

Guide

to compose tendering specifications
for the outsourced migration of audiovisual content

Introduction

Preservation and Migration Commission

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Comments to this publication

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This guide

1. What is this guide?

This document is a guide issued by the International Federation of Television Archives FIAT/IFTA to provide help for anyone considering writing a tender for the outsourced migration of content from physical audiovisual carriers.

Why do we use the term migration?

Sometimes audiovisual carriers already hold information in the form of a digital signal. It is also possible for such information to exist as a file on that carrier. Many audiovisual archives aim to store their information on a file storage system which is more common or easier to manage on a large scale. In these cases, the term *digitisation* – which is often used as an umbrella term to describe such projects - is not an accurate description. Therefore, for the purposes of this document we have chosen a more encompassing term. Within this document, the term migration describes the conversion (from analogue to digital information, if applicable), the transformation of non-file based digital information into a file (if applicable) as well as the transfer of that file onto a common system for large quantities of files.

2. Who is this guide for?

Essentially, this guide is meant for every person or organisation planning to carry out a migration project and involve a third party (usually a commercial company) to execute the actual migration work and possible other tasks surrounding it, such as transport, reporting, quality control etc. More specifically this guide focuses

on the migration of audiovisual content such as sound, video or even motion picture film works.

This guide targets an audience of archivists, librarians, museum curators and other professionals managing heritage collections - and especially those responsible for the preservation of audiovisual collections. As these collections are often preserved by government institutions legally bound to national or international agreed tendering procedures, this guide often refers to such procedures. However, this doesn't make this guide less relevant for private organisations or commercial companies who are not bound by such regulations, who can also be inspired by the listing of aspects that we feel a call for tenders should contain.

This guide starts from the premise that the migration is done by a third party, in principle at a location external to where the carriers are preserved and with equipment not owned by the organisation which owns or manages the carriers. It thus aims at organisations who do not have the capabilities internally to execute such a task, or who do not have the means to do it as efficiently and effectively as an external partner could achieve. The tendering specifications will cover the goals, the conditions and to some extent the methods of the operation. As good agreements make good friends, such a tender is a key document in every project involving an external partner.

3. Who wrote this guide?

This guide was written by the Preservation and Migration Commission (PMC) of the International Federation of Television Archives (FIAT/IFTA). It is in the mission of the PMC to assist members and non-members in their audiovisual preservation task and to spread best practices in this field. The PMC has therefore

taken the initiative to write, publish, spread and promote this document.

The PMC consists of a group of around ten experts in the domain of audiovisual preservation, working for audiovisual archives or private companies active in the field. A tendering process involves external (and almost always profit-driven) service provision companies and often considerable budgets, it is therefore important to stress that all PMC members were committed to collaborate in this project from a neutral and unbiased perspective.

The PMC also involved representatives of a few large and well-known migration service providers to review and advise on the content of this publication, as we believed it could make the guide stronger and more widely acknowledged. However, it was the PMC who autonomously decided on whether to accept or decline these suggestions. By seeking input from a multitude of migration service providers, we believe that advice not broadly shared was avoided.

4. Why have we written this guide?

It is widely accepted that a well-executed content migration process is fundamental to address deterioration of audio and video carriers and the obsolescence of their playback technologies. Although some organisations have come a long way in the migration of the content from their carriers, huge quantities of extremely valuable audiovisual heritage still await migration. Through both formal and informal requests, FIAT/IFTA, and the PMC members regularly receive questions around how a good migration project should be set up, and which aspects should be covered in a specification statement. FIAT/IFTA members have expressed their desire for FIAT/IFTA to act as a guiding body, with

the aim of incorporating initiatives of direct and practical use to their daily activities. This guide is one of FIAT/IFTA's answers to that wish.

The aim of the PMC was to create a guide that lists the key elements which should be specified and agreed upon with an external service provider before the start of the project, in order to achieve a migration process which aligns with international preservation standards as well as with the scope, timing and budget of the tendering organisation. The ideal approach to make such agreements in an official and contractually binding way is via the listing of a specification statement. This statement is usually included in a call for tender.

