Software Preservation Network: Implementation Pathways

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Jessica Meyerson - UT Austin
<j.meyerson@austin.utexas.edu>
Zach Vowell - Cal Poly University
<zvowell@calpoly.edu>
Origin and Scope

- SAA 2014 presentation
- Archival discourse dates back to early 1980s
- IMLS application, summer 2015

<table>
<thead>
<tr>
<th>IN SCOPE</th>
<th>OUT OF SCOPE</th>
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<tbody>
<tr>
<td>Proprietary</td>
<td>Research software</td>
</tr>
<tr>
<td>Executable</td>
<td>Source code</td>
</tr>
<tr>
<td>Microcomputing</td>
<td>Games</td>
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Research - SPN Study (Methods)

- Lack of empirical evidence demonstrating the need for software preservation
- CalPoly IRB Approved

METHODS

Survey - 23 questions including informed consent; no required questions; “Other” option provided for every question

Semi-structured interviews

RECRUITMENT

Listservs relevant to museums, libraries, archives, curation, digital preservation, preservation administration

Social media
Research - SPN Study (Prelim Findings)

- Type of Organization:
  - 22% Other
  - 19% University Library

- Position:
  - 43% Archivist
  - 15% Information Technologist
Research - SPN Study (Prelim Findings)

- **Role:**
  - 52% Permanent, Full time (with supervisory responsibilities)
- **Avg. yrs experience working with digital materials**
  - 46% More than 10yrs
- **Level of preparedness to work with legacy software**
  - 30% “well prepared”
Research - SPN Study (Prelim Findings)

- 32% IMPORTANT to collect legacy software
- Challenges for V/EaaS deployment
  - 35% “Other”
  - 27% “Staff resources”
- Challenging content types:
  - 19% Other
Research - Legal

- Berkman Center for Internet and Society (Harvard Law Clinic)
- Experience in both software licensing and digital preservation
- SPN defines the problem space - BC researches the case law
Research - Legal

- Copyright
- DMCA anti-circumvention
- Existing software agreements (think EULA)
- Trademark dilution
- Patent issues
- Computer Fraud and Abuse Act (CFAA)
Research - Legal

Key Questions:
- Is Fair Use enough?
- Ideal licensing framework for cultural heritage
- Outside of copyright: EULAs
- SPN’s matchmaking role
Stakeholders

- University of Freiburg (bwFLA)
- Yale University
- Rhizome.org

- Stanford Internet Archive
- NSRL
- Computer History Museum

- SSI
- CAD/BIM Task Force
- UNESCO-PERSIST
- Rosenthal

- Emulation
- Collection
- Broader Initiatives
SPN Core Components

Legal Framework

Collection

Technical Infrastructure
Access Preservation
Potential Implementation Pathways

- Where does the “stuff” live?
- How do end users access the material?
- Who/Where is the organizational home?
- How is the “stuff” preserved?
- Who is responsible for rights management?
- How do people discover the “stuff”?
- What do partners contribute?
- What is the explicit role of SPN?
# Potential Implementation Pathways

<table>
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<tr>
<th></th>
<th>STEWARD</th>
<th>MATCHMAKER</th>
<th>BROKER</th>
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</thead>
<tbody>
<tr>
<td>Where is the software stored?</td>
<td>MetaArchive Private LOCKSS Network (PLN)</td>
<td>Project partner institutions</td>
<td>HathiTrust</td>
</tr>
<tr>
<td>How/What do partners contribute?</td>
<td>Support for an Educopia Program Manager; software; descriptive and technical metadata; rights metadata for centralized rights management</td>
<td>Support for Educopia Program Manager; descriptive and technical metadata; rights metadata for centralized rights management</td>
<td>Support for either a HathiTrust Program Manager or a Program Manager hired by an alternative organizational home; software; descriptive and technical metadata; rights metadata for centralized rights management</td>
</tr>
<tr>
<td>How do end users access?</td>
<td>Project partner institutions</td>
<td>Project partner institutions</td>
<td>Software “access cache” through project partner institutions via SPN’s HSaaS API</td>
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Request for Feedback

- Initial thoughts & concerns
- Is there any missing from this model - what questions are unanswered here?
- Any thoughts on current scope - ways that the same model or pathways might be expanded to address the needs of research software?
- Where does the university library or university IT sit in relationship to legal counsel? Is there a fair use advocate at your institution?
- Is your institution involved in consortial relationships that cover some aspect of each of these components (ex. Hathi Trust and rights management, etc.)?
- How to make the business case? What aspects of this model speak directly or indirectly to current administrative initiatives?
- What additional evidence or proof-of-concept would you need to see before you provided executive sponsorship for participation in SPN?