half of the current percentage of users create their own content on-line in form of blogs, forums participation, web pages etc. (LeGlatin, 2007).

## Internet in Croatia

Possibilities for the development of digital cultural content in Croatia should be viewed within the entire Croatian context of Internet use, which defines basic issues for the development of the information society. For this reason some statistical indicators of the present readiness of Croatia for further development of the information services and content, which determine the development context of the digital culture in Croatia, will be analyzed.

Although the level of the Internet use in Croatia is on the rise, Croatia still falls behind the European average. The ITU – International Telecommunication Union - estimates that Croatia has about 1.472.400 Internet users (March 2007), which makes 32.9% of the total population<sup>4</sup>. Similar data can be found in the *Study of the Information Society Development in Croatia in Year 2005*<sup>5</sup>, which states that in the year 2005 35% of the population regularly used the Internet, which is by 8% lower than the average of the European Countries.



**Figure 1. Percentage of population regularly using the Internet in 2005** (Source: Study of the Information Society Development in Croatia in Year 2005, 2006)

Although the difference of 8% in comparison to the EU average in the regular use of the Internet may seem low, the difference gets higher when we analyze the data about use of the broadband Internet in Croatia. With the average of 3.92% Croatia is far below the E.U. average (11.5%). Most Croats in 2006 still used the dial-up connection, while the broadband access was limited mostly to business user. The reason for such situation is not the non-existence of the needed infrastructure, but rather high prices of this service. According to the data from the *Study of the Information Society Development in Croatia in Year 2005*, prices of the basic, normal (1 Mbps) broadband flat-rate access in the selected European countries in September of 2006. were as presented in Table 1.

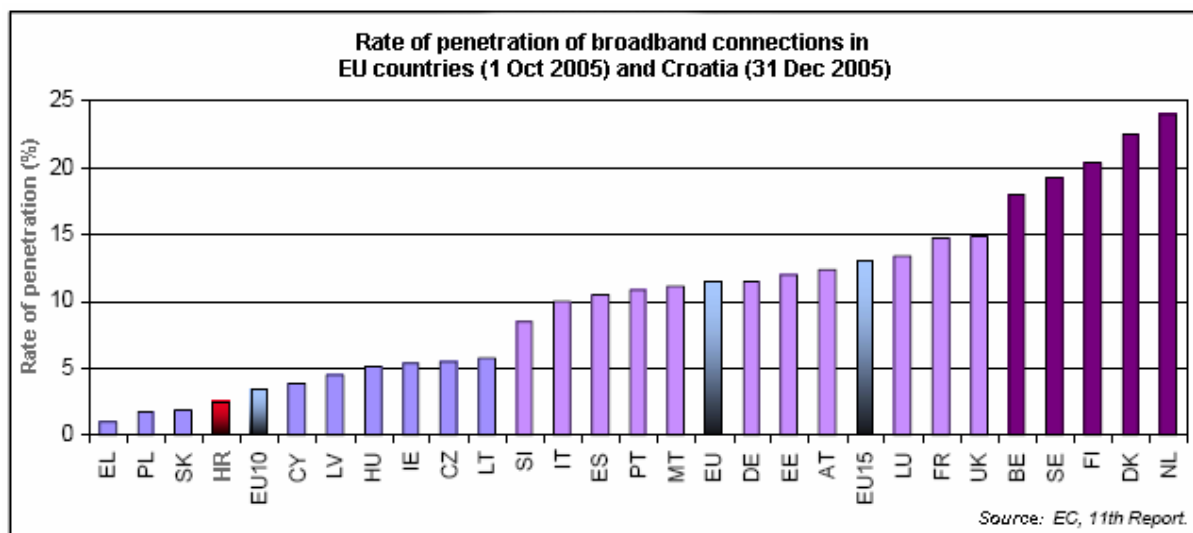
<sup>4</sup> <http://www.Internetworldstats.com/europa2.htm> (last accessed 3. July 2007)

<sup>5</sup> *Studija razvoja informacijskog društva u Hrvatskoj u 2005. godini* [http://www.e-hrvatska.hr/repozitorij/dokumenti/downloads/Studija\\_razvoja\\_informacijskog\\_drustva\\_2005.pdf](http://www.e-hrvatska.hr/repozitorij/dokumenti/downloads/Studija_razvoja_informacijskog_drustva_2005.pdf)

Table 1.

Country	Price (EUR)
Italy	0,94
Ireland	1,01
Slovakiaa	1,25
Czech Republic	1,42
Slovenia	2,35
Croatia	2,55
The Netherlands	2,90
Bulgaria	6,78
Serbia	14,03

Broadband access to Internet is an important element which stimulated the move towards the interactive approach to the Internet content, and offers to users an easier and faster access to the multimedia content that needs high speed access and higher capacity for traffic on the net. In Croatia the amount and type of content available on the net reflect the level of Internet access and traffic capacity of the net. In situation of the scarcely spread broadband infrastructure (with exception of the business sector), the web pages are mostly textual, with small amount of multimedia content, which makes the traffic and access to web pages slower. The examples from more developed countries show that with the improvement of the access infrastructure and increase of the communication capacities the nature of the on-line services and habits of the users have also been changed (Holden, 2007; OECD 2007). The users become more oriented towards the interactive possibilities that generally request faster connection in order to function adequately.



**Figure 2. Rate of penetration of broadband connections in EU countries and Croatia in 2005** (Source: *Strategy of the Development of Broadband Internet Connectivity in the Republic of Croatia until 2008*, 2006)

Besides the communication infrastructure, the ways Internet is used is also influenced by the offer of on-line services and content, which is closely connected to the use of the Internet in business and public sector. In terms of the Internet access in the business sector, it can be said that the large majority, i.e. about 95% of the surveyed companies in Croatia had Internet access in 2005. On-line presence of companies, i.e. the percentage of companies with web pages is 58%, which is just by 3% lower than the EU average (61%). The difference with EU

is increasing when we look at the percentage of companies having intranet and extranet systems, as can be seen from the following table:

Table 2.

	Croatia	EU (average for 25 countries)	Most developed EU country
Companies having Internet access	95%	91%	98%
Companies having website	58%	61%	85%
Intranet usage in companies	29%	34%	46%
Extranet usage in companies	6%	15%	32%

Source: *Study of the Development of Information Society in Croatia in 2005*

These data show that most companies use their Internet pages for presentation of information, and less for development of concrete e-services that could be used by potential clients. Also e-commerce, buying and selling via Internet in Croatia, although on the rise, still accounts for a very small part of all commercial transactions. The data presented in the *Study of the Information Society Development in Croatia in Year 2005* show that in that year 0.51% of all retail commercial transactions in Croatia were done as on-line sale transactions. According to the data from the same source, 6% of all companies have an online sales system.

When looking at e-services, public e-services such as e-Administration, e-Education, e-Health etc. are priorities in European e-strategies. The aim is to offer higher quality service to the citizens and facilitate interaction with public administration authorities. In respect to the development of e-services, Croatia started several projects (Hitro.hr, e-land registry, e-court register, e-VAT, e-Regos). Cultural sector has participated in the mentioned development of e-services in the segment of public libraries, which allow Internet access of all library catalogues, as well as, access to full text content<sup>6</sup>. In addition to libraries, it is planned that cultural professionals and artists will be able to submit their tax reliefs and requests for project (co)financing electronically. These facts show that within the eCroatia programme, eCulture has not been recognized as an area of high interest. Reasons may be that up to 2007 there existed no segment of the strategy for development of digital content and services in the field of culture.

## Digital Culture Strategies in Croatia

Digital culture and digitalization have been on the agenda of professional discussions in Croatia since the mid nineties of the past century<sup>7</sup>. The importance of systematic digitalization is undisputed, but until October 2006 its development programme and its goals have not been defined. Although new technologies, Internet, and its application in culture, as well as the role of culture in the information society were mentioned in both the *Strategy of Cultural Development – Croatia in the 21<sup>st</sup> Century* and *Strategy for ICT Development- Croatia in the 21<sup>st</sup> Century*, Croatia has still not developed a national strategy for stimulating the development of digital culture. The working group that created the *The National Programme*

<sup>6</sup> Libraries are one of the most advanced segments in the area of digital culture in Croatia providing users with online services and library catalogue access for a number of years.

<sup>7</sup> The public and professional discussions have been taking place within various frameworks. A series of yearly seminars and corresponding publications entitled 'Archives, libraries and museums – cooperation possibilities within the framework of global information infrastructure' (<http://public.carnet.hr/akm/>) provides insights into state and development trends of digitization of culture in Croatia.

*of Digitisation of Archival, Library and Museum Holdings (2006)* was formed in 2005, but the programme of cultural heritage digitalization (the Croatian Cultural Heritage project) started in 2007<sup>8</sup>. A broader strategy for development of cultural e-content and strategic goals of the digitalization for other cultural fields besides heritage, have not been defined.

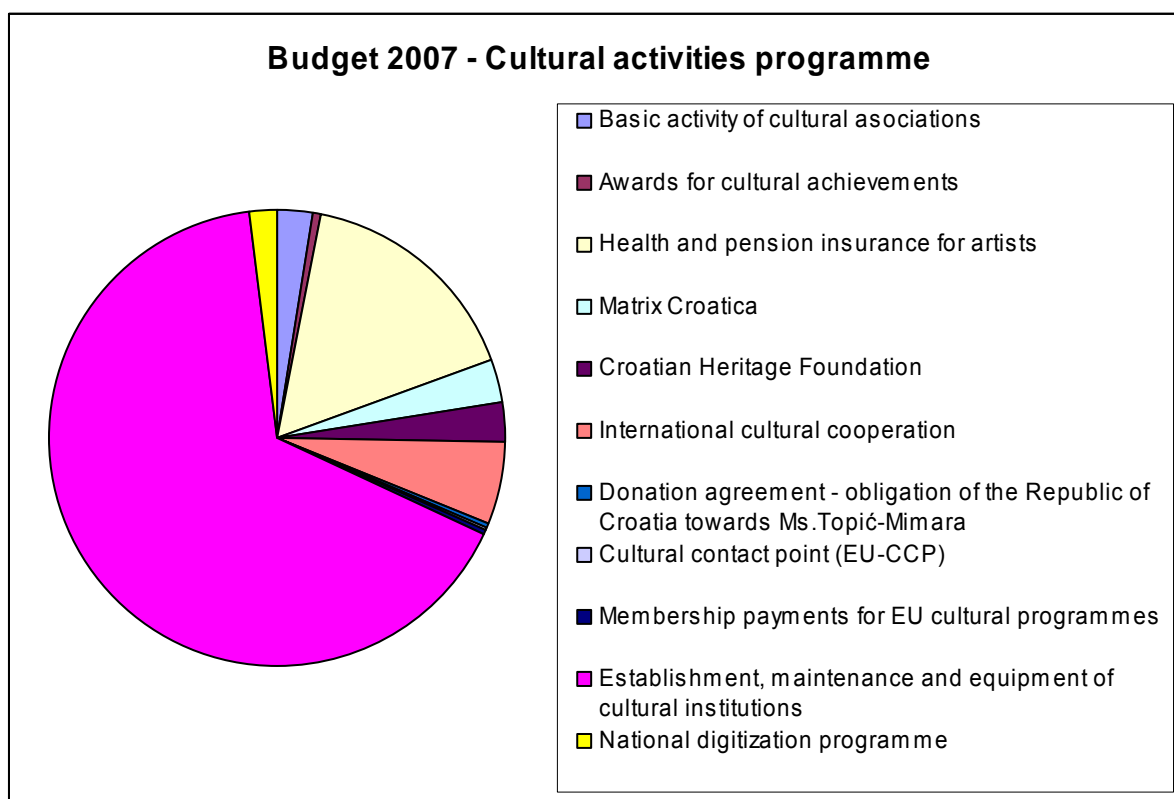
This means that up to 2007 the development of digital cultural content was left to initiatives of cultural institutions, and financing by the Ministry of Culture in that segment was limited. In 2007 the Ministry of culture allocated 5.000.000 kuna to the newly started national programme of digitalization of cultural heritage, which is less than 2% of the total cultural programmes funds. Up until 2006, cultural institutions could have applied for funding of their virtual projects from the programme funds allocated for informatization, and they could apply for either purchase of equipment or implementation of projects. In 2006, according to the data published on the web pages of the Ministry of Culture<sup>9</sup>, 200 programs were funded, with a total amount of 3.782.183,00 kuna. Although the amounts allocated vary between 5.000 kuna to over 350.000 kuna, the most frequent amount that went to individual projects was 20.000 kuna, dedicated in most cases for the purchase of equipment.

<b>Cultural activities programme</b>	<b>270.929.075</b>
Basic activity of cultural associations	6.500.000
Awards for cultural achievements	1.700.000
Health and pension insurance for artists	44.840.274
Matrix Croatica	7.752.000
Croatian Heritage Foundation	8.007.000
International cultural cooperation	15.400.000
Donation agreement - obligation of the Republic of Croatia towards Ms.Topić-Mimara	780.000
Cultural contact point (EU-CCP)	530.000
Membership payments for EU cultural programmes	750.000
Establishment, maintenance and equipment of cultural institutions	179.669.801
National digitization programme	5.000.000

<sup>8</sup> In September 2006 the Ministry of Culture approved the final text of The National Programme of Digitisation of Archival, Library and Museum Holdings, on the basis of which the implementation of a national project entitled Croatian Cultural Heritage was started.

<sup>9</sup> According to the data published at webpage of the Ministry of Culture - *Informatizacija – Pregled programa po programskoj djelatnosti* (for 2006)  
[www.min-Kulture.hr/userdocsimages/odobreni%20programi%20u%202006/Informatizacija\\_odobreno.pdf](http://www.min-Kulture.hr/userdocsimages/odobreni%20programi%20u%202006/Informatizacija_odobreno.pdf)





Source: Ministry of Culture Budget for 2007

*The National Programme of Digitisation of Archival, Library and Museum Holdings*, is an official document that aims “to identify the goals and content of the National Programme of Holding Digitisation in cultural institutions, to establish the preconditions for the introduction and implementation of the programme, and to evaluate the possibilities and determine specific programme activities and their desired effects”. (2006:2<sup>10</sup>) The mentioned document is focused mainly on the question of technological and organizational delivery of the digitization projects, and it gives guidelines that have to be taken into consideration in order to assure the quality delivery in the cultural heritage digitization projects. The document deals primarily with digitization of the existing heritage, and not with stimulation for development of new types of digital content. Even with such limited aim the establishment of the national digitization project is a very important step on the way to recognizing digital culture as a new and pivotal segment of cultural activities<sup>11</sup>.

The digital content and services became an essential source of information for users, as well as a important means of global communication. The existence of a broader strategy of digital content and service development that would take into consideration concrete national context and establish concrete and measurable social objectives is an important baseline in the development of digital culture in Croatia. For this reason, within the digital content

<sup>10</sup> Document and more information about the planned activities are available on the following web page <http://www.kultura.hr/eng/content/download/590/23895/file/MINISTRY%20OF%20CULTURE%20OF%20THE%20REPUBLIC%20OF%20CROATIA.pdf>

<sup>11</sup> Within the framework of the National Heritage Digitisation Programme, a Department for Digitisation at the Croatian Ministry of culture was formed; an agreement of cooperation on the national project “Croatian Cultural Heritage” between the Ministry of Culture, National and University Library, Croatian State Archives, and Museum Documentation Centre was signed; and funds for digitisation projects were provided.

development strategy, careful consideration should be made of how to achieve the goals set by the national cultural development strategy through development of digital culture.

# On the Way to Digital Cities

## Cities and Digital Culture

The digital and information and communication technology (ICT) revolution has a significant impact on contemporary cities. As a result of these changes there is an increased interest in research of digitalisation and digital networking of cities in numerous research disciplines, humanities in particular. Considering that practices of digital cities and application of ICT within the local context are highly diversified, some researchers argue that such diversity confirms that technology systems/networks have been shaped by their social context and specific factors reflecting such social context and the local needs (Besselaar 2005). Thus, development, application and effects of digital culture on local levels are strongly influenced by local organisation, administration and local cultural and socio-economic factors.

One of the key questions of the social impact of digitalisation of Croatian cities is related to the changed context where geographical position of the actors in the process of communication in overcoming of spatial distances and accessibility of information becomes less important. According to the indicators of increased use of information in the virtual domain such as *e-learning*, *e-reading*, *e-shopping*, the application of new technologies has re-defined processes of production and communication of cultural content. Virtual space has opened new possibilities of promotion of and interaction with the local cultural values on a global scale. ICT users continuously express their demand for an updated content and personalised access to cultural products (Besselaar 2005; Holden 2007). New modes and ways of communication redefine local-global relations and traditional modes and practices of cultural cooperation and communication especially from the perspective of digitalisation of cities. Strategic and legal aspects of cultural policies at the level of European countries in relation to international cultural cooperation which link culture with other areas such as tourism, urban renewal and economic development are continuously modified and new priorities are highlighted<sup>1</sup>.

The initiatives of *e-cities* have been manifested within the context of Croatia, primarily in connection with various community subjects such as public institutions and organisations through the advanced technology which enables their communication and exchange of data through the broadband networks. One of the most important factors of the establishment of the digital infrastructure in the cities has been an improved and effective communication of the residents and their city councils and their services delivered over the Internet. On the other hand, digitalisation and the increased use of the Internet in Croatian cultural sector provide new challenges to the cultural presentation, relations of cultural production and consumption and positioning of the cultural product within the local, national and global context. This opens new possibilities to the international cultural cooperation of the cities considering that the virtual space offers new modes of communication and presentation as well as new economy relations.

In accordance with the post-modern tendencies within the area of tourism, cities are the very focus of tourist interest<sup>2</sup>. Considering that the urban tourism always depends on culture as a

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<sup>1</sup> Data source <http://www.culturalpolicies.net/web/international-cultural-cooperation.php>, last visited 15 June 2007.

<sup>2</sup> This is characteristic of the short tours known as 'weekend breaks'.

resource of tourism, contemporary cities are the subject of renewal in a cultural sense. Increased number of visitors of cities brings more income resulting in their economic growth. Position of culture in relation to the international market thus indicates such an increase in participation and chances of the higher economic profit. Digital culture and presentation and promotion of cultural products are some of the challenges to concepts and approaches to cultural tourism and design of new profiles of cultural tourist or what is defined as a postmodern tourist. Such tourist is above all an individualist fully skilled to use the Internet as his/her main source of information (Tomić-Koludrović and Petrić 2007). To satisfy the needs and affinities of a postmodern tourist virtual space provides large quantities of information. On-line presentations of the cultural sector have an impact on marginalisation of issues such as geography, nation or religion focusing interest on the cultural content.

This research looks at how cities in the Republic of Croatia use the Internet and virtual space to present the public cultural sector and whether these presentations are open to the possibilities to establish and promote the international cultural communication and cultural tourism.

### **Research Methodology**

This research focuses on digital presentation of public cultural institutions and their services on websites of Croatian cities. Official websites present diverse content relevant for the local communities and this influence the overall presentation. Focus of our research has been on cultural content, public cultural institutions and other cultural organisations and tourist information presented at the official websites of Croatian cities.

The selection criteria for the sample of the cities and their web presentations were the size of the cultural infrastructure measured against the number of public cultural institutions and organisations<sup>3</sup>. According to the applied methodology eleven cities were selected for our research analysis. These were: Zagreb, Split, Dubrovnik, Rijeka, Varaždin, Osijek, Pula, Zadar, Šibenik, Bjelovar and Sisak.

Our research focused on three major factors: 1) analysis of the city websites which present cultural content; 2) analysis of the public cultural organisations and other cultural organisations belonging to private and civil sector represented on the city websites; 3) analysis of the tourism potential of virtual cultural resources.

Virtual presentations of Croatian cities were analysed against criteria such as the quality of information of an official city Internet site, links to other information about culture, links with websites of cultural organisations, access to contents presented in languages other than Croatian<sup>4</sup>, information about the international cultural cooperation and communication, and options of multimedia and interactive content.

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<sup>3</sup> This criterion was applied to the cities which financially support at least three cultural institutions. Open universities are also founded by some cities but these were not defined as cultural institutions because their main activity was education. The city of Bjelovar was an exception. It was included in order to balance the number of continental cities with the cities along the Adriatic coast. In those cities where apart from the minimum of three cultural institutions there were also open universities, we analysed only those which had a significant role in the cultural life of the city and which were included in the official city website.

<sup>4</sup> Some websites present their content only in Croatian language and some are multilingual. However, very often the content is not similar in all languages. In order to include large number of cities we analysed primarily websites in Croatian language. Otherwise, many websites would not be analysed because they would not meet the criteria for the international communication.

Accessibility of information was analysed against specific elements which support the international cultural communication and cooperation and influence cultural tourism. These were:

- Accessibility of the Internet site (web address)
- Accessibility of a particular cultural programme on-line
- Option of accessibility of the content in languages other than Croatian
- Multimedia/interactive content<sup>5</sup> (virtual tours, download options, e-catalogue etc)
- On-line marketing (on-line ticketing and other cultural product sales)
- Links to information on international communication and cooperation.

Part of research which analysed tourism related web sources of the selected cities primarily aimed at digital marketing of cultural organisations. On-line ticketing, bookings, audio and video clips and virtual tours were measurable data which show impact of virtual presentation of cultural organisation on the international communication and cultural tourism.

### Cities in Virtual Space: Information and Communication of the Official City Websites

We commence our analysis listing the official websites of eleven Croatian cities. Our analysis looks at the presentation of cultural sector and accessibility of information relevant for promotion of the international cultural communication and cooperation and presentation of local cultural product in virtual space.

Table 1 lists the main characteristics of the Internet pages of the selected cities.

Cities	Internet site	Languages other than Croatian	Number of public cultural institutions	Option of direct link to cultural sector	Option of direct link to public cultural institutions	Link to international cultural cooperation <sup>6</sup>	City population
Zagreb	<a href="http://www.zagreb.hr">www.zagreb.hr</a>	-	34	+	+	+	779.145
Split	<a href="http://www.split.hr">www.split.hr</a>	-	11	+	-	-	188.694
Dubrovnik	<a href="http://www.dubrovnik.hr">www.dubrovnik.hr</a>	English	8	-	+	-	43.770
Rijeka	<a href="http://www.rijeka.hr">www.rijeka.hr</a>	English Italian	5	+	+	-	144.043
Varaždin	<a href="http://www.varazdin.hr">www.varazdin.hr</a>	-	5	+	-	+	49.075
Osijek	<a href="http://www.osijek.hr">www.osijek.hr</a>	English German	5	+	-	-	114.616
Sisak	<a href="http://www.sisak.hr">www.sisak.hr</a>	-	4	+	+	-	52.236
Šibenik	<a href="http://www.sibenik.hr">www.sibenik.hr</a>	English	4	+	+	-	51.553
Zadar	<a href="http://www.grad-zadar.hr">www.grad-zadar.hr</a>	-	3	+	+	+	72.718

<sup>5</sup> Internet is an interactive medium: the literature generally defines interactive media as communication media which make possible active participation by the receptors of information. The term multimedia refers to media which use different forms of information content and processing (such as text, audio, graphics, animation, video), with the purpose of entertaining the user. Multimedia, i.e. interactive content includes activities which offer the user the possibility of acquiring certain material related to the activities of the institution presented through his computer and the Internet (e.g. download of music and video clips, virtual tours). Also, this category includes e-catalogues, which, though not allowing the acquisition of complete materials, offer search capabilities, thus providing information on where these materials may be found.

<sup>6</sup> Information on this can be found in menus 'International Cooperation' and/or 'Sister Cities/Partner Cities'. We cite only those menus which inform on the international *cultural* cooperation and not on the international cooperation in general.

