

DELIVERABLE

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D4.1 Public Website

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This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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EXECUTIVE SUMMARY

This document provides an overview on the progress of the online branding strategy for PREFORMA and provides a reference point for all necessary actions regarding the promotion of PREFORMA's web presence.

It also aims to provide an overall description of the PREFORMA project website, the various sections, technical infrastructures and related services, including the blog on *Digitalmeetsculture.net*

The promotional elements addressed in the document are the design and definition of the PREFORMA logo, its tagline and graphic elements (including the website graphics and layout).

The current document is comprised of four main Chapters, an Executive Summary, Conclusions and an Annex.

Chapter 1 describes the PREFORMA logo, branding and visual identity.

Chapter 2 offers a detailed overview of PREFORMA's website layout and structure, the public and reserved areas and the blog.

Chapter 3 describes the technical infrastructure, the tools and the additional services that are embedded in the website, e.g. web feeds, analysis tools etc.

Chapter 4 describes the workflow of the editorial team.

Chapter 5 presents some final considerations and draws the conclusions.

Finally, the Annex contains the content of the website's various sections.

1 PREFORMA VISUAL IDENTITY

This project focuses on research and development (R&D) and technical developments and we do not anticipate featuring a lot of attractive multimedia content on the website.

Therefore, the concept behind the visual identity and proposed layout is to present to the visitor with an appealing website, independent of any images that may be included.

Graphic illustrations have been used to translate technical diagrams as a simple and effective way to explain the aim and the mission of PREFORMA to a wide audience.



Figure 1. Graphic illustration

The core aim of the visual identity is to develop an overall 'look-and-feel', a unique and easily identifiable brand to be consistently utilised across all platforms during dissemination. This includes the following elements:

- the PREFORMA Logo
- the graphic elements, guidelines and specifications (e.g. colors, CSS rules, typographical rules, etc.)
- a tagline, an encapsulation of PREFORMA brand personality', summarising what PREFORMA stands for in concise terms
- templates for the webpages (home page; general page, events pages; blog pages; partners' page; contacts page, etc.).

1.1 THE PREFORMA LOGO

The colour pattern of the logo has been chosen to make it visible and attractive on the dark grey background that has been adopted for the webpages. The shape of the 'P' icon aims to evoke a 'mould'. All files using the PREFORMA branding will be checked for compliance with the certified standards and will be reviewed to ensure data is of a high quality.



Figure 2. The PREFORMA logo

1.2 THE PREFORMA TAGLINE

Another important component of the PREFORMA 'brand personality' is the PREFORMA tagline, which summarises what PREFORMA stands for in concise terms.

The chosen tagline is *FUTURE MEMORY STANDARDS*.

These words were chosen carefully to highlight the fact that the overall objective of the project is to establish a long lasting ecosystem around the developed tools. At the end of the project, the network will be transformed into a sustainable, open, user community surrounding the applications provided by PREFORMA. The aim is to encourage future use and development and to contribute to the standardisation process.

2 PREFORMA WEBSITE LAYOUT AND STRUCTURE

Three domain names have been registered for the PREFORMA website:

- www.preforma-project.eu
- www.preforma-project.org
- www.preforma-project.net

The website is both the cornerstone of the project dissemination strategy, which is to promote the project activities and results to a wide audience, and the access point to the main outcomes e.g. the open source portal where the PREFORMA tool will be deployed (public area). Furthermore, it serves as an internal collaborative space for the project (reserved area).

2.1 LOGIC VIEW

PREFORMA website implementation is based on a very simple logic and a fresh web design, which is uncomplicated and is intended to drive the user's attention on the main function of the portal.

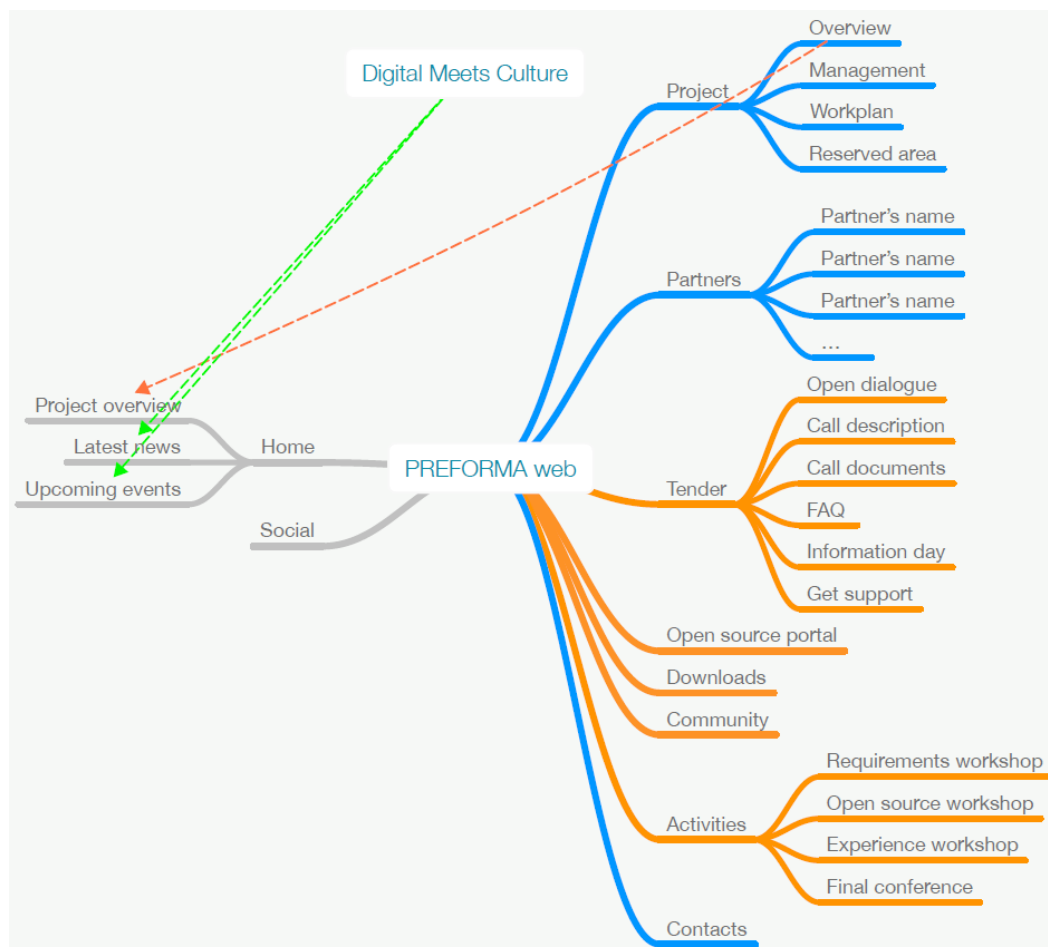


Figure 3. PREFORMA website logic view

2.2 PUBLIC AREA

2.2.1 Home

The landing page of the website is a clean-looking and intuitive access point from which all further navigation begins.



The screenshot shows the home page of the PREFORMA website. At the top left is the PREFORMA logo. To its right are the European Union flag and the logo of the European Union's Seventh Framework Programme. A small text box states: "This project has received funding from the European Union's Seventh Framework Programme under grant agreement no 619568". Below this is a navigation menu with links: HOME, PROJECT, PARTNERS, TENDER, ACTIVITIES, OPEN SOURCE PORTAL, COMMUNITY, DOWNLOAD, CONTACTS.

