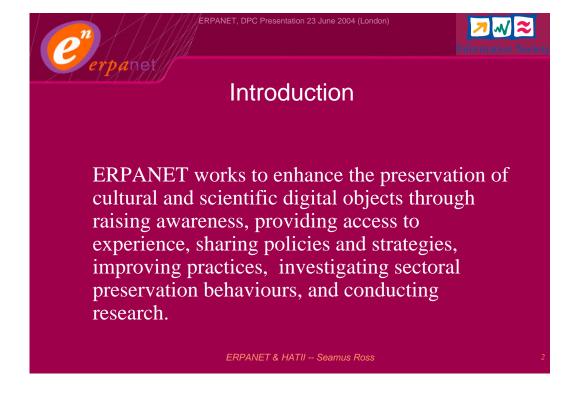


## An Introduction to ERPANET

DPC Forum 23 June 2004

Seamus Ross Director HATII, University of Glasgow & Principal Director ERPANET





## **ERPANET EU FP5 Project**

- ERPANET aims to do the following:
  - raise awareness of preservation needs and strategies;
  - appraise and evaluate information sources and developments in digital preservation and increase the accessibility of this work;
  - provide an EU-wide enquiry and advisory service on preservation issues, practice and technology;
  - organise 15 developmental seminars and workshops across EU (so far 20 leading organisations and more than 100 professionals contributed)
  - stimulate research in digital preservation;
  - promote awareness among software producers of the preservation needs of the user community; and
  - research to improve method and practice.



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# The Directors and Co-ordinator The Directors – Niklaus Bütikofer (Schweizerisches Bundesarchiv)

- Maria Guercio (ISTBAL, Università di Urbino)
- Hans Hofman (Nationaal Archief Nederland)
- Seamus Ross (HATII, University of Glasgow)
- The Co-ordinator

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- Peter McKinney (HATII, University of Glasgow)











ERPANET, DPC Presentation 23 June 2004 (Londor



#### Organisations Need Help



Maria Guercio and John McDonald at the *Preservation Policy and Procedures* cosponsored with the Archives de France – Le Centre des Archives Contemporaines, Fontainebleau, January 2003.

- Off-the-shelf policy statements
- Business cases & strategies
- Digestible guidance on technologies and their preservation implications
- Improved models (reference, costs, standards, functional requirements)
- Simple Guidelines on digital survival
- Guidance on creating data repositories
- IPR support and guidance

#### OBJECTIVES Thematic Workshops & Seminars

- Exploring core topics with experts and specialised institutions
- Increasing the level of awareness within the communities of digital information providers, practitioners, experts and preservers
- Developing basic recommandations
- Providing documentation of new research directions and results
- Provide skills development opportunities to the community



Speakers at the Lisbon Seminar on *The Selection, Appraisal and Retention of Digital Scientific* 

Data, Weber Amaral, William Anderson, Terry Eastwood, John Faundeen, Pedro Fernades, Luigi Fusco, Francoise Genova, Myron Gutmann, Gail Hodge, Jürgen Knobloch, Meredith Lane, Seamus Ross, Kevin Sch?rer, Alex Szalay, Peter Weiss

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#### Workshops & Seminars

- Workshops & Seminars, June 2002 October 2003
  - *Digitisation, Conservation and Quality Control* (Toledo, June 2002)
  - XML for digital preservation (Urbino, October 2002)
  - Introduction to the OAIS Model (Copenhagen, November 2002)
  - Preservation Policy and Procedures (Fontainebleau, January 2003)
  - Long term preservation of databases (Bern, April 2003)
  - Preserving the Web, (Kerkira, May 2003)
  - Metadata in Digital Preservation, (Marburg, September 2003)
  - *ERPANET 'DSpace' Installation Workshop*, (Glasgow, September 2003)

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#### WORKSHOPS & SEMINARS

- Workshops & Seminars, November 2003 June 2004
  - Digital repositories: audit and certification, (Rome, November 2003)
  - Preservation of Scientific Data Sets (Lisbon, December 2003)
  - Audit and Certification (Antwerp, April 2004)
  - File Formats (Vienna, May 2004)
  - Persistent Identifiers (Cork, June 2004)
  - Business Models (Amsterdam, September 2004)
  - Preserving Digtal Art (October 2004)
  - Workflow (Budapest October 2004)