Cities	Internet site	Languages other than Croatian	Number of public cultural institutions	Option of direct link to cultural sector	Option of direct link to public cultural institutions	Link to international cultural cooperation <sup>6</sup>	City population
Bjelovar	<a href="http://www.bjelovar.hr">www.bjelovar.hr</a>	English Italian German	3	+	-	-	41.869
Pula	<a href="http://www.pula.hr">www.pula.hr</a>	-	3	-	+	+	58.594

### *Informativeness*

Quality of information on the websites of the selected cities has primarily been related to the presentation of information about the cultural sector at the city websites. This aspect of the presentation of culture is satisfying considering that only two cities do not offer an option of direct link to the information on cultural sector while other nine have this option on their menu bar. This does not mean that users cannot find the cultural content but these are differently structured and usually designed less user friendly. Four cities do not offer direct link to the information on public cultural organisation and therefore do not inform users about their activities.

All the analysed city websites provide information needed to find out about the culture of a particular city as a potential tourist destination. This is most usual characteristic of the opening sections of the city websites. In this sense presentations of all cultural organisations and festivals offered in virtual space whether they belong to the public, cultural or civil sector are especially important. Most of the analysed cities provide information on tourism or links to the tourism industry websites. Very often a segment of the content on these websites informs about culture as a source for the tourist packages.

### *Communicativeness*

We measured communicativeness of websites of the selected Croatian cities in relation to the language of the presentation. More than half of these sites present their content only in Croatian; two in Croatian, English and Italian and Croatian, English and German; and one site in Croatian, English, Italian and German.

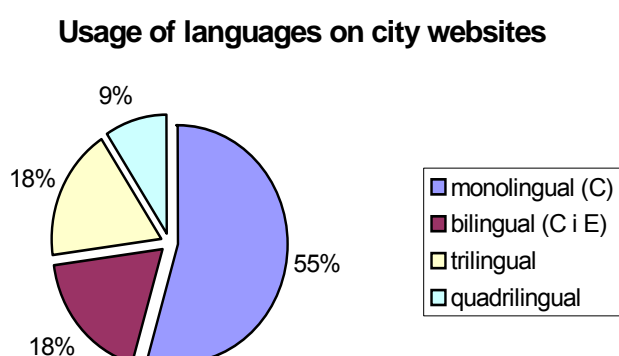


Figure 1. Languages of city websites

Most websites do not inform on the programmes of the international cultural cooperation. However, 36% of the analysed cities do inform about the local funding resources for this type of international cooperation (see Figure 2). Websites of Croatian cities inform about awareness of significance of the international communication but mainly through the sister

city programmes. Therefore, although these forms of communication and digitalisation are planned in local budgets there are no links between these two areas.

#### Links to international cultural cooperation on city websites

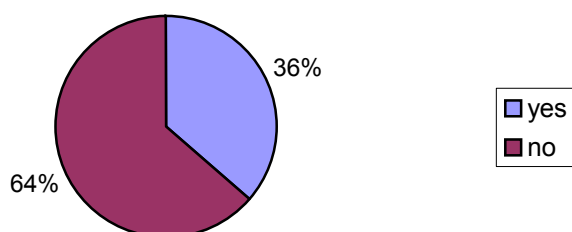


Figure 2. Links to information on international cultural cooperation on city websites

The majority of websites have a form of interactive and multimedia content e.g., photo gallery, interactive map of a city and animations but these are not directly linked to culture. For cultural and tourism purposes some cities provide interactive and multimedia content e.g., virtual tours, e-postcards, interactive city maps, web cameras etc. The city of Varaždin, for example, informs about local cultural institutions exceptionally well through its audio and video interactive web content.

#### Analysis: Presentation of Cultural Institutions in Virtual Space

This part of our research presents analysis of the public cultural institutions founded by the cities. These are highlighted in order to distinguish the public cultural sector from the private and civil sector which is also presented at official websites of Croatian cities.

A total of 85 cultural institutions have been founded and managed by 11 cities (Zagreb, Split, Dubrovnik, Rijeka, Varaždin, Osijek, Sisak, Šibenik, Zadar, Pula, Bjelovar). Figure 3 shows the geographical distribution of the institutions analyzed in this research.

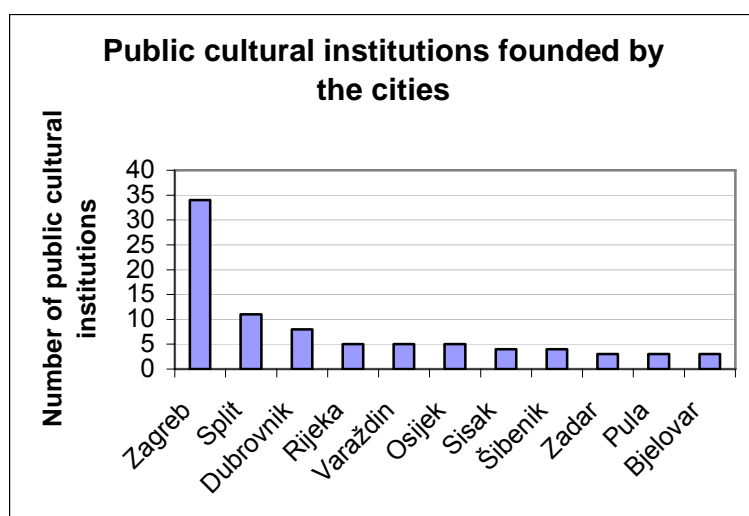


Figure 3. Public cultural institutions founded by the cities

The highest concentration of cultural institutions founded by one city is found in Zagreb. It is followed by Split and Dubrovnik while this number is significantly lower in other cities.

For our analysis we selected 80 cultural institutions presented at city websites<sup>7</sup>. 76, or 95% of these institutions are represented by their own websites (Figure 4).

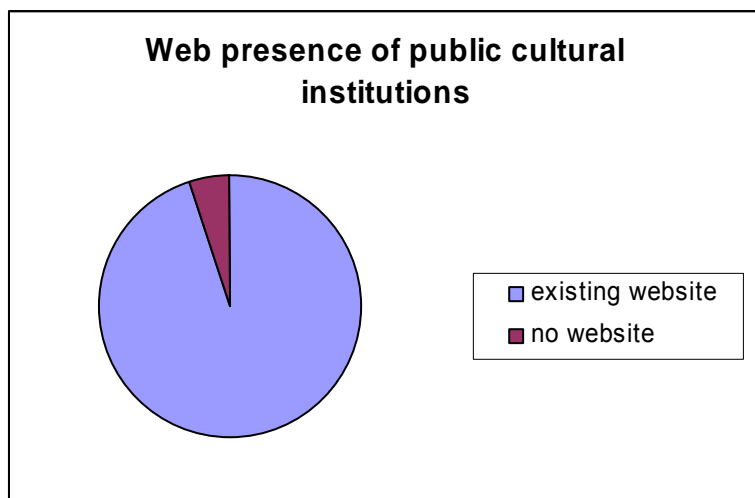


Figure 4. Web presence of public cultural institutions

Figure 5 shows the website presence of cultural institutions by their field of activity. The cultural and educational programme includes city cultural centres and open universities.

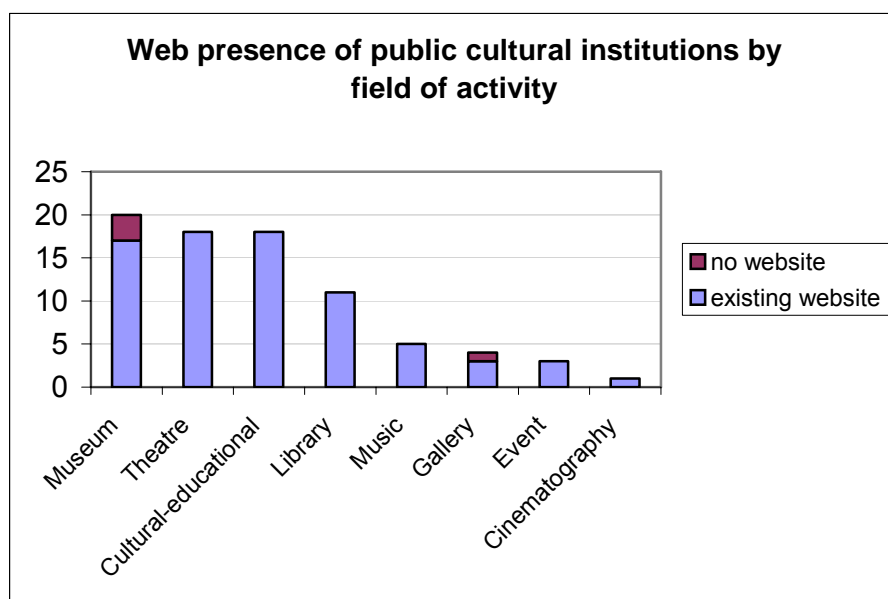


Figure 5. Web presence of public cultural institutions by field of activity

Websites of Croatian cities present at their various menus an additional number of 218 institutions and associations. These institutions<sup>8</sup> belong to the public, private or civil domain. Their target audiences are mainly local residents but they have a potential to attract international users as well, cultural tourists in particular. Figure 6 shows these institutions by their programmes and activities.

<sup>7</sup> This research encompasses only those public cultural institutions presented at the cities' websites.

<sup>8</sup> In some cases they are in the role of co-founders.



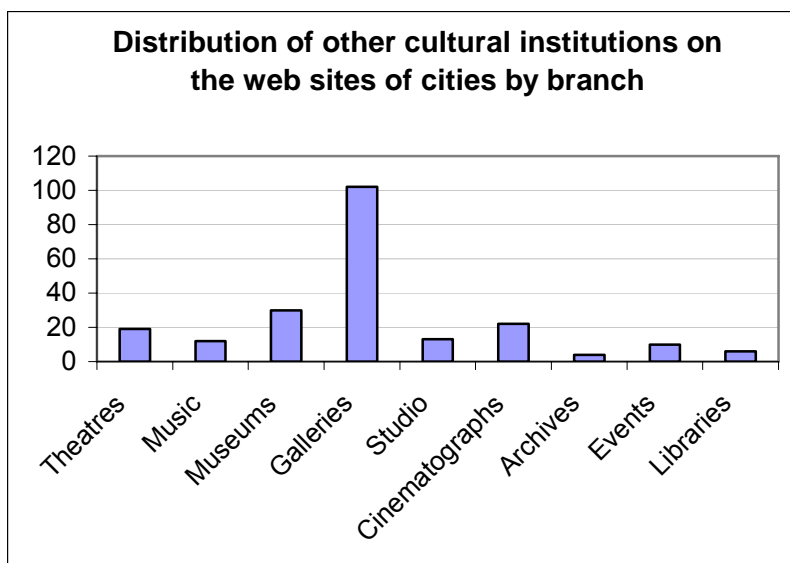


Figure 6. Distribution of the presence other cultural institutions on the websites of cities by their field of activity

Galleries (102) are the most frequently represented group within the category of other institutions. They are followed by museums (30), cinemas (22), theatres (19), art studios (13), music institutions (12), festivals (10) and libraries (6). Archives (4) belong to the additional category because they do not entirely belong to cultural institutions but they are important in the context of cultural memory of Croatian cities. Therefore, some cultural sectors are equally represented in the analysis of public cultural institutions and analysis of other cultural institutions which have the cultural and tourism potential (e.g., museums and theatres).

Geographic distribution of other cultural institutions represented on the websites of Croatian cities complements the size of a city and its infrastructure. Thus the most cultural institutions are in the City of Zagreb as Figure 7 shows.

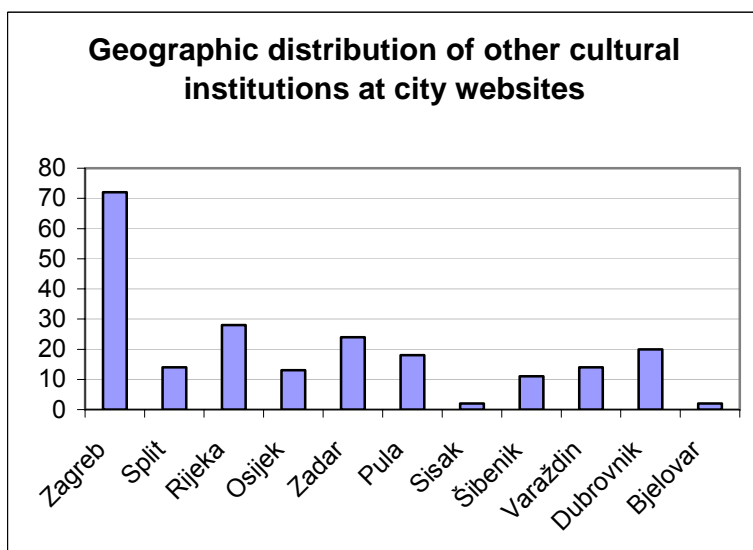


Figure 7. Geographic distribution of other cultural institutions on the websites of Croatian cities

### *Public Cultural Institutions in Virtual Space: Informativeness*

Most of websites (95%) of public cultural institutions provide basic information such as postal address, contact details and their programmes. Similar level of informativeness is characteristic for other cultural organisations.

### *Public Cultural Institutions in Virtual Space: Communicativeness*

One of the main criteria for the analysis of communication with the international users was the language of the presented content. Cultural institutions are represented linguistically in three ways: Croatian only (43), two languages which include a combination of Croatian and English or German (29) and three languages (4). Figure 8 shows this data.

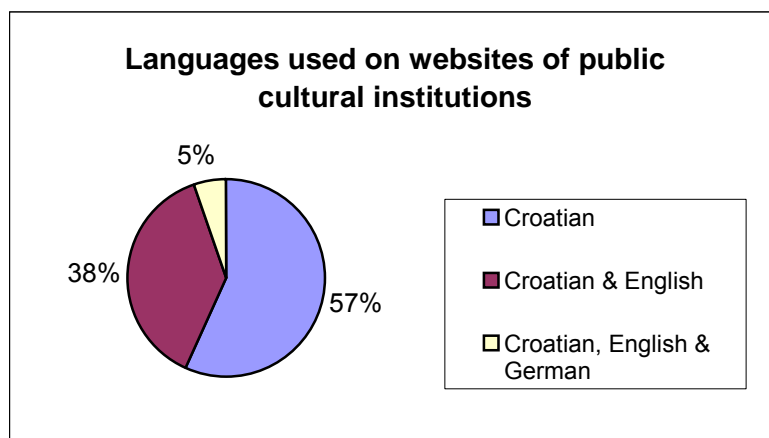


Figure 8. Languages used on websites of public cultural institutions

Analysis of this data against the cultural programmes (Figure 9) indicates that a small number of institutions deliver their content in three languages. Cultural centres, city cultural centres, open universities and cinemas are a sector which informs only in Croatian. This is due to their activities which primarily target local communities but such practice is not a long term solution.

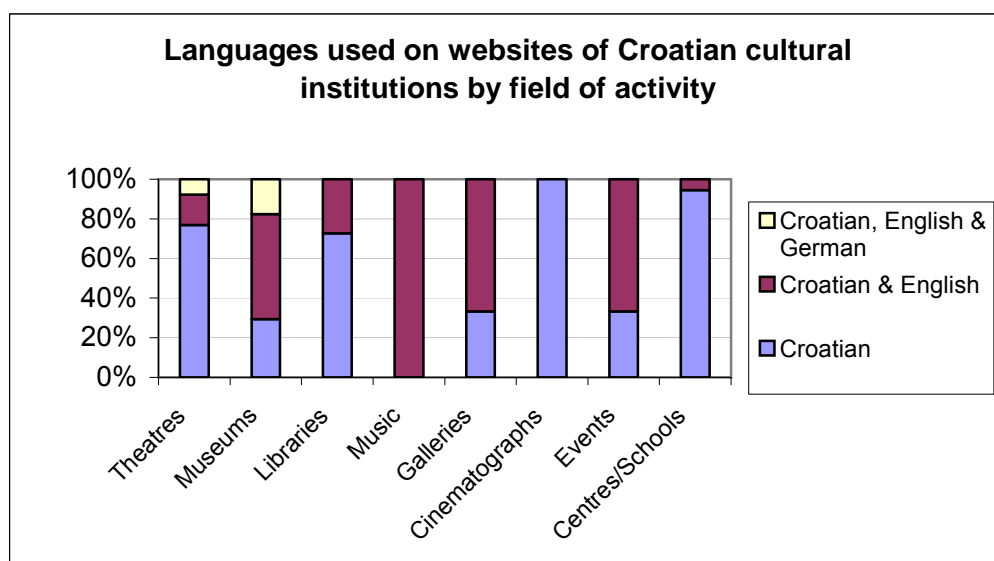


Figure 9. Languages used on websites of Croatian cultural institutions by field of activity

The second criterion of communicativeness was information about international cultural cooperation. Only Rijeka City Library informs about international projects. Other institutions

present this data as information about art tours, international awards and inter-library loans but not as a separate menu option. Therefore, this segment of activities does not clearly indicate that the information presented does support the international communication and cooperation.

### *Public Cultural Institutions in Virtual Space: Participativeness*

In order to measure how the cultural institutions support communication with their users we focused on two factors: the amount of interactive/multimedia content and number of institutions which offer an option of online sale (tickets, souvenirs, cultural tourism products etc).

Half of the analysed cultural institutions use interactive/multimedia option. Figure 10 shows distribution of this content and indicates that public libraries (11) most often provide an interactive content. They are followed by museums (10) and theatres (10).

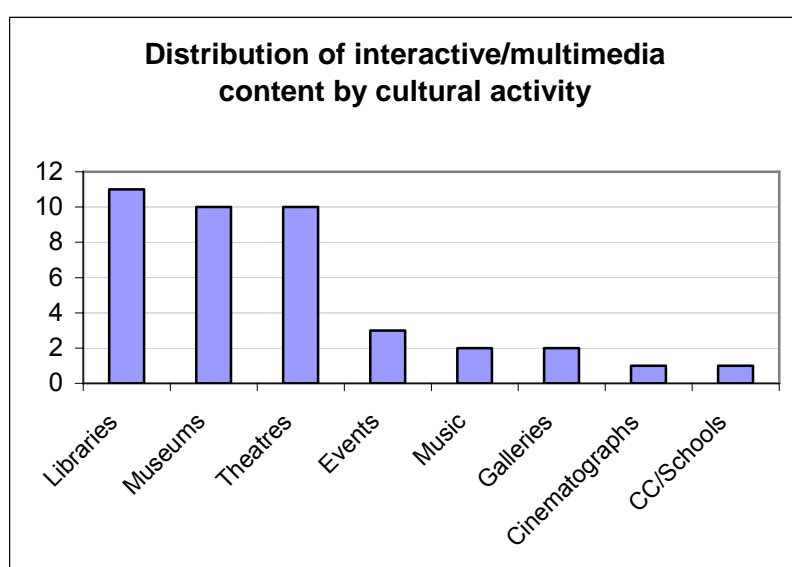


Figure 10. Distribution of interactive/multimedia content by field of cultural activity

We divided typology of interactive and multimedia content into ten categories: photo gallery, video clip, introductory animation, audio file, music background, e-catalogue, games, chat forum, virtual tours, and interactive maps. They do not show the quality of communication and participation but indicate potential to increase the number of the website users.

The most frequent and simple one is a photo gallery. It is followed by the web introductory animation. E-catalogue enables browsing of a cultural institution and it is mainly a tool used by public libraries. Some public cultural institutions provide interactive maps in order to increase the number of their off-line users. Similar role has the option of a virtual tour. It can contribute, together with photographs, maps and other information to the increased rentals of spaces within cultural institutions. Museums often offer options of interactive and multimedia content (e.g., virtual games) as an education tool. Music and online forums are less used, as can be seen from Figure 11 which presents the forms of interactive and multimedia content used by the cultural institutions.

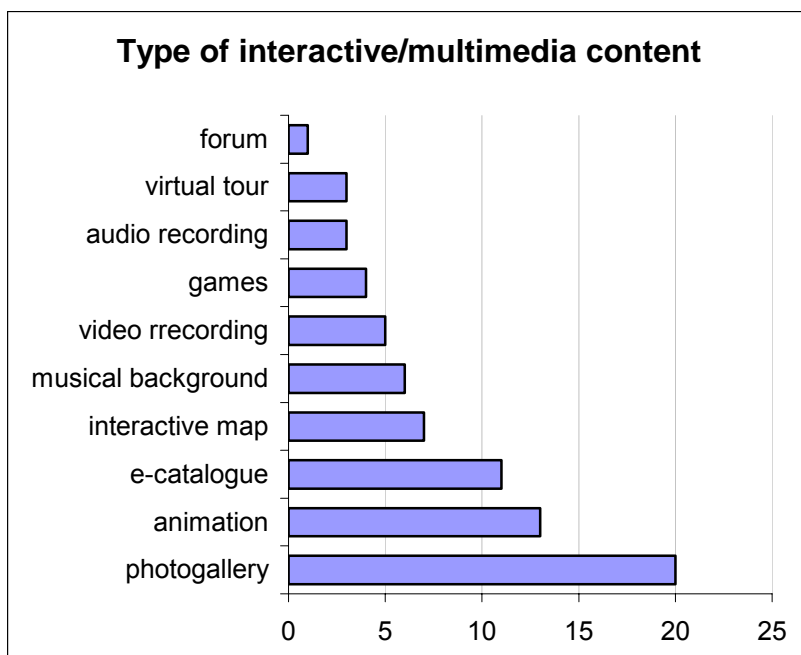


Figure 11. Type of interactive/multimedia content on the web sites of public cultural institutions

The second aspect of participativeness analyzed here is online sales which includes tickets, souvenirs, books and other cultural and tourism products as the measurable variables. Online bookings can be interesting indicators of participation but they do not include forms of payments and there is no evidence of the actual purchases. Number of institutions which offer ticket booking and sale is not large (16%) so we analyse them within the same category.

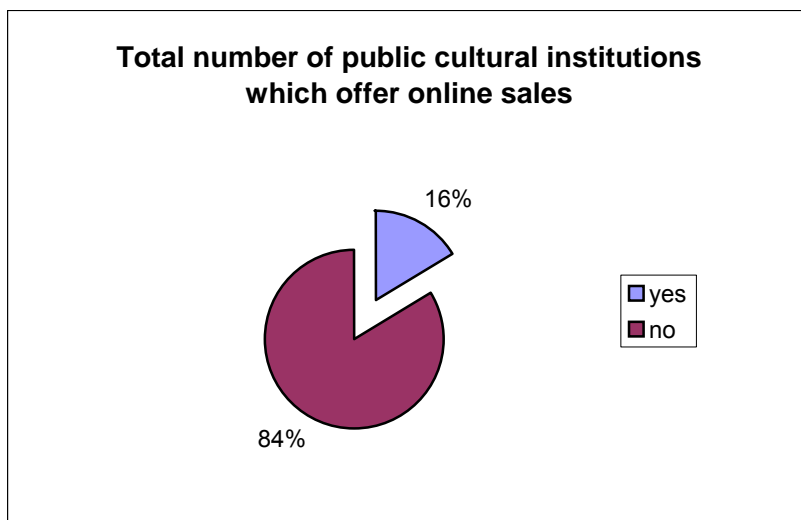


Figure 12. Total number of Croatian public cultural institutions which offer online sales

Figure 13 indicates that online booking and sales are most characteristic for theatres (6) which are followed by museums (2) and concert halls (2), galleries (1), festivals (1) and community halls (1).