The main content area features a large graphic of a document being processed into a folder, with a smiley face on the resulting document. Below this is a section titled "UPCOMING EVENTS" with a "VIEW ALL" link. The featured event is "BRUSSELS, 4 APRIL 2014 PREFORMA CALL FOR TENDER, INFORMATION DAY". A graphic for "INFO DAY 4 April 2014" is shown. The text below reads: "On April 4th 2014 PREFORMA project will organise an Information Day to present the call for tender that will be launched as part of the Pre-Commercial Procurement. Participation is open to everybody who is interested to participate to the call and to become a PREFORMA supplier but will be subject to registration." There are "READ MORE" links for this event.

Below the event section is a "NEWS FROM THE BLOG" section with a "VIEW ALL" link. It contains three articles:

- OPEN DIALOGUE: TOWARDS A JOINT USER MODEL**: A group of memory institutions met in Brussels to agree on the expected behavior and functionality of the tools to be developed in the coming years by the software suppliers that will be selected out of the procurement that will be launched by the project. The outcome of the workshop will be soon available on the PREFORMA website. (Includes a photo of a meeting.)
- PREFORMA PRESENTED ON ARCHEOMATICA WEBSITE**: Archeomatica, an Italian multidisciplinary e-magazine about new technologies and Cultural Heritage, presents PREFORMA and the related Call for Tender to its readers in an article entitled "PREFORMA: gli standard del futuro per la conservazione dei dati digitali culturali".
- PREFORMA @ THE BERLIN OPEN DATA CULTURE HACKATHON**: The German National Library and its Service Office for Digitalization organize the "Open Data Culture Hackathon" event in association with Wikimedia Germany and the Open Knowledge Foundation Germany. The events represents a good opportunity to attract the participating developers to participate to the forthcoming PREFORMA Call for Tenders. (Includes a word cloud with "hackathon" as the central word.)

At the bottom of the page is a row of logos for partner organizations: Riksarkivet, PAKED, PIR, Fraunhofer, UNIVERSITY OF MANNING, UNIVERSITA' DEL SALENTO, IRPA, GREEK FILM CENTRE, LGMA, and others. At the very bottom, it says "DIGITAL CULTURE Official Media Partner: Digital Meets Culture. Designed & Powered by: Promoter SRL." and includes an RSS feed icon.

Figure 4. Home page

Immediately visible at the top left of the page, a slideshow advertises the most important things that are happening within the project. This provides the users with the key messages about the project and brings their attention to important dates. .

Scrolling down the main frame, after a brief presentation of the project, the latest news from the blog is showcased, while the right frame features the upcoming events that are relevant to PREFORMA.

In accordance with the latest European Commission's guidelines on visual identity, the EU emblem is displayed in the header, together with the FP7 logo and with the following sentence:

“This project has received funding from the European Union’s Seventh Framework Programme under grant agreement no 619568”.

Finally, all the partners’ logos have been included in the footer, together with the Digital Meets Culture logo, the official media partner of the project.

The horizontal navigation bar features the following menus:

- **Home**
- **Project**
- **Partners**
- **Tender**
- **Activities**
- **Open Source Portal**
- **Community**
- **Downloads**
- **Contacts**

2.2.2 Project

This menu reroutes to the sections of the website devoted to the description of the PREFORMA project. It features the following sub-sections:

- **Overview**, which contains general information about the project, its mission and its objectives.
- **Management**, which describes the management structures and the and responsibilities of the main management bodies.
- **Workplan**, which focuses on the description of the tasks and activities carried out during the project: goals, outcomes, structure and implementation.
- **Reserved Area**, which links to the area reserved to the project partners (see Paragraph 2.3).

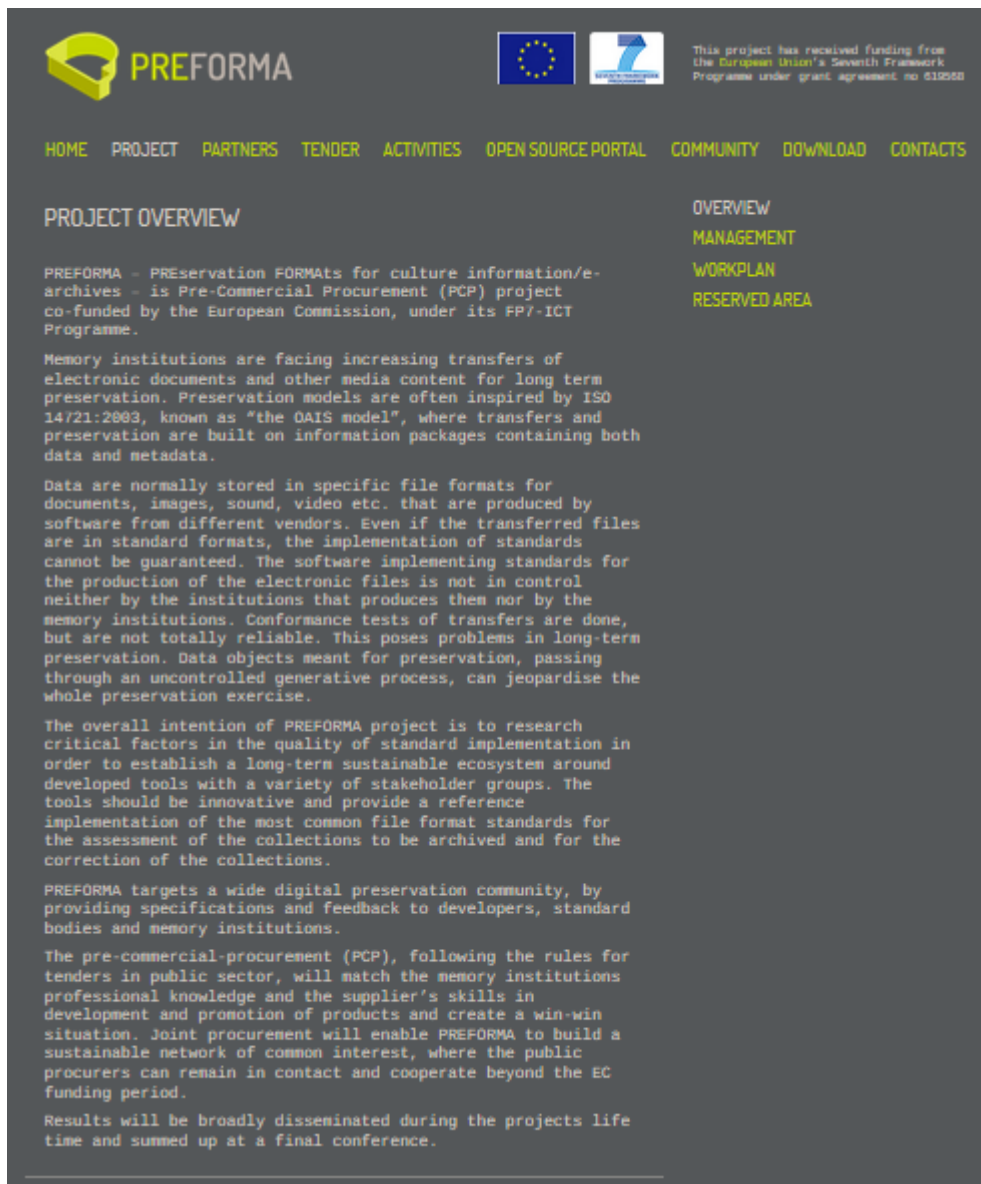


Figure 5. The Project section

2.2.3 Partners

This section contains a description of the PREFORMA Consortium and the list of all project partners. Each partner has their own page with a logo, a description of their institution, a description of their role within the project and a link to their website.