Writing such a specification can be an arduous and highly specialised, albeit very important task. The tendering organisation might lack technical, legal or project management expertise, while the principles of preservation require a conscious, ethical, efficient and effective migration process. Concerted effort has been put into keeping this document understandable, not only for those conversant with technological processes but also for colleagues with less technical background or understanding. References to more specific, technical sources are however regularly mentioned for readers who would appreciate such detail.

A well-structured, comprehensive tender has several advantages, not only for the tendering organisation, but also for prospective candidate service providers. First and foremost, comprehensive information about the tendering organisation, the project, the audiovisual carriers subject to content migration etc. provides the candidate service providers with an insight into the organisation and helps them estimate costs for the proposed work. Good estimates are important; they can reduce the risk of something not going according to plan and typically lead to lower overall

costs. In summary, a well-structured, comprehensive tender increases the prospect of a successful project in terms of scope, timing and budget. In this regard, we also hope that this document may have a positive consequential effect on the approaches taken by migration service providers, thus leading to a degree of homogenisation - both in the structuring of tenders and specifications as well as encouraging clear indication of any significant deviations. Overall it is hoped that exercising good principles and practice will help shape a framework for clearer and better responses in service offers and thus encourage continued professionalisation within the field.

5. How can this guide be used?

This document intends to help a tendering organisation carefully think through and draft a tender for the outsourced migration of audiovisual carriers. We explain why each aspect should be covered in the tendering documents, what this aspect encompasses and why the candidates could use this information. If possible, we also refer to formal standards and accepted best practices. It was not the aim of the PMC to write a document on how the preservation (or more narrowly the migration) of audiovisual content should be precisely executed. For this purpose, references are made to well-established documents in this field, such as IASA TC04 [1] and the more recent IASA TC06 [2].

The reader should use these documents as a step-by-step guide to write their tender. As every project is different, it is not necessary to copy every step completely. The tenderer is free to add any other aspect fitting with their needs. We do believe that following this guide will result in a comprehensive specifications statement for projects that follow a regular, typical migration process path.

6. What does this guide consist of?

This guide is split up into several documents:

- This first document serves as a general introduction and features a selective list of relevant publications in this domain.
- The second document is the **Overview Document** and provides detail on the tendering procedure itself. Although legal constraints differ from country to country, there are some elements independent of these constraints which should not be overlooked.
- The third document is the **Background Document**, the core document which describes the organisational and technical aspects of the migration project itself.

It is important to note that although several possible appendices are suggested in the Background Document, a ‘template’ is deliberately not included. This is because such templates tend to be very dependent on specific aspects which inevitably vary largely from one project to another. Possible appendices include samples of metadata schemas and XML’s, a photo book, a so-called RACI matrix, etc.

7. What is this guide based on?

This work is not unique in its scope, nor in its form. Other organisations have issued similar publications. However, the PMC has felt the need to bring the strengths of such documents together into one guide. Furthermore, the field of audiovisual preservation and content migration is in constant transformation. An aim of this document, therefore, is to provide an update on older documents.

The PMC gratefully acknowledges the merits of its precursors. These sources of inspiration are mentioned in the bibliography at the end of this document.

8. How to contribute?

This guide includes the PMC's best attempt to find the most recent, trusted information available, but 'recent information' soon becomes dated. The PMC welcomes comments, additions, updates and remarks via office@fiatifta.org and/or pmc@fiatifta.org. The PMC plans to publish updates of this document when necessary and feasible.

9. Disclaimer

The authors have of course put their utmost effort into the drafting of this guide. However, the tenderer following this guide remains responsible for the consequences of his or her own tender. Especially - but not exclusively - for legal provisions we advise to take out sound legal advice. Neither FIAT/IFTA as an organisation nor the authors individually or collectively can be held liable in any way for any disadvantage that any party may encounter by making use of this guide.

Bibliography

[1] IASA Technical Committee, Guidelines on the Production and Preservation of Digital Audio Objects, ed. by Kevin Bradley. Second edition 2009. (= Standards, Recommended Practices and Strategies, IASA-TC 04).

<https://www.iasa-web.org/tc04/audio-preservation>

[2] IASA Technical Committee, Guidelines for the Preservation of Video Recordings, ed. by Carl Fleischhauer and Kevin Bradley. Edition I, version for comment 2018. (= Standards, Recommended Practices and Strategies, IASA-TC 06).

<https://www.iasa-web.org/tc06/guidelines-preservation-video-recordings>

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