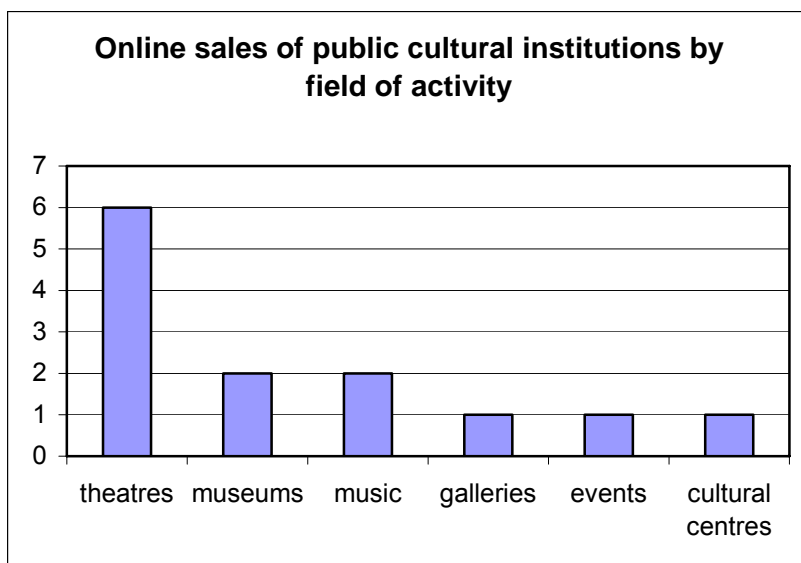


Figure 13. Online sales of Croatian public cultural institutions by field of activity

Online ticket sales are the most relevant data. This indicates that the majority of users come from the local population but there are some international users which show the realization of cultural tourism. We analysed data from the sample of two Croatian cultural institutions: The Concert Hall *Vatroslav Lisinski* and Dubrovnik Summer Festival. Both institutions continually monitor their ticket sale statistics which confirms their planned introduction and interest in further development of such form of marketing. We compared data from 2005 and 2006 which show the annual increase of 43% in case of the Concert Hall *Vatroslav Lisinski* and 46% in the case of Dubrovnik Summer Festival.

The Concert Hall *Vatroslav Lisinski* mainly attracts local audiences, from the capital city of Zagreb and other Croatian towns. Within Croatia audiences outside the capital city mainly use online booking. Online booking is also used by the visitors from Slovenia (6-8%) and lesser from other countries. Dubrovnik Summer Festival attracts larger international audiences. Online booking is still mainly used by Croatian audiences but it is also popular among UK visitors (they were at the top of the list in 2005), tourists from USA and Slovenia.

What is the current status of online sales? Our data indicate that the Concert Hall *Vatroslav Lisinski* sells most of its programmes through the annual subscription packages (47%) and 3% through the online booking. The other 50% sells through their box office.

Dubrovnik Summer Festival figures indicate that 6% of all tickets are purchased through the online booking. The other 94% are purchased through their box office (55%) and other forms of off line ticketing. Continual increase of online booking indicates very slow but changing trend towards the Internet sale.

### Virtual Presence of Cultural Sector in Croatian Cities: Status and Prospects

Our analysis of websites of eleven Croatian cities focused on:

1. international cultural communication through the web content of the represented cultural institutions
2. support of cultural tourism through the use of Internet

These were analysed through the three major factors:

- communication of the website content in two or more languages
- participation/interaction with the interactive and multimedia content

- online services.

### *Multilinguality of the Web Content*

This analysis indicates that the information on websites of Croatian cities is mainly monolingual and presented in Croatian language. Therefore, majority of cultural institutions are focused on local users despite the size of the city, its cultural infrastructure and its image as an international tourist destination. When a language other than Croatian is used it is most often English language. Other languages are German and Italian.

Considering that six out of eleven analysed cities present their content only in Croatian, language is a significant barrier in development of the international cultural communication.

### *Interactive and Multimedia Content*

Interactive content is the second important factor of the international cultural communication. Examples of these options<sup>9</sup> are rare and their efficiency is closely linked with the multilingual presentation of the web content. Interactive and multimedia information is mainly based on the visual content. Image based information is a simple and effective mode of communication because it can bypass linguistic differences. However, images are only one component of the presented content which combines various modes of presentation.

### *Online Services*

These services are closely linked with the multilingual options of the presented information. Croatian cities mainly offer interactive options as online library catalogues, data bases, online booking, selling of souvenirs, publications, online forms and venue rentals together with technical details.

Online services only marginally support creative practices and planning of cultural programmes. They are mainly marketing oriented which significantly contributes to the cultural tourism. All analysed websites provide information relevant to cultural tourism. Initial information on the city facts are of particular importance for the potential visitors. Therefore, every information is important whether it belongs to the public, cultural or civil sector. Most websites provide special information for tourists and they often present a segment on culture as a tourism resource. In that sense they are well designed (interactive maps, links with tourism industry and accommodation, virtual tours, web cameras). However, monolingual presentation is a constant obstacle to more efficient support of the international cultural tourism.

To conclude, virtual resources of Croatian cities and cultural sector in particular are not fully employed. Our research findings indicate that in Croatia there are no genuine examples of digital cities with full digital infrastructure including the integrated e-services. Therefore, there is a need for continual design, construction and permanent update and upgrade of websites of cultural institutions with a broad spectrum of high quality content and services as a prerequisite for a successful digital global communication.

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<sup>9</sup> These are online applications for the art festivals, online applications for the projects, virtual presentations of the performance venues etc.

### **Analyzed Websites of Cities**

<http://www.zagreb.hr>

<http://www.split.hr>

<http://www.rijeka.hr>

<http://www.osijek.hr>

<http://www.grad-zadar.hr>

<http://www.pula.hr>

<http://www.sisak.hr>

<http://www.sibenik.hr>

<http://www.varazdin.hr>

<http://www.dubrovnik.hr>

<http://www.bjelovar.hr>





# Private Sector of Croatian Creative Industries in Virtual Space

## Creative Industries and New Technologies in Croatia

Network communication and information exchange has fundamentally transformed the way people live and work. Among the essential transformations of the new economy are, as Castells (1996) argues, decentralisation and dehierarhisation of the networked relations. New (network) economy of the information age does not depend either on territory or material products. Symbolic products gain an increasing importance in exchange and communication, and with them, creative industries as well.

Creative industries include production of symbolic goods (books, films, music etc) that are created (and distributed) primarily through the usage of new (communication) technologies (Hesmondhalgh, 2002). Thus, products of creative industries endorse dual value, symbolic and material. Due to its symbolic value creative industries make a significant social impact. At the same time, due to high growth rate that is characteristic for creative industries, their market value becomes significant as well. According to 2004 UNCTAD figures creative industries marked the highest growth rate in the world (UNCTAD, 2004). Such growth rate provides a constant change of cultural production and consumption. Development of creative industries is closely related to development of new technologies<sup>1</sup> that have an impact on creative industries on three levels – level of production, level of distribution and a level of consumption. Consequently, digitalisation has significantly changed the structure of work, the tools for work as well as the nature of the final products of such process. One of the essential changes of the information age has been disappearance of clear boundaries between work and leisure which is especially visible in the cultural sector and creative economy (Castells, 2003).

Within the regional context of South-Eastern Europe one can note that creative industries are in the phase of rapid development. Several levels of change occurred simultaneously in countries in transition such as democratisation, globalization, the consequences of war in Croatia and Bosnia and Herzegovina, and impact of the processes of integration into EU (Primorac, 2007b: 56). Factors of instability of social and political environment which have been especially significant for the cultural sector arise from the crisis of public policies and public sector, low level of communication flow between public, private and civil sector, crisis of the position of institutions and their social role, and as Dragičević-Šešić and Dragojević argue, the crisis of participation and the cultural market (2005: 23-24). Each of these crises created the so-called 'turbulent circumstances' within Croatian culture which further influenced the sector of creative industries.

Despite these specific contexts typical for each of the countries of South-Eastern Europe, their common issues are small markets, production in small series, impact of the international creative industries as well as problems in distribution of the creative industries' products (Primorac, 2004: 73). It has to be highlighted that, despite of our use of the term *industry*, creative industries incorporate those sectors whose type of production cannot be classified as 'industrial'. Švob-Đokić (2002) points out that in the context of South-Eastern Europe 'Cultural diversification still prevails on the local level, not because it is less exposed to

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<sup>1</sup> Castells (1996) is trying to distance himself from technological determinism arguing that technology is a reflection of ourselves.

global influences, but because the type of cultural production remains artistic and artisan, which is particularly evident on the local, domestic level' (Švob-Đokić, 2002: 126).

A segment of regional creative industries (although they belong to the private sector) is under heavy influence of public budget as is the case of film industry, publishing and partly music industry. Part of creative industries such as design, architecture, marketing and advertising operate only along the market standards (Primorac, 2007a). Analyzing the current status of the regional creative industries it can be stated that 'the whole field has to be restructured in order to establish strong domestic production that will have a healthy distribution system and accessibility and that will be in touch with global processes' (Primorac, 2004: 74).

Historically taken, creative industries in Croatia emerge almost simultaneously with developed European countries. Cvjetičanin and Katunarić (1998: 258) point out that production for the market and mass culture appeared in socialist Croatia and Yugoslavia in the late 1950s. At that time, some sectors of creative industries were used for the 'enlightenment' purposes, but they also created products of mass culture. In addition, former Yugoslavia was more open for the products of mass culture from the West than other socialist countries of Central, Eastern and South-Eastern Europe. Major political, economic and cultural changes that started in the 1990s still echo in these regions. Croatia, as a society in transition undergoes the processes of transformation from the model of self-governed socialism into the model of capitalism. In such context Croatian society can be defined as a 'mixed society', as noted by Tomić-Koludrović and Petrić (2005), in which modernisation processes are intertwined - they encompass simultaneously phenomena of the first and second modernity<sup>2</sup>. It has to be taken into account that the processes of the second modernity are less visible and occur mostly in urban areas. Creative industries are closely linked with cities as centres of economic, political and cultural activities. Therefore, some scholars point out the significance of culture and creative industries for the urban innovation of the so-called 'creative city' (Landry, 2000).

Presence of Croatian internauts in virtual space started in early 1990s. Croatia was connected in 1992<sup>3</sup>, while the real-time link was established in 1993 as noted by Mrkonjić in: Tomić-Koludrović and Petrić (2004). Use of new technologies in Croatia is in constant rise which is visible from the data used in this study<sup>4</sup>. However, the use of new technologies is reduced to the narrow segment of society: younger, middle and higher educated segment of population that earns an average income<sup>5</sup>.

Connected to the question of new technologies, and with it the question of digitalisation, the activities of creative industries is to a high extent rooted in the exploitation of intellectual

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<sup>2</sup> First modernity is typical for industrial society – social changes occur in relation to preindustrial institutions; second modernity relates to social changes that did not occur during the 'first' modernity (e.g., questions of gender, family and work rights, etc.). That is why Ulrich Beck (1986) calls the second modernity a 'reflexive' modernity (according to Tomić-Koludrović and Petrić, 2005: 14).

<sup>3</sup> First international communication link was established in November 1992 – Croatian University and Research network CARNET in Zagreb was connected to the Austrian network, that connected Croatia with the global network Internet. <http://www.carnet.hr> (Accessed: 04.05.2007.)

<sup>4</sup> See the Introduction.

<sup>5</sup> Majority of users are the age group between 15-24 and 25-34; 54% of users completed vocational secondary school, secondary school or they are university students; 27% completed TAFE or a university degree, 21% have 2000-4000 kunas (280-560 Euro) per month, 25% 4000-6000 kunas (560-830 Euro) per month. (Research findings of the study 'Residents and Internet', GfK, 1.09.2006). Source: <http://www.gfk.hr/press1/internet.htm> (Accessed: 24.06.2007.) According to the Central Bureau of Statistics (<http://www.dzs.hr>), an average monthly income in November, 2007 was 5131 kunas (approx. 713 Euro).

property rights (IPR) and authors' rights. In Croatia, this same right is regulated by the *Law on Authors' Rights and Related Rights* (NN 167/03), that can be realised either individually, or collectively through (copyright) collecting societies<sup>6</sup>. As the questions of intellectual property are mostly connected to the work with new technologies that are relatively new field in Croatia, many users are not well informed about the intellectual property rights and regulations. This is one of the key obstacles of development of the sector of creative industries in Croatia.

## Research Methodology

In this part of our research study we investigated the presence of private business subjects of Croatian creative industries in virtual space. A number of key factors were selected as criteria for the assessment of the observed web content:

- a) general informativeness of the web (off-line accessibility, aim and mission, annual reports, events calendar, links with clients and sponsors, additional information tools)
- b) orientation to user participation in order to expand business and activities (on-line questionnaires, on-line marketing, on-line registration for newsletter, on-line participation tools, information on business subjects in media)
- c) communicativeness of web towards international users (language, information on the activities of business subjects, links to international projects, awards-national and international).

Activities of the private creative industries sector were researched through the Croatian Chamber of Commerce on-line database BIZNET<sup>7</sup> whose classification of business activities was made according to the Primary Business Activity Codes categorisation of the Central Bureau of Statistics (CBS). Total number of businesses of creative industries in Croatia according to the aforementioned database is divided according to following sectors: publishing and printing activities and reproduction of recorded materials (2396 business organisations); film and video activities (274 business organisations/companies); radio and television activities (298 business organisation); advertising and PR (1255 business organisations); architecture and engineering and connected activities (all together 4762 businesses, out of which the department for architecture takes 1971 business organisation according to data of Croatian Chamber of Architect and Engineers (HGKAIG) – Department for Architecture<sup>8</sup>). In this way for the purposes of this research the total number of business organisations on the basis of which we have created the research sample is 6104 companies. Figure 1 shows data on the number of private businesses according to sectors of creative industries in Croatia.

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<sup>6</sup> In Croatia rights can be claimed through collecting societies that are validated by the State Intellectual Property Office of the Republic of Croatia. These are: Croatian Composers Society, ZAMP department (HDS-ZAMP) as association of authors, Croatian Association for Protection of Croatian Performers Rights' collecting society, HUZIP, as association of artists-performers, Croatian Discographers Association (HDU) as association of producers of phonograms, and Croatian Film Directors Guild (DHFR).

<sup>7</sup> <http://www.biznet.hr> (April, 2007).

<sup>8</sup> For the purposes of our research we were interested in business organisations in architecture, and thus, they were separated.

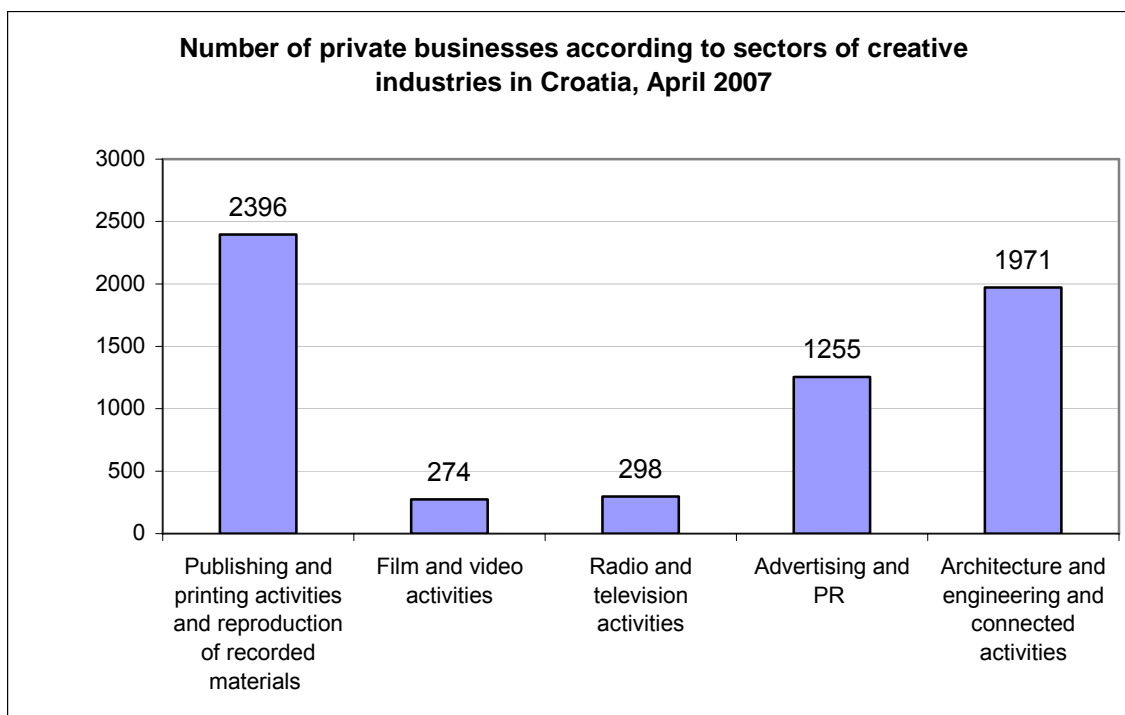


Figure 1. Number of private businesses according to sectors of creative industries in Croatia, April 2007, BIZNET, and HGKAIG

Random sample of 11.55% (70 business organisations) was created proportionally on the basis of the above-mentioned number of companies. They were selected proportionally to their sectors: publishing and printing activities and reproduction of recorded materials (25 business organisations), film and video activities (2 business organisations/companies), radio and television activities (3 business organisations), advertising and PR (13 business organisations), architecture activities (27 business organisations).

## Analysis of the Empirical Part of the Research

As was mentioned, when discussing the creative industries sector it is important to note that development of creative industries is closely related to development of cities. Thus, we analysed the distribution of businesses for all sectors of creative industries according to the County Chambers<sup>9</sup>. This distribution is presented in the Table 2 which indicates the leading role of the County Chamber of the City of Zagreb in creative industries sector. This is not surprising considering the position of Zagreb as a capital city of the Republic of Croatia which is the centre of the majority of business and cultural infrastructure. County Chambers of Split, Pula and Rijeka follow Zagreb<sup>10</sup>.

<sup>9</sup> Database BIZNET, Croatian Chamber of Commerce, April, 2007.

<sup>10</sup> In Figure 2 all business organisations in category 'Architecture and engineering and connected activities' were included, and not only 'Architecture activities', as there were problems with the database at the time of writing this article.

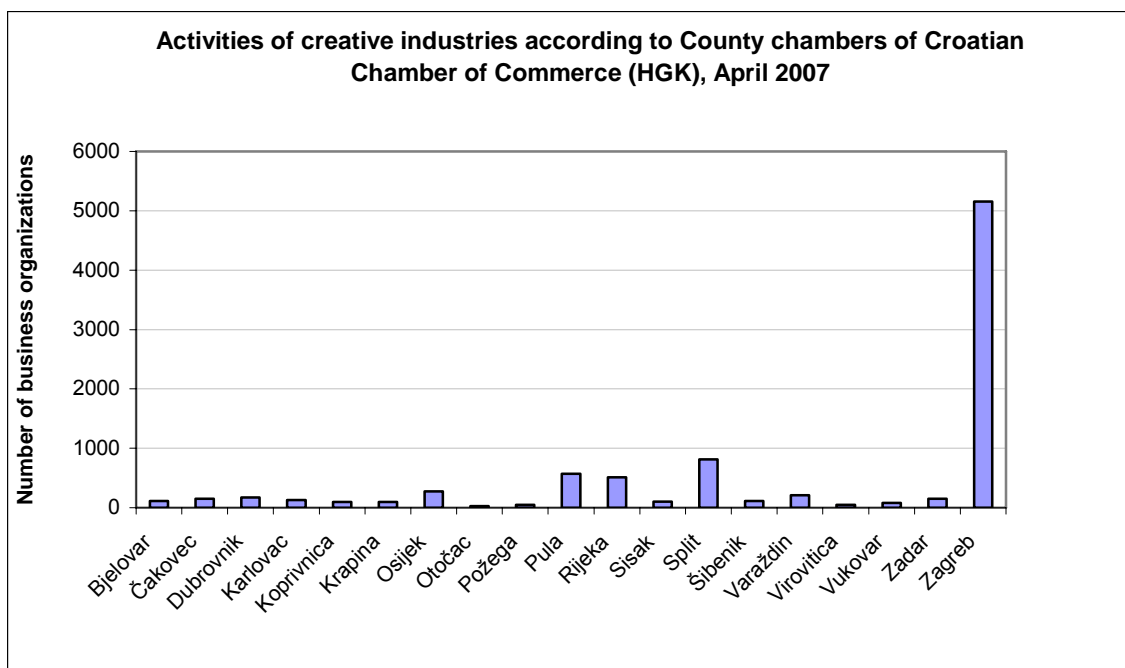


Figure 2. Activities of creative industries according to County chambers of Croatian Chamber of Commerce (HGK), BIZNET, April 2007

The next stage of our study investigated the presence of Croatian cultural industries' business subjects in virtual space. Thus we investigated which of the selected subject from the BIZNET database had its' own website and whether it was active.

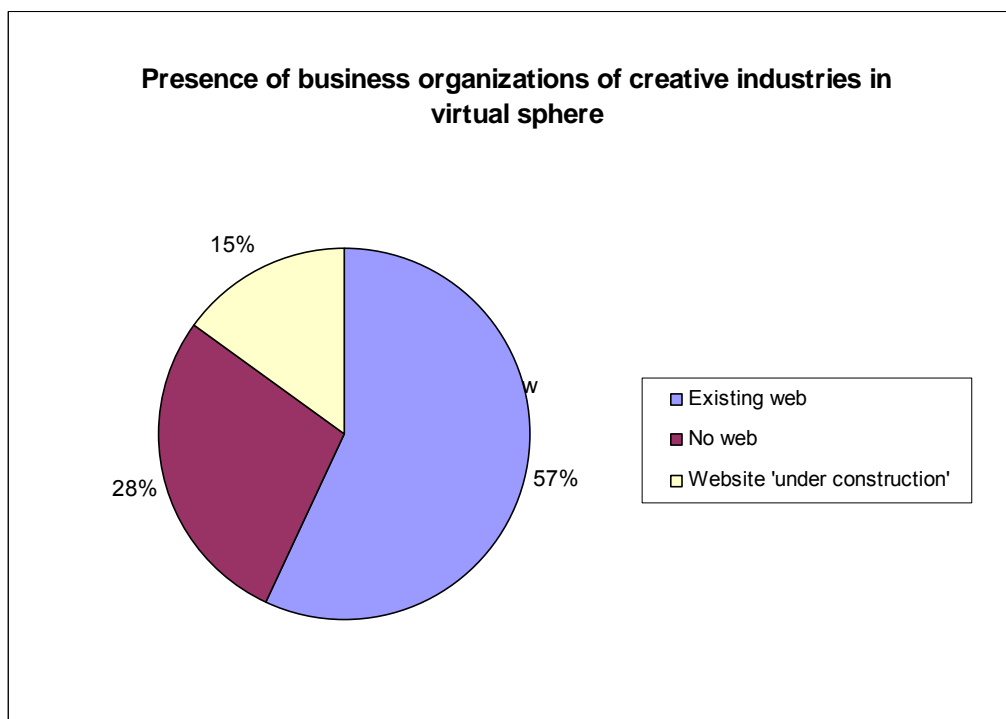


Figure 3. Presence of business organisations of creative industries in virtual space, April 2007

Figure 3 shows that 57% business organisations in creative industries have their website while the remaining 28% are not represented in virtual space. 15% business subjects are present in virtual space but their website was not active or was under construction. Therefore, Figure 3

shows that de facto 43% companies in the sector of creative industries currently do not use Internet as a communication and presentation marketing tool (this include companies that have no website or it is inactive).

The following section presents the analysis of websites against the assessment criteria of their content.

### General Informativeness of Websites

Regarding the general informativeness of websites of Croatian creative industries, the majority of the websites provide general information about the company, that is, their off-line availability and email address. 27% of websites have links to their clients' websites, while 25% websites have links to websites of their sponsors. Less than 50% of all websites provide a statement about their company's mission and aim. On the other side, low percentage of websites provide additional tools which may increase information quality of a website. For example 7% have a search engine as help, or a counter of the number of visits to the site. None of the analysed websites provide the calendar of events designed by the company or events linked to the company. Concerning the transparency of the activities only two websites have links to the company's annual report.

We can conclude that websites of business subjects of creative industries provide good quality general information about their primary activities. However, the majority of websites provide very few additional options and information about their ongoing projects.

