Jisc RDM Shared Service
Development Process and Procurement
» Project Stages
» Process Overview
» HEI engagement
» Procurement process and lots
» Timeline and Next Steps
Shared Service Proposed Stages

» **1st Stage:** Jisc procured and developed beta service with framework of suppliers and pilot HEI’s

» **2nd Stage:** Jisc delivered RDM Service (agreed via business case)

» **3rd Stage: tbc** - Jisc offer modules and/or national agreements to fill architecture gaps in existing systems

• Jisc require feedback from the community and welcome feedback on published concepts.

• To take these concepts forward volunteer pilot institutions to work up detailed requirements and develop/test the service in partnership will be needed.
Pilot HEI Engagement

» 6-8 HEI’s needed to partner with to develop, pilot and test the service

» Already have informal expressions of interest, formal selection process announced

» Looking for a range of institutions based on:
  - size, type of institution
  - types of data
  - degree of RDM readiness
  - current institutional systems

» Deadline for formal EOI’s 7th December, pilot HEI’s selected w/c 21st December

» More information available on Jisc Blog
Procurement

» DRAFT Lots
  1. Repository
  2. User interface
  3. Metadata exchange and integration
  4. Data exchange and integration
  5. Research data preservation
  6. Reporting
    - Looking to create a framework with up to three suppliers per lot

» Existing Frameworks and Agreements
  - Data Archiving Framework
  - Cloud Storage
  - Shared Data Centre
  - Jisc Futures Framework (Developer Services, RDM and Technical Architecture Consultancy)

» Tender to go out late November/Early December 2015
Jisc is looking for suppliers who can deliver a range of components of a research data service solution which are described in brief in the 6 draft Lots.

We would welcome bids from commercial providers, academic institutions, community groups or any other organisation with relevant skills and experience. Collaborative bids are also encouraged.

Jisc is open to bespoke solutions, an existing open source / commercial solution or an integrated solution.

Jisc envisages that the service will utilise and benefit from using open standards, in order to allow and encourage interoperability above that available in many existing products.

This part of the tender can include enhancements to existing products as well as the development of new tools where existing products do not exist.
Lot 1. Repository

- A product that can record all research data ingested by institutions.
- The research data repository will take metadata from the ingest process and internal (institutional) and external research systems.
- The repository will be searchable and make metadata available for published objects.
- The repository will store discovery, administrative and preservation metadata and provide metadata to other systems using open standards.
- Repository data storage will be provided by Jisc’s current agreements for cloud, local and archival storage or institutional storage.
Lot 2. User Interface

» Development of a front end to the research data repository from Lot 1
» based on specification that will be defined by Jisc from a requirements gathering activity with pilot HEI’s.

» This UI will include functions for:
  – access and authentication
  – data ingest form based on the metadata schema(s) supported by the repository
  – publication pages
  – a discovery (search) function
  – user workspace areas
  – institutional administration area.
Lot 3. Metadata Exchange Interface

To provide a solution using open standards to take metadata from a range of research systems and integrate the data into the Research Data Repository.
- institutional research information systems
- Institutional administration systems
- Data management planning tools
- Scholarly communication systems
- Funder systems

The interface will also provide metadata from the Research Data Repository to institutional and external systems such as CRIS systems, institutional HR and Finance systems and researchers’ data management plans, scholarly communications systems and the UK Research Data Discovery Service.
Lot 4. Data Exchange Interface

» Provide a solution using open standards and transfer protocols that allows for ingest and export of research data outside of any web interface.

» These cases could include:
  » large file sizes,
  » large volumes of files,
  » transferring files to offline archives,
  » automated ingest and transfer between systems,
  » sensitive data that needs to use a specific transfer route into a specific data store.

» The Data Exchange Interface will enable additional ingest routes into the Repository, archive and other storage.

» The Data Exchange interface will also allow bulk extraction of research data for purposes of migration, backup and archive.
Lot 5. Research Data Preservation

» Funder policy expectations are for datasets to remain accessible and useable for ten years after date of last access.

» Jisc anticipates that this lot will provide a suite of tools that enable archived objects to be usable over time-frame and beyond.

» This lot will specify preservation metadata requirements for lot 1 - research data repository, and draw on metadata from lot 1 to perform preservation actions specified by preservation plans and policies and record those actions.

» Jisc expects this lot to perform:
  » File format identification, integrity checks
  » Transform files into newer, usable versions where appropriate and necessary
  » Investigate emulation as preservation use cases
  » Recording of preservation metadata and actions

» Requirements for the types of data that needs to be preserved will come from the pilot institutions. Jisc anticipates that there will be research and development work needed around the large number of file types that will be needed to preserve.
Lot 6. Research Data Reporting

» This lot will use system data and available metadata provide a solution using open standards to generate reports on an institution’s research data, preferably using a dashboard approach.

» This lot will enable research managers to view the size, volume, usage, policy compliance and cost of research data activities.

» This lot will also provide data to automate reporting data to funding bodies.
Procurement Lots

RDM Shared Service: data and metadata transfers between lots and systems

Lot 1: Research Data Repository
- Data Input
- Metadata Input
- Discovery
- Publication

Lot 2: User Interface

Lot 3: Metadata Exchange Interface

Lot 4: Data Exchange Interface
- Automated migration, large and offline data not suitable for Web UI

Lot 5: Research Data Preservation

Lot 6: Reporting

Internal Institutional Systems (CRIS, IR etc.)
External Systems (Metrics, ID’s, Funders, Scholarly Comms etc.)

Storage and Archiving
- Data Archiving Framework
- Cloud Storage
- Local (Infinity) Storage

Processes

Data
## DRAFT procurement timetable

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>Notice of procurement in the EU journal</td>
<td>25th November 2015</td>
</tr>
<tr>
<td>Final date for clarifications</td>
<td>8th January 2016</td>
</tr>
<tr>
<td>Close of registration to take part in the shortlisting</td>
<td>13th January 2016</td>
</tr>
<tr>
<td>Prequalification questionnaire returns by</td>
<td>12:00 noon, 12th January 2016</td>
</tr>
<tr>
<td>Complete review of responses and shortlist bidders to enter the procurement process</td>
<td>29th January 2016</td>
</tr>
<tr>
<td>Produce and issue the Operational Requirement and draft contract</td>
<td>5th February 2016</td>
</tr>
<tr>
<td>Return of Operational Requirement responses</td>
<td>1st March 2016</td>
</tr>
<tr>
<td>Selection of preferred supplier</td>
<td>29th March 2016</td>
</tr>
<tr>
<td>Standstill completes</td>
<td>Midnight, 8th April 2016</td>
</tr>
<tr>
<td>Contract placed with preferred supplier</td>
<td>29th April 2016</td>
</tr>
</tbody>
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Summary

Milestones 2015

April-August
- Gather information and requirements
- Develop concepts and architecture

September
- Initial engagement with pilot HEI's
- Develop procurement approach

October
- Firm up requirements, approach, design and procurement

November
- Consult and finalise on requirements and begin procurement process

December
- Selection of pilot HEI's
- Expert Advisory Group review requirements

- First Expert Advisory Group Meeting, Selection of Pilot HEIs
Summary

Milestones 2016/17

January 2016
- Work begins on detailed requirements and technical architecture

February 2016 – April 2016
- Development phase

May 2016 - July 2017
- Development Phase
- Contact additional early adopter HEI’s and promote Beta Service

August 2017 - September 2017
- Business planning and Begin Business Case
- Market Research and Consultation

October 2017 - December 2017
- Promote service to institutions
- Start on next phases (service enhancement/modular)
We want your feedback...

Thank you!

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