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A Policy Framework for the Digital Library

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2013-03-07
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ALIGNING NATIONAL APPROACHES TO DIGITAL PRESERVATION

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Background

- The intent of the conference/workshop is to contribute in some way to the next phase of community development for digital preservation and encourage national/international collaborations of all kinds.

- Preserving Digital Information report of 1996

Background

- The introduction of the "*opportunities"* is expected to provide some background on the emergencies of the digital preservation community as context to the *discussions*

- and *introduce a model* that might be used to identify milestones as the community takes its next steps towards alignment, incrementally and comprehensively.

Background

- The *six alignment* themes demonstrate both the need to come together to define common goals and objectives for the community to pursue globally and

- the benefits to be reaped by having an on going discussion of those issues.

Synopsis - ANADP

- 23 – 25 May 2011 – 125 delegates; 20 countries, Tallinn, Estonia
- Aligning National Approaches to Digital Preservation (ANADP) *concept meeting*
- Purpose – explore how to create and sustain international collaborations to support the preservation of our collective digital cultural memory

Synopsis

- 1st ANADP together with **iPRES** in Singapore (Nov 2011)
- 2rd ANADP together with IDCC (14 Jan 2013) Amsterdam
- The SADI workshop is based on the "***already established strong foundation for future collaborative efforts in digital preservation"***
- SADI workshop outputs to be added to the Amsterdam series published by EDUCOPA Institute Publications: Atlanta, Georgia www.educopia.org/publications
- Nancy Y McGovern (Vol Editor) & Kathrine Skinner (Series Editor)

Day 1

- DAY 1
- Summaries of potential Areas of Alignment

Legal

- *Raise awareness about legal deposit* – To overcome resistance to legal deposit for digital material, the memory community needs to identify, articulate, and disseminate case studies demonstrating the benefits and impact of legal deposit to different stakeholder groups.

- *Pursue cooperative agreements* – As distributed preservation infrastructures and architectures become the predominant models, these activities need to be governed and implemented in a more certain and supportive legal environment, *not just in terms of the agreements*, but also in *terms of the laws governing how content* can be managed for preservation purposes.

Legal

- *Investigate collective licensing* – Preserving and providing access to digital material does not take place at a national level, but current approaches to managing copyright tend to operate at this level.

- *Extended collective licensing* could help address issues of orphan works and cross-border access.

Organizational

- *Foster good practice* – Increasing the geographic spread of good practice for digital preservation and curation needs to include a more deliberate exchange of *lessons learned and case studies* documenting the use of emerging tools, workflows, and techniques across national and continental boundaries,

- including regions ie other African organisations that have not been well represented in the digital preservation field thus far.

Organizational

- *Encourage collaboration* – Collaborations across institutions and nations should seek to extend the scope of content that is preserved by sustainable digital preservation programs.

- *Shift from projects to programs* – Digital preservation must move from *project driven* activities to a *core activity* of memory organizations nationally.

Standards

- *Delineate interoperability standards* – “Interoperability” needs to be *explored and defined* along the whole chain of steps that form the lifecycle of an object – from its conception to its re-use through the process of preservation.

- *Express platform-agnostic digital preservation requirements* – Moving away from a repository-centric worldview allows *concentration upon functional requirements* that can be implemented in a variety of information systems that manage digital assets for the short to medium term.
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Standards

- *Standardise requisite skill-sets* – Codes of practice that rely on clear requirements for skills and *know-how* should be better defined by setting standards for education and training courses in digital preservation.

- *Engage the users of standards* – The value of standards in digital preservation can best be demonstrated if we engage *appropriate user communication* in the discussion to determine relevancy, gaps in available standards, and roles in creating new standards.

Technical

- *Develop evaluation protocols and benchmarking* – Common test data should be developed and made available to provide the means for evaluating and comparing technical benchmarks across solutions.

- *Approach interoperability rigorously* – We must better understand the value of inter-system communication and interchange and weigh that against the value of immediate interoperability in the digital preservation realm.

Economic

- *Raise awareness about sustainable digital preservation* – Initiating a coordinated national/international campaign could help to make Library/Archive/Museum (LAM) directors and administrators (and the broader public) aware that long term digital preservation is necessary and that it requires stable funding and a continuous allocation of resources.

- *Establish a digital preservation resource centre (DPRC)* – Provide decision-makers at LAMs with a single place for current information on various digital preservation solutions to enhance uptake and foster a broader understanding of options.

Economic

- *Develop case studies* – Assemble and make available case studies of digital preservation costs in order to promote better and more comprehensive understandings of where costs accrue and where cost savings may be possible.

- *Define selection criteria* – Develop a matrix of selection criteria for digital preservation - in other words, a digital preservation “triage chart” - to help build a common framework for digital content selection decisions.

Economic

- *Study and promote community sourced solutions* – Identify viable community driven business models, particularly those that extend across national boundaries, and study how these models work and can be reapplied in other contexts.

Explore opportunities for public-private partnerships – Identify ways to cooperate in mutually beneficial ways by standardizing the preservation needs of public sector institutions and by creating conditions in which private companies can compete to meet those needs against an agreed upon set of benchmarking criteria.

Economic

- *Define core services* –
- Identify key services, coordinate initiatives, promote common standards, implement policies and recommendations, and
- encourage the use of basic services for preservation networks to offer tested, universally applicable solutions for end-users and to stimulate competition among technology providers, which should in turn lead to lower prices.

Economic

- *Support research and development* – Support inter-institutional research and development across national borders to identify tools and services worldwide that yield the best return on investment.