### Orientation Towards User Participation

The next analysed component of websites of Croatian creative industries was oriented towards the means for the increase of the user participation so as to enhance commercial communication and company's activities in creative industries. Use of on-line communication tools such as on-line request or order forms, on-line newsletter subscription, other instruments and on-line marketing and sale were considered as the key factors of participation. Figure 4 shows that 38% of websites provide such mode of communication.

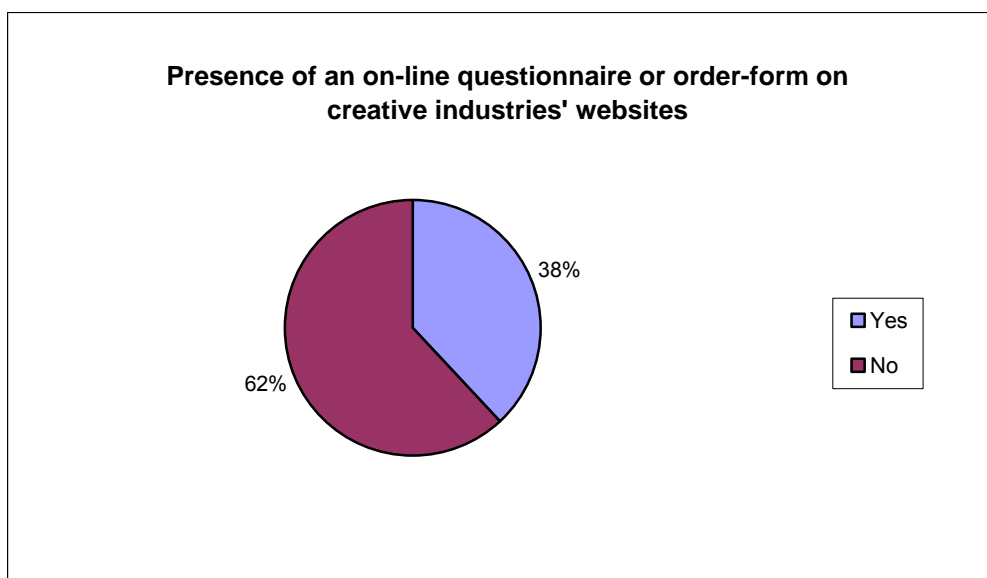


Figure 4. Presence of an on-line questionnaire or order-form on creative industries' websites, April 2007

Figure 5 shows results of the analysis of on-line sale as the next participation indicator. There are two characteristic types of on-line sale that occur on researched websites – 8% of websites have option of credit card payment and 8% have on-line sale by invoice or delivery. The remaining 84% do not provide on-line sale.

It should be noted that all sectors of creative industries do not provide only final products but also services. Therefore, on-line sale in such cases is either not possible or difficult.

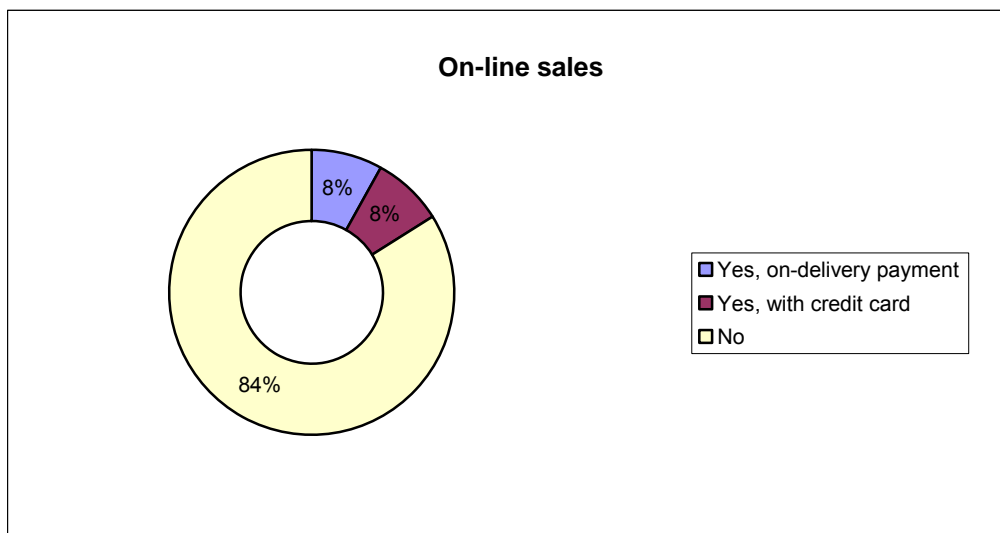


Figure 5. On-line sale, April 2007

All websites have email address as a separate category. 12% of websites provide an option of subscription to their newsletter. Participation and communication options were analysed through the presence of media information such as a link or a press cut about the company projects, products or awards. 7% out of the total number of business organisations provide this option.

User participation is not fully explored and applied. We have already mentioned limited use of some of the on-line participation tools, but other similar tools such as forums, surveys and multimedia content are only sporadically used. Web presentations most often contain only basic information about the company without additional interactive content that could motivate users to spend more time browsing the website of the company.

### Communicativeness Towards the International Users

We analysed language options as one of the aspects of communication with the international users of websites of the Croatian business organisations. In most cases (63%) Croatian is the main language of communication which is followed by websites that are bilingual - Croatian and English (31%), and a small number of websites which use only the language other than Croatian (English 4%, other 2%) as is represented in Figure 6.

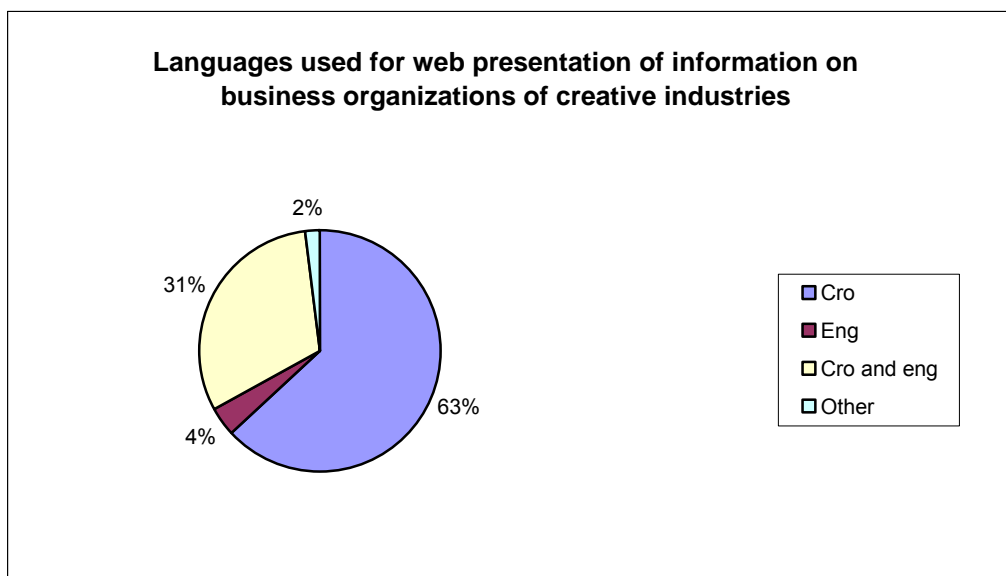


Figure 6. Languages used for web presentation of information on business organizations of creative industries, April 2007

The following factor of communication of websites refers to the information on international contacts and projects. 41% of pages inform about their international contacts and projects (see Figure 7).

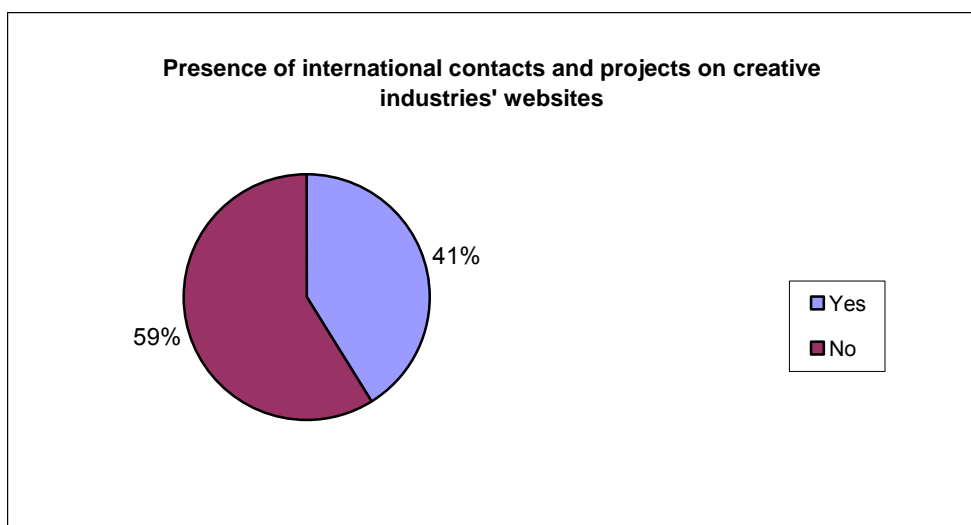


Figure 7. Presence of international contacts and projects on creative industries' websites, April 2007

It is important to notice that 51% of this information does not offer links to the listed international projects. Most of the analysed websites provide description on the main activity of a company and 25% list their national and international awards.

Companies, which provide their content only in English, are either branch offices of foreign companies<sup>11</sup>, or their activities are focused on the international market and international

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<sup>11</sup> E.g. McCann Erickson.



communication<sup>12</sup>. Thus, for one part of companies, links to their international projects are actually links to their international head offices.

We can thus conclude that most companies are oriented on domestic users. Information on international contacts and projects (if exists) is more of a list without further links and does not provide additional information on projects of a company. In this way websites remain not used to their full capacity.

Taking into account each of the listed criteria that we used to analyse websites - of general informativeness, user participation and communicativeness brings us to conclusion that companies within Croatian creative industries sector do not fully employ potential of the Internet. Content of their websites provides information on their activities but without options of additional tools which would improve their informative quality. Majority of websites provide their content in Croatian language and a small number in other languages, mostly in English. Information on international projects is only listed, without any additional information or links to these projects. There are very few tools which may increase the user participation. Websites are not used to expand marketing potentials of these companies; only few companies provide on-line sale option. Multimedia presentations of their projects and products are used by a small number of companies.

Therefore, we can conclude that creative industries websites are mostly static and they provide information which can be found in any printed brochures – in most cases they do not use multimedia potential of new technologies.

## **Creative Industries and International Cultural Scene**

Although our research results indicate low use of potentials of new communication technologies (57% have a website, that is mostly static in its' presentation), there are successful examples of Croatian creative industries international practices. Their numerous international awards support this, although their work is not fully recognised at the national scene.

Some authors achieved a significant international success in the past two years in the areas of design, architecture, film and advertising. We can list some of them: the most awarded advertising agency 'Bruketa and Žinić'<sup>13</sup>; local agency with international branch office, Lowe Digitel, Tridvajedan agency<sup>14</sup>, Architecture and Urbanism studio 3LHD<sup>15</sup>, Randić-Turato studio and Penezić and Rogina studio<sup>16</sup>. Among the awarded are design studios Laboratorium<sup>17</sup>, Studio Cuculić<sup>18</sup> and Studio International<sup>19</sup>. A number of animated films won

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<sup>12</sup> E.g. Randić-Turato d.o.o.

<sup>13</sup> Award for design EPICA 2008; London International Awards (LIA) 2007; Creativity Annual Awards, New York, 2008; ARC Awards 2006 (for Off calendar Accounting), New York; London International Awards 2006; Good Design Award, USA, 2006; Creativity Annual Awards 2006, etc.

<sup>14</sup> Red Dot for High Design Quality 2006; BEDA European Design Award 2006.

<sup>15</sup> First award at the international architecture competition 'New Silk Road – Culture Park', China; included in daab publication 'Young European Architects'; Memorial park Jasenovac - award 'Carlo Scarpa' for landscape architecture.

<sup>16</sup> Both companies presented Croatia at the Biennale in Venice.

<sup>17</sup> Studio Laboratorium First Award for European Design – category Printed self-promotion, May, 2007, Athens; EUDA '07; London International Awards (LIA) 2007; Milano, Italija; 16.MIAF, Moscow, Russia, etc.

<sup>18</sup> Red Dot Design Award 2007 for visual identity.

international awards such as 'Levijatan' and 'Soldat' produced by Studio Kenges, and 'Regoč' by Bulaja production<sup>20</sup>. Some short and long feature films were also internationally recognised: 'Karaula' (dir. Rajko Grlić), 'Armin' (dir. Ognjen Sviličić) and 'Plac' (dir. Ana Hušman)<sup>21</sup>, to name only few.

A number of authors in creative industries are primarily active on the international market while their work is hardly visible at the local market until they become internationally recognised. For example authors from web design studio 'Rootylicious' work only for international clients<sup>22</sup>. Company 'Gideon' is one of the leading distributors of interactive tourist postcards for various tourist destinations<sup>23</sup>. Also, some hip-hop producers such as Baby Dooks, KoolAde and Dash distribute their beats at European and US markets. These are only several selected examples which are not a result of strategic campaign and systematic funding in the sector of creative industries.

## Assessment of the Current Status

Creative industries are a rapidly growing sector of the global economy which strongly impacts development of new technologies. Use of new technologies in Croatia shows a growing trend but it is still reduced to the narrow segment of society: younger and higher educated population with an average monthly income.

Majority of cultural companies in creative industries are based in Zagreb which indicates centralisation in the creative industries sector. However, there are numerous cultural businesses/companies located in regional centres such as Split, Rijeka and Pula.

Results of our research show that over half of the business subjects (57%) in creative industries are represented in the virtual space. Considering that the main language of communication is Croatian, majority of these cultural subjects are focused on Croatian users. Some websites are bilingual (Croatian and English - 31%) and a small number of websites are only in a language other than Croatian. Although mainly focused on Croatian users, almost half of cultural subjects provide information on their international projects and contacts but without providing links to these projects.

Considering interactivity, most of the analysed websites are static. They rarely offer options such as on-line inquiries, forums or on-line sales.

Analysed websites are also static in terms of visual design. They do not utilise multimedia tools. In some cases the type of their services which are not compatible with the on-line presentations determines this. Some of these factors depend on the type of activity that

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<sup>19</sup> Poster 'Adam and Eva' won platinum award 'Graphis posters 2007' New York; ReBrand 100, Providence, USA, 2006; International Museum Day poster 2006 awarded in Hamburg, Essen, Toronto and Mexico.

<sup>20</sup> Best short film, International Family Film Festival, Hollywood 2007.

<sup>21</sup> Among others, 'Armin' – the best East European film at the film festival Karlovy Vary, Paris Cinema; 'Karaula' awards at festivals in Festroia, Portugal, Film festival in Trieste; 'Plac' awards at festivals: Documenta Madrid, Vallecas Puerta Del Cine and ZEMOS98-Spain, Indielisboa in Portugal, CineFest in Hungary and Ohnekohle Video Film festival in Austria.

<sup>22</sup> Clients such as: Sean John aka P.Diddy (fashion website); Icetec watches, etc; More on awards for these websites on: [www.rootylicious.com](http://www.rootylicious.com)

<sup>23</sup> Innovation and quality awards 'Golden award, category interactive media for marketing', 12th International Summit, London; Geneva expo 2006. For more see: [www.gideon.hr](http://www.gideon.hr)

specific sectors of creative industries are involved – e.g., cultural services cannot be sold online as easily as goods such as books or movies.

Websites are treated as substitutes for printed brochures rather than a part of a complex information and communication network. In Croatian context, it seems that creative industries entrepreneurs are not completely aware of the need to have a website that would give an additional value to the information on business activities. ‘Visibility’ on the web is important not only for the business success in Croatia, but it provides possibilities for international projects and communication. It is expected that representatives from Croatian creative industries will recognize how important is to be connected in a quality way.

A step towards improvement of presence of Croatian creative industries in virtual space could be achieved by developing a web portal on creative industries in Croatia. Such portal would be opened to companies that work in the sector of creative industries in Croatia, and in this way their existing websites could be joined together. The portal would be primarily oriented to presentation of Croatian creative industries to international visitors and potential partners. The information provided on such portal would contain additional content and subprojects that would maintain interest of users (e.g., presentations of most successful companies, description of awards received, links to open calls in creative industries sector, etc.). Development of such portal would emphasise the importance of presence in virtual space in contemporary information age, and would incite other entrepreneurs in Croatian creative industries to work on further development of their websites and to position themselves in domestic and international, but above all, virtual space.

#### **Web Data Sources (last accessed on 20 September 2007)**

<http://www.biznet.hr>

<http://www.dzs.hr>

<http://www.hkaig.hr/>

<http://www.min-kulture.hr>

<http://www.nn.hr>



## **Cultural Associations in Virtual Space**

A specific aspect of post-socialist societies is that their actors simultaneously engage with anachronistic<sup>1</sup> processes of democratisation of their societies and with the challenges of the new contemporary global phenomena. An example of the first is the institutionalisation of civil society, and an example of the latter is wide use of new technologies which is a prerequisite for inclusion into global social processes of contemporary world.

There is no need to highlight the fundamental changes in communication caused by wide use of the internet as a global communication network in contemporary societies. Its potentials have been widely recognised in creation of collaborative networks enabling fast dissemination of information, increased flexibility and improved achievements in solving problems, better coordinated decision making processes and decentralised implementation, individualised expression and global non-hierarchical communication (Castells, 2003: 12). One of the positive sides of global communication networking has been in strengthened autonomy of local environments which, by operating through global information resources, manage to avoid dependence solely on local institutions (Castells, 2003: 171). However, high hopes in the potential of networking via new technologies and the enthusiasm typical for the initial period of any new medium were soon cooled down, when problems related to uneven access to new media (often linked to the 'old' variables of gender, age, profession, income, education etc.), various activities on the internet, copyright and privacy issues were marked. Despite these obstacles, internet remains the medium which provides interactive options to its users, fast access to information, opinion expression, innovativeness and de-territorialized communication. Also, this medium is relatively cost effective communication channel which still facilitates relatively free communication among its users.

Thus, this research project aims to explore the level to which Croatian associations of the civil sector<sup>2</sup>, utilise the possibilities opened up by the virtual space in order to overcome spatial boundaries and the level to which this may open up new possibilities for intercultural networking and communication. This part of the study analyses the associations of civil society in Croatia.

## **Cultural Associations in the Context of Civil Society in Croatia**

There are 32 543 registered associations in Croatia<sup>3</sup> (Central State Office for Administration of the Government of the Republic of Croatia). Geographically, the majority of cultural associations are registered in the City of Zagreb (6915). The next largest area is Split-Dalmatia County with 2841 registered associations, followed by Primorsko-Goranska County

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<sup>1</sup> "Anachronistic" in relation to development of western democracy.

<sup>2</sup> Such a rigid division in these three sectors is not possible in practice. However sectoral division was necessary to open the analytical potentials.

<sup>3</sup> Data of the Central State Office for administration of the Government of the Republic of Croatia show the number of registered associations different from the total number of registered associations according to their primary activity (32 422) as well as the total number of registered associations in Croatia by the counties (32 507). In addition, the categorization of associations according to area of activity differs: one type of classification given in the Register of associations, was created according to their main type of activity, while the other, outlined in a chart of the funding applications awarded by the Ministry of Culture, according to geographic area of activity. In order to analyse the real status within this sector public institutions should use the same classification standards.

(2633) and Osijek-Baranja County (2436). The lowest number of registered associations is visible in Lika-Senj County (401) and Požega-Slavonia County (578). These figures indicate that the number of associations is, assuredly, closely related to the population of a particular city (Zagreb, Split, Rijeka, Osijek). However, when the number of residents is compared to the number of associations it can be seen that associating in relation to the population is more frequent in Dubrovnik-Neretva County (101,1). It is followed by the City of Zagreb (112,7), Primorsko-Goranska County (116,0), and Istria County (119,0). The lowest number of associations in relation to the population of a county is in Brod-Posavina County (175,9), Vukovar-Srijem County (173,8) and Zadar County (170,9) (Table 1).

Table 1. Numbers of residents and associations by Croatian counties

	Population	Total number of registered associations**	Average number of inhabitants/ members per association	Number of cultural associations financially supported by the Ministry of Culture in 2006* (**)
Bjelovar-Bilogora County	133 084	983	135	9
Brod-Posavina County	176 765	1005	176	7
Dubrovnik-Neretva County	122 870	1215	101	8
City of Zagreb	779 145	6915	113	172
Istria County	206 344	1734	119	26
Karlovac County	141 787	990	143	9
Koprivnica-Križevci County	124 467	940	132	2
Krapina-Zagorje County	142 432	880	162	8
Lika-Senj County	53 677	401	134	3
Međimurje County	118 426	892	133	6
Osijek-Baranja County	330 506	2436	136	23
Požega-Slavonija County	85 831	578	149	2
Primorsko-Goranska County	305 505	2633	116	26
Sisak-Moslavina County	185 387	1356	137	16
Split-Dalmatia County	463 676	2841	163	28
Šibenik-Knin County	112 891	824	137	5
Varaždin County	184 769	1218	152	4
Virovitica-Podravina County	93 389	644	145	N/A
Vukovar-Srijem County	204 768	1178	174	7
Zadar County	162 045	948	171	10
Zagreb County	309 696	1896	163	16
<b>Total in Croatia</b>	<b>4.572 624</b>	<b>32 507</b>	<b>141</b>	<b>387</b>

\* It was not possible to attain data about cultural associations by county, which would correspond to the last column.

\*\* Source: Addressbook of associations and societies which were financially supported by the Ministry of Culture in 2006. Overview by counties.

In the year 2006 the total funding of associations of civil society was 321,636,823.06 kn. 45,02 % of this sum was from the state budget, 54,28 % from the lottery profit<sup>4</sup>, and 0,70 % from the National Foundation for Development of Civil Society. (Table 2)

Table 2. Total funds awarded to associations in 2006

SOURCES OF FUNDING	Per cent	AMOUNT IN KUNA (USD)
State budget	45.02	144,806,928 (27,192,527)
Croatian Lottery	54.28	174,585,420 (32,784,473)
National Foundation for Civil Society Development	0.70	2,244,474 ( 421,477)
TOTAL	100.00	321,636,823 (60,398,479)

Source: Unpublished data from the Office for Cooperation with NGOs, Republic of Croatia, received on 08 June 2007.

From the total sum of funds distributed by the State to the civil society associations, the Ministry of Culture participated with 25,215,614.47 kn, which is 17,41 % of the total sum. Out of the total sum of grants given through the State budget which was 2766, most went to the area<sup>5</sup> of 'protection and promotion of cultural and historic heritage and protection' of nature which makes 36,15 % of the total number of grants. However, a close look at the funding figures indicate that sport was the best funded activity – the total of 96654.151,99 kn, which is 30,05 % of all distributed grants. This is not surprising considering that the majority of associations in Croatia have been registered in the area of sport (11 679), followed by cultural associations (4 335). Total number of cultural associations in the Register of associations has been divided in the following sub-groups<sup>6</sup>:

- ostale kulturne djelatnosti – 1617 registriranih udruga
- kulturno-umjetnička društva – 1074 registriranih udruga
- glazbena djelatnost – 857 registriranih udruga
- plesna djelatnost – 259 registriranih udruga
- likovna djelatnost – 218 registriranih udruga
- kazališna djelatnost – 112 registriranih udruga
- literarna djelatnost – 74 registriranih udruga
- film i TV – 50 registriranih udruga
- strukovna djelatnost – 27 registriranih udruga
- balet – 6 registriranih udruga

<sup>4</sup> Government of Republic of Croatia introduced legislative criteria which regulate the annual distribution of the lottery game income. Development of civil society is supported by 14,5% and culture by 5% of the total income. Various government departments regulate distribution.

