



**White Rose**  
university consortium  
Universities of Leeds, Sheffield & York

## **Repositories Review**

### **Background**

1. The University Libraries of Leeds, Sheffield and York collaborate on a number of initiatives. We have a strong and effective partnership, sharing the strategic and operational development of collaborative services. The joint open access repository, White Rose Research Online (WRRO<sup>i</sup>), uses EPrints<sup>ii</sup> software and was originally developed under the JISC-funded SHERPA Project. It is currently being taken forward as a fully supported service by the three institutions and holds research outputs – predominantly journal and conference papers, book chapters and working papers – from all partners. We have also developed an electronic thesis service, White Rose Etheses Online (WREO<sup>iii</sup>) and are collaborating on establishing institutional processes to support e-theses deposit, with all three partners working toward institutional-level policies on open archiving.
2. The White Rose Library Directors wish to commission an independent evaluation of the WRRO repository, the WREO repository and their relationship with the three partners' digital library and digital asset management infrastructures. In broad terms the review will establish a roadmap for the repositories with a five year planning horizon.
3. WRRO has proved to be a robust and successful service since its inception and currently provides a shared repository solution for the White Rose partners. It is now timely to review the technical infrastructure in relation to the changing needs of said partners. In particular, external drivers including the emergence of research data management storage needs and developing research council models and policies mean that the repositories could fulfill a broader role in the future. Internal drivers within partner libraries are also salient including the development of LUDOS and YODL, digital libraries at Leeds and York respectively; the connection of Research Information Systems (RIS) to WRRO; e-theses mandates at each institution; and each of the libraries adopting a resource discovery tool which will allow repositories content to be surfaced easily.
4. The review should be mindful of national and international developments in this area, and in particular be familiar with the work commissioned on behalf of the JISC and the UK Research Councils to develop a robust repository infrastructure for the future in order to support the new Research Outcomes System.

## Review Objectives

5. This review should consider and comment on:
  - 5.1. How successful are the WRRO and WREO repositories in delivering on their value proposition in the current consortia/shared model?
  - 5.2. Is the current model of hosting and service delivery at Leeds optimal and sustainable? For example, could the infrastructure and/or service delivery be shared between partners?
  - 5.3. Is the present technical infrastructure (both hardware and software) fit for purpose and comment on the potential of cloud-based storage.
  - 5.4. Is there potential, using the current ePrints software, for improving interoperability with:
    - corporate systems in place at partner universities (VRE's, staff databases, research publications systems, resource discovery layers)
    - external organizations e.g. Research Councils, British Library
    - other repositories, either institutionally based or discipline led?
  - 5.5. Are there any other more durable, sustainable and/or flexible software, hardware, interoperability options that could provide alternatives to the existing infrastructure? In short, what is the optimal direction of travel for repository development within the current national and international context?
  - 5.6. What potential do the WRRO and WREO and 'digital library' repositories have for the storage and effective retrieval of research data management outputs across the full spectrum of academic disciplines within the three contributing universities?
  - 5.7. What potential do the WRRO and WREO and 'digital library' repositories have for supporting long-term preservation of digital content?

## Review Deliverables

6. The review should deliver the following outputs:
  - 6.1. an evaluation of the current service model,
  - 6.2. an evaluation of the WRRO and WREO repositories (including all aspects of infrastructure) and their relationship with 'digital libraries' and other services including any recommendations for change,
  - 6.3. a roadmap with a five year horizon detailing the recommended development of the repositories,
7. The appointed consultant will be expected to deliver draft findings in advance of a final report and to attend a meeting of the White Rose Directors group to discuss the review findings.
8. The review deliverables should be completed by 30/6/12.

## Response requirements

9. To facilitate the appointment of an external and neutral consultant, quotations will be sought from three interested bidders.
10. Expressions of interest will be sought by means of an invitation circulated on appropriate discussion lists.
11. Interested bidders should submit a response of no more than 2 sides of A4 outlining
  - 11.1. details of previous relevant experience (ability to demonstrate knowledge of the UK and international repository landscapes, track record of successful projects, referees,
  - 11.2. the proposed approach to the review,
  - 11.3. a quotation including daily rate and number of days.
12. Responses should be sent to Bo Middleton, m.m.middleton@leeds.ac.uk by 29/2/12.

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i <http://eprints.whiterose.ac.uk/>  
ii <http://www.eprints.org/>  
iii <http://etheses.whiterose.ac.uk/>