MS27: Strategic Requirements Check

MILESTONE

Project Acronym: Europeana Cloud

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Project Title: Europeana Cloud: Unlocking Europe's Research via The Cloud

MS27: Strategic Requirements Check

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Dissemination Level	Public

REVISION HISTORY AND STATEMENT OF ORIGINALITY

Revision History

Revision No.	Date	Author	Organisation	Description
0.5	2013-07-29	Maarten Zeinstra	Kennisland	Initial Draft shared for feedback
0.6	2013-07-30	Lisette Kalshoven	Kennisland	Review and Feedback
0.7	2013-07-30	Pavel Kats (Lead WP2)	Europeana Foundation	Review and Feedback
0.8	2013-07-31	Julia Fallon (Lead WP5)	Europeana Foundation	Review and Feedback
0.9	2013-08-01	Maarten Zeinstra	Kennisland	Final draft

Statement of originality:

This milestone contains original unpublished work except where clearly indicated otherwise.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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Introduction

Background

Europeana Cloud is a Best Practice Network funded by the European Union and coordinated by the Europeana Foundation. It is tasked with creating a new digital infrastructure for cultural content that will be used by Europeana and its aggregators. More information on Europeana Cloud and its division across responsibilities and work groups can be found in the [Description of Work](#) and on the project [website](#).

This Milestone

Work Package five (WP5) has been tasked with researching the Legal, Strategic and Economic Issues of Europeana Cloud and to create an agreement on the operating conditions of Europeana Cloud. This is reflected in WP5's first milestone of creating initial High Level Principles for Europeana Cloud (MS26, see annex 1). Work Package two (WP2) has been tasked with developing the Infrastructure for Europeana Cloud.

To complement the on going collaboration between WP2 and WP5 the High Level Principles will be matched continually against technical progress within WP2. This milestone reports on the technical progress of the implementation of the Europeana Cloud infrastructure from the perspective of cohesion with the High Level Principles, as well as their relation to other Europeana projects that require collaboration with Europeana Cloud (Europeana Awareness and Europeana Creative). This Milestone is subject to review and update in months 12, 18 and 30.

WP5: High Level Principles

Mission statement

Europeana Cloud serves Europe's cultural heritage institutions by delivering a more efficient solution to the current methods of storing, sharing and providing access to cultural heritage objects. It does so by providing an open source system that stores and enables services for accessing structured metadata and content. The intention is to re-use and share this material with users and participants. Europeana Cloud will be available under a sustainable business model and be governed by its users.

Principles

1. Europeana Cloud primarily serves Europe's cultural heritage institutions, enabling them to provide audiences with access to their digital objects
2. Europeana Cloud promotes openness
3. Europeana Cloud delivers a more efficient solution to the current methods of storing, sharing and providing access to digital cultural heritage objects
4. Europeana Cloud operates under a sustainable business model
5. Europeana Cloud provides the infrastructure to access metadata and content
6. Europeana Cloud is accessible through standardised data models
7. Europeana Cloud supports a legal framework to govern access and re-use
8. Europeana Cloud is a governed and led by the community

Annex 1 contains detailed description of each principle (MS26).

WP2: Technical Progress within Europeana Cloud

The Architectural Design

WP2 is delivering an Architectural Design (D2.2) in month 6. This outlines the possible technical scenarios of Europeana Cloud and presents research on the different effects of these choices. MS26 provides operational boundaries for this document. Issues like the use of open source software and open formats, methods for measuring more efficient storage of cultural heritage were discussed.

Management of collaboration

The Executive Board

The Cloud Executive Board, comprising of all WP leaders meet monthly to discuss progress, opportunities, issues and risks to and of the project.

WP Cooperation

A number of WP interdependencies were identified in the planning stages of Europeana Cloud in the delivery of certain Deliverables and Milestones. To facilitate these interdependencies, WP2 is explicitly invited to participate in the various activities of WP5. Furthermore, WP5 attends the regular bi-weekly WP2 meetings.

The consequences of which are that WP2 members contributed to the development of the High Level Principles (MS26). This practice established open and regular lines of communication in the working practices between the two Work Packages.

Other Europeana Projects

Europeana Cloud WP5 has been in close contact with other Europeana projects, which is reflected in their deliverables (Europeana Creative D3.1 and Europeana Awareness D5.2). These deliverable deals specifically with principles on an open infrastructure and an open Cloud (principles 2, 5, 6, and 7). The choices that are made in those deliverables will be reflected in future requirements of Europeana Cloud.