<sup>5</sup> Civil society activities are divided in 12 categories: Protection and promotion of culture, cultural values and environment; Democracy, development of civil society and volunteers, strengthening of social cohesion, philanthropy; Welfare and War veterans; Health, physical and physical integrity and well-being; Youth and children support; Human rights; Environmental protection and sustainable development; Customer rights and protection; European Union integration process, Other.

<sup>6</sup> Data are slightly different depending on the source of the number of registered associations.

## Research of Civil Society in the Area of Culture in Croatia

Research of civil society in Croatia indicates that the public opinion and opinion of professionals in associations are significantly different when activities conducted within the cultural sector were considered. Research in 2005<sup>7</sup> showed that the activities of associations in the area of arts and culture were the least recognised by the public: only 2,9 % recognised these associations. Other segments which were not recognised were associations in the area of religious affiliations and freedom (0,7 %) and in the area of education (1,9 %). The most recognisable were the war veteran associations (39,3 %), environment protection associations (36,2) and groups for political organisations and campaigns (33%).

Opposite to the public opinion about cultural associations, the research<sup>8</sup> of opinions of professionals in these associations<sup>9</sup> were significantly different. They recognised cultural sector as the most represented segment within the civil sector (2007: 27). Also, this research showed that out of total number of analysed associations, 19,5 % conducted regional projects and the most represented field was that of culture (2007: 75).<sup>10</sup>

Cultural professionals and a number of registered associations confirmed high representation of culture within the civil sector. According to their answers cultural associations were at the second place, immediately after the sports associations but the wider audience could not recognise them. This can be explained by the general low representation of civil society associations in local media which can be seen from the research findings of diversity of Croatian media (2005). Research results indicate that representation of civil society in the printed media and television was only 2 %.<sup>11</sup>

When public was informed about activities of civil society associations it was mostly through television<sup>12</sup> (61,4 %), daily newspapers (25,4%), radio (6,1 %), internet (4,7%) and political weekly magazines (1,0%).<sup>13</sup> Therefore, role of the Internet as a source of information is very

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<sup>7</sup> Research 'Public opinion on non-government organisation', led by the Institute Ivo Pilar. Sample of 1008 participants in Croatia. Results indicate the perception of civil society in Croatia. 83,3 % participants were informed about the term 'association' but only 43,3 % was able to define it.

<sup>8</sup> Research study Procjena stanja razvoja organizacija civilnoga društva u Republici Hrvatskoj, 2007., Ana Hromatko, Nacionalna zaklada za razvoj civilnog društva (<http://zaklada.civilnodrustvo.hr/files/upload/hr/procjena%20stanja.pdf>)

<sup>9</sup> According to the study «Public Opinion on NGOs», conducted by Institute Ivo Pilar for the Academy for Educational Development (AED), from the total of 1008 respondents only 8,3 % are members of an association, of which 5,6 % are active members, 3,2 are inactive, and 0,2 % are active professionals (paid or their work). Those that are not members of any association state as reason a lack of information about the work of associations, not being acquainted with persons actively involved in their work, a lack of free time, and a lack of trust towards existing associations active in specific spheres. (2005: 48).

<sup>10</sup> Assessment of the state of development of civil society organizations in the Republic of Croatia, 2007., Ana Hromatko, National Foundation for Civil Society Development (<http://zaklada.civilnodrustvo.hr/files/upload/hr/procjena%20stanja.pdf>).

<sup>11</sup> Study on the assessment of Content Diversity in Newspapers and Television in the context of increasing trends towards concentration of media markets, Media department of the Council of Europe, MC-S-MD(2006)001, dr. David Ward, Centre for Media Policy and Development, UK, 2005. Quantitative analysis of presentation of various social organizations on TV and newspapers (6 daily newspapers).

<sup>12</sup> 'Public opinion on non-government organisation', Institute Ivo Pilar, 2005.

<sup>13</sup> The percentage of respondents informing themselves over the Internet is a little higher than three years earlier (2002). Study entitled Public Opinion on Non-governmental Organizations in Croatia (N=1000), conducted as part of the GfK Agency project Support of Croatian Non-governmental Organizations – CroNGO, commissioned by the Academy for Educational Development (AED), shows that the Internet is present in 4,1 % of the



low although 30 % of Croatian population are regular users of the internet. ('regular user' is defined as making at least one connection per week), and 6 % are occasional users.<sup>14</sup>

Considering the research results it can be concluded that although cultural associations are rated second (4335) on the list of all registered associations, they are not recognised by the Croatian public (2,9 % of the participants). When the results of sources of information about associations' activities where the internet is positioned very low are considered, it can be concluded that they have to focus on television as a tool of representation if these associations want to increase their representation in Croatian public sphere. However, if their aim is not only a sound media representation but also a rapid development of communication, it is necessary to develop their internet presentation in a form of an interactive platform. Research findings also show slow increase in a number of those participants who are informed about the cultural associations through the internet: 4,1 % in 2002 and 4,7 % in 2005. This can be the result of methodology of research but considering the stable increasing trend of the use of internet it is very likely that more people use internet as a source of information.

## Research Methodology

This part of research aims to measure the indicators of the use of internet by the Croatian cultural associations of civil society in order to overcome geographical/spatial barriers and how they create possibilities of intercultural communication. We analysed those associations which through their activities support (or should support) international cultural cooperation and communication. We selected those associations which applied and were awarded funding grants from the Ministry of Culture in the program section: 'International cultural cooperation in 2006'<sup>15</sup>. Since the Ministry of Culture listed all individuals and legal entities which were awarded grants regardless of the sectors they operate within this list was compared with the Address book of associations and groups which were funded by the Ministry of Culture in 2006 (listed by Croatian counties)<sup>16</sup>. This address book includes professional cultural associations, arts organisations, cultural amateur groups, non-institutional groups (youth and alternative culture) and other groups associated with culture. Third selection criterion referred to the formal registration. This means that the selected associations were those listed in the Register on 17th and 18th May 2007. These criteria provided a list of 56 associations which were funded by the Ministry of culture in the program section 'International cultural cooperation in 2006' and were listed in the Register of associations<sup>17</sup>.

For the analysis of websites we used variables developed in the quantitative research conducted by Balasz Vedres, Laszlo Bruszt and David Stark. These researchers identified various genres formed in the virtual sphere of civil society in the so-called post-socialist

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respondents. The most common source of information about associations is television (94,5 %), followed by daily newspapers (58,5%), radio (55,5%), personal contacts with friends or acquaintances (30,8 %), magazines (22,0 %), street advertising (17,6 %), brochures and flyers about the associations (14,5 %).

<sup>14</sup> In 2005 and 2006, CATI and Prizma conducted a study about the usage of the Internet in Croatia, on a nationally representative sample of 54.000 persons, aged 12 and above. Men use the Internet more frequently (39 % of regular and occasional users) than women (30 % of regular and occasional users). The Internet is more frequently used in cities of more than 25 000 inhabitants, most commonly by younger, higher educated users , and those with a monthly income of over 3500 kuna.

<sup>15</sup> [www.min-kulture.hr/userdocsimages/odobreni%20programi%20u%202006/madjunardna%20odobreni%202006.pdf](http://www.min-kulture.hr/userdocsimages/odobreni%20programi%20u%202006/madjunardna%20odobreni%202006.pdf)

<sup>16</sup> The named addressbook was prepared by Sanja Markušev-Jelačić, Boris Jurinić and Stipe Buljan, from the Directorate for Economy and Finances, Department for Planning and Financing, Section for Documentational and Analytic Affairs and Investments.

<sup>17</sup> Professional associations ([www.hzs.hr/udruga.html](http://www.hzs.hr/udruga.html)), are discussed in a segment on private sector.

countries. They also identified the organisation of information on websites measuring to what extent these were accessible to their users. These researchers used 11 variables in order to design five models of the organisation of the web content. Four of these were based on printed media, and one was typical for new technologies:

1. *newsletters* – content targeting subscribers and potential users. Includes information on current events, online information about activities which can facilitate off-line participation of potential members;
2. *multilingual solicitations* – content available in several languages targeting potential donors. Most often includes information on professional achievements and annual reports;
3. *brochures* – reduced information on association's activities in one language particularly focused on off-line availability;
4. *virtual directories* – contain hyperlinks which facilitate further network search;
5. *interactive platform* – facilitates online communication among users. Content is usually not translated in any language other the principal one (Vedres et al. 2004: 7).

Considering that we analysed associations which are active in the area of culture as a specific area and as we focused on their representation in the international context which through the use of new technologies opens up potentials for the intercultural dialogue and international communication, this categorisation was not entirely applicable but only to some variables that were applied<sup>18</sup>. We added several more, which we found useful for this particular study<sup>19</sup>.

Using five models applied by Vedres et al. (2004) and additional variables, we measured **participativeness** (virtual and real) and **informativeness** of web contents and how they aimed both international and national users. Our aim was to define which audiences these associations were targeting: members of the local community who could participate in real (space) activities through forums, email contacts and/or chat (discussion) groups. We also analysed what types of activities were offered, participation in the work of the association, participation in the events they organised or something else. We also analysed whether an association addressed the users in languages other than Croatian. Our starting point was a presumption that those associations which were funded for their international cooperation aimed their audiences through online interactivity and informativity of the international character.

### Analysis of Empirical Part of Research

We analysed 56 associations whose projects of international cooperation were funded in 2006 by the Croatian Ministry of Culture. These grants mainly funded international travel costs, attendance and presentations at the international programs/festivals. According to the Register of Associations our sample included the following categories of associations:

- other cultural activities – 18
- cultural and artistic associations – 8

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<sup>18</sup> Offline accessibility (telephone, address), e-mail address, annual financial report, mission of association, calendar of activities, information on conferences, foreign language content, links to other web sites, newsletter or membership registration, possibility to participate in web content creation through forum, etc., online polls.

<sup>19</sup> Description of project/programme/activities, description of international projects and/or relations, online event registration, media coverage of their activities.

- music – 7
- dance – 3
- visual arts – 1
- theatre – 9
- writing – 4
- film and TV – 1
- professional guilds – 5
- ballet – 0

Out of the total number of analysed associations, 14 (24,6 %) of them do not have their website; while 6 (10,5 %) websites were, during this analysis which took place between 17/05/2007 and 28/05/2007, under construction. (Figure 1)

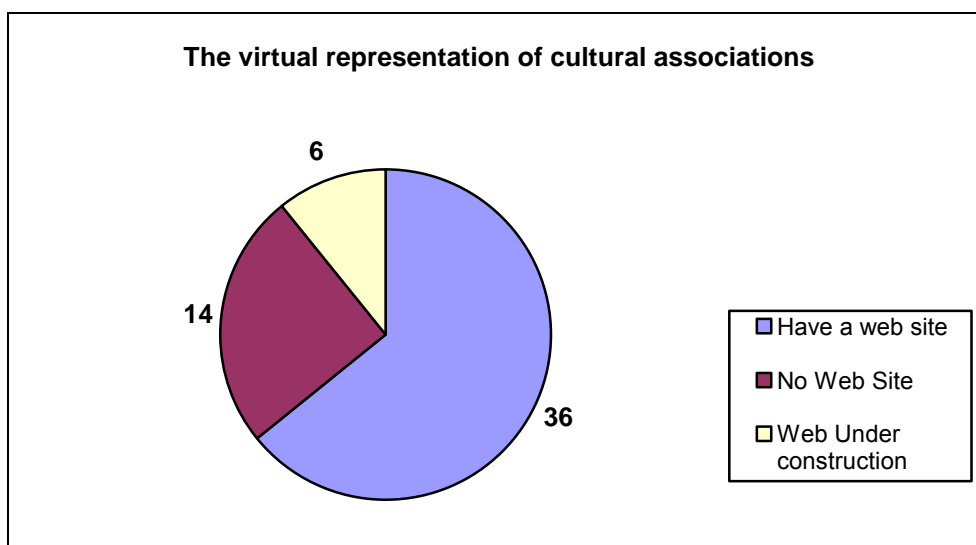


Figure 1. Representation of cultural associations in virtual space

Representation of associations in virtual space according to their main activity is represented in the Figure 2. Those associations which do not have their web page and those whose websites were under construction are listed under the same category. However, due to the very small sample (56) (for example there is only one website under the categories 'film and TV' and 'visual arts') and rather large number of categories (9) the results of this analysis do not apply to the specific sub category. They show the results according to the categorisation of those associations that were sampled for this study.

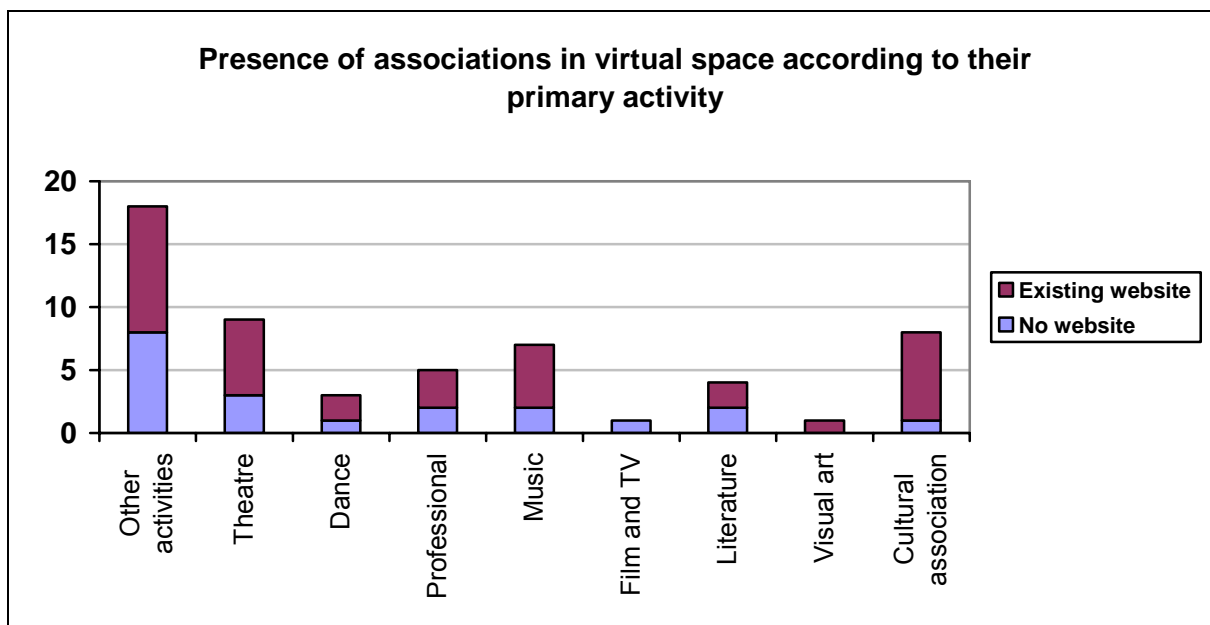


Figure 2. Presentation of the analysed associations in virtual space according to their primary activity

### Virtual Representation of Cultural Associations: Informativeness

Out of total number of the analysed websites, 2 websites do not represent the association but an event organised by such association. Presentation of an international event is more important to these associations. Therefore they are similarly structured: they contain email address, bilingual content (Croatian and English), information on the project and program. They do not provide information about an association nor do they list links to other cultural institutions.

Some websites only serve as an information source and options to contact them are limited. They usually do not provide their postal address and/or telephone number and email address. There is however a direct application for sending messages on the web which depersonalise (or deinstitutionalise) a receiver which as a consequence may affect frequency of their communication. There is however significant difference among these 5 websites due to their different activities. Three have only provide information without participation options while the other 2 offer a direct application for sending messages over the internet and they are oriented to online participation. They offer options of interaction through online forms, surveys and forums.

Two out of 36 analysed websites present their content only in English and 13 only in Croatian (2 websites have links in English, German and Italian but none of these links was in function). 16 websites are bilingual, 15 in Croatian and English and 1 in Croatian and Esperanto. Five associations have major part of their content in Croatian. Minor part of the content about the association or a part which is related to some event is offered on 4 websites in English and on 1 in English and German. It is obvious that English language dominates while other languages play a minor role (German in one case and Esperanto in the other case because it is the main activity of these associations) (Figure 3).

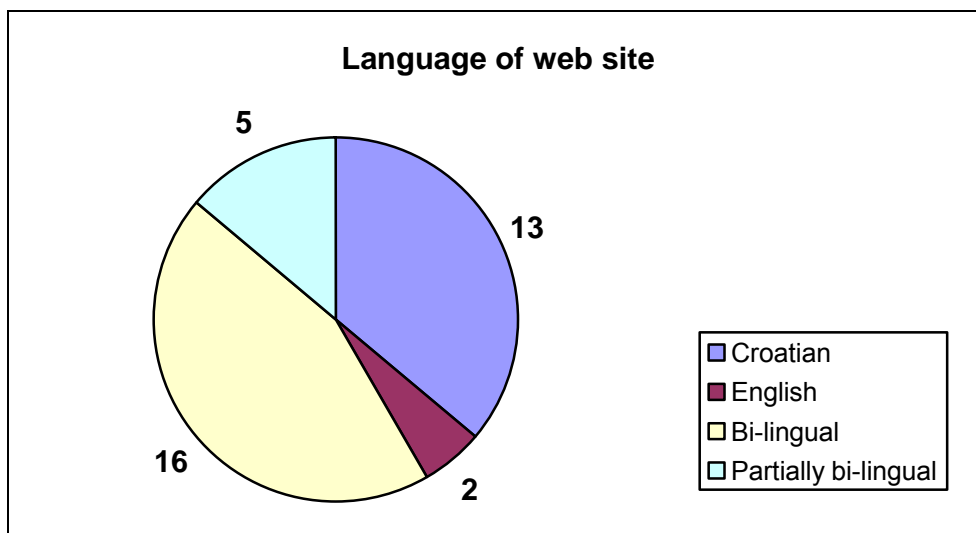


Figure 3. Representation of languages

Two websites which provide their content in English target both, international users and a segment of Croatian population which can communicate with the content in English. Their design is innovative and they provide information about a particular association, their email address, list of events and a list of their sponsors. However, these websites do not offer a participation option.

Considering the structure of the web presentation of an association, majority of associations (25) do not include their mission, vision and/or aims statements – in other words, short text that explains their main activities. Only 11 associations present their statements. However, projects and programs are usually visible: 32 associations present their projects and programs. Exceptions are 4 associations, 3 of them are professionally oriented and therefore not project oriented. Most of the associations (29) also announce events on their websites (conferences, seminars, workshop, festival etc).

Several associations highlighted their collaboration with the media which inform about their activities. This is useful for the identification of a particular media which support activities of civil society. Such information is provided on websites of 6 associations.

None of the analysed websites present their annual report. Nine do state sponsors and donors and one states the proposal of their financial plan for which they opened a tender. The remaining 26 associations do not present such content.

23 associations list their web links to other cultural institutions or to their members and individual artists involved in association's activities. 13 associations do not provide links for further navigation options.

28 web pages inform on some kind of international exchange, either through projects, collaboration, descriptions of collaboration, information about visits or information on similar institutions. The remaining 8 websites do not provide such information.

### **Virtual Representation of Cultural Associations: Participativeness**

When potential participation is considered in work and activities of associations, it mainly means engagement of potential participants into their off-line activities. Out of 29 associations which advertise an event, 11 of them offer an interactive option via on-line application to the event. On-line registration for membership is offered by 3 associations (categorised under music, theatre and literature). All 3 associations present their content only in Croatian which

clearly indicates their main audience. Two associations offer options of on-line membership registration and newsletter subscription. One theatre association presents its content only in Croatian while the other categorised as technical professional association present the web content in Croatian and English. Wider orientation is visible only in those associations which offer subscription to their newsletter. All three associations present their web content in English and Croatian. These associations are classified under dance, literature/writing and under the category 'other'. All listed associations which offer such form of on-line participation can be recognised in the earlier mentioned model of newsletters (Vedres et al.) in which the content of a website targets real members. They use on-line participation in order to engage these potential members in their activities and programs. There are two exemptions. One technical professional association and one writers association which both offer their users additional on-line activities (forums, surveys) (Figure 4).

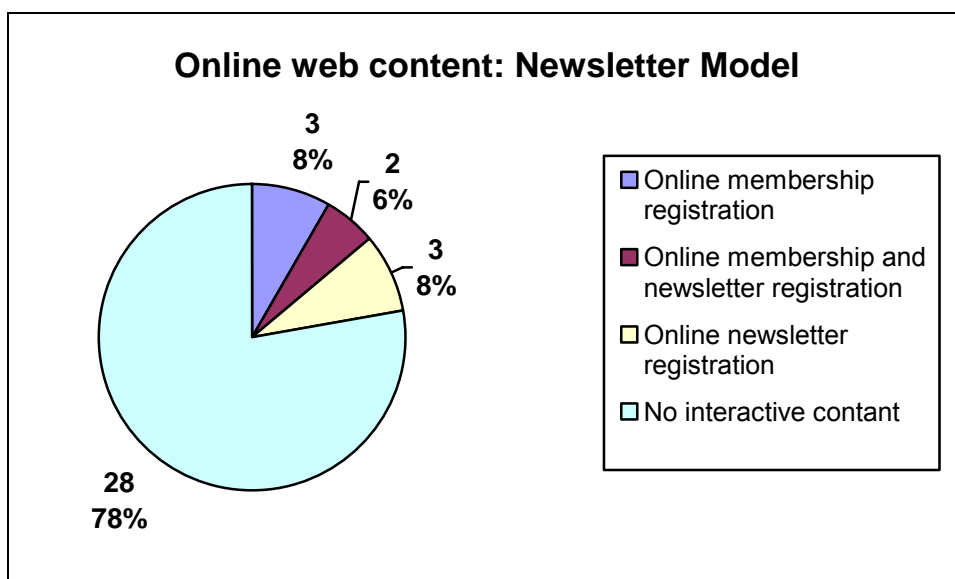


Figure 4. Online web content: Newsletter

Virtual participation through forums is available on web pages of 6 associations categorised as: dance (although their web was last time updated in 2004), technical-professional, writers association, amateur cultural associations and 2 associations under the category 'other' (one provides a service of on-line language course). The remaining 30 associations do not offer any participation options.

Four associations (2 in the category 'other cultural activities', one theatre and one amateur cultural association) offer an option of participation through on-line surveys about different attitudes. The remaining 32 do not offer such model of participation. Associations which offer interactive options can be classified as a model of interactive platform (Vedres et al. 2004: 7), which is a new mode of on-line user participation in creation of the web content (Figure 5).

