



Invitation to Tender

from

DLM Forum

MoReq 2 Work Programme 2010

Table of Contents

1	Invitation to Tender	2
2	Background	2
3	MoReq Roadmap.....	3
4	Work Programme Objectives	3
5	Project Approach Guidelines.....	4
6	Project Enquiries & Information	5
7	Submission Date & Contract Value.....	6

Invitation to tender – MoReq2 Work Programme 2010

1 Invitation to Tender

The DLM Forum invites submissions from consultants and other applicants who are interested in undertaking the MoReq2 Work Programme.

1.1 Award Criteria

The contract will be awarded to the applicant that is best able to:

1. Demonstrate the necessary expertise and experience in the following areas:
 - a. specification of requirements for software products,
 - b. the field of electronic records management,
 - c. the MoReq2 specification, and
 - d. the MoReq roadmap.
2. Show that the work programme can be completed and delivered within the stated timeframe.
3. Develop an inclusive community-based consultative approach to updating the MoReq2 specification.
4. Provide evidence of an approach to the restructuring the specification that demonstrates MoReq will be easier to maintain in the future.
5. Complete the work in no more than eight months from the inception of the project

1.2 Evaluation Criteria

The criteria listed above in Section 1.1 will be used by the DLM Forum Executive Committee to evaluate the tender responses.

1.3 No Suitable Submission

The DLM Forum Executive Committee reserves the right to reject all applications without explanation if it decides that there is no suitable submission.

1.4 Costs Incurred by Tenderers

Any costs incurred, in preparation and submission of a tender, in response to this call for tenders must be borne by candidates.

2 Background

MoReq stands for “Model Requirements for the Management of Electronic Records”. The DLM Forum in association with the European Commission published the first MoReq specification in 2001. A scoping study was undertaken in 2005 to upgrade the specification and a contract was issued and MoReq2 was published in early 2008.

MoReq2 differs substantially from the original MoReq specification by incorporating a broader scope to the original, and by the inclusion of an XML schema and a testing and certification regime. Under MoReq2, Electronic Records Management Systems (ERMS) may be certified by an accredited MoReq2 test centre. The first MoReq2 test centre was imbus AG, accredited in December 2008. The first off-the-shelf software to be certified against MoReq2 was Fabasoft Folio 2009, which was certified in August 2009.

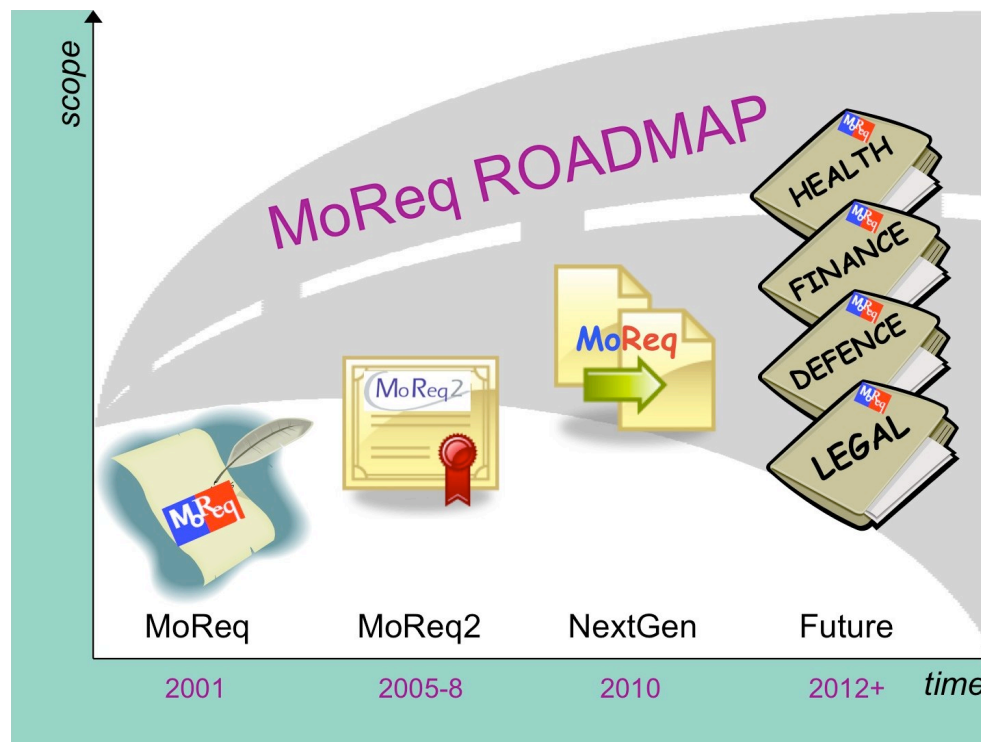
To date, MoReq2 has been highly successful and has made a distinct impact in the field of records management in Europe and beyond. Translations have been made into a number of European languages and many more translation projects are underway.

Since the publication of MoReq2, and the commencement of the testing programme, the MoReq Governance Board has received considerable feedback from suppliers, consumers, translators, records management experts and industry groups.

The success of MoReq2 and the feedback it has received has allowed the MoReq Governance Board to outline a broad roadmap for the future development of the MoReq specification, starting with the MoReq2 work programme.

3 MoReq Roadmap

At its last general meeting in Härnösand, Sweden on the 5th November, the MoReq Governance Board released its roadmap for MoReq.



The immediate goal is to make MoReq more modular and scalable. This is the purpose of the MoReq2 Work Programme.

4 Work Programme Objectives

4.1 Objectives

The MoReq2 Work Programme should achieve the following:

1. Establish a more compact core of mandatory requirements for ERMS software to comply with – this will provide lower entry criteria for MoReq certification and enable the specification to be adopted by more products.

2. Make the relationship between the specification and the increased number of optional modules derived from previously core requirements more loosely coupled, making updates and maintenance of the specification easier.
3. Through a combination of 1. and 2. enhance the scalability and flexibility of the specification, allowing it greater market penetration across a more diverse range of products, including those not traditionally classed as “ERMS” software.
4. Establish a foundation for future extension of the specification, which will make MoReq more “customisable” to specific industry solutions, in line with the MGB’s future vision for MoReq.

4.2 Main Considerations

The specific areas of MoReq2 that have been identified as most important to this work are:

- Access control (role-based)
- Classification scheme(s)
- Correlation to other standards
- Modularisation
- Vital records
- Backup and recovery
- Audit trail
- Metadata model
- XML Schema
- Test materials

4.3 Other Work Programme Activities and Deliverables

1. Incorporate the suggestions, clarifications, bug fixes and recommendations that have been received from the DLM Forum community since the specification was published in March 2008.
2. Update the test framework and XML schema in addition to the specification itself.
3. Provide alongside the revised specification a mapping of the MoReq specification to the two other internationally recognised specifications in this area, these being:
 - a. US DoD 5015.2 Electronic Records Management Software Applications Design Criteria Standard (version 3)
 - b. ICA Principles and Functional Requirements for Records in Electronic Office Environments (version 1)
4. Present a progress report to the DLM Forum membership at the AGM in Madrid in May, 2010, and a final report to the DLM Forum members meeting in Brussels in the Autumn. *Note DLM Forum will reimburse the cost of attending these meetings.*

5 Project Approach Guidelines

Community consultation and transparency are important values to the DLM Forum. The successful applicant should show how proposed improvements will be shared with the records management community and how the community will be invited to participate in the project. The project plan should allow for more than one iteration of the proposed update with each iteration including a period of community consultation to gather feedback and incorporate the outcomes back into the revised specification.

The ultimate authority for signing off the next version of MoReq will be the MoReq Editorial Board (MEB), which is currently being set up. The MEB will be a European Commission expert group established as a sub-group of the European Archives Group (EAG). The DLM Forum and MGB will ensure that MEB members are experts in electronic records management. Because of the nature and composition of the MEB, applicants should factor into their plans a period of about a month to achieve MEB endorsement of the final specification, including potentially at least one presentation to the MEB.

The DLM Forum has committed a fixed value of €50,000 (euro) to this project, applicants should therefore plan to submit as part of their proposals a project timetable and a delivery schedule stating exactly what they will deliver against this fixed sum and by when.

In some circumstances the DLM Forum will consider claims for expenses, such as travel to attend meetings and make presentations, and for set-up costs (for example, for Web technologies that may be used in the community consultation phase), as additional to the fixed project cost. Submissions should highlight exactly what is included in the proposal and what expenses are considered additional.

6 Project Enquiries & Information

All enquiries about the project should be directed to the DLM Forum Secretariat (secretariat@dmlforum.eu).

If you wish to consider responding we will provide on request an information pack including:

- Presentation by the MGB on the MoReq Roadmap from Härnösand meeting, November 2009
- AIIM MoReq2 Working Party (AMWP) Recommendations to the MoReq Governance Board (MGB) – October 2009
- Presentation by Jon Garde on refactoring MoReq2 from Prague meeting, April 2009
- Issues raised by suppliers and responses by the MGB – March to May 2009
- Issues raised by other parties – 2008 to present

Please make your request for the pack to secretariat@dmlforum.eu.

Note that some of these materials are not in the public domain and applicants may therefore be required to establish their credentials as bona fide applicants, and agree to non-disclosure, before they will be given access.

The MoReq2 specification, XML schema and test materials, and other information and resources from the DLM Forum, may be obtained from the DLM Forum website, which additionally incorporates the official MoReq website:

Website addresses are:

<http://www.dmlforum.eu>

<http://www.moreq.info>

7 Submission Date & Contract Value

7.1 Closing Date for Applications

Monday, 18th January 2010

7.2 Value of contract

The tender quotation must be fifty thousand Euros - €50,000 or less.

- Prices must be quoted in Euro
- Prices must be a fixed amount and inclusive of all expenses;
- Prices should be quoted free of Value Added Tax (VAT)

7.3 Submission

Tender should be e-mailed to secretariat@dmlforum.eu and addressed to DLM Secretariat – MoReq 2 Work Programme 2010.

Note that the final date for submission is **18th January 2010**.