Europeana Creative D3.1

Europeana Creative D3.1 sets a standard for the reusability of Europeana Creative Content. Content that will have close ties to future work of Europeana Cloud. Related to High Level Principle 5 (access to metadata and content), Europeana Creative has identified specifications for implementing an access control mechanism by storage providers should be made in the project. Key partners of Europeana Creative and Europeana Cloud discussed these in workshops (see also the section 'future work') and results of those will be reflected in future work of WP2.

Europeana Awareness D5.2

Europeana Awareness D5.2 sets a roadmap for further development of the Europeana Licensing Framework as part of the Europeana Data Model (EDM). This work is important for High Level Principles 5 & 6 (standardized open access to the content in Europeana Cloud). EDM is the de facto data model standard for sharing large amounts of metadata about digital cultural objects. Further development on the Europeana Licensing Framework includes more flexibility in rights statements and additional 'conditional rights statements' to improve the sharing and access capabilities of Europeana Cloud.

Risks

The following Risks and Concerns are identified by WP5 that will be dealt with during upcoming workshops that are described in the section 'Future Work'.

1. Technical restriction that will make reaching Strategic Requirements impossible

Both the current architectural design of D2.2 and the High Level Principles are abstract documents. It is possible that real world situation arise where we need to deviate from certain already made choices to accommodate the current technological possibilities.

2. Partners unwilling to adopt the governance model of the commons principle

Europeana Cloud is designed for collaboration and sharing of cultural heritage collections (principles 1,2,3 and 8). It is possible that future possible partners are not as willing to share their collections in an open cloud infrastructure as we now foresee. This means that we will need to adopt a different governance model and therefore a different technical architecture that allows for that.

3. Unforeseen legal issues

Europeana has a lot of experience in building a Licensing Framework, a set of rules and guidelines to effectively share cultural heritage with compliance to local rules and regulations. These are currently solely based on the sharing of metadata (information about cultural objects) and not the digitised versions of these objects themselves. It is possible that a cloud environment imposes additional rules that Europeana and its partners have not foreseen. Principles 2,3 and 7 imply that cultural institutions are allowed to share their collections (objects and metadata) openly among each other. Different architectural decisions need to be made if this does not prove to be the case.

On going Checkpoints

In the near term, WP2 & WP5 will collaborate on the development of work researching and identifying the costs and potential savings of participation in Europeana Cloud. In addition D2.2 will be validated with key technological partners and members of WP5 in a workshop led by WP2, held in Month 10.

In the coming period WP5 will refine the strategic requirements for Europeana Cloud and will work together with WP2 to implement these in technical requirements and/or products. In order to do so Europeana Cloud WP5 has scheduled three workshops that brings together data partners of the projects with potential users and key partners that are active in WP2.These workshops (invitation in annex) are on:

- 18 September 2013 on social issues
- 3 October 2013 on legal issues
- 4 October 2013 on economic issues

WP2 has also scheduled a workshop to discuss how we are going to validate the D2.2 with the Europeana Cloud Principles. This will be held in October.

- October 2013, WP2 Workshop on validating D2.2 to the Europeana Cloud Principles

Members of Europeana Cloud WP5 will continue to liaise with members of relevant Work packages of Europeana Cloud and other Europeana project to ensure that requirements and deliverables of those project match up to the development of Europeana Cloud and to address the risks and concerns above mentioned.

Annex 1: MS26 – Europeana High Level Principles

MILESTONE

Project Acronym: Europeana Cloud

Grant Agreement number: 325091

Project Title: Europeana Cloud: Unlocking Europe's Research via The Cloud

MS26: Europeana Cloud High Level Principles

Revision	Version 1.0
Date of submission	August 13th 2013
Author(s)	Maarten Zeinstra Julia Fallon
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REVISION HISTORY AND STATEMENT OF ORIGINALITY

Revision History

Revision No.	Date	Author	Organisation	Description
1,0	August 13th 2013	Maarten Zeinstra	Kennisland	Formalising documentation

Statement of originality:

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Introduction

Background

Europeana Cloud is a Best Practice Network funded by the European Union and coordinated by the Europeana Foundation. It is tasked with creating a new digital infrastructure for cultural content that will be used by Europeana and its aggregators. More information on Europeana Cloud and its division across responsibilities and work groups can be found in the Description of Work and on the project website[1].