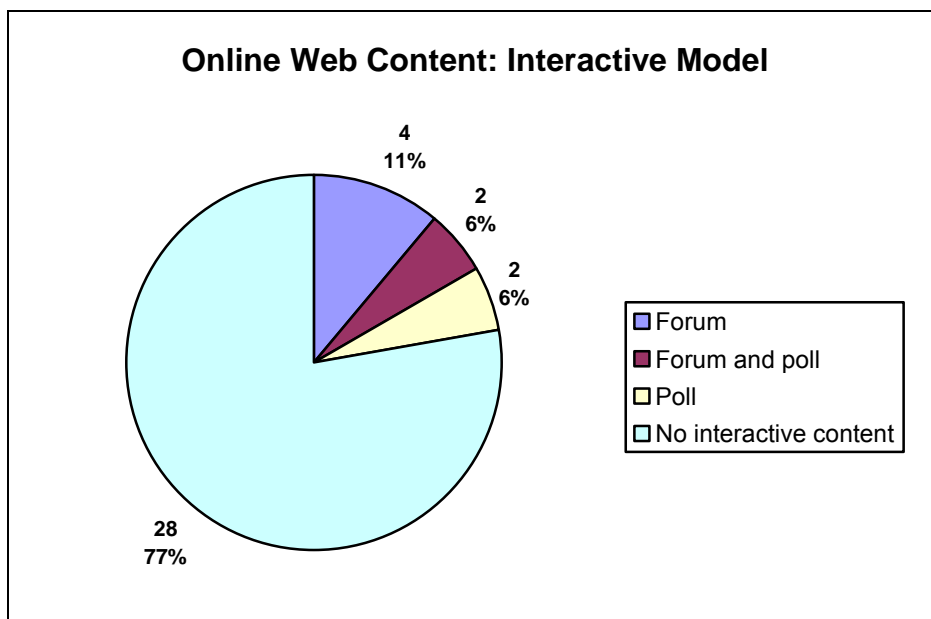


Figure. Online web content: interactive model

Considering all the above, majority of associations use internet to create virtual brochures as their web pages. Its function is to inform local and international users about their activities. Eight associations use more potential of the internet through options of on-line membership forms and subscriptions to newsletters. Such use of internet indicates only one-way communication. Two-way communication which would enable users to participate in creation of the website content is usually limited to options such as forums or other forms of content uploading. The unions of associations in order to improve communication among their members should use this type of content. Only 6 of the analysed associations utilise such potential. On-line survey partly belongs to this type of participation although the survey results are usually grouped and the position of an individual user is not visible. Only 4 associations use this option. However, assessment of the use of internet has to take into account the context which involves association's activity and its aims in a broad social and cultural context.

### Assessment of the Current Status

Analysis of websites of cultural associations evaluates the extent to which they use potentials of IT in development of international communication and cooperation. Internet in Croatia is used by 30% of population, mainly younger and educated.

Research of the civil sector shows that internet as a source of information on their activities is used by a small segment of Croatian population. This is expected to change considering the increasing trend of use of internet in Croatia.

Cultural associations are also not recognised by the wider population (2,9% participants) although they form the second largest group (4335) of the total number of registered associations. This can be partly explained by the relatively low representation of the civil sector in Croatian media. However, the question is why the other associations are better recognised by the public? Partial explanation can be found in activities of these associations within the context of the actual social and political climate in Croatia. Issues related to the war veterans or democratisation of society in the context of political campaigns is a priority. It is perhaps this marginal but elite position of the sphere of art and culture that makes these associations less recognised. The second reason can be the problem of recognition of what the

sphere of culture actually means, since the ongoing activities (or at least a part of these activities) in this sphere have a progressive character, which makes the categorisation difficult even for its members.<sup>20</sup>

Our research results show that only 64,9 % of associations (36) have a website. The remaining 35,1 % do not have website or it is still under construction. However, of those associations which are represented in virtual space, relatively large number has at least part of its content presented in the language other than Croatian (63,8 % or 23 associations). 13 associations (36,1 %) present their content only in Croatian language. Relatively large number of associations (28 or 77%) presents information about international networking.

Considering all variables, most cultural associations present their activities on the level of information. Participation options are less used. Only one third present their content in such way that it supports on-line participation (membership forms, newsletter, forums, surveys). All this indicates that majority of the analysed associations use internet as a tool of self-representation and not as a tool of interactive participation and communication. It also indicates that a large number of associations are represented in a form of brochure. Newsletter as a popular format provides information on current activities mostly for local audiences. There is also an option of receiving information via email in order to facilitate off-line participation.

Assessment of the status of cultural aspect of civil society in virtual space has to take into account the context. This means the aim of a particular association. Web representation is not of prime importance if an association's aim is oriented towards the grass-root activism which includes contacts with local population. Networking and establishing of communication links on the international level are important if an association aims to connect with the global social activities. Therefore, content selection as well as its presentation depends on these aims. If association aims international networking, with European cultural associations in particular, then further work on virtual representation of cultural associations is essential.

### **Web Data Sources**

[www.hzs.hr/udruga.html](http://www.hzs.hr/udruga.html)

[www.biznet.hr](http://www.biznet.hr)

<http://www.uprava.hr/RegistarUdruga>

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<sup>20</sup> For example, the listing of associations by field of activity illustrates that the largest category is «other cultural activities» (1617). In addition to this category some traditional categories are represented, which are characteristic of the sphere of elite culture, while some modern trends remain non-recognized, including new forms of art expressed through the new media, design and architecture, alternative culture and others.



## Cultural Portals – Structures of Virtual Communication

Presence of the cultural sector through diverse web resources has been one of the fundamental aspects of digital culture. In the analysis of digital culture, structures formed in the virtual space itself such as portals, virtual social networks, blogs and wiki services are of vital importance. These structures have more complex role than just as a mere information providers – they significantly contribute to the construction of new forms of virtual communication and collaboration. Virtual space contains diverse information but this is also a space, which facilitates communication and interaction on a global scale. Thus a combination of these two modes, informative and communicative has contributed to such rapid development of the Internet as well as diversity of the accessible services and service providers on the Internet.

It is estimated that there are over 136 billion web servers available on the Internet in September 2007 - there are many more web pages available to users.<sup>1</sup> However, the very fact that information is available over the Internet does not mean that it is easily accessible to the network users. Mega search engines and portals such as Google.com and Yahoo.com are among the most powerful search engines which enable their users to access the available information resources. Together with these mega search engines there are numerous specialised portals which enable the access to the virtual resources in specific areas and which select the relevant information for their targeted users.

Portal is usually defined as a starting website through which its users can easily access the other virtual information resources they are interested in and which are located at different websites.<sup>2</sup> Portals enable their users to access information from various sources at one place. Apart from information, large portals often provide access to services such as email, search engines, forums, e-commerce etc. Cultural portals are specialised portals which provide access to the existing web cultural resources, but these portals also contribute to the production of their content<sup>3</sup>. Through the construction of new referral services (systematic collection and organisation of contents) they contribute to organisation and information support of the particular cultural sector. Considering the communication dynamism over the Internet and permanent appearance of new contents, the role of portals has become increasingly significant in providing information on new resources on the Internet and activities of cultural sector in real sphere. Portals have become aggregators, producers and organisers of dynamic content such as news and information, rather than just a set of links as

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<sup>1</sup> How many web pages there are on the Internet is a tricky question. Nobody is sure. The Netcraft Web Server Survey reported that in the September 2007 survey they received responses from over 136 billion sites (news.netcraft.com). There should be many more web pages. Search engines do not regularly publish the number of pages they index. Boutell.Com Consulting Services estimated that in 2007 the number was about 30 billion. It was worked out by comparing statistics of Netcraft (for servers) with Yahoo published statistics (for indexed web pages) for the same month in 2005. This allowed them to make an estimate that there are on average 273 web pages per server. So presuming the accuracy of this estimate one can multiply this estimated number of web pages per website by Netcraft's monthly count of websites for an estimated figure of how many web pages there are at a given moment ([www.boutell.com/newfaq/misc/sizeofweb.html](http://www.boutell.com/newfaq/misc/sizeofweb.html)).

<sup>2</sup> Various definitions of web portals are available on the net, see:

[http://searchsmb.techtarget.com/sDefinition/0,,sid44\\_gci212810,00.html](http://searchsmb.techtarget.com/sDefinition/0,,sid44_gci212810,00.html)  
<http://www.dynaportal.com/aeaps/aeitem.cfm?aeid=1>, [http://en.wikipedia.org/wiki/Web\\_portal](http://en.wikipedia.org/wiki/Web_portal)

<sup>3</sup> For more information about the role of portals in promotion of digital culture see Hargittai, Eszter (2000) "Open Portals or Closed Gates", [www.princeton.edu/~eszter/portals.html](http://www.princeton.edu/~eszter/portals.html)

was their role at the early stage of development of the Internet. Therefore, the majority of portals can be described as online publishers - virtual magazines (news portals) which provide news for their users. They are not focused on promotion of other web resources. Instead, their focus is on information on cultural events in the real sphere. Regardless of a definition of a portal, in practice clear distinctions between portals and other virtual resources are not easily observed because portals, on-line journals and often web pages of professional associations all provide information relevant to the cultural sector. One of definitions distinguishing portal from the web page points out the role of the user. While the web pages are structured to represent an institution and foreground the representational logic of an institution, portals structure their content in the way expected by users<sup>4</sup>.

According to the research conducted by the Culturemondo network<sup>5</sup> building of cultural portals is motivated by desire to inspire users to explore their own culture and various culture related contents. The main goal in construction of cultural portals is related to securing of the relevant, reliable and updated information to portals' users. Design of these portals depends on national cultural context considering that they are created as a response to the actual sectoral and national interests. According to their research findings portals can be classified in three sub-groups<sup>6</sup>:

- national cultural portals presenting multidisciplinary cultural themes
- thematic portals which inform about the specific regional, national and international cultural issues
- cultural observatories – which via portal present the research findings, and aim to systematically monitor the trends in the cultural sector in order to contribute to definition of cultural policies based on research studies and their findings.

Portals are designed as public, private or civil sector projects with the aim of communication with users through the Internet. Thus, it is important to identify for which group of users portal is designed and to identify interests and needs of its users. Cultural portals are designed for and oriented to two major groups of users: cultural practitioners and cultural audience. Research conducted by Culturemondo shows that for every cultural portal it is essential to link cultural sector with its audience and it is thus important to secure the sources of information for the content which is published on the portal. Majority of portals depend in their content creation partly on decentralised sources of information and a network of the external contributors in order to achieve the comprehensiveness and representation of the content. Success of such aim and the quality of information depend on a network of the associated collaborators which is one of the major challenges in building of cultural portals.

Besides being the service for providing information, cultural portals also link their users with cultural resources. In order to succeed in this, they often emphasise the need for establishing suitable networking structure, understanding users needs as well as partnership with the cultural sector. In order to operate as a space of dialogue, portals have to create a platform which can facilitate users' active participation in communication. Therefore, interactivity is the main aim of the majority of cultural portals, but according to data provided by two most

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<sup>4</sup> Interview with Howard Strauss, in program TechTalks Event, What Is a Portal, Anyway? January 20, 2000, [www.campustechnology.com/techTalks/events/000120portal.asp](http://www.campustechnology.com/techTalks/events/000120portal.asp)

<sup>5</sup> Culturemondo Network published Culturemondo report – Cultural Portals: Gateways to a Global Commons, 2005, which is based on results of a research on cultural portals based on conducted surveys and round table discussions in 2005. Second survey and the round table were organised in 2006 in collaboration with Culturelink.

<sup>6</sup> Culturemondo report – Cultural Portals: Gateways to a Global Commons, 2005

recent Culturemondo surveys, interactivity at the present stage is not the dominant principle of communication at cultural portals.

## Research Methodology

There is no a comprehensive register of virtual resources in Croatia which would identify all cultural portals. We have thus researched virtual cultural space in Croatia and identified cultural portals as well as virtual resources which stand above the average websites of cultural institutions and use the possibilities of Internet to developed cultural content in virtual domain. We took into consideration those virtual resources which use the Internet in a dynamic way (establish resources such as journals, data bases and calendars of cultural events) and those resources which do not only provide information on activities of their host organisation but cover broader cultural sector.

We used a survey method for our analysis of cultural portals in Croatia. In June 2007, a questionnaire was posted to 30 identified cultural portals and active web resources in order to conduct a comparative analysis and get an insight into the new possibilities facilitated by the virtual communication. Seventeen out of 30 contacted portals responded to our questionnaire. Analysis of their answers provided an insight into the activities of cultural portals in Croatia. We were interested in the purpose of portals, time when they started working, type of portal, geographical focus and the language of information, targeted audience, areas of their interest, financial resources, type of content they provide, type of service they provide, dynamics and frequency of updates, ways of establishing collaborations and partnerships, their budget, promotion activities and the instruments for measurements of their success.

We analysed the answers provided by the following portals:

- Besplatne elektroničke knjige ([www.elektronickeknjige.com](http://www.elektronickeknjige.com))
- Booksa.hr ([www.booksa.hr](http://www.booksa.hr))
- Culturelink Network ([www.culturelink.hr](http://www.culturelink.hr))
- Culturenet.hr ([www.culturenet.hr](http://www.culturenet.hr))
- Dnevni kulturni Info ([www.dnevnikulturni.info](http://www.dnevnikulturni.info))
- Film.hr ([www.film.hr](http://www.film.hr))
- Filmski.net ([www.filmski.net](http://www.filmski.net))
- Hrvatski filmski savez ([www.hfs.hr](http://www.hfs.hr))
- Institut za suvremenu umjetnost ([www.scca.hr](http://www.scca.hr))<sup>7</sup>
- Knjižni informacijski sustav ([www.knjiga.hr](http://www.knjiga.hr))
- Kulturpunkt ([www.kulturpunkt.hr](http://www.kulturpunkt.hr))
- Kupus.net ([www.kupus.net](http://www.kupus.net))
- Libra libera ([www.jedinstvo.hr/libra](http://www.jedinstvo.hr/libra))
- Moderna vremena Info ([www.mvinfo.hr](http://www.mvinfo.hr))
- Muzejski dokumentacijski centar ([www.mdc.hr](http://www.mdc.hr))
- Muzika.hr ([www.muzika.hr](http://www.muzika.hr))
- Teatar.hr ([www.teatar.hr](http://www.teatar.hr))

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<sup>7</sup> SCCA (Institute for Contemporary Art) used to regularly publish news on visual arts. Currently it is a static website although there are plans to start regular daily news service again. As it was the only thematic website for visual arts in 2007 it was included in our research.

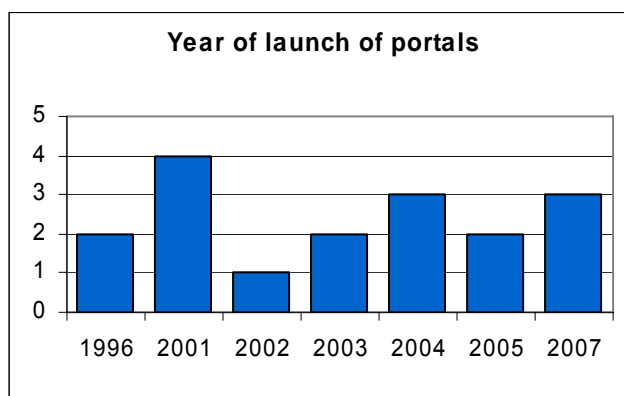
## Cultural Portals in Croatia: Data Analysis

### Purpose of Portals

Common to all portals which participated in this research is that their purpose is general promotion of culture or specific cultural areas. Majority of answers (80%) indicated that portals use the Internet to improve activities of cultural sector in real space. Answers such as – promotion of literature and reading habits; monitoring and support of cultural production; or increased visibility which empower independent and non-profit cultural and civil sector – support such conclusion. Only in one case it was reported that the purpose of portal was facilitation of an easy and systematic access to other existing virtual cultural resources. None of the participating portals has reported a systematic and comprehensive digitalisation of cultural heritage and cultural production as their aim and mission. Also, only one portal reported initiatives in enhancing international and intercultural communication as well as communication between their users as its goal. Other portals contribute to intercultural communication indirectly through information, reviews and announcements of culture related issues at the national level; information on cultural events and trends in other countries; dissemination of information about the possibilities of international cultural exchange and cooperation such as conferences, projects, artist in residence programmes etc.

### Development of Portals

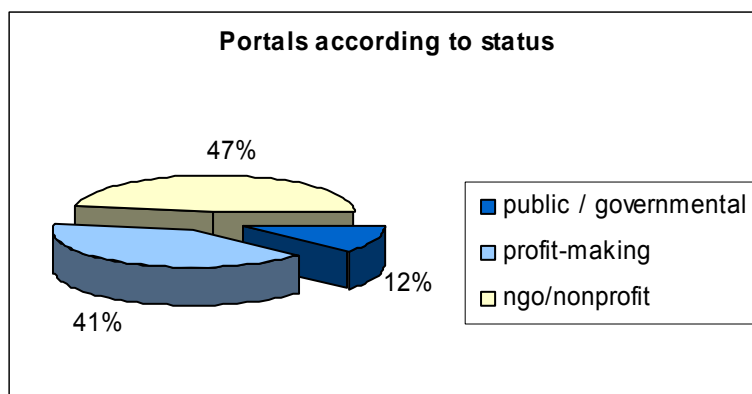
It can be concluded from the analysed answers that development of digital culture in Croatia started more dynamically during the past six years through development of various virtual resources of information and portals. With the exception of Culturelink and Museum Documentation Centre which have their virtual resources from 1996, all other portals have started after 2000. In the year 2001 four portals started working, one in 2002, two in 2003, three in 2004, two in 2005 and three portals in 2007. Considering the increased presence of the Internet in Croatia such trend was expected. The question is whether an increasing number of thematic portals in the same area will be able to secure the sustainability of their operation - competing for their users' attention as well as for sufficient financial support. In order to gain the insight in various aspects of the performance of portals we will analyse their role in promotion of new forms of virtual communication and cooperation and modes of sustainability of their activities<sup>8</sup>.



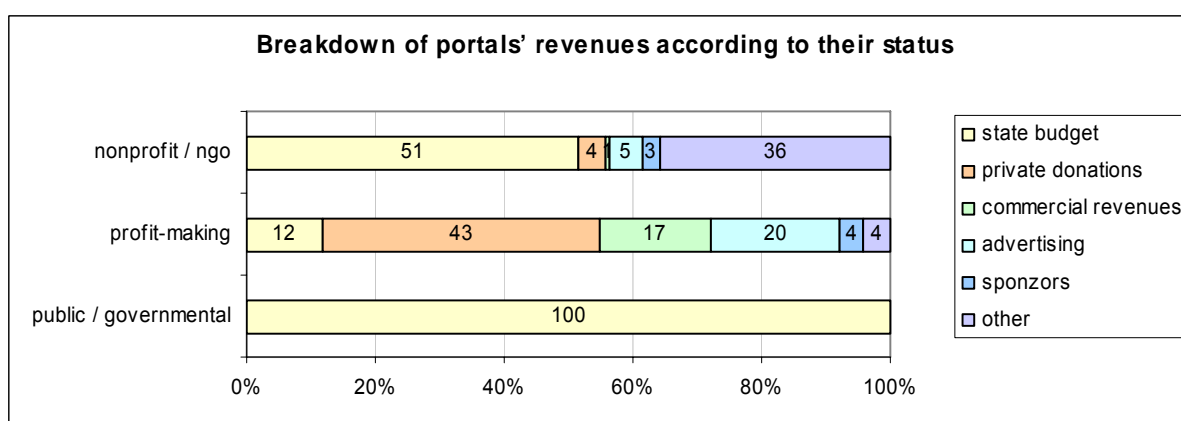
<sup>8</sup> Target audience determines whether a level of collaboration is national (regional) or international. Selected cultural portals are mainly local and their contribution to the international cultural collaboration manifests through dissemination of information on the international cultural events, projects and conferences.

## Status of Portals and Funding Resources

Of the total number of the analysed cultural portals only two were initiated by the public sector (Ministry of Culture of the Republic of Croatia and the public cultural institution Museum Documentation Centre). Other portals were initiated by the existing cultural associations or private, for-profit cultural sector. Professional cultural associations which we would expect to act as initiators of virtual resources because of links with their members, did not develop their activities in such direction.

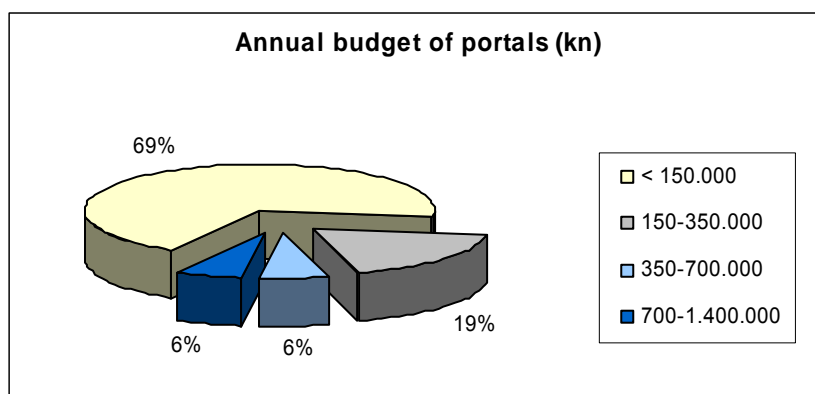


Answers to our question about funding sources indicate that portals receiving most of its funding from the government budget (i.e. more than 85% of their total budget) are either portals with the public institution status or non-profit/non-government status portals (in total 30% of the analysed portals are mostly funded from the government budget). Two portals with the non-profit/non government status stated that all their activities on their portals are based on the voluntary work, which is not a part of their primary activity for which they have secured funding. Portals in a for-profit status in most cases are funded from the government budget up to 10%. Only one portal in a for-profit status is 50% funded from the government budget. Portals in a for-profit status earn most of their income from a combination of advertisements and marketing e.g., sales, subscriptions, sponsorship and some from private donations.



Question related to the annual budget was divided into several scaled categories. Majority of portals, almost 70%, answered that they had limited finances for their activities, less than 150.000 kunas (cca 20.000 Euro) per year. Several participants reported that they do not have any budget and that they operate on a voluntary basis. Three portals stated that their annual budget is less than 350.000 kunas (cca 50.000 Euro) while one portal's budget is in a category of 350-700.000 kunas. One portal reported the budget of up to 1,4 million kunas. Majority of

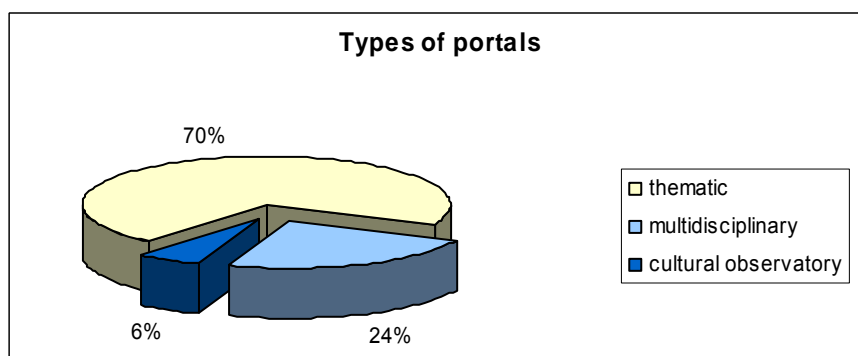
portals which participated in our research operate within a modest budget which partly determines the volume and variety of services they can develop.



Three thematic portals which participated in this research organised their activities from 2007 on a partnership basis in an effort to realise synergy in their activities. This is one of important indicators that portals are aware of the importance of finding sustainable forms of activities under the limited financing possibilities.

