The PREFORMA Tender

Bert Lemmens

PACKED

WP2 Lead

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SEVENTH FRAMEWORK PROGRAMME

PREFORMA TENDER

- ❑ WP2 Requirements & Assessment
- ❑ Challenge Brief
- ❑ Evaluation Process

WP2
Requirements & Assessment

❑ # T2.1 Tender Preparation & Coordination
   Riksarchivet

❑ # T2.2 Functional Requirements
   PACKED

❑ # T2.3 Technical Requirements
   University of Skövde

❑ # T2.4 Tender Selection
   Riksarchivet, University of Padua, Fraunhofer

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WP2
Tender Specifications

		M1				M2				M3				M4			
		w3	w4	w5	w6	w7	w8	w9	w10	w11	w12	w13	w14	w15	w16	w17
		13 jan 14	20 jan 14	27 jan 14	03 feb 14	10 feb 14	17 feb 14	24 feb 14	03 mrt 14	10 mrt 14	17 mrt 14	24 mrt 14	31 mrt 14	07 apr 14	14 apr 14	21 apr 14
		17 jan 14	24 jan 14	31 jan 14	07 feb 14	14 feb 14	21 feb 14	28 feb 14	07 mrt 14	14 mrt 14	21 mrt 14	28 mrt 14	04 apr 14	11 apr 14	18 apr 14	25 apr 14
	Milestones											MS10 pre-announcement				
	Deliverables											D2.1 Overall roadmap				
	Meetings	kick-off meeting								requirements workshop			information meeting (4/4 brussel)			
T2.1	**Planning**															
T2.1	**Framework Contract**															
T2.1	**Request for Tender**		terms & procedures							requirements						review
T2.1	**Coordination Tender**		market Study										Pre announcement			
T2.2	**Stakeholder Needs**		survey requirements via skype, google docs, etc													
T2.2	**Usage Scenarios**		compile them in # usage scenarios, one for each institution													
T2.3	**Joint User Model**								write use cases v1 and verify them in a workshop							
T2.2	**Functional Requirements**										write the functional requirements					
T2.3	**Standards & Reference Im**								assess standards and implementation from usage scenarios							
T2.2	**Existing Validation Tools**								assess existing validation tools							
T2.3	**technical Requirements**										write the technical requirements					
T2.4	**Evaluation Strategy**		procedure								criteria					
T2.4																

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WP2
Tender Specifications

❑ Ingest Procedure
  – current services and protocols
  – compare to the state of art
  – identify desired services

❑ Infrastructure & Expertise Level
  – technical components
  – service providers
  – in house knowledge & skills

❑ Validation Procedure
  – what do you check?
  – what would you like to check?
  – what should you check?

WP2
Preservation Formats

	AUDIO|VISUAL			TEXT	IMAGE
	broadcast	film	Consumer		
PREFORMA stakeholders	MPEG-IMX (MXF/MPEG2) XDCAM HD422 (MXF/MPEG4)	DPX DCP (MXF/JPEG2000)	MOV/MPEG2 AVI/MPEG2 MPEG/MPEG2 MPEG/MPEG4-AVC	PDF 1.4 PDF/A1	TIFF 6.0 JPEG JPEG2000 RAW
Industry standards	AS-07 (MXF/MPEG2) (MXF/JPEG2000) FIMS (MXF/MPEG2)	DCDM (TIFF 6.0) DCP (MXF/JPEG2000) IMF (MXF/MPEG4)	MPEG-AF	PDF	JPEG2000 TIFF
Open standards	MKV/FFV1 OGG/Dirac	PNG	WebM/VP8 OGG/Theora	PDF/A1 PDF/A3 PDF/A3	PNG
PREFORMA	MKV | OGG JPEG2000 | FFV1 | Dirac LPCM			PDF/A	TIFF 6.0

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WP2
Deliverables

❑ D2.1 Overall roadmap v2.0
- Operational & Legal Procedures
- Functional & technical specifications
- Guidelines for the tender Procedure

❑ D2.2 Tender Specifications v2.1
- Challenge Brief
- Exclusion Criteria
- Minimal Requirements
- Assessment of Tenders
- Procedure for Answering Questions

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Challenge R&D

Empower memory institutions to gain full control over the technical properties of digital content intended for long-term preservation.