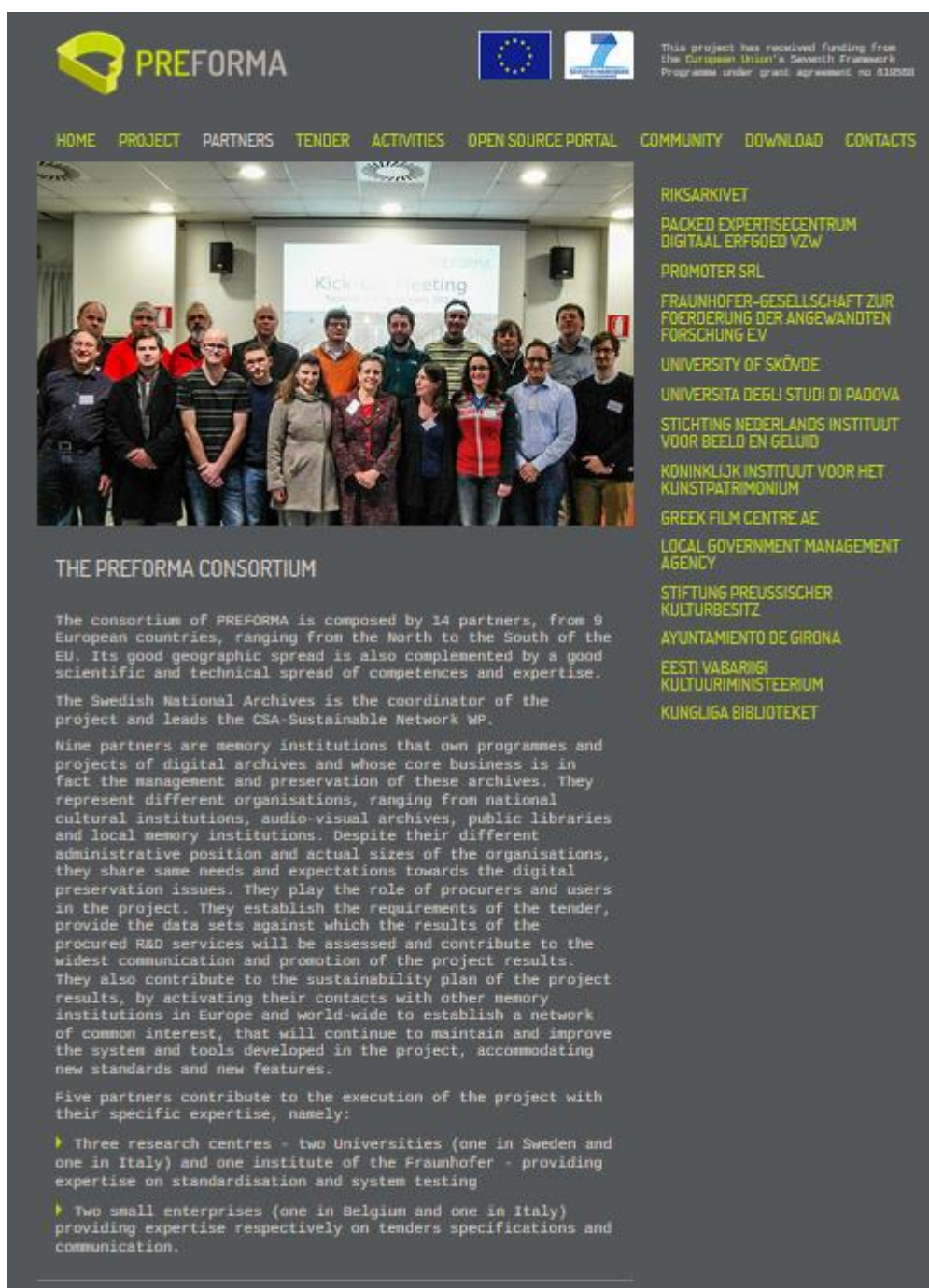


Figure 6. The Partners section

2.2.4 Tender

The Tender section is dedicated to the call for tender that will be launched as part of the pre-commercial procurement. It contains the following sub-pages:

- **Open Dialogue**, which is dedicated to the publication of the outcomes of the open dialogue between memory institutions and technology providers which will define the functional requirements of the tender in the most open and transparent way
- **Call Description**, which contains a description of the call

- **Call Documents**, which will contain all the documents and materials that are useful for the applicants who want to prepare a proposal
- **Information Day**, which links to the web page dedicated to the public Information Day in Brussels on April 4th 2014 when the project and the call for tender to the potential suppliers will be presented
- **FAQ**, which will include a selection of frequently asked questions
- **Get Support**, which provides the contact details for people who would like to obtain more information on the procurement or to ask partners a specific question.



The screenshot shows the 'Tender' section of the PREFORMA website. At the top, there is a navigation menu with links: HOME, PROJECT, PARTNERS, TENDER, ACTIVITIES, OPEN SOURCE PORTAL, COMMUNITY, DOWNLOAD, and CONTACTS. The main content area is titled 'INFORMATION DAY, PRESENTATION OF THE PREFORMA CALL FOR TENDER'. It includes a paragraph about the project's objective, a paragraph about the Information Day on April 4th, 2014, and a paragraph about participation. To the right of the main text is a vertical list of links: OPEN DIALOGUE, CALL DESCRIPTION, CALL DOCUMENTS, INFORMATION DAY, FAQ, and GET SUPPORT. Below the main text, there are sections for 'DATE AND VENUE' (April 4th, 2014, Koninklijk Instituut voor het Kunstpatrimonium (KIK-IRPA), Jubelpark 1 Parc du cinquantenaire, B-1000 Brussels (Belgium)) and 'PROGRAMME AND REGISTRATION' (For more information, for the detailed agenda and to register to the event, please visit the dedicated page in our blog on Digital Meets Culture: www.digitalmeetsculture.net/article/info-day/).

Figure 7. The Tender section (Information day)

2.2.5 Activities

This menu presents the activities and events that have been planned by PREFORMA to raise awareness and disseminate the results of the project. It aims to engage both the open source community and the memory institutions who will benefit from the software developed by the technology providers e.g.:

- The **Requirements Workshop**, which was held in Brussels on March 5th 2014, provided the memory institutions with the opportunity to agree on the functional requirements and technical specifications of the reference implementation tools to be developed in PREFORMA.

- The public **Information Day** event in Brussels on April 4th 2014 which will provide an opportunity to engage with potential suppliers and to present the PREFORMA call for tender.
- A **training event for Open Source companies** which will take place in Stockholm in December 2015, in connection with the first Prototype Demonstration.
- An **Experience Workshop** which will take place in Berlin in December 2016, in connection with the second Prototype Demonstration. The PREFORMA partners will share their experiences of working with suppliers under R&D services agreements with memory institutions.
- A **final conference**, which will take place in Stockholm in December 2017, to present the results of the project.



Figure 8. The Activities section

2.2.6 Open Source Portal

This page will link to the Open Source Portal, which will be available by the end of 2014 and will host all the software developed during PREFORMA project.



Figure 9. The Open Source Portal section

2.2.7 Community

This section provides information about how to join the PREFORMA community. The network of common interest will be set up with representatives from memory institutions, researchers and developers who are interested in contributing to the definition of the requirements, and to taking part in the assessment and the exploitation of the results produced by the suppliers.



Figure 10. The Community section

2.2.8 Download

This section will include all public documents produced over the duration of the project such as public deliverables, promotional materials, presentations, papers, articles related to the project etc.



Figure 11. The Download section

2.2.9 Contacts

An easy-to-use access point for communications with the PREFORMA team. It includes both the official project's email address and the contacts of the Project Coordinator, Technical Coordinator and Communication Coordinator.



