

