Education

- *Develop an International certificate program* – Develop a common understanding of digital preservation concepts by developing an international certificate program in digital preservation.

- *Develop accredited curriculum, providers, and metrics* – Establish a means of benchmarking courses or their content and foster cooperation between international providers of education and training by using real-life courses to draft and refine metrics.

Education

- *Address supply and demand for qualified trainers* – Develop an adequate pool of qualified trainers capable of delivering high quality training both within and beyond the cultural memory sector.

- *Engage with employers and professionals bodies* – Rely upon employers and professional bodies to act as reviewers for current training offerings and associated learning objectives and either endorse these skills or identify gaps that used to be addressed.

Education

- *Improve cooperation in defining skills-sets* – Develop a coherent way to education and training options to facilitate effective comparison of offerings and to enable professional development planning.

Education – C Lynch

- After emphasizing the benefits of alignment, Cliff Lynch noted a number of additional opportunities within each alignment aspect, observed gaps in the discussion, and proposed two areas for the convergence of the alignment aspects.

- *Develop a multi-functional view on challenging issues (legal) – building on the successes of the New Renaissance as an example, bring together problem solvers from a broad international* pool.

Education

- *Build on strategies within nations* – (organizational) align efforts intra-nationally and consider benefits of lateral collaborations at local and regional levels between nations.

- *Leverage interdependence between organizations (*organizational) – evaluate choices about replications at all levels to inform challenging negotiations about interdependence as the community aligns.

Education

- *Link testing of software and implementation to economics (technical)* – the community can achieve economics of scale working cross-nationally on costly efforts like establishing operational benchmarks.

- *Avoid too much alignment (technical)* – multiple approaches are beneficial for technical development and the absence of diverse approaches can lead to a monoculture perspective that will be limited.

Education

- Accept a long learning curve (technical) – to avoid the damaging effects of hubris, accept that there is a long learning curve and that in a hundred years the community will really know about preserving over long periods of time.

- *Address the need for a commodity bit storage layer (technical)* – embrace the common near-term need for a well-managed bit layer as an opportunity for alignment and work together to evaluate options.

Education

- *Protect against vulnerabilities of collections as examples of digital cultural heritage (technical)* – develop defenses against attacks to the security and integrity of cultural heritage collections that would jeopardize content as well as confidence and trust in repositories.

- *Monitor external standards (standards)* – be aware of the numerous standards pertaining to digital content that are developed beyond the influence of the digital preservation community.

Education

- *Develop readiness for re-standardization (standards)* – prepare for interoperability that alignment might require and the need to adapt current thinking or organizational standards as practice evolves.

- *Distinguish between investing in digitization versus digital preservation (economics)* – understand in developing alignment collaborations that digitization is a short-term investment requiring long-term investment in digital preservation that is often not accounted for when content is selected to be digitized.

Education

- *Benefit from a collective understanding of cost models (economics)* – it will be easier to develop a sound understanding of cost models collectively than individually.

- *Accept instances where the sustainability strategy identifies long-term collections as public goods (economics)* – the public through its government sustains digital materials by using general public funds, and international alignment may present opportunities to acknowledge that.

Education

- *Prepare for disinvestment in cultural heritage (economics)* – related to public goods, work together on strategies to respond to massive disinvestment in cultural heritage globally due to economic challenges.

- *Balance costs of physical risk management strategies against opportunities of digitization (economics)* – understand the connection between the costs of risk management strategies for physical collections and the opportunities to digitize and then protect the digital as an economic trade-off by recognizing the value of digitized content as a special kind of insurance for physical collections.

Education

- *Conference curricula internationally, then supply nationally (education)* – many curricula and certifications are national, so translate international outcomes into national action.

- *Extend training to people outside the community, including the general public (education)* – address the growing needs of people who are preserving their own content as an opportunity to raise awareness more broadly through training and as a counterpoint to rapid commercial obsolescence.

Education

- *Develop holistic strategies for data-intensive scholarship (gap)* – recognize the pervasive impact of data to develop national strategies that embrace the full range of the cultural linkages in identifying candidates for common and shared infrastructure.

- *Devise strategies to address the analog legacy in audio-visual portions of the cultural record (gap*) – address the costs and challenges of preserving fragile and at risk audio-visual resources (eg. The need for specialized expertise, obsolete formats and media) that might benefit from cumulative effort.

Education

- *Extend strategies to new born digital formats (gap)* – address content that is less familiar and may not be publicly accessible (e.g., data in government and business sectors, social media content, database underlying Web content) to determine appropriate selection and accessioning approaches.

- Engage in outreach efforts to make the case in the public and to policy makers (convergence) – educate the public and policy makers to understand the importance of digital preservation for ensuring the consistent presence of our cultural, scholarly, intellectual and scientific record.

Education

- Focus attention on the archival scope reflects in collecting and stewardship policies (convergence) – enable effective decisions about selection and retention that encompass new and evolving content by evaluating institutional and national collecting and stewardship policies to consider shared collecting and preservation strategies.

Prioritisation Exercise

- Actions for prioritisation
  - Within own institutional context
  - Focus areas for alignment 1 -2 years

Group Discussions

- Strategies for sharing and collaboration
- What activities/areas mentioned in prioritisation
- What should be acted upon?

Day 2 Analysis

- Mapping of key findings from the groups

- Priority activities on 1 – 5 scale

Roadmap

- Plans for collective actions
- Institutional alignments and collaborations
- SADI potential role/focus