Figure 12. The Contacts section

2.3 RESERVED AREA

A specific section of the portal is reserved for the PREFORMA partners, the EC Project Officer and the reviewers. Access to this section requires the entry of a username/password.

This reserved area will be used to:

- Store and retrieve useful documents and information that constitute the knowledge base of the project e.g. working documents, contracts, templates, confidential deliverables, information about the project and review meetings, etc.
- Plan activities through the use of an embedded Google Calendar.
- Send news, information, links about dissemination/networking activities related to PREFORMA.

The following sections describe the information and services that are currently hosted in this private area. Additional services (such as a wiki or other collaborative tools) will be installed and integrated in the reserved area if requested.

2.3.1 The PREFORMA Repository

The Project repository stores all the documentation with restricted circulation, such as:













- lists of deliverables, including peer reviewers and due dates
- Grant Agreement, Description of Work and all the official documents exchanged with the EC to set up and start the project
- final deliverables submitted to the EC
- information related to the project meetings, e.g. presentations shown during the meetings, agenda, minutes, etc.
- administrative documents (timesheets, periodic reports, etc.)
- document templates such as those prepared for deliverables, presentations, and reporting of dissemination activities
- any other document determined to be useful for the project partners.


The repository is accessed via a user-friendly interface that allows simple, fast and secure access to large volumes of data.


The navigation tree contains:

- An **Image Gallery** folder that contains all the images made available by the PREFORMA partners to be used for dissemination and communication purposes, including the associated captions.
- A **Deliverables** folder that contains all the deliverables that will be officially submitted by the Consortium and a table summarising deadlines, partner responsibilities and peer reviewers.
- A **Meeting** folder that contains a sub-folder for each meeting or event organized by the project. Each sub-folder includes the agenda, minutes, presentations and other useful material.
- A **Templates** folder that contains all the available templates.
- One folder for each **Work Package**, each of which is managed autonomously by the corresponding WP leader.

You are in top level folder

File name ^	
 Deliverables	abc
 Image gallery	abc
 Meetings	abc
 Templates	abc
 WP1 - Project Management	abc
 WP2 - Requirements & Assessment	abc
 WP3 - Sustainable network and use	abc
 WP4 - Dissemination and Communication	abc
 WP5 - Co-Design	abc
 WP6 - Prototyping	abc
 WP7 - Validation and testing	abc
 WP8 - Competitive Evaluation and Monitoring of the RTD work	abc

Create new folder: 

Upload file: 

The maximum file size is 32M. To upload bigger files please contact Promoter team.

Figure 13. PREFORMA repository top-level folder

Each authorized partner can upload/download/replace files and create directories. Each page of the tree displays the size of the uploaded files as well as the date of their upload.

Only the administrator is allowed to delete files and manage the sharing and permissions settings.

A specific folder will be dedicated to the review meetings, where relevant documents will be collected for ease of access by the PO and reviewers'. It will include documents such as periodic partners' cost claims, deliverables under review, Description of Work, the review agenda and related practical information, review reports and any other relevant material.

2.3.2 The PREFORMA Calendar

The PREFORMA reserved area embeds a Google Calendar to offer an easy access point to important professional events related to the project. Its main purpose is to have a general overview of the planned meetings/skype calls etc. and to plan the project's activities without any overlap.

Google Calendar is a free time management web application that will help the consortium to share events of common interest.

All the users authorised to access the reserved area can view the Google Calendar, but only the WP/Task leaders have permission to create new events.



Figure 14. PREFORMA Appointments shared calendar

2.3.3 The PREFORMA web form

A web form has been also implemented to allow every partner to send news, information and links about his/her dissemination/networking activities related to PREFORMA.

Every partner can use this form or alternatively send an email, to keep the dissemination team informed of all the ongoing activities (participation to events, presentations of the project at local, regional, national and international events, publication of news, posts, links on websites, blogs or other web resources, etc.).

Who Am I

Name: (Required)

Email: (Required)

News

Title (Required):

Text (Required):
 Allowable Tags: <p><u><a><table><tr><td><blockquote></td></tr></table></u></p>

Upload Files

Max File Size: 8 MB
 Allowable File Types: .txt .doc .pdf .jpg .gif .zip

Upload: Nessun file selezionato.

Upload: Nessun file selezionato.

Upload: Nessun file selezionato.

Figure 15. PREFORMA Web form

2.4 THE PROJECT BLOG

The project blog is hosted on *Digitalmeetsculture.net*, which is the official PREFORMA media partner.

Digitalmeetsculture.net is an interactive online magazine dedicated to the theme of digital technologies applied to cultural heritage and the arts. A rich archive of articles, information and events about projects and initiatives in the field of digital cultural heritage makes *Digitalmeetsculture.net* valuable both as an information tool and as an advertising showcase, with a sharp focus on a selected, high-profile audience. The portal is gaining significance in the global digital cultural heritage community; it already receives 15,000 visitors per month. The visibility that it offers to a selected and interested audience is an added value in terms of dissemination and advertising of PREFORMA activities and results.

The PREFORMA blog (<http://www.digitalmeetsculture.net/projects/preforma/>) is organized in three columns:

- The central frame contains the main content.
- The left side column features the contacts, the list of the latest news and upcoming events and the list of the most popular tags of PREFORMA in *Digitalmeetsculture.net*.
- The right side column contains the list of the partners' logos.

The blog has three menu bars to provide access to the main pages and functions.

The first menu bar recalls the main menu bar of the PREFORMA website, giving access to the related website sections. The second menu bar gives access to the blog home and to the reserved area. Finally, the menu bar at the bottom of the page provides access to website home, blog home, reserved area and contacts page of the website.

The blog home page contains a general presentation of the project, followed by a series of articles related to the project activities and partners, including interviews, chronicles of project's meetings and so on.