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OAIS environment
(ISO 14721 / CCSDS 650)

Recommendation for Space Data System Practices

REFERENCE MODEL FOR AN OPEN ARCHIVAL INFORMATION SYSTEM (OAIS)

RECOMMENDED PRACTICE

CCSDS 650.0-M-2

MAGENTA BOOK
June 2012

- ❑ Obtain sufficient control of the information provided to the level needed to ensure Long Term Preservation
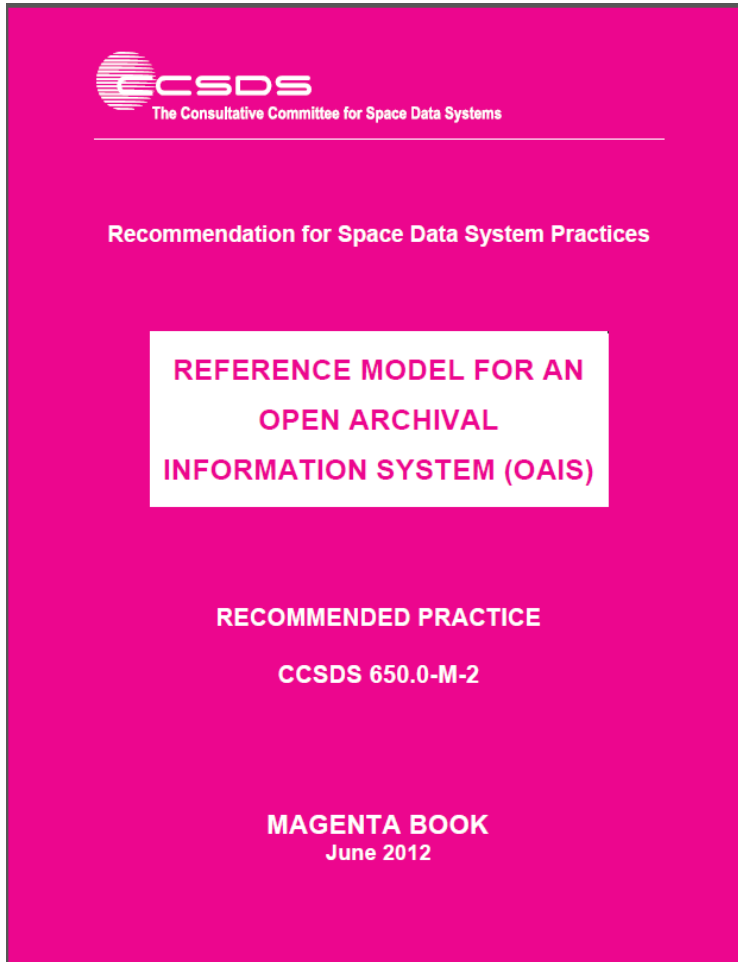
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Strategy

- ❑ Develop an **open source conformance checker** that:
  - – checks if a file complies with standard specifications
  - – checks if a file complies with the acceptance criteria of the memory institution
  - – reports back to human and software agents
  - – perform simple fixes

- ❑ Establish an ecosystem around an **open source reference implementation** that:
  - – generates useful feedback for those who control software
  - – advances improvement of the standard specification
  - – advances development of new business cases for managing preservation files

Conformance checker
Use Cases

☐ Conformance Checking at **Creation** Time

☐ Conformance Checking at **Transfer** Time

☐ Conformance Checking at **Digitisation** Time

☐ Conformance Checking at **Migration** Time

Conformance checker
Deployment (allow for)

- ❑ PREFORMA website (deliverable)