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Peter Robinson and Manfred Thaller at the ERPANET and the Accademia dei Lincei workshop on *Trusted Repositories for Preserving Cultural Heritage* (Rome, November 2003)



#### Nearly 100 Speakers since June 2002

#### Speakers included (sample, see erpanet website for full list):

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Group B at the File Formats Seminar in Vienna, May 2004





#### **BENEFITS of Workshops & Seminars**

- Creation of authoritative sources of information
- Fora for information and preservation professionals that can be extended into their own and other communities
- Exchange of experiences; successes and failures
- Post-event analytic report recommending areas for research, development and service provision following each event



Mr Allemann, Trivadis AG Switzerland co-sponsor of the ERPANET Bern Workshop on Long term preservation of databases, April 2003.





#### Some Lessons learned

- Community hungry for practical case studies and reports of real world experiences
- Lack of good examples makes it difficult to identify speakers with expertise, technical knowledge of a high enough calibre and suitable presentation skills
- Audience has a high and increasing skill-base
- Discussion with experts through break-out sessions in hot demand
- Cross-domain audience helps to overcome the barriers between domains
- Evaluations show that ERPANET events are in demand and participants in one event intend and do return to others

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ERPANET Bern Workshop on *Long term preservation of databases* at the Schweizerisches Bundesarchiv, April 2003.



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#### Content Development Instruments

- Literature Evaluation Mechanisms
- Commentaries
- Case Study Instruments
- Case Study Reports
- Evaluation of erpaEvents
- Workshop and Seminar Reports
- Materials from all Workshops & Recordings of most



Alex Szalay, The Johns Hopkins University (USA) speaking at the ERPANET Lisbon Seminar on *The Selection, Appraisal and Retention of Digital Scientific Data,* December 2004.

http://www.erpanet.org ERPANET & HATII -- Seamus Ross

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## erpaCOMMENTARIES

- Authoritative online information services on Digital Preservation
  - Analytic Reviews of published and online literature
    - including assessment of 100 journals
  - Assessment of technical guidelines and relevant standards
  - Projects reviewed



Participants at the ERPANET Seminar on *Metadata for Digital Preservation*, Marburg (September 2003)



#### **ERPAePrints**

- Ensuring long term accessibility to digital preservation literature, both gray and published
- Creating a single point of accessibility
- Better profiling of the literature



Andrew Wilson of the National Archives of Australia speaking at the ERPANET Seminar on *Metadata for Digital Preservation*, Marburg (September 2003).

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Robert Kahn (Corporation for National Research Initiatives) and Tito Orlandi (Centro Linceo Interdisciplinare) at the ERPANET and the Accademia dei Lincei workshop on *Trusted Repositories for Preserving Cultural Heritage* (Rome, November 2003)

#### erpaAdvisory

- Provides the community with access to answers to digital preservation expertise
- Building a Resource of Authoritative Answers to Digital Preservation Questions
- Making accessible examples of best practice
- Currently under-utilised—we are investigating why

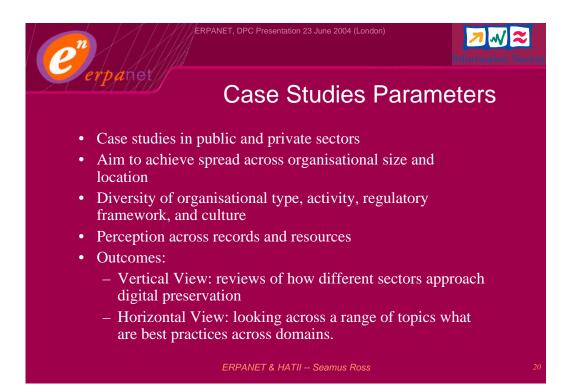




Stuart Weibel of OCLC at • the grave of George Boole following the ERPANET seminar on *Persistent Identifiers*, Cork, June 2004

#### erpaStudies - their aims

- Build a picture of current methods matched against their context of use underpin the definition of best practices;
- Accumulate and make accessible information about how approaches to digital longevity;
- Produce materials for seminars and workshops;
- Enable comparisons of approaches across sectors;
- Enable the development of assessment tools;
- Identify issues for further research.