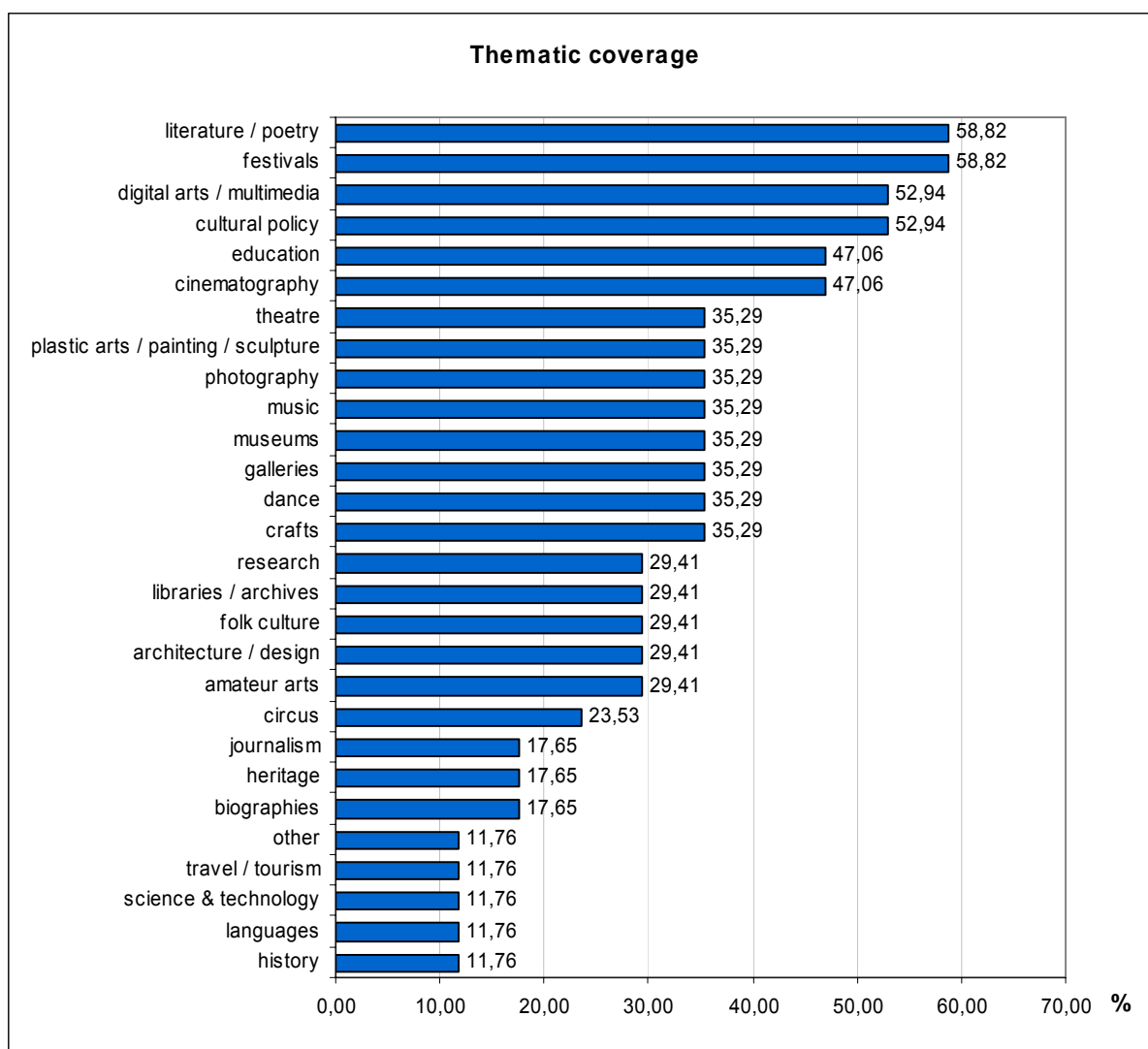
### **Types of Portals, Geographic Focus and Language of Communication**

Analysis of cultural portals in Croatia by the type of portal criterion provides following results: four portals belong to the category of national cultural portals which present multidisciplinary cultural themes, twelve portals are thematic presenting regional, national and international information about specific cultural sector, and one portal is cultural observatory which provides information on research studies and information on international cultural communication and cooperation.



According to their main theme portals can be classified into following categories: General Culture – 6; Books and literature - 4; Film – 3; Museums – 1; Theatre – 1; Visual art – 1; and Music – 1<sup>9</sup>. Each of these categories covers diverse themes which are important for the specific cultural sector.

<sup>9</sup> There is a number of music portals which did not respond to our questionnaire.

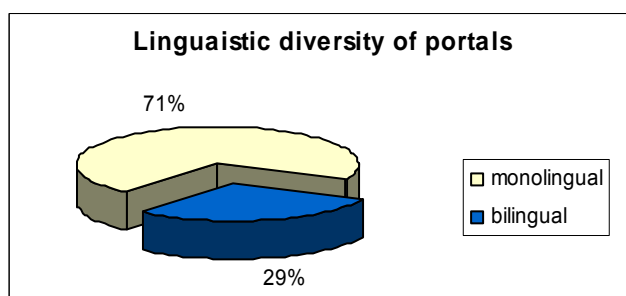
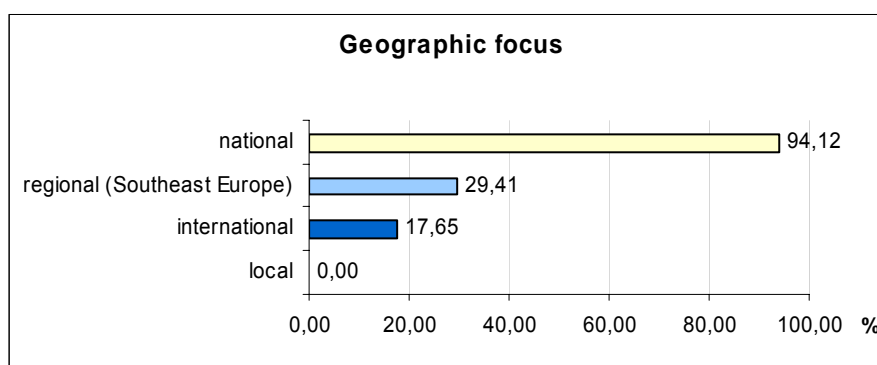


The survey showed relatively low percentage of portals which cover the cultural heritage (17%) and museums in Croatia (35%). Research of cultural portals conducted by Culturemondo network shows that museums and cultural heritage are two most represented categories on a global scale (more than 70%). Considering that most portals in Croatia are in a form of virtual magazine which present cultural news and that not a single one portal reported digitalisation of heritage as its goal, there is a significant difference between the Culturemondo findings and our analysis of portals in Croatia. Only one portal is specialised for museums and heritage, and multidisciplinary portals present the news on this theme. Considering that the project of digitalisation in Croatia is in its initial phase<sup>10</sup>, information related to museums and heritage are reduced to announcements of museum events rather than promotion or development of their virtual resources. The fact that of all analysed portals only two belong to the public sector (which protects cultural heritage) also explains the reasons of low representation of the cultural heritage. However, it is important to note that in the National program of Digitalisation of Archive, Library and Museum heritage there is a plan of

<sup>10</sup> Register of museums, galleries and collections in Croatia ( 31 December 2006) indicate that a large segment of museum objects is not documented in museum inventory (54%), 37% is documented in a traditional way in museum books, and only 9% is documented in digital data bases which includes a small number of objects in multimedia format (photographs of museum objects).

development of the national portal of Croatian national heritage as a central hub which will increase and support networking of these digital resources with their users.

All the participating portals, except one, primarily target national audiences and inform on national culture, while one part (about 30%) provide information relevant to users from the SEE region. Only one analysed portal (cultural observatory type) targets international users as its main target audience. Several portals (below 20%) of those of the national orientation partly inform international audiences about Croatian cultural scene. This correlates with findings on information available on languages other than Croatian. More than 70% of portals provide their information only in one language. Majority of monolingual portals are in Croatian, with the exception of one portal where the only language is English. Small number of portals provides information in two languages - either the full web content or summaries of the texts. In such cases the other language is always English (there are no examples of other languages).



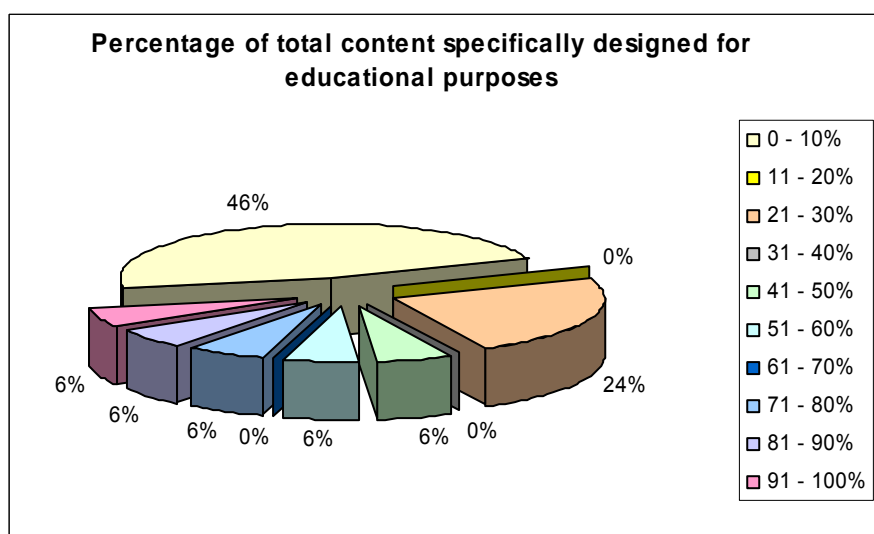
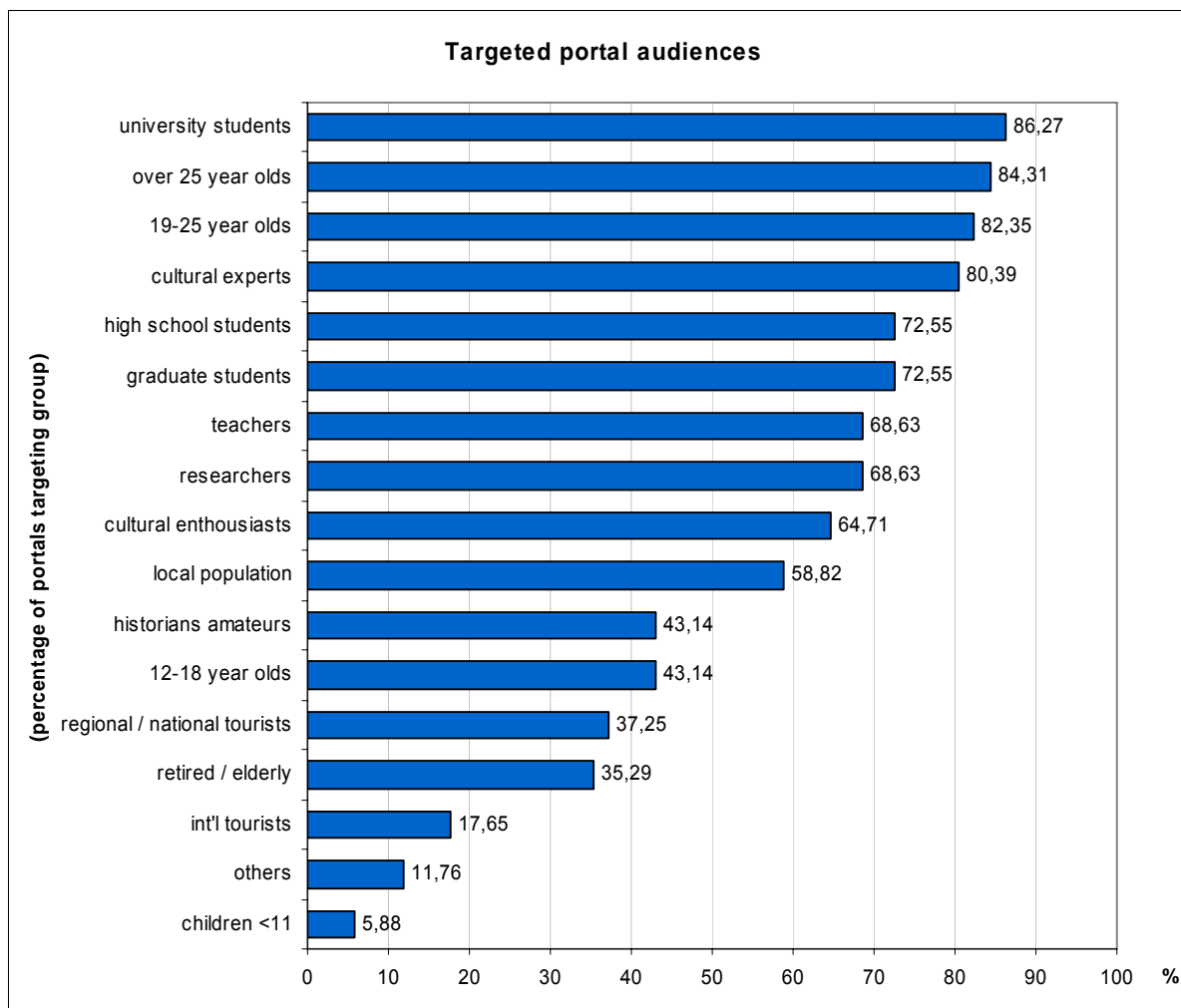
Information accessible only in Croatian makes the communication barrier which results in limited contribution to the intercultural communication. Next to the national focus of the majority of the analysed portals, there is a strong regional orientation of the one third of these portals because the language barrier is less significant and can be easily bypassed. Regionally accessible information indicates that portals which inform about Croatian culture and cultural events in other countries of former Yugoslavia contribute to the intercultural communication and dialogue at the regional level.

### Targeted Audiences

Outcomes of our research show that majority of portals indicate cultural professionals, art practitioners and researchers as their main users. Among other significant users are the university students, young adults, schoolteachers and cultural enthusiasts. None of the portals have activities targeted for children and rarely activities targeting aged population. Information for potential tourists visiting Croatia is also not available which indicates that they do not belong to the targeted audience. Some portals have indicated that parts of the available content could be relevant for use by schools (teachers and children) but they have

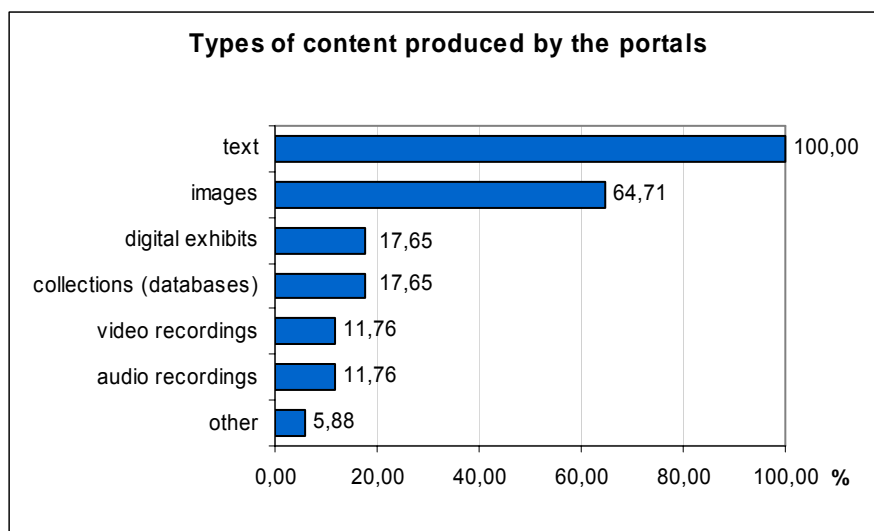


not developed any specific collaborative projects which would complement the school curriculum. The described situation indicates that Croatian cultural portals are not targeting specific groups of their users and are not designed according to their needs - they remain rather general in their focus. This also indicates potential for further development of specific virtual projects targeted at e.g., children, tourists, students, etc.



## Virtual Content and Services

It is not possible to distinguish virtual content from its organisational and technology basis. Digital content depend on its concrete organisational/technology basis and its potential, as their interaction defines an ‘information product’. We do not have a simple situation in which the content and a medium can be easily distinguished. Between content and hardware there is always software which is an organisational basis of the ‘user content’. Thus, it is essential to define what sorts of content (information) are provided to users. Our data show that the analysed portals rarely produce themselves multimedia content. They all provide information in textual form, 65% use visual content while only 12% provide audio and video content. When provided, multimedia content is in most cases used from other sources.

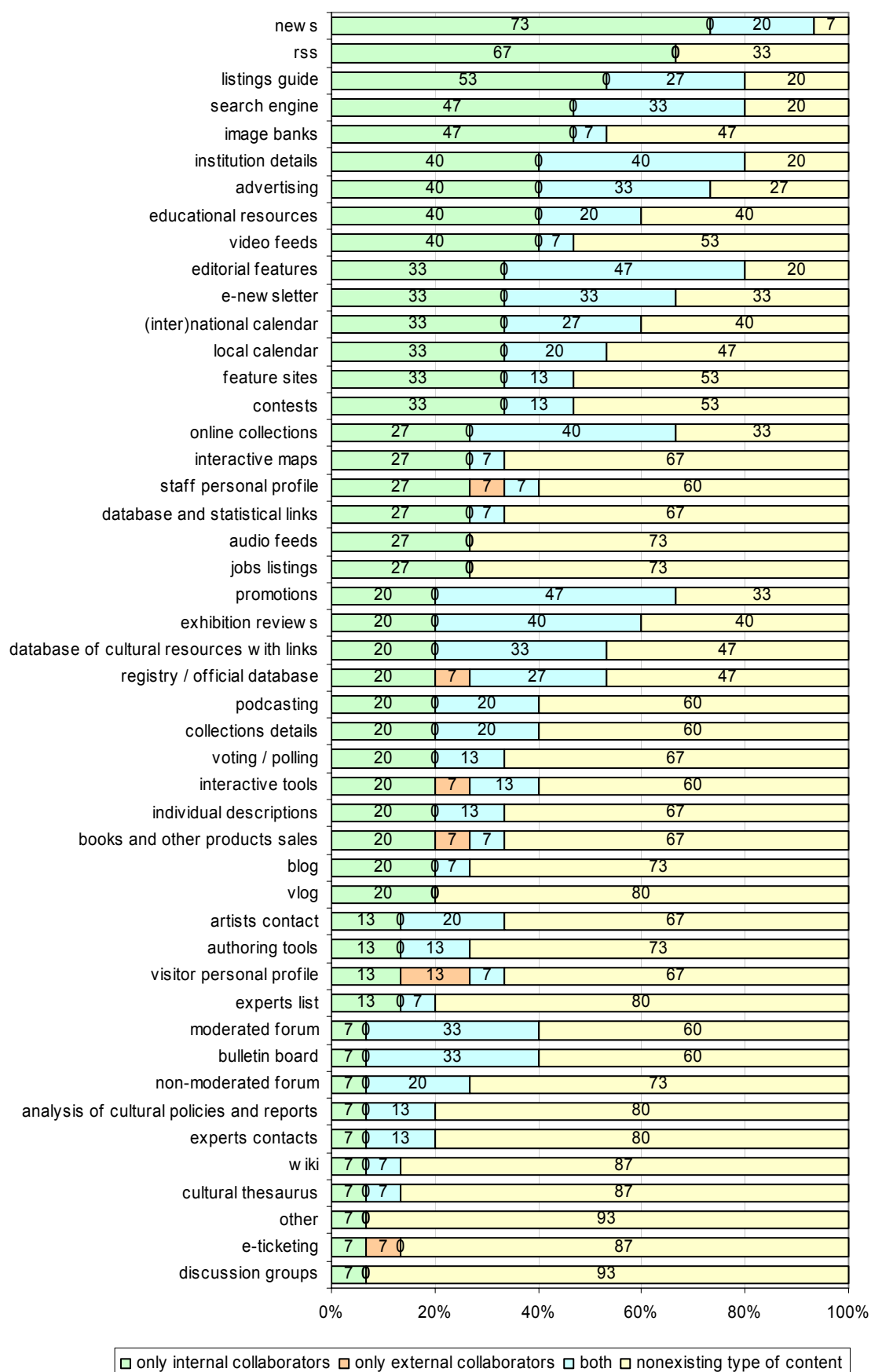


The most common services on cultural portals in Croatia (more than 50%) are news, information about cultural institutions, various guide lists and editors texts, databases, calendars of cultural events, search engines and RSS<sup>11</sup> and e-newsletter. Few portals (10-30%) provide services based on interactive communication which includes forums, blogs, wiki services and discussion groups. Online ticketing is available on a small number of portals (2) and it is similar with buying other products such as books and journals. There are a number of online bookshops not included in this study of Croatian virtual space. However, thematic portals on literature and books include information on new publications; they publish reviews and link them with buying options at the online bookshops. Our data show that an interaction option is available on a small number of portals although numerous examples<sup>12</sup> show that the services based on interactive options are among the most popular, as they provide an opportunity to their users to communicate, express their opinions and publish their own contents.

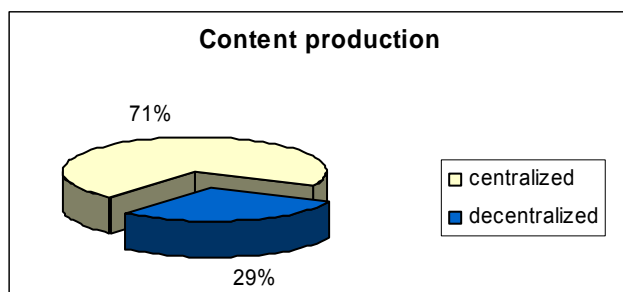
<sup>11</sup> Really Simple Syndication (RSS) is a standard which enables users to collect on one site news from different websites. It requires a software which supports RSS format and website has to be compatible with RSS.

<sup>12</sup> See the list of the most visited websites: <http://www.alexa.com/>

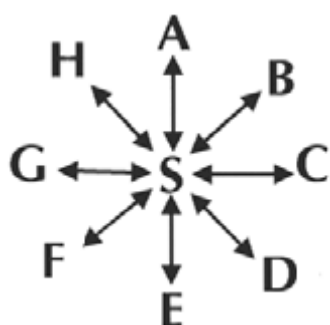
### Types of services offered by the portals



Information provided by Croatian cultural portals are primarily based on the content produced by portals' teams (core team plus permanent external collaborators) while the interactive services which could support collaboration between their users are rare. Majority of portals focus their activities on a centralised production of the content – 50% of them create more than 90% of their content themselves. Almost 90% of portals create 50% and more of their content as a centralised production.



This shows that portals are aiming to achieve quality of the presented information but it is also essential for portals to establish two way communication with their users that in such situation are also sources of information for content published at portals. Communication logic of portals can be represented with the following model<sup>13</sup> which shows that the users can indirectly, by communicating with the portal team, announce their projects and activities.



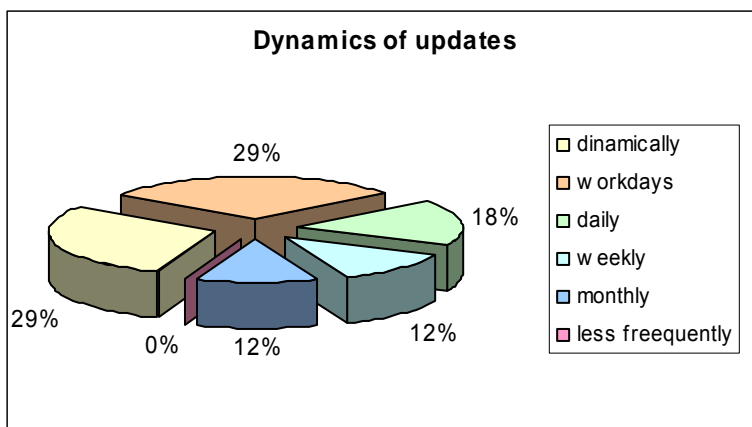
S – portal site; A, B, ...H – users

### **Dynamics of Information, Ways of Promotion and Measurement of Success**

The majority of portals (over 75%) update their content daily. Two portals that produce their content in a form of an online journals and studies and provide occasional announcements and reviews update their content weekly, while two portals update their content monthly.