- ❑ Stand-alone

- ❑ Networked

- ❑ Integration in legacy systems

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Conformance checker
Components
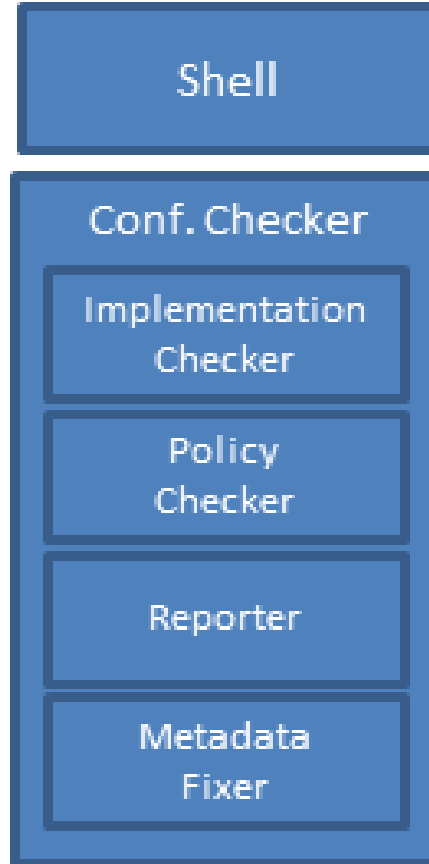
Shell

Conf. Checker

Implementation Checker

Policy Checker

Reporter

Metadata Fixer

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Conformance checker
Modularity

(Toolset to be deployed)

(Toolset to be tendered)
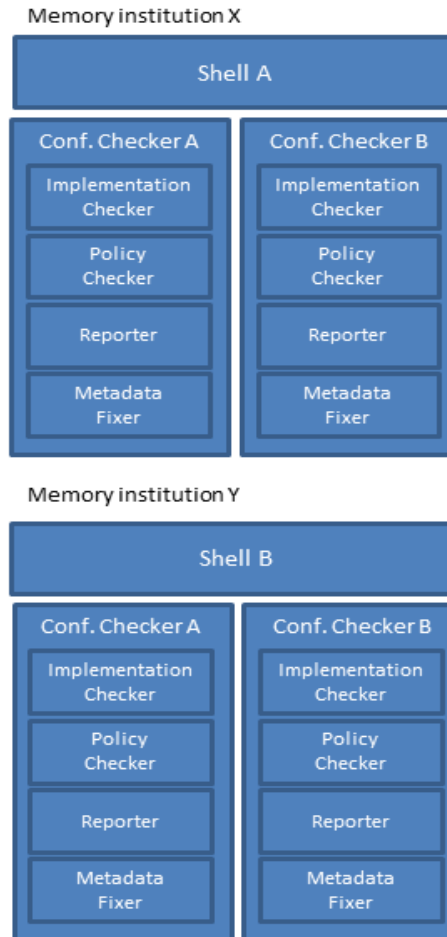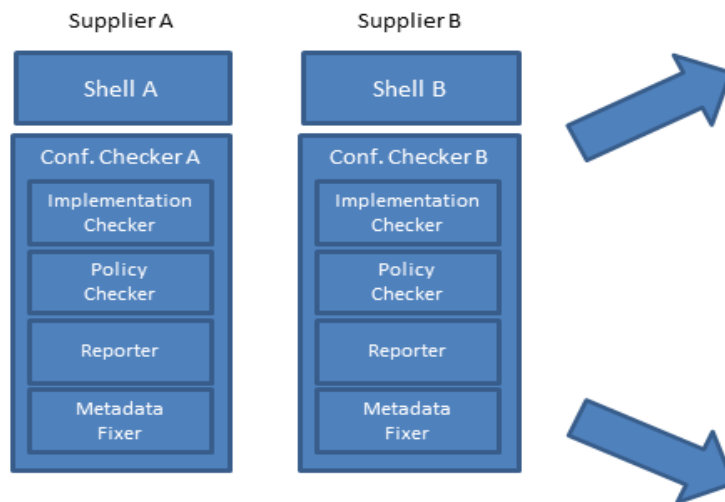
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Reference implementation
Standard improvement

❑ Establishing **contacts** with key representatives in the organisation

❑ Raising and contributing to resolution of (new and existing) **issues**

❑ Proactive interaction related to the **technical specifications**

❑ Proactive contributions of experiences and development of **synergies** between organisations

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Reference implementation
OSS business models