This Milestone

Work Package five (WP5) has been tasked with researching the legal, strategic and economic Issues of Europeana Cloud and to create an agreement on the operating conditions of Europeana Cloud. To give direction to these issues a set of high level requirements are created to shape the development of all areas of the Europeana Cloud project. Following an initial workshop that was held on March 5th in the Hague, and subsequent Skype meetings, a basic brief for High Level Principles and a mission statement are presented below.

Principles

Process

The principles are created using the outcomes of a workshop on March 5th in The Hague during the kickoff meeting of Europeana Cloud. This produced an initial set of broad principles of Europeana Cloud.

These initial broad principles were discussed per theme (legal, social, strategic, technical) through Skype meetings. After the Skype meetings the principles were further refined and published to the Europeana Cloud Network as a first draft. Several members of the network commented on this draft. This resulted in the accepted High Level Principles:

- Europeana Cloud primarily serves Europe's Cultural Heritage Institutions, enabling them to provide access to their digital objects to their audience;
- Europeana Cloud promotes openness;
- Europeana Cloud delivers a more efficient solution to the current methods of storing, sharing and providing access to digital cultural heritage objects;
- Europeana Cloud operates under a sustainable business model;
- Europeana Cloud provides the infrastructure to access to metadata and content;
- Europeana Cloud is accessible through standardized Data Models;
- Europeana Cloud supports a legal framework to govern access and reuse;

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[1] http://pro.europeana.eu/web/europeana-cloud

- Europeana Cloud is a governed and led by the community.

To easily communicate this, a mission statement was created that covers these principles.

Europeana Cloud primarily serves Europe's Cultural Heritage Institutions, enabling them to provide access to their digital objects to their audience

Driven by the needs of the cultural heritage industry, Europeana Cloud provides the services to enable the sharing of metadata and content for the purposes of providing access to digital objects. This delivers improved services to providers with low barriers to entry and exit.

Europeana Cloud promotes openness

Openness supports reuse and sharing of cultural heritage objects as well as providing an infrastructure with low barriers for expansion and further development. Europeana Cloud produces open source software, has a preference for open standards, open file formats and promotes open content. Closed standards and closed formats can only be viewed as long as there is software available that can read proprietary file formats proof difficult to access on future operatings systems/devices.

Europeana Cloud delivers a more efficient solution to the current methods of storing, sharing and providing access to digital cultural heritage objects

Europeana Cloud delivers efficiencies to cultural heritage providers along the lines of: a reduction of IT costs as compared to classic hosting technologies, avoiding IT infrastructure costs, enabling more time to focus on strategy and innovation, and the pooling of resources. Efficiencies are also be expected in terms of saving time, speed of delivery, better integration across the network to offer services with high availability, reliability, and security and better interoperability, easier management, and greater automation.

Europeana Cloud operates under a sustainable business model

To ensure the long term sustainability of the services provided by Europeana Cloud, Europeana Cloud will operate under a sustainable business model. A variety of options will be discussed in light of EU funding availability and the need to become self sustaining. This may allow for a reduction on the reliance of competitive funding rounds, and will encourage long term investment.

Europeana Cloud provides the infrastructure to access to metadata and content

Europeana Cloud delivers storage and services to provide secure, robust, technology neutral and sustainable access to metadata and content. These services include but are not limited to programmatic read/write access to Europeana Cloud, controlling the access to Europeana Cloud, connecting to other data services and systems and version control of data in Europeana Cloud.

Europeana Cloud is accessible through standardized Data Models

Europeana Cloud believes interoperability is crucial for cooperation and for the use of materials in its service. Europeana Cloud makes all metadata accessible using internationally recognised standard data models. Although standards are important for reuse and interoperability Europeana Cloud understands that source formatting is important. Europeana Cloud does not remove contributed source documents in favor of standardized models.

Europeana Cloud supports a legal framework to govern access and reuse

Europeana Cloud is linked to the Europeana Licensing Framework that enables the access to - and reuse of - metadata and content according to differing provider and user profiles. Each user and providers provides, makes available and reuses metadata and content in different ways with, and for, different purposes. The legal framework ensures that these requirements are met.