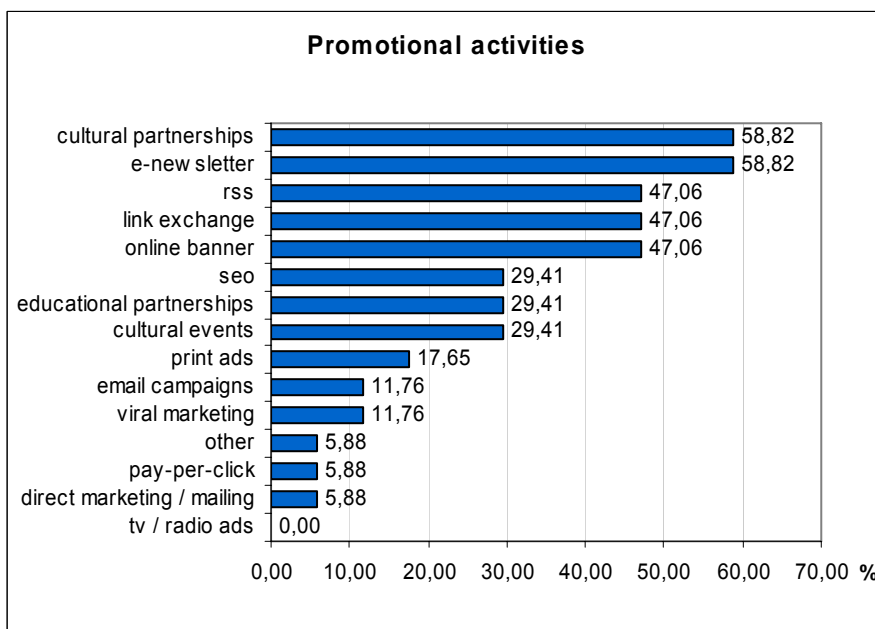
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<sup>13</sup> For more detailed information see: Aleksandra Uzelac: Cultural Networks in Virtual Sphere – Between Infrastructure and Communities, in *Dynamics of Communication: New Ways and New Actors*, ed. Biserka Cvjetičanin, 305-317, Zagreb, 2006, IMO.



Dynamics of content updates indicates portals' interest to motivate regular visits of their users. However, mere regular content updates do not secure users' interest. In order to engage them it is essential to position portal strategically among numerous other virtual resources. Thus, portals search strategies of efficient communication with their users while the users search and select information they find relevant.

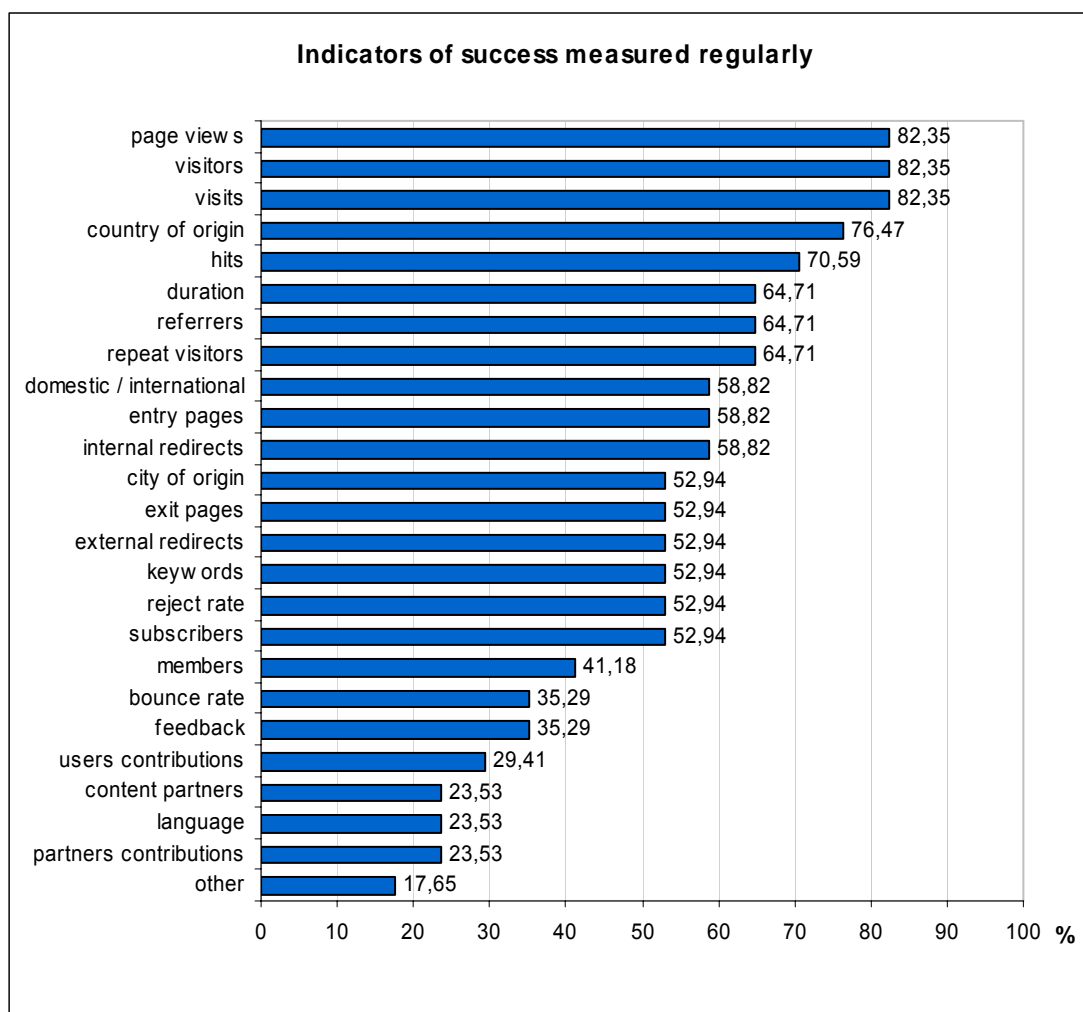
These strategies are different. The most common mode of communication between portals and their users is an electronic newsletter. They provide regular daily, weekly or monthly information about new activities. Equally important mode of promotion of portals is their close collaboration with cultural institutions and associations in order to establish portals as a resource of relevant information and a communication channel through which they can distribute their news. Almost half of the analysed portals address their users via online advertisements, exchange of links to portals which target similar audiences. Use of RSS is also regarded as an efficient strategy of communication with users. A number of portals (approximately 30%) seek to improve their position optimising their web pages for mega search engines such as Google (search engine optimisation).



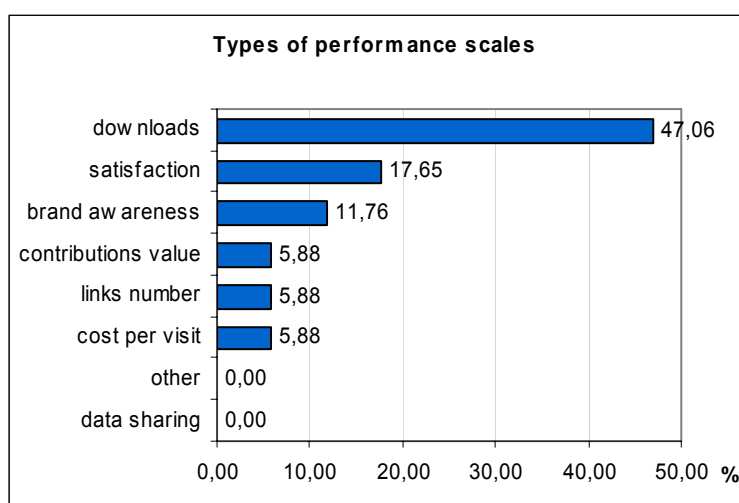
The measurement of success of portals is a complex process which requires definition of measurement parameters of an achievement of certain goals. Virtual sphere has enabled communication with a great number of users that are not any more physically present and easily identifiable. Their presence is virtual and thus they are mostly anonymous users. It is

therefore important to identify users profile and ways and frequency of use of portal's services. Current Web metrics programs provide statistical data of visits to web sites and provide information on various aspects of the users' activities on the site. In this survey we have tried to identify the extent of the web metrics use by cultural portals in order to measure their success.

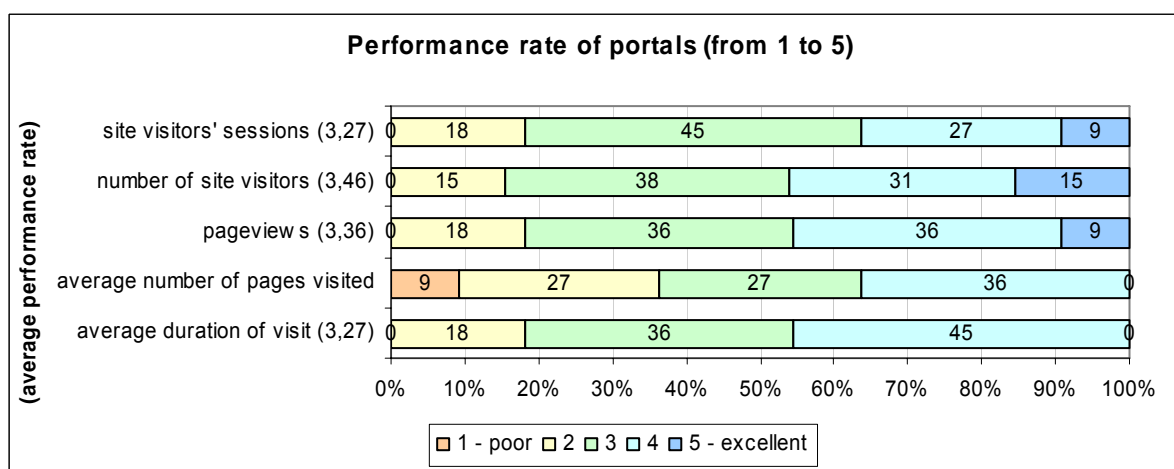
The most common indicator of success is a number of visits, number of visitors and number of page views. These are followed by geographic location (users' country and city of origin), and a number of hits. Portals also measure their success and efficiency of their network through visits received through established links with other websites and they monitor number of regular users of their services. These data are collected by more than 60% of the analysed portals. More than half of portals observe comparative data of the number of users from their host countries compared to users from other countries. They also register the starting (landing) page of their users. Portals observe their users navigation of other virtual resources and register other web pages their users navigate from their web site. They consider as relevant indicators lists of their newsletter subscribers and key words which lead users to their web pages. Less than half of analysed portals provide subscription options to their users and thus collect data about them. One third of portals analyse feedback information from their users. They also measure their site rankings according to specific keywords at the mega search engines. The least used measurement indicator is number of the portal contributors and a number of their contributions.



Success of virtual project can be measured against various parameters. These criteria are: wide popularity of a portal and its name as a sort of brand-awareness parameter for the particular theme; number of content downloads from a particular portal, number of links portal provides, financial sustainability (cost per visit) of a portal. Approximately half of the analysed portals measure their success against a number of downloads parameter. This parameter is the most quantifiable while others are more sporadically applied. Another parameter that is easily measurable is an amount of communication and data sharing happening through the portal. Croatian portals participating in this survey did not register this parameter among their answers that indicates us that those portals did not base their mode of operation predominantly on interactive paradigm. The question is how portals use collected data to improve their content and services? Approximately half of these portals responded that they use data to shape their developing strategies and to promote portals among their targeted users. In lesser extent these indicators are used as arguments in their funding applications for supporting their work.



Portals rated success of their work on a scale between 1 and 5. Median rating is 3.22 but it varied from 2.4 to 5. Half of the analysed portals rated their work higher than 3.4. This analysis indicates that services of cultural portals can be improved but their activities partly depend on development of digital culture on national level. Technology is not a significant limiting factor for development of portals and their services. Their development depends on a conceptual structure and development goals of digital culture.



## Assessment of the Current State

The survey of Croatian cultural portals and data analysis indicate the development trends of digital culture in Croatia. Virtual context enables cultural sector to operate on a new basis – in which network environment foregrounds possibilities of collaboration. But the current state of virtual culture in Croatia does not indicate significant changes in the activities of cultural sector in this respect. Such situation corresponds to the experiences in other countries<sup>14</sup> where more significant development of interactive multimedia services that are based on models of virtual cooperation occurred as a consequence of a wide use of broadband internet. The broadband internet is still not dominant way of internet access in Croatia. Thus, majority of Croatian cultural portals base their content on news, announcements and various reference information services in a form of databases instead of developing multimedia and interactive projects. This is partly a consequence of portals' working reality that is based on rather limited financial and human resources or in some cases the activities are based on volunteer work, where portal is only a segment of the organisation's main activity. The level of the use of internet determines development of cultural portals in Croatia. Considering that the majority of cultural institutions and cultural associations use their websites to present mostly static content and that there are very few virtual projects, cultural portals in Croatia mainly developed their services in a form of on-line publications. In order to surpass this level of development and to initiate development of digital culture that would be based on the participatory principles and wide application of multimedia there is a need to support digital culture with a systematic funding, education and facilitation of participation in collaborative projects.

Interactive services available to the users of portals are not incorporated in specific virtual projects. Users can communicate through forums or make comments on news, but they are not encouraged to use these tools to participate in specific virtual projects. Web 2.0 services are used in a small extent – e.g., clips from YouTube service accompany news but Web 2.0 technology is not used as a main mode of organisation of portals' work. Users of some portals can rate portal's content or write reviews of the content presented at the portal but the logic of Croatian cultural portals is based mainly on a presentation rather than participation logic.

Portals through their activities contribute to cultural communication and visibility and promotion of cultural sector and the existing virtual resources, and they facilitate dissemination of information on ongoing cultural projects and about the possibilities of cultural cooperation. However, we did not find any examples of portals having contributed to enabling virtual cooperation in common, shared virtual projects. In order to create sustainable virtual cultural resources there is a strong need that portals should focus on the portals users. Such user-focused approach can contribute to defining clear developmental strategies of portals. It is evident from our research findings that there is a room for further defining of portals towards various niche markets. In addition to addressing cultural audiences (which is a rather general category) and cultural professionals (cultural practitioners and artists) portals should through specific projects meet the needs of other social target groups such as children, tourists, etc. and try to encourage their active communication and participation in virtual projects. Recognising different target users and catering for their specific needs is essential for successful functioning of cultural portals.

Cultural portals have to consider in their development plans linguistic barrier as it presents an obstacle to the international communication and cooperation. Most of portals analysed in this study primarily target national audiences and thus present the information only in Croatian

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<sup>14</sup> Holden, 2007, OECD 2007.



language. Although a prerequisite for the international communication, multilingual modes of presentation are not likely to develop due to the shortage of adequate funding. In the extent in which portals present referral information on Croatian cultural sector current bilingual information on the Croatian cultural portals seems sufficient. However, development of interactive and multimedia projects will have to target wider international users in order to promote Croatian cultural diversity and cultural traditions. Application of digital culture projects in the area of cultural heritage is considered to be a significant factor for promoting interdisciplinary and inter-sectoral approach to culture, as it can promote culture in the context of cultural tourism or in educational context. Nowadays virtual sources of information are a significant knowledge resource for users and important element of international communication. Thus the planned construction of a national portal on Croatian Cultural Heritage should significantly contribute to the international cultural communication in the area of cultural heritage.

Comparative analysis of development trends in Croatia and globally indicates similar trends, although some differences exist. In Croatia there are more specialised thematic than multidisciplinary portals, while Culturemondo research shows the opposite trend. Also, cultural heritage is less represented on Croatian cultural portals than shown in Culturemondo research of the international portals. This is understandable as digitalisation of Croatian cultural heritage is at its early stage. Also this survey showed that only a small number of portals are run by the public institutions that are in fact responsible for cultural heritage, as well as a low presence of public cultural sector in projects of construction of digital cultural resources. In order to enhance the development of digital culture resources in Croatia it is important that both, cultural policy and public cultural sector recognise digital culture and portals as an important space of their interest and activity.

The context of the participative internet changes the context of cultural sector as well, in which the role of the users becomes more prominent as they become co-creators of the digital content. However, although based on the concept of participation and interaction, there is a strong need for initiatives from cultural institutions and sustainable support by the cultural policy. Digitalisation of cultural content is a basis for development of digital culture and cultural portals are thus an important link between the cultural content and its users, as they try to encourage users to explore their culture and to participate in the process of intercultural communication. Through the interactive content and by enabling cultural institutions an interactive communication with their users cultural portals contribute to development of cultural democratisation in virtual space. Therefore, in order to become the sites of dialogue with their users and promoters of international cultural communication, cultural portals have to design platforms for the active participation of all key cultural subjects.



## RESEARCH FINDINGS AND RECOMMENDATIONS

We started this research with the question whether digital culture opens new perspectives of digital development and international cultural communication and cooperation to Croatia.

The research, which investigated **public, private and civil sectors of culture in the virtual space**, revealed that since the year 2000 the efforts for creation of virtual cultural content that encourage intercultural communication and cooperation have been made. The sample of eleven Croatian cities revealed the continual investment in computerization of the **public cultural institutions**, and in programs of digitalization, especially in the museum, library and archives sectors. Cities are gaining new modes of presentation; history and modern life of the cities are being re-thought. The area of **cultural tourism** is also being redefined: presentation of cultural product in the virtual space creates new profiles of cultural, the so-called, post-modern tourist. **Creative industries** that belong to the private sector show an increasing interest for their presentation in the virtual space. **Cultural associations** use the potentials of new technologies for their promotion as well. **Cultural portals**, as new structures that are born in the virtual world are present in all three sectors: public, private and civic. With their activities the portals contribute to the visibility of the culture sector and its virtual resources, and to the dissemination of information about cultural events, projects, and cooperation possibilities.

The outcomes of the research highlight the importance and positive aspects of the digital culture at the national level, and its opening towards the international community. Positive response was received to the question whether digital culture in Croatia opens new development perspectives and intensify cultural communication. The research, however, at the same time warned about a whole range of issues in the development of digital culture in Croatia and its role in the international cultural communication.

Croatia does not have the strategy of digital content or digital cultural services development. The exception is the domain of cultural heritage (national program of cultural heritage digitalization). Although the digitalization of cultural heritage is an important stage in the development of digital culture in Croatia, it represents only one aspect of the strategy that is to be designed according to the broader social goals, especially according to the role of the digital culture in the information/knowledge society. There is no strategic document that analyses the importance of the development of e-content and e-services in the domain of culture and/or in the broader social context. Digital culture has been viewed as an 'additional', partially integrated aspect of the cultural activities. Croatia has not embraced the experience of the EU countries which use innovative approaches in their digital content strategies (e.g., British strategy *Culture Online* that was mentioned in this research) and resources that encourage the engagement and participation in culture and arts.

For this reason eCulture has not been recognized as an area of primary interest within eCroatia development program. Virtual sphere is the field in which we can encourage the development of resources, content and projects which focus on the issues of interest to the entire international community – issues of cultural democracy, cultural diversity and intercultural communication. Moreover, the European Union proclaimed 2008 the Year of the Intercultural Dialogue. It is therefore necessary to systematically encourage and stir the development of digital culture in this direction, and recognize the potential of the digital culture in creation of the knowledge society. The existence of the digital content and service development strategy that takes into consideration the concrete national context and creates

concrete social goals is an important baseline in the development of the digital culture in Croatia.

Activities in the virtual sphere therefore cannot be treated as mere 'addition' to the conventional practices; it is important to recognize the digital culture as a new cultural form, deeply rooted in the traditional cultural forms, but which, through the use of the digital technology network environment, changes the ways in which society functions. New models of business and cultural actions are created and new possibilities for interactive and intercultural communication opened. It should not be forgotten that culture is one of the fastest growing recourses that the world uses: arts and culture, although marginal from the perspective of market capitalisation, turn today into 'an enigmatic force that can make or brake the economies' (Lovink).

The analysis of the public sector, that is **public cultural institutions**, based on the example of eleven cities, shows that three basic communication factors of the content presented on the internet (multi-lingual presentation, interactive/multimedia content, and on-line services) at this stage do not offer the possibility for a more intense intercultural communication and cooperation. The language barrier is one of the key issues when instigating the intercultural communication; there is an insufficient amount of interactive multimedia content and on-line services are rather modest. Our findings show that the international communication and cooperation between the cities is oriented primarily towards 'twin towns', but even then the culture content remains inaccessible in the virtual word. Most towns/cities and their respective public cultural sectors do not have their programs of international cultural communication developed and integrated in their virtual presentations.

Although digital culture at the global level opens possibilities and promotes development of international cultural communication, virtual resources of Croatian cities and public municipal cultural sector remain insufficiently used. The issue of not using virtual resources, not connecting internationally, and not participating in the process of culture digitalization is put in the context of the need to follow continual changes that new technologies brined to the field.

Companies in **creative industries** in Croatia also do not use the possibilities of the virtual space to its full extent. Virtual presentations of most Croatian creative industry companies are static in a sense that they have no interactive content; websites are designed as brochures rather than as a complex system of information presentation and communication possibilities. According to our findings, more creative industry companies are oriented towards domestic users; websites are mostly presented in Croatian, which is not compatible with their exporting potential and their global marketing strategies. Multimedia presentation of projects and products is used by a relatively small number of companies.

**Associations in culture** use virtual space in the function of web identification, primarily as a tool for self presentation, and not as means for interactive participation and communication. Participation dimension is not well represented, only one third of all associations offer on their website content that allows some sort of on-line participation.

**Cultural portals** in Croatia use internet mostly as on-line equivalent of their printed publication, instead of promoting participation (and interaction) of their users and potential of multimedia. Hence the cooperation of the cultural portals at the international level is rather rudimentary.

With the aim of suggesting a more systematic and faster development of digital culture and promotion of the intercultural communication, based on the outcomes, the following recommendations can be formulated:

- till the end of 2007, no document regulating the development of digital content and services in the culture sector was published, and this issue deserves the highest attention of all participants in the digitalisation process;
- when creating their own strategies for development of information networks and their interactivity, the responsible state and local institutions of the Republic of Croatia should apply the experiences of the countries with the highest digitalisation standards;
- systematic promotion of the development of digital culture on the way to cultural democracy, cultural diversity and intercultural communication are priority aims stated in the strategic documents of the European Union;
- development of digital culture demands for a digital content development strategy, which prioritises the concrete national context and establishes measurable social goals as well as clear criteria for giving priorities to particular type of projects related to digital culture and potentials of communication in the virtual space;
- cultural policy should transparently display full commitment and systematic support towards development of digital culture, which will facilitate activities of the entire cultural sector, especially of cultural institutions that have to efficiently operate under constantly changing global social and economic conditions and face new challenges brought forth by digitalisation;
- it is necessary to recognise digital culture as one of the fundamental new cultural models;
- in the public cultural sector, multilingual presentation of the information, interactive and multimedia content, and on-line services are key factors to establishing links to virtual clients. They are important for promotion of intercultural communication and development of cultural tourism, which should be one of the major concerns of the cities.
- in accordance to the increasing presence on the internet, public cultural institutions must change their patterns and modes of operation;
- while creative industries seem to be the industry with the highest growth rate in the world, the static character of websites as well as the absence of on-line participation tools and the interactive/multimedia content, show that in Croatia this sector needs a radical change, geared not only towards higher user participation, but also towards better presentation of creative industries in international communication;
- creation of virtual portals for Croatia's creative industries could significantly contribute to better presentation and information about Croatia's creative industries;
- as associations in culture seem to be less recognised in public, which is confirmed by our research, they often carry the activities that are key to innovation and social change. They, too, have to be more present in virtual space and open themselves to intercultural communication and international collaborative projects.
- cultural portals in Croatia are mostly oriented towards informing, while the outcomes of our research indicate that their future lies predominantly in

participation, interactive services, international communication and cooperation on joint virtual cultural projects.

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# Connecting Croatia

## The Public, Private and Civil Sector of Culture in the Virtual Space

This study conducted by IMO/Culturelink is a unique and fundamental document in Croatia, providing insight into the state of digital culture in Croatia in a global context.

The analysis of the websites of 11 Croatian cities is not only a welcome but also the first systematic effort of defining the criteria of a successful presentation of the identity of urban entities. The study clearly shows the importance of digital exposure for possible tourism, but, obviously, also in others, those we call productive industries, still under the specific and unique "aura" which is so successfully created by an effectively presented identity.

Multilingualism, interactive multimedia content, online services as an answer to the speed of life and the challenge of coping with the supply - all of these are novelties of a new information reality, but also a new business culture, and even culture in general. Digital culture is a legitimate requirement of the educational strategy, because, unfortunately, a lagging behind in this field could adversely influence the entire national development strategy.

From the review by Professor Tomislav Šola, University of Zagreb



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