❑Combine with other software offerings

❑Selling optional proprietary extensions

❑Selling professional services

Tender Evaluation
16 tenders

	Project Title	Tenderer
1.	TIFF ConformanceChecker	InConTec GmbH
2.	Digital Long Term Preservation Enhancement	(pre-startup)
3.	OSCAR - OpenSource Conformance checker for Archives	Engineering Ingegneria Informatica S.p.A.
4.	PreForma MediaInfo	MediaArea.net
5.	Workflow Integrated Conformance Checker Tool	Monguz
6.	DiGiReady	DOTSOFT
7.	Fit for Future	ArkivIT Jacobson & Pettersson AB
8.	Digital Preservation Validation Framework	Preservica
9.	LIBIS/Aware	LIBIS
10.	VeraPDFa	Open Planets Foundation
11.	Digital Preservation Formats Manager (text files)	EasyInnova
12.	Digital Preservation Formats Manager (Image files)	EasyInnova
13.	Digital Preservation Formats Manager audiovisual files)	EasyInnova
14.	NIDA Checker	DIZI UAB
15.	Candidate case study of TIFF and PDF files in OAIS	ICT Ad Duas Lauros
16.	OpenMediaCheck	Universite Catholique de Louvain

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Tender Evaluation
principles

❑ Comprehensive evaluation of all aspects of the Challenge Brief
(take the time to consider all proposals, it is not just about delivering a product. It is about offering expertise to do R&D)

❑ Represent views from the different stakeholders in PREFORMA (triple helix: academics, memory institutions, commercial feasibility. See also decision on the formats)

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Tender Evaluation
eligibility check: all 16 pass

	Project Title	Tenderer
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2.	Digital Long Term Preservation Enhancement	(pre-startup)
3.	OSCAR - OpenSource Conformance checker for Archives	Engineering Ingegneria Informatica S.p.A.
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Tender Evaluation
individual evaluation

1. SCORING MODEL

1.1 IMPACT ON CHALLENGE

I.	The extent of how well the proposed idea/ solution/ technology meets the challenge as detailed in the Brief, and whether it will it have the desired impact
[1]	There is no indication that the proposal will meet the challenge
[4]	There is very little indication that the proposal is likely to meet the challenge
[8]	There is little indication that the proposal is likely to meet the challenge
[12]	There is some indication that the proposal is likely to meet the challenge
[16]	There is indication that the proposal will meet the challenge
[20]	There is clear indication that the proposal will meet the challenge

II.	Potential of the proposal to address future/ wider challenges in the area in an innovative way (e.g. by developing or employing novel concepts, approaches, methodologies, tools, or technologies)
Scoring Guide	
[1]	The project shows no potential to address future/ wider challenges in the area
[2]	The project shows little potential to address future/ wider challenges in the area
[4]	The project shows some but limited potential to address future/ wider challenges in the area

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Tender Evaluation
16x3=48 individual evaluations

	Project Title	Tenderer
1.	TIFF ConformanceChecker	InConTec GmbH
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Tender Evaluation
16 consolidated reports: 10 pass

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Tender Evaluation
consensus meeting: 6 invited

Ranking	Bid	Media type(s)	Final score
1	**Vera consortium**	TEXT	142 pt
2	**Preservica**	TEXT; (AV)	125 pt
3	**EasyInnova - image**	IMAGE	122 pt
4	**MediaArea**	AV; TEXT	114 pt
5	**LIBIS - Aware**	IMAGE	113 pt
6	**UCL - IntoPix**	AV	109 pt
7	DIZI - IO	TEXT; IMAGE	106 pt
8	Monguz	TEXT; IMAGE; AV	104 pt
9	ArkivIT consortium	TEXT; IMAGE; AV	103 pt
10	Engineering	TEXT	99 pt

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Tender Evaluation
negociation report

❑ Ensure equal treatment of tenderers

❑ resolve incongruities between ITT/CB and tender

❑ engagements requests for clarification

❑ engagements hearing

>>> will be part of the evaluation of Phase 1

Tender Evaluation
award decision

❑ Sent 29 October 2014
- – Decision Note
- – Evaluation Protocol
- – Signed Framework Agreement

Thank you!

Bert Lemmens

PACKED Centre of Expertise in Digital Heritage

bert@packed.be