Europeana Cloud is a governed and led by the community

Europeana Cloud serves the needs of its community: the providers, members and users of the services provided, making use of and building on the Cultural Commons [principals](). The community is self-regulating and has responsibility for establishing the boundaries of the community as well as the services provided. These services includes raising awareness, offering and enabling access to resources and tools as well as ensuring Europeana Cloud is a trusted and secure resource and service for the community.

Mission Statement

"Europeana Cloud serves Europe's Cultural Heritage Institutions by delivering a more efficient solution to the current methods of storing, sharing and providing access to CH objects. It does so by providing an open source system that stores and enables services for accessing structured metadata and content with the intention of sharing and re-using this material to its users and participants. EuropeanaCloud will be available under a sustainable business model and governed by its users."

Next Steps

These requirements will be revised in the light of what is technically feasible and uses other requirements that come out of a series of workshops that obtains input from other Europeana Network members and large-scale networks such as Clarin and Dariah, that are deploying Cloud strategies. These initial outcomes will be continually matched against technical progress of WP2. Further documentation of this process will occur in month 6, 12, 18 and 30 of Europeana Cloud. MS27 is the earliest milestone document that further describe work on this.

Annex 2 – Invitation Europeana Cloud High Level Principles workshop series

Europeana Cloud High Level Principles workshop series September/October 2013

You are kindly invited to the Europeana Cloud High Level Principles workshop series, organised by the Europeana Foundation and Kennisland. The first of the workshops will be in Amsterdam on September 18th, hosted by the Rijksmuseum. The second and third workshops will be on October 3rd and 4th in Edinburgh, hosted by the University of Edinburgh.

Europeana Cloud will provide new content, new metadata, a new linked storage system, new tools and services for researchers and a new platform. Content providers and aggregators across the European information landscape urgently need a cheaper, more sustainable infrastructure that is capable of storing both metadata and content. Researchers require a digital space where they can undertake innovative exploration and analysis of Europe's digitised content.

The workshops are part of the developmental phase of the Europeana Cloud project. Following an initial workshop that was held on March 5th in the Hague, and subsequent Skype meetings, a basic brief for High Level Principles is presented. This set of principles shapes the development of all areas of Europeana Cloud. The Principles will be revised in the light of the input of these workshops and matched against the technical progress of WP2.

To this end, these workshops will discuss the implications of the Principles for the Europeana Cloud service. In order to have a focused discussion we have split up the Principles in three main categories: social, legal and economic - the technical issues will be dealt with in the project by WP2. For each workshop the invitees will be asked to complete a short survey to provide their perspectives and requirements - the results of these will help shape the discussions in the workshops.

The desired outcome of the workshop is to deliver a list of clearly defined issues relevant to the Principles, deliver a number of suggested solutions to the issues and to prioritise the issues within the scope of Europeana Cloud.

The workshops will be attended by partners of the Europeana Cloud project, along with selected experts and stakeholders specific to each workshop theme (technical, legal, economic, social). We would advise that one person per project partner should attend.

Please let us know by the 26th of July if you are able to attend by filling out this form: http://goo.gl/K10Mx If there are any questions please email Lisette Kalshoven (lk@kl.nl).

We would be honoured to welcome you during the High Level Principles workshop series.

With kind regards,

Julia Fallon, Maarten Zeinstra, Lisette Kalshoven

Programme

Workshop 1: Focus on Social Principles

Wednesday 18th September (Amsterdam)
09:00   Arrival, Registration
09:45   Welcome
10:00   Tour of the Rijksmuseum
11:00 - 16:00   Workshop

Workshop 2: Focus on Legal Principles

Thursday, 3rd October (Edinburgh)
10:00   Arrival, Registration
10:30 - 17:00   Workshop Programme
19:00   Workshop Diner
21:00   Social Programme

Workshop 3: Focus on Economic Principles

Friday, 4th October (Edinburgh)
9:00   Arrival, Registration
9:30 - 16:00   Workshop Programme
16:00   End of workshop

Lunch is being offered on all days. Coffee, tea, water and fruit are available throughout the workshops.

Practical Information

More detailed information will be sent out to the participants of the workshops closer to the date.

Amsterdam, September 18.
Het Bureau
Hobbemastraat 20
1071 XZ Amsterdam

Edinburgh, October 3 and 4.
University Library,
University of Edinburgh
George Square,
Edinburgh.