## **Case Study Practices**

• Research by questionnaire and interview (normally by telephone)

- A team of six research assistants in four countries

- Examined how other projects had conducted surveys to inform our own design
  - The Pittsburgh Project and InterPARES
- Designed focused template which we hope other projects will adopt when conducting similar studies
- Interviews with three staff members in each organisation sought: Business Manager, IT Manager, Archivist/Records Manager

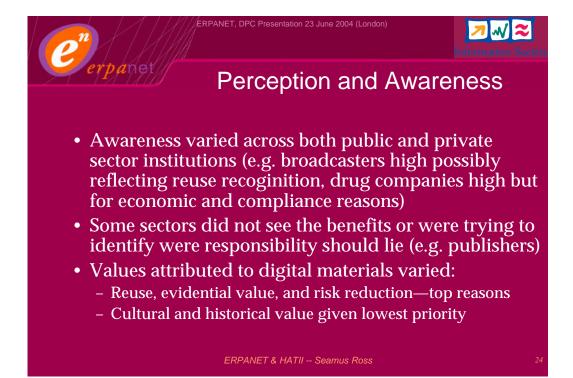
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## Focus of Investigations

- Preception and awareness of risk posed by digital materials
- Understanding how digital preservation affects the organisation
- Identifying what actions have been taken to prevent loss of digital materials
- Develop an understanding of the way preservation activities are monitored (policies or programmes)
- Understand how organisations plan future preservation requirements (e.g. costs)
- What technologies are in place ERPANET & HATII -- Seamus Ross





## Policy, Strategy and Standards

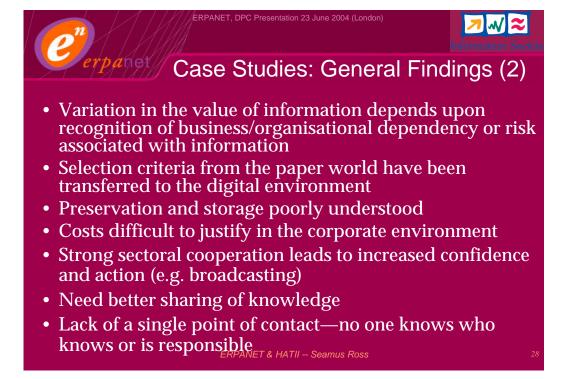
- Few organisations had developed policies
- Where there were policies interviewees acknowledged they were not implemented across organisations
- Standards and guidelines developed by other communities were not attractive
- Few organisations articulate preservation strategies as part of system and software specifications



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## Case Studies: General Findings (1)

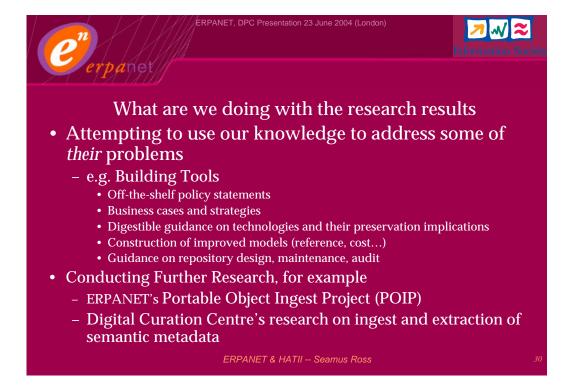
- Diversity of strategies but few have them
- Activity is fragmentary
- Variation in awareness of risk (many only following our survey)
- Responsibility rarely taken at corporate level
- Recognised need for better sharing of knowledge
- Collaborative action rare (broadcasting is an exception)
- Organisations are waiting for external solutions
- Practices tend to be: incomplete, ad hoc, and individual





## Case Studies: Objectives Achieved

- Accumulated materials to illustrate methodologies and practices
- Created a basis for establishing practical guidelines
- Raised awareness among more than 400 institutions and individuals
- Stimulate sharing of information and experiences
- Added objective understanding to a profile which has often been based on single analyses and anecdotal





# VISIT The ERPANET WEBSITE:

# http://www.erpanet.org