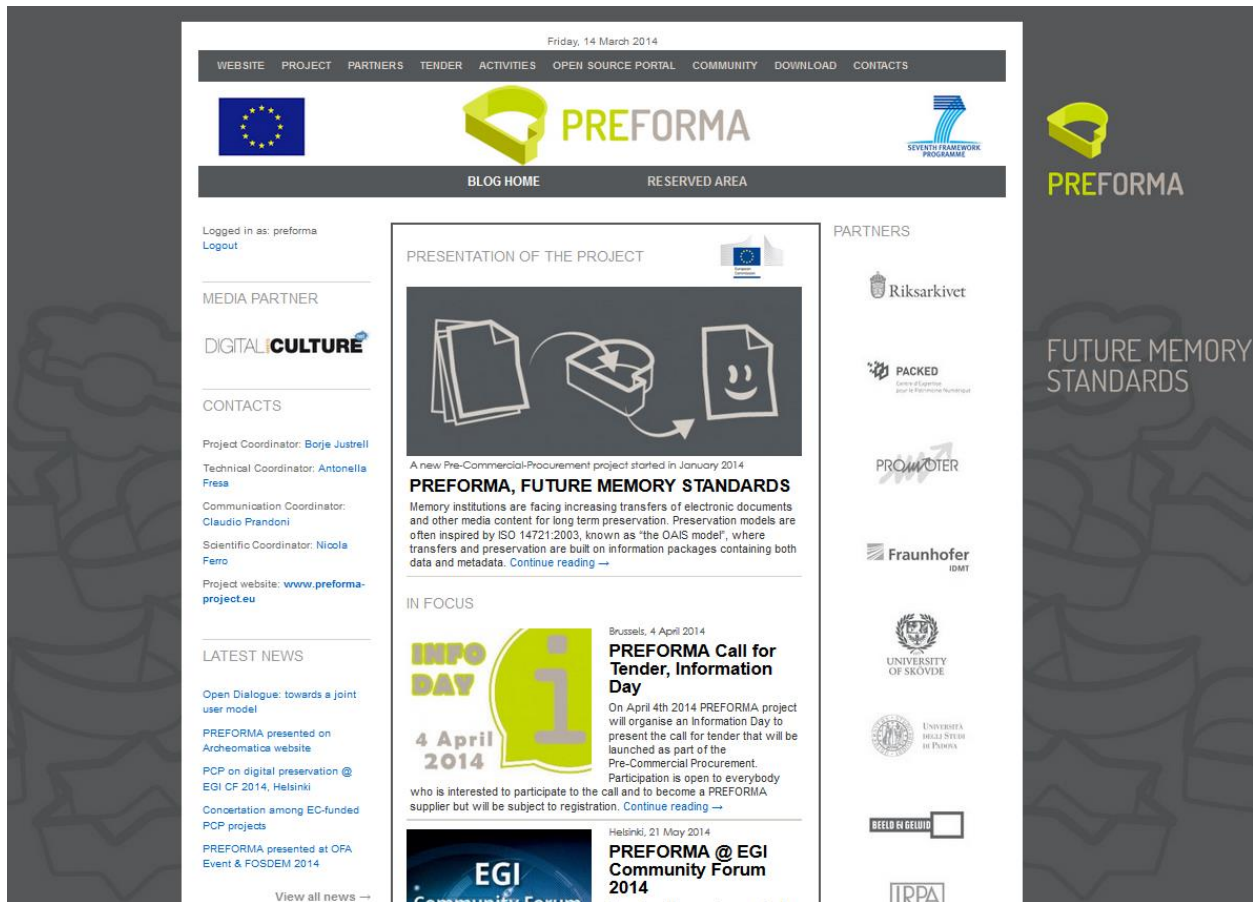


Figure 16. PREFORMA Blog home

The main objective of the blog is to provide a constantly living page, combining information from within the project with the discussion on the themes of digital preservation occurring outside the project, and to redirect traffic to the official project's website.

All the latest news and the upcoming events relevant to the project are published on the blog and automatically featured via RSS on the website's home page. This will increase communication of the project to a larger audience, both professional and general public. This includes news about the main project's activities, outcomes and appointments, information about events organised by PREFORMA, third party events where PREFORMA intends to participate and other events that are of interest for the PREFORMA community etc.

3 TECHNICAL INFRASTRUCTURE AND SERVICES

The PREFORMA website is structured according to the navigation sitemap described in paragraph 2.1 (see Figure 3). The content is periodically updated to reflect the ongoing activities and on the basis of input from the partners.

The PREFORMA website is W3C compliant and it is smartphone and tablet ready thanks to the responsive web design solution that has been adopted.

The website is connected with the project blog, which is continuously updated. An automatic mechanism based on RSS feeds has been implemented to capture, format and display the latest news and the upcoming events from the blog on the website home page. Clicking the title of an event or news redirects the visitor to the blog.

The PREFORMA blog is implemented with WordPress¹ Content Management System, an open source blog tool and publishing platform licensed under the GNU General Public License (GPL).

3.1 SOCIAL NETWORKS INTEGRATION



PREFORMA webpages allow for easy one-click sharing, bookmarking, and emailing of articles and pages through the provision of a large variety of services. In particular, AddThis is the add-on tool that has been integrated to make sharing and bookmarking simple, and to place all of the leading web 2.0 social networking, bookmarking, blogging, and e-mail services² at the immediate disposition of users. Visitors to the PREFORMA webpages can bookmark an item using services such as Facebook, Twitter, Pinterest, LinkedIn, Google+ and many more. Bookmarking is available on each blog page (news, events, etc.).

3.2 WEB FEEDS



Every page on the website has an associated RSS feed³ that a reader can subscribe to. This feed has been implemented to keep interested users updated on the Project and automatically inform them about news and dates.

¹ <http://wordpress.org>

² <http://www.addthis.com/>.

³ <http://feed2.w3.org/docs/rss2.html>, <http://feed2.w3.org/docs/rss2.html>

3.3 ANALYSIS OF STATISTICS

Statistical operations are implemented with Google Analytics, a very popular web analytics solution that gives rich insights into website traffic and marketing effectiveness⁴⁴. It allows for Advanced Segmentation, Custom Reports, Advanced Analysis Tools, Analytics Intelligence, Custom Variables, and Data Exports.

Google Analytics can track visitors from all referrers, including search engines, display advertising, pay-per-click networks, e-mail marketing and digital collateral such as links within PDF documents.

The service offers the following specific statistical insights:

- number of visits and number of unique visitors
- visit duration and last visits
- authenticated users and last authenticated visits
- days of week and rush hours (pages, hits, KB for each hour and day of week)
- domains/countries of visitors
- host list, last visits and unresolved IP addresses list, most viewed, entry and exit pages
- browsers used
- robot visits
- search engines, key phrases and keywords used to arrive at site
- number of times site is added to the user's 'favourites' bookmark.

⁴⁴ <https://www.google.it/analytics/>

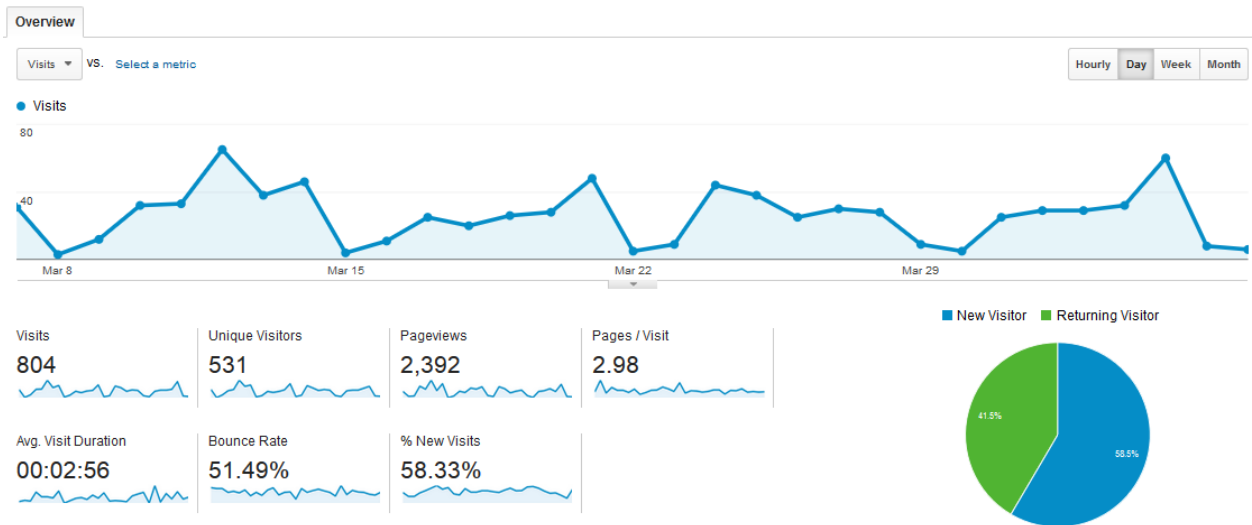


Figure 17. PREFORMA Google Analytic webpage

4 THE CONTENT

4.1 EDITORIAL TEAM

An editorial team has been established at Promoter for the management and curation of the project website and blog. The **Editorial Team** is composed of the following members:

- Technical Coordinator Antonella Fresa, responsible for the monitoring of activities
- Communication Coordinator and WP4 leader Claudio Prandoni, responsible for the overall communication and dissemination strategy
- Organisation Manager Pietro Masi, in charge of checking and validating the content
- Editors Valentina Bachi, Elisa De Bernardi, Tania Masi, Rodolfo Pessina, Situ Xiaochun and Claudia Pierotti, in charge of editing and updating the content of the website and all the news, events and articles published in the blog
- Webmaster Manuele Buono, responsible for the technical maintenance of the website and blog.

The editorial team work during the whole execution of the project to maintain and update the layout and the content both of the website and blog and to regularly publish reports and articles about relevant initiatives and outcomes related to the project.

The content to be published on the website and on the blog is provided by all partners; contributions can be sent to the editorial team.

The project visual identity has been created by the web and graphic designer Nicola Cionini.

4.2 INTELLECTUAL PROPERTY RIGHTS

The PREFORMA Project is the sole responsible party for content published on the website; it does not represent the opinion of the European Commission.

The text of the PREFORMA web pages is licensed under a Creative Commons Attribution 4.0 (by) license⁵.

It must be noted, however, that the rights on images and videos published on the website are dependent upon the respective attributions of each content provider and may not fall under the above CC license. Each image has a specific caption with all relevant information.

All other specific content may be licensed differently according to agreements with single authors.

⁵ <http://creativecommons.org/licenses/by/4.0/>

5 CONCLUSION

This deliverable presented the work carried out to define the project's visual identity and to implement the project's website and blog.

It has to be noted that the current release of the deliverable presents the first stage in the development of the website. The website will be constantly and timely updated along the project's lifetime, and its structure may change to take into account new requirements.

For the duration of the project's life, the editorial team will continue to:

- constantly update the content of the website
- publish news and events in a timely fashion
- make project deliverables and other documentation available in a timely fashion.

6 ANNEX 1: WEBSITE PAGES

This Annex contains the texts of the web pages at the submission of this deliverable.

6.1 PROJECT

6.1.1 Overview

PREFORMA – PREservation FORMAts for culture information/e-archives – is a Pre-Commercial Procurement (PCP) project co-funded by the European Commission, under its FP7-ICT Programme.

Memory institutions are facing increasing transfers of electronic documents and other media content for long-term preservation. Preservation models are often inspired by ISO 14721:2012, known as “the OAIS model”, where transfers and preservation are built on information packages containing both data and metadata.

Data is normally stored in specific file formats for documents, images, sound, video etc. that are produced by software from different vendors. Even if the transferred files are in standard formats, the implementation of standards cannot be guaranteed. The software implementing standards for the production of the electronic files is not controlled either by the institutions that produces them or by the memory institutions. Conformance tests of transfers are done, but are not totally reliable. This poses problems in long-term preservation. Data objects meant for preservation, passing through an uncontrolled generative process, can jeopardise the entire preservation exercise.

The overall intention of PREFORMA is to research critical factors in the quality of standard implementation in order to establish a long-term sustainable ecosystem around developed tools with a variety of stakeholder groups. The tools should be innovative and provide a reference implementation of the most common file format standards for the assessment of the collections to be archived and for the correction of the collections.

PREFORMA targets a wide digital preservation community, by providing specifications and feedback to developers, standard bodies and memory institutions.

The PCP, following the rules for tenders in public sector, will match the memory institutions' professional knowledge and the suppliers' skills in development and promotion of products to create a win-win situation. Joint procurement will enable PREFORMA to build a sustainable network of common interest, where the public procurers can remain in contact and cooperate beyond the EC funding period.

Results will be broadly disseminated during the lifetime of the project and summed up at the final conference.

6.1.2 Management

Project Management Team (PMT). The PMT is responsible for the management, work and direction of the whole project; the work packages; the supervision of the technical and scientific work; and for decisions concerning the overall project management.

Members of the PMT are the Project Coordinator (Chair), the Technical Coordinator (TC), the Scientific Coordinator (SC), the Communication Coordinator (CC) and the Work Package Leaders (WPL).

- The Project Coordinator (PC) Borje Justrell (RIKSARKIVET) is responsible for the overall coordination of the project and is the contact person for the European Commission. The PC is in charge of the project planning and monitoring, progress reports, milestone reports, cost statements, audit certificates, budgetary overviews and reviews of the organization. The PC is assisted by experts on administrative, financial and legal matters.
- The Technical Coordinator (TC) Antonella Fresa (PROMOTER) focuses equally on the coordination of the work of the partners, including ad-hoc face-to-face meeting, virtual meetings, direct mailing and telephone conferences, etc., and on monitoring and facilitating the correct execution of the project planning, including the scheduling of the project, periodic reporting and quality of the deliverables.
- The Scientific Coordinator (SC) Nicola Ferro (UNIPD) is responsible for monitoring the project's scientific work and providing assistance and cross-coordination for the researchers in the project. The SC also monitors progress towards the scientific objectives of the project, creating and fostering connections with other research activities, and ensuring excellence of the research results. The SC is also the WP7 Leader.
- The Communication Coordinator (CC) Claudio Prandoni (PROMOTER) is responsible for coordinating the communication activities, with particular regard to the work achieved in WP2, WP3 and WP4. The CC also monitors progress towards the outreach objectives of the project, creating synergies and cooperation with other memory institutions that are not partner in the project but that will join the PREFORMA network of common interest. The CC ensures balance and efficiency of the project communication. The CC is also the WP4 Leader.

General Assembly (GA). The GA, chaired by the PC, is the highest authority of the project where each partner is represented. Major changes in the project are decided by the GA, and the project milestones are monitored for suitable planning and timely completion. GA decides on (re)allocation of resources or redefinition of work packages, changes in partner participation and is responsible for resolving conflicts based on the principles agreed in the Consortium Agreement e.g. IPR issues.

Advisory Board (AB). To ensure that the project will keep in line with the needs of memory institutions, an AB has been established. The AB is chaired by the PC and consists of experts appointed by organisations outside the consortium that have skills which are useful for the project. All members of the AB must have solid expertise in the context of preservation of cultural heritage but also competence for international projects. The AB may suggest recommendations for the development of the exploitation strategy and possible new actions to continue the research.

6.1.3 Workplan

The activities of PREFORMA are divided into two main parts:

- **Coordination Activities:** these include carrying out the tender procedure and defining the functional and performance criteria for suppliers, including the legal and financial issues; setting up a wide network of stakeholders (memory institutions and research groups); and disseminating the outcomes of the tender.
- **Collaborative Activities:** these constitute the core part of the project where the suppliers design, develop and test the software components.

Coordination Activities

Under the PREFORMA Coordination and Support Action (CSA), the PREFORMA memory institutions specify requirements and performance criteria for issuing an open tender to procure suppliers as partners in the Collaborative Project (CP).

The CSA is also responsible for the overall PREFORMA project management, and for wide dissemination of the project results. In particular, dissemination of the results of testing commonly available content generation tools for standard file formats. This will contribute to ensuring better future standards that are easier to implement in a conforming manner. In addition, the analysis of how the most commonly used archival file formats can be implemented under open source (copy-lefted) licenses will highlight the importance of open standards and enable future-proof open source licensing alternatives.

CSA Phases

- **Project Management (Leader: RIKSARKIVET)**
- **Requirements phase (Leader: PACKED):** Financial and legal aspects will be discussed among the partners and external stakeholders in an open dialogue activity.
- **Procurement phase (Leader: UNIVERSITA DEGLI STUDI DI PADOVA):** The pre-commercial procurement (PCP) tender will be published and evaluated; individual framework contracts will be awarded to the selected suppliers.
- **Network Expansion phase (Leader: RIKSARKIVET):** Starting with the PREFORMA memory institutions, academic partners and the organisations that have signed letters-of-interest during the preparation of the proposal, more stakeholders will be invited to act as a reference group during the project. Some of them will also participate in the Advisory Board (AB) and will contribute to the peer review of key project deliverables. The aim is to establish a sustainable, long-term network of common interest for pre-commercial and commercial procurement for digital preservation.
- **Outreach phase (Leader: PROMOTER):** The project results will be disseminated widely with the aim of gaining broad acceptance for use of the open source tools, recruiting more stakeholders to the PREFORMA network of common interest and contributing to the coordination of the research in this domain. Preparation and organisation of the final conference is included in this phase.

Collaborative Activities

The Collaborative Project (CP) part is organised along three work packages that constitute the core research and development (R&D) work procured by the participating memory institutions:

- Design of the PREFORMA system and tools, where the suppliers describe their solutions in terms of detailed functions (Leader: FRAUNHOFER)
- Prototyping of the services, where the suppliers develop prototypes of their solutions, satisfying the agreed functional and performance criteria (Leader: HOGSKOLAN I SKOVDE)
- Scientific testing of the results, where the prototypes are subjected to scientific testing against datasets provided by the memory institutions (Leader: UNIVERSITA DEGLI STUDI DI PADOVA).

Each phase is executed by the suppliers selected through the tender procedure. The CP work packages are led by academic partners to ensure scientific quality. Memory institutions are task leaders that provide pilot workflows and datasets for the suppliers to test their solutions.

It is foreseen that the prototyping will start at the end of the design phase. A redesign phase will take place on the basis of the results of the first release of the prototype. The second release of the prototype will then be developed and eventually passed to the test phase.

Six suppliers will be selected at the end of the tender procedure (two for each media type) to carry on the first design phase that will last for four months and will conclude with the ranking of the delivered designs. The suppliers of the best three designs (one for each domain) will be requested to proceed to the prototyping phase. This will include two releases and the re-design phase and will last for 22 months in total. The suppliers will then be requested to proceed to the testing phase that will last for six months.

Assessment of the results of each phase will be carried out under the supervision of the respective WP Leaders and will be based on the competitive evaluation criteria published in the tender procedure.

6.2 PARTNERS

6.2.1 The PREFORMA Consortium

The consortium of PREFORMA is composed of 14 partners, from nine European countries, ranging from the North to the South of the EU. The wide geographic spread is also complemented by a wide scientific and technical spread of competences and expertise.

The Swedish National Archives is the coordinator of the project and leads the Coordination and Support Action (CSA)-Sustainable Network WP.

Nine partners are memory institutions that manage programmes and digital archive projects and whose core business is in fact the management and preservation of these archives. They represent different organisations, ranging from national cultural institutions, audio-visual archives, public libraries to local memory institutions. Despite their different administrative position and size, they share same needs and expectations for digital preservation. They play the role of procurers and users in the project. They establish the requirements of the tender, provide the datasets against which the results of the procured research and development (R&D) services will be assessed and contribute to the wide communication and promotion of the project results. They also contribute to the sustainability plan for the project results by engaging their contacts with other memory institutions in Europe and worldwide. This will establish a network of common interest that will continue to maintain and improve the system and tools developed in the project, accommodating new standards and new features.

Five partners will contribute to the execution of the project with their specific expertise, namely:

- Three research centres, two Universities (one in Sweden and one in Italy) and one institute of the Fraunhofer, providing expertise on standardisation and system testing
- Two small enterprises (one in Belgium and one in Italy), providing expertise respectively on tenders specifications and communication.

6.3 TENDER

Publication date	Yyyy-mm-dd	Deadline Date	Yyyy-mm-dd hh:mm:ss (Brussels local time)
Budget	€ 2,805,000	CALL ID	PREFORMA-XXX
Status	Open/Closed	OJ reference	

6.3.1 Open Dialogue

PREFORMA aims to ensure the establishment of a process of open dialogue between the memory institutions and the technology providers who develop the software. The memory institutions will define the functional requirements of the tender based on the outcome of the open dialogue.

This process, which will lead up to the publication of the tender in May, includes:

- The establishment of a task force to build consensus on the preservation formats that will be tested by the PREFORMA toolset, focusing in particular on the audiovisual domain (PDF/A for texts and TIFF/JPEG2000 for still images are already agreed).
- An open consultation about the tender to get an understanding of the needs of the individual memory institutions regarding conformance checking. This includes:
 - a series of open questions about the way memory institutions acquire digital objects, their policy on receiving and preserving digital objects, the resources at their disposal and the digital objects they might be able to share with the PREFORMA partners for training and testing;
 - interviews to discuss the usage scenario for the conformance checker which will be developed for the single institutions. All the collected usage scenarios will be merged into one joint user model, integrating all individual requirements in a concise set of generic use cases.
- The organisation of a workshop in Brussels on the 5th of March 2014 targeted at the memory institutions. This provided the opportunity for them to agree on the functional requirements and technical specifications of the reference implementation tools to be developed in PREFORMA.
- The organisation of a public Information Day event in Brussels on the 4th of April 2014 to facilitate engagement and consultation with potential suppliers and to present the PREFORMA call for tender.

- The organisation of a networking session at the EGI Community Forum in Helsinki on the 21st of May 2014 as an additional opportunity to present the PREFORMA call for tender and to collect feedback.

The progress and the outcomes of this process are continuously updated in a dedicated living webpage on the PREFORMA blog: <http://www.digitalmeetsculture.net/article/open-dialogue-for-the-preparation-of-the-preforma-tender/>.

Contact us at info@preforma-project.eu to obtain more information on the procurement or with specific queries. We will make sure that your requests are forwarded to all the relevant parties and that they will be taken into account in the design of the tender functional requirements and technical specification.

6.3.2 Call Description

The overall intention of PREFORMA is to research critical factors in the quality of a standard implementation in order to establish a long-term sustainable ecosystem around developed tools with a variety of stakeholder groups. The tools should be innovative, provide a reference implementation for the most common file format standards and a mechanism for the assessment of the collections to be archived and for the correction of the errors.

CALL OBJECTIVE

The main objective of the pre-commercial-procurement is the development and deployment of an open source, software licensed, reference implementation for file format standards aimed at any memory institution (or other organisation with a preservation task) wishing to check conformance with a specific standard. This reference implementation will consist of a set of modular tools, which will be tested against the implementation of specifications of standards relevant to the PREFORMA project and used by the European memory institutions to preserve their data objects. In order to demonstrate effectiveness (and refine) these tools, they will be developed in an iterative process with multiple releases and with a number of experiments with 'real' data sets (files) from memory institutions during each iteration.

The media types covered by the tender are: texts, still images and audio-visual records.

The standards for each domain are:

- PDF/A for texts
- TIFF 6.0 Part 1: Baseline Tiff Uncompressed for still images
- MXF OP1a: SMPTE 378M-2004, MKV, OGG (containers); Lossless JPEG2000: ISO/IEC 15444-1:2004, FFV1, Dirac (video encoding); LPCM AES3 (audio encoding) for audio-visual records.

Areas which will be covered by the tools developed by PREFORMA are:

- Preservation-relevant metadata (for documents, books, images and audiovisual records).
- Particularly challenging types of digital objects (notably audiovisual records).
- Integration of digital preservation requirements into existing systems in order to increase their resilience to technological changes.

EXPECTED OUTCOMES

The expected outcomes include:

- The set modules (called “Abstract Conformance Checker”, “Scorer”, “Reporter”, and “Abstract Fixes Suggester/Correcter”) for the chosen each media type.
- The Technical Reference for these modules and their API, to provide full information for the future integration of the modules in the actual workflow of the memory institutions.
- A web application that provides the user interface to the four modules.

CALL IMPLEMENTATION

Six suppliers are planned to be selected at the end of the tender procedure to carry on the first design phase that will last for four months and conclude with the ranking of the delivered designs.

The suppliers of the best three designs will be requested to proceed to the prototyping phase, which will include two releases and the re-design phase and which will last for 22 months in total.

If the result of the prototyping phase are good enough, the three suppliers will then be requested to proceed to the testing phase that will last for six months. This will correspond with the final testing of real datasets provided by the memory institutions.

Assessment of the results of each phase will be carried out under the supervision of the respective WP Leaders and based on the competitive evaluation criteria published in the tender procedure.

The total cost of the procurement amounts to 2,805,000 EUR.

The maximum amount available for the design phase is 390.000 EUR.

The indicative amount available for the prototyping and testing phases is 2.415.000 EUR.

The PREFORMA consortium considers that proposals that cost in the order of 65.000 EUR for the design phase, 700.000 EUR for the prototyping and 105.000 EUR for the testing phase would allow this specific challenge to be addressed appropriately. Nonetheless, this does not preclude submission and selection of proposals requesting other amounts.

6.3.3 Call Documents

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Visit this page in the near future.

6.3.4 Information Day

The main objective of the pre-commercial-procurement (PCP) launched by PREFORMA is the development and deployment of an open source, software licensed, reference implementation for file format standards for use by any memory institution (or other organisation with a preservation task) wishing to check conformance with a specific standard.

On **April 4th, 2014**, PREFORMA will organise an Information Day event in Brussels to present the call for tender, which will be launched as part of the PCP.

Participation is open to anybody who is interested in participating in the call and becoming a PREFORMA supplier, but will be subject to registration.

Date and Venue

April 4th, 2014

Koninklijk Instituut voor het Kunstpatrimonium (KIK-IRPA), Jubelpark 1 Parc du Cinquanteenaire, B-1000 Brussels (Belgium).

Programme and Registration

For more information, for the detailed agenda and to register to the event, please visit the dedicated page on our blog on *Digitalmeetsculture.net* <http://www.digitalmeetsculture.net/article/info-day/>.

6.3.5 FAQ

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Visit this page in the near future.

6.3.6 Get Support

Contact us at info@preforma-project.eu to obtain more information on the procurement or to ask a specific question. We will make sure that your requests are forwarded to all the relevant parties and that they will be taken into account in the design of the tender functional requirements and technical specification.

6.4 ACTIVITIES

Several activities have been planned during the project to raise awareness and disseminate the results of the project and to engage both with the open source community and with the memory institutions who will benefit from the software developed by the technology providers.

These activities include:

- The organisation of a workshop for memory institutions that took place on the 5th of March 2014 in Brussels. This provided the opportunity for them to agree on the functional requirements and technical specifications of the reference implementation tools to be developed in PREFORMA.
- The organisation of a public Information Day event in Brussels on the 4th of April 2014 to facilitate engagement and consultation with potential suppliers and to present the PREFORMA call for tender.
- A training event for Open Source companies that will take place in Stockholm in December 2015, in connection with the first Prototype Demonstration.
- An Experience Workshop that will take place in Berlin in December 2016, in connection with the second Prototype Demonstration, where the PREFORMA partners will share with memory institutions their experiences of working with suppliers under R&D services agreements.
- A final conference that will take place in Stockholm in December 2017 to present the results of the project.

All the members of the PREFORMA community will be invited to the above events and their proceedings will be made available online on the PREFORMA website. Visit the Community section of the website to find out more and to join the PREFORMA community.

More information on the ongoing activities can also be found on our project blog on *Digitalmeetsculture.net*: <http://www.digitalmeetsculture.net/projects/preforma/>.

6.4.1 Requirements Workshop

The main objective of PERFORMA is to give memory institutions full control of the process of conformity testing of files to be ingested into archives, through the development of a set of tools which enable this process to happen within an iteration that is under full control of the institutions. It is in fact a basic requirement for memory institutions to be trustworthy in performing their preservation programmes.

On **March 5th, 2014**, PREFORMA organised a workshop in Brussels targeted at memory institutions in order to agree on the joint user model for tendering the PREFORMA conformance checker. In other words, to agree on the expected behaviour and functionality of the tools to be developed in the coming years by the software suppliers that will be selected from the procurement process of the project.

These requirements will be further developed in the subsequent design and prototype phases. However, the set of requirements that have been defined initially will be used for selecting the software suppliers.

Date and Venue

March 5th, 2014

FARO, cultural interface centre for cultural heritage, Priemstraat 51, 1000 Brussels (Belgium).

Programme

For more information and for the detailed agenda of the workshop, visit the dedicated page on our blog on *Digitalmeetsculture.net*: <http://www.digitalmeetsculture.net/article/preforma-requirements-workshop/>.

6.4.2 Open Source Workshop

Date: December 2015

Venue: Stockholm (Sweden)

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Visit this page in the near future.

6.4.3 Experience Workshop

Date: December 2016

Venue: Berlin (Germany)

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Visit this page in the near future.

6.4.4 Final Conference

Date: December 2017

Venue: Stockholm (Sweden)

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Visit this page in the near future.

6.5 OPEN SOURCE PORTAL

PREFORMA is following an open source approach, with the aim of establishing a sustainable research and development community comprising of a diverse selection of contributors and users from different stakeholder groups. Since the ecosystem will be established around the Open Source Software component, the development of the project is also broadly applicable outside the archiving domain. Therefore, by allowing participation from a broader contributor base, the ecosystem in the archiving domain will be strengthened.

By employing an open source approach, a catalyst is created for high-quality research and development of tools to ensure file formats are compliant with standards. The open source nature ensures long-term availability of the software, independent of the memory institutions and suppliers involved in PREFORMA.

The Open Source Portal, which will be available by the end of 2014, will host all the software developed during PREFORMA.

Follow us on www.preforma-project.eu to join the PREFORMA open source community!

6.6 COMMUNITY

PREFORMA is open to collaboration with experts, organisations, institutions and other projects in order to find synergies and discuss opportunities for cooperation.

The network of common interest of PREFORMA will be set up with representatives from memory institutions, researchers and developers who are interested in contributing to the definition of requirements and taking part in the assessment and exploitation of the results produced by the suppliers.

We are very much interested in engaging with:

- **Memory institutions** and cultural heritage organisations coordinating or representing memory institutions, that are involved in (or planning) digital culture initiatives, to use the tools developed by PREFORMA
- **Developers** contributing code for the PREFORMA tools as well as developers implementing the reference implementations in production software
- **Research organisations** providing technical advice and expertise to cultural stakeholders
- **Standardisation bodies** maintaining the technical specifications of the preservation formats addressed in PREFORMA

- **Funding agencies**, such as Ministries of Culture and national/regional administrations, that own and manage digitisation programmes and may endorse the use of the PREFORMA tools in the digitisation process
- **Best practice networks** endorsing the use of open standards in creating and managing digital content
- **Other projects** in the digital culture, e-Infrastructures and policy arenas.

Contact us at info@preforma-project.eu to join the PREFORMA community!

6.7 DOWNLOADS

This section presents a list of public documents, deliverables, dissemination materials, publications and other significant written material related to the PREFORMA project.

6.8 CONTACTS

The best way to contact the EAGLE team is by sending an email to info@preforma-project.eu.

You can direct your messages to the attention of the Project Coordinator, Borje Justrell and to the Communication Manager, Antonella Fresa.

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