

POSC Caesar Association & FIATECH



Realizing Open Information Interoperability – ROI²

JORD (Joint Operational Reference Data) Project Sponsorship Prospectus

Executive Summary

The primary audience for this Prospectus is any organization invited to sponsor the JORD project, but it also describes alternative subscription levels of project support for those unable to take on full sponsorship. The focus is requirements and benefits to sponsors and subscribers. *(There is therefore minimal historical and technical background included. For full project definition see the JORD Project Definition.)*

Included are business justification for business-like scalable and sustainable ISO15926 reference data service operations and the need for the JORD project to deliver these.

The plan for the project and the business model for the deliverable reference data services operation are outlined. This includes technical and organizational scope breakdowns, project and operational funding aspects, as well as proposed operational management arrangements.

The operational services delivered by the JORD project are also described. This operation is fundamentally not-for-profit, with copyrights & licensing to guarantee free-read-access to the reference data. These core services support not only the needs of the Owner-Operator, Contractor and Supplier operations, but also enable other specialist interoperation and integration consultant service providers.

Sponsors are invited to fund the project cost and the operational funding shortfall in the first three years. Sponsors benefits include: Achieving the necessary reference data services by the most economic and timely means; Receiving enhanced subscriber services, over and above base & supplementary subscribers, without subscription for the first three years, and; Representation on the project and operational management committee. This committee controls long term planning and resolves deliverable priorities in the project and core operations.

Why the JORD Project ? A Little Background.

ISO15926 “Integration of Lifecycle Data for Process Plants including Oil & Gas Facilities” was first drafted by POSC Caesar Association (PCA) in 1996 as “Snapshot C/D”.

With a very generic information model, practical use of ISO15926 in any business domain is entirely dependent on shared reference data. By the sharing of references to common vocabularies and common definitions of all information resources:

- The ambiguity of information within and between interoperating organizations, business operations and software applications is minimized,
- The exchange, mapping and integration of information between these are simplified such that the cost, effort and complexity of maintaining those mappings are minimized.
- The potential for interoperability and integration are therefore maximized, whilst
- The consequential risks of suboptimal operations (or worse) are greatly reduced.

PCA has continued to develop ISO15926, develop reference data and operate the PCA Reference Data Services (RDS) that support the use of ISO15926.

FIATECH and its members took an interest in ISO15926 as part of its Element 9 “Lifecycle Data Management and Information Integration” activities since FIATECH started in 2000. In 2005 FIATECH member DuPont hosted the “Wilmington Workshop” that confirmed FIATECH’s focus on ISO15926 for information integration and interoperability.

In 2006 both PCA & FIATECH members initiated projects to extend practical ISO15926 use. These were FIATECH’s “Accelerating Deployment of ISO15926” (ADI) project and PCA’s “Intelligent Data Sets” (IDS) project. Members of both IDS and ADI projects recognized their overlap, and natural collaboration between these generated a succession of multiple new projects and ongoing collaborative initiatives in 2007, 2008 and 2009.

Recently, the architectural principles of ISO15926 and the reference database management procedures of the PCA RDS operation have also been adopted higher within the ISO hierarchy. PCA’s collaborations with other industry initiatives continue to broaden and deepen.

The net result has been an exponential growth in ISO15926 usage across industries globally, increasing recognition of the dependence on reference data and ever growing demands on the PCA RDS services. In addition there has been evolving definition of those service requirements as a result of the learning and experience of those wider ISO15926 implementations.

In 2009 PCA and FIATECH individually and then jointly committed to enhancing the RDS operational services available to industry. The joint commitment became the JORD project, first publicly announced in February 2010. The JORD Project Business Definition and this Sponsorship Prospectus are deliverables from the front-end “Phase F” of the JORD project.

The Deliverable RDS Operation

The deliverable operation will be :

“The enhanced PCA RDS Operation created in partnership with FIATECH”

That operation is defined in terms of the services and service levels it provides, as well as the resources, organization and management to deliver those services.

The services are summarized in Figure 2.

Core Services		
Read / Export Content	Free to anyone. (Funded by others, below.)	Primary Service. All references resolvable to unique content, all readable, exportable (Supported formats include Browser UI, MDB, Excel, HTML, XML and RDF/OWL.) Copyright & licensing apply.
Core Content Mgmt & Validation	Available to Subscribers & Sponsors	Maintenance and fixes of core content only and testing of proposed changes, etc. (for <i>new</i> domain content, see below).
Support for Users, Projects & SIG's	Available to Subscribers & Sponsors	Maintenance of core procedures and support requests concerning use of core content and processes (For <i>new</i> content processing, see below.)
Create / Read / Export new ID's	Available to Subscribers & Sponsors who are Certified	Registered subscribers to the management services are free to generate new Global ID's for content in their locally managed Libraries / Sandboxes, etc.
Content Write	Available to Subscribers & Sponsors who are Certified	Once subscribers achieve a level of certification, they will be able to write content directly (with appropriate meta-data controls on provenance & quality)
New Content & Standardization	Available for additional fees. (Per project / scope.)	Estimated cost per scope - Price list / rates development possible. Will arise from both Commercial Projects and Collaborative "SIG's".
Certification of Users, Org's, Tools & Interfaces	Available for additional fees. (Per project / scope.)	Estimated cost per scope - Price list / rates development possible. Organized around Compliance Checklist with scopes per BIDG or other transaction sets. (Free & self-certifying components)
Training & Related Consulting	Available for additional fees. (Per project / scope.)	Estimated cost per scope - Price list / rates development possible. (Note that these are services related only to providing and using the core RDS Operations content and procedures. Additional services are supported by commercial consultants in content creation, interoperation and integration solution planning and implementation.

Substrate services and infrastructure resources are provided on a globally competitive basis from the outset, as in fact they are in the current PCA RDS Operation. Initial core ISO15926 content and modeling resources include those used by the existing PCA RDS Operation, diminishing proportionately as they are supplemented and replaced by those developed by the project.

As well as operational services and resources, the RDS Operation will include normal business marketing, sales, planning and financial functions. This core business operation itself is not-for-profit, and the principal deliverable is reference data content freely accessible to any user, protected by appropriate copyright and licensing.

Revenue generation is via the subscription and fee-based services which are described more fully in the JORD Project Definition. Compliance certification services are one such revenue generating fee-based service, whereby any tool, interface, information-set, organization or individual are certified according to the compliance checklist. Within that checklist, different transaction interface scopes are defined according to the Business Interfaces Definition Guide.

In addition to operational and technical management, these will report to an Operational Management Committee representing the interests of PCA, FIATECH and sponsors. Interests of subscribers will be handled through normal customer relationship management as well as through member voting rights for PCA & FIATECH representation.

Why should you sponsor the JORD project ?

As a potential sponsor of the JORD project, you will have already been involved in some level of ISO15926 implementation activity for your own business needs justified by your own business case for standards-based interoperation and lifecycle integration. You have already made internal investments, and contributed both in-kind and financially to collaborative projects of PCA, FIATECH, iRING and other interested groups. *(Of course, you may be committed to exploiting ISO15926 and wish to support the JORD project, even if you are unable to take on a full sponsorship role. See “Choosing sponsorship or subscription – costs & benefits” below.)*

For you as a sponsor, the JORD project coordinates and consolidates those early project investments, so that they can be leveraged to support the sustainable business lifecycle and supply-chain expectations beyond those immediate project successes. Scalable, sustainable and cost-effective reference data management is the component needed to provide that leverage.

Read access to the reference data content is free. All subscribers to the RDS operation and the industry supply-chain as a whole will benefit from the enhanced operation, but sponsors gain additional benefits.

- By sponsoring the JORD project, you establish commitment to timely delivery of the sustainable and scalable RDS operation your business needs, rather than waiting for other organizations or groups to make alternative plans and commitments.
- By sponsoring the JORD project, you will receive additional subscriber benefits in enhanced SLA's with no subscription fee required during the sponsorship period.
- By sponsoring the JORD project, you will have direct representation on the Operational Management Committee, controlling the ongoing planning of the operation and resolving priorities within the project and the operation.

Choosing sponsorship or subscription – the costs and benefits.

Sponsorship is intended to finance the project itself and the operational shortfall in service income in the first three years, after which the operation will be self-sustaining based on basic subscriptions and service fees. The project budget is 1.47m USD and the initial operating budget

is 1.06m USD annually. (*Detailed project and operating cost and income profiles are included in the JORD Project Definition.*)

Until basic subscriptions and fees make the operation sustainable, subscribers may also contribute to the project and initial short-fall by choosing a supplementary subscription level. The costs and benefits, of base-subscription, supplementary-subscription and full-sponsorship are summarized in Figure 3 below.

Figure 3 – Subscription & Sponsorship Fees & Benefits

SERVICE BAND	COSTS (US Dollars)	SERVICES / BENEFITS			
		Content Read Access	Basic Core Support Services	Additional Support or Fee-Based Core Services	Operational Management Committee Representation.
General Public	None	Free / Unlimited	None	None	None
Base Subscriber (Annual)	OO Org = 25K / year Large Org = 10K / year Small Org = 5K / year	Free / Unlimited	40 hours included per year.	None. (On a supplementary fee basis only.)	None. (Membership voting rights only.)
Supplementary Subscriber (Annual)	OO Org = 50K / year Other Org = 25K / year	Free / Unlimited	40 hours included per year.	Additional 40 hours included per year. (On a supplementary fee basis beyond this.)	Representation per subscription year.
Full Sponsor (Contract)	OO Org = 250K USD lump sum (or 100K annually for 3 years) Other = 100K USD lump sum (or 40K annually for 3 years)	Free / Unlimited	40 hours included per year for 3 years sponsorship contract plus 2 further years.	Additional 80 hours included per year for 3 years sponsorship contract plus 2 further years. (On a supplementary fee basis beyond this.)	Representation for 3 years sponsorship contract plus 2 further years.

What should you do next ?

If you are considering a sponsorship or subscription, please send your proposal to:

- Ian Glendinning, JORD Project Manager (ian@glencois.com) or
- Nils Sandmark, PCA General Manager (nils.sandmark@posccaesar.org) or
- Ray Topping, FIATECH Director (raytopping@comcast.net).

We would like to hear:

- Expression of positive interest to sponsor or subscribe.
- Request to review the full JORD Project Definition.
- Expression of intent to fund from existing or 2011 budgets (if possible).
- Firm confirmation of offer of support (when appropriate).
- Specific basis, amount, timing or other conditions relevant to the above (if any).