Collaboration to Clarify the Cost of Curation

4C Focus Group on CCEx

15th January 2015 in London, UK

Report

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Dissemination Level		
PU	Public	✓
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	

Version History

Version	Date	Changed pages / reason	Modified by
0.01	Jan 15 2015	First draft	KH
0.02	Jan 19 2015	Edited	KH
1.0	Jan 21 2015	Finalised	KH

Attendees 4C:

- Luis Faria, KEEPS

- Neil Grindley, Jisc

- Katarina Haage, DNB

- Hervé L'Hours, UK Data Archive

- Paul Stokes, Jisc

External Participants:

- Matthew Addis, Arkivum
- Robert Bley, ExLibris
- John Kaye, Jisc
- Natasa Milic-Frayling, Microsoft Research
- Mike Quinn, Preservica

Meeting Details:

Date: 15th January 2015

Time: 01:00 - 04:00 pm

Location: Jisc, Brettenham House, 5 Lancaster Place, London, WC2E 7EN

Main objectives:

- To find out what users think of CCEx

- To identify what users want / expect from the tool

- To find out what the common problems are when using it

- To collect recommendations for improvement

- To find out if there are concerns about sharing cost data and if so, why. What could be done to mitigate these concerns?

Agenda:

- 13:00 Lunch

- 13:30 Welcome

- 13:40 Introduction to CCEx

- 14:00 Time for individual familiarisation with the tool

- 14:30 Focus group discussion on CCEx based on prepared questions

- 15:15 Coffee break

- 15:30 Continued group discussion on the CCEx

- 16:00 END

Questions for CCEx discussion:

- What are your genuine thoughts on the CCEx tool?

- Do you find it easy and intuitive to use?

- What do you like best/least about it?

- What are the barriers in using it?

- Are there redundant features?

- Is the language understandable or is there too much jargon?

- Would your organisation submit cost data? Who in your organisation would be responsible for submitting the data?

- What kind of support are you currently using for costing digital curation?

The objectives and questions should be ideally considered from a vendor's and digital preservation solution provider's perspective and also, if possible, mirror their users' view and requirements.

Minutes

Note: Because the presentation slides are available on the [4C website](), this report focuses on the discussion during the meeting.

After a welcome by project coordinator Neil Grindley (NG) and a brief introduction round, NG gave an overview to the 4C project and the project results to date were presented. Following this Luis Faria (LF) gave a live introduction to the Curation Costs Exchange (CCEx) website, focusing on the Cost Comparison Tool (CCT): http://www.curationexchange.org/

The participants have browsed the website beforehand the meeting and had the chance to ask questions they had already formulated. After this initial Q&A session the participants went into one-on-on sessions to discuss the website and the tool based on the first use experience. Since the participants had prepared the questions (see above) the following discussion was lively and started in medias res.

The following highlight remarks re CCEx and CCT were made and discussed in plenary discussion round:

The overall impression of the website is positive; it is well designed, looks good and is easy to use; it is also easy to create a profile, and to add cost data sets and costs. Also the Open Source aspect and integration into working practices evokes interest. There was some criticism concerning the lack of knowledge what happens when the submission of costs was completed (missing explanation) and also the question of what the comparison factors are. There is a need of more cost data sets to be

able to compare costs, however, the comparison of costs vs. value seems rather difficult in the first place since defining value is complicated because it is too multi-faceted for and in each organisation; quick innovation makes it even more difficult to define value and benefits. Nevertheless, the demand for a tool like the CCT is existent and "The CCEx has an important role in connecting the community" (says Natasa from Microsoft Research). At the moment the main objectives of the CCEx/ the submission of cost data are to share it with other (peer or non-peer) organisations to start an information exchange on costs in curation. It was mentioned that vendors may be prepared to add "standard" off the shelf costs (Matthew from Arkivum opened up his 3 sets in the meeting). They would feel much more comfortable if those sets had some form of quality metric attached (Mike from Preservica suggested digital preservation capability maturity model might form a framework for quality).

Wish list:

- value added features
- put more data sets online and for this purpose communicate the benefits to the stakeholders
- Extension of the platform and add a function to make it a planning tool
- Import/export of the data submitted (possible future feature?)
- Mirror the numbers that have been submitted in the end results
- Have a maturity slider?
- Add a pop-up window after "save and close" the cost data sets to tell the user his/her State of the Art ("Your costs are average/high/low etc.")

Future possibilities for the CCEx:

- Integration in Data Management Plans
- Separation of costs is getting increasingly difficult as services become more integrated
- Connect vendors and academics through the CCEx to support the discussion (and challenge) about funding universities and other public research institutions
- CCEx as a "market place"; it could be the catalyst for a community to show there is a market
- Get the research councils / funders to either use it as a (closed?) cost tracking tool?
- It could be the catalyst for a community to show there is a market; a vote/up vote down aspect could make it essentially self-regulating with little moderation needed

Conclusions from participants:

- a certain maturity is necessary to use it as a market/comparison tool
- concentrate on memory institutions since no commercial organisation/customer will most likely ever share their costs
- Total cost of ownership (TCO) is highly important and should be mirrored in the tool
- Communicate clearly the value and benefit of using the tool is necessary
- To support the dialogue and exchange it is a good tool for the community, however, value and benefits must be added as factors

Towards the end of the meeting other 4C outputs such as the DCSM (former ESRM) and the Roadmap in general and the messages and actions for vendors/solution providers in particular were presented to the participants and gained much interest. Reactions to the Roadmap were to shrink the aims by 2 or 3 years and to look outwards; also take into account accreditation and benchmarks

(what is good and/or bad accreditation). Vendors believe it will be problem solved in 3 years (they will be out of business as digital preservation will be integrated and therefore be more "business as usual" and there will no longer be a need for a specialist preservation unit.

Conclusions from 4C:

- The Preservica view (in particular) supports the general view that 'benefits' are more important than costs. We need to design a 'benefits comparison tool' to complement the CCT. (There's 4C mark2 (the Horizon 2020 sequel) just designed)

- There is potentially scope to provide private instances of the CCT for more localised comparisons

- We can and should generate costs data with publicly available pricing information from vendors (we would need to look carefully at this and work out how plausible the data ends up being. The endgame might be to compel vendors to engage with us because they would want to be accurately represented in the CCEx!)

In terms of further engagement activities the participants and project members agreed on future information exchange re the CCEx, CCT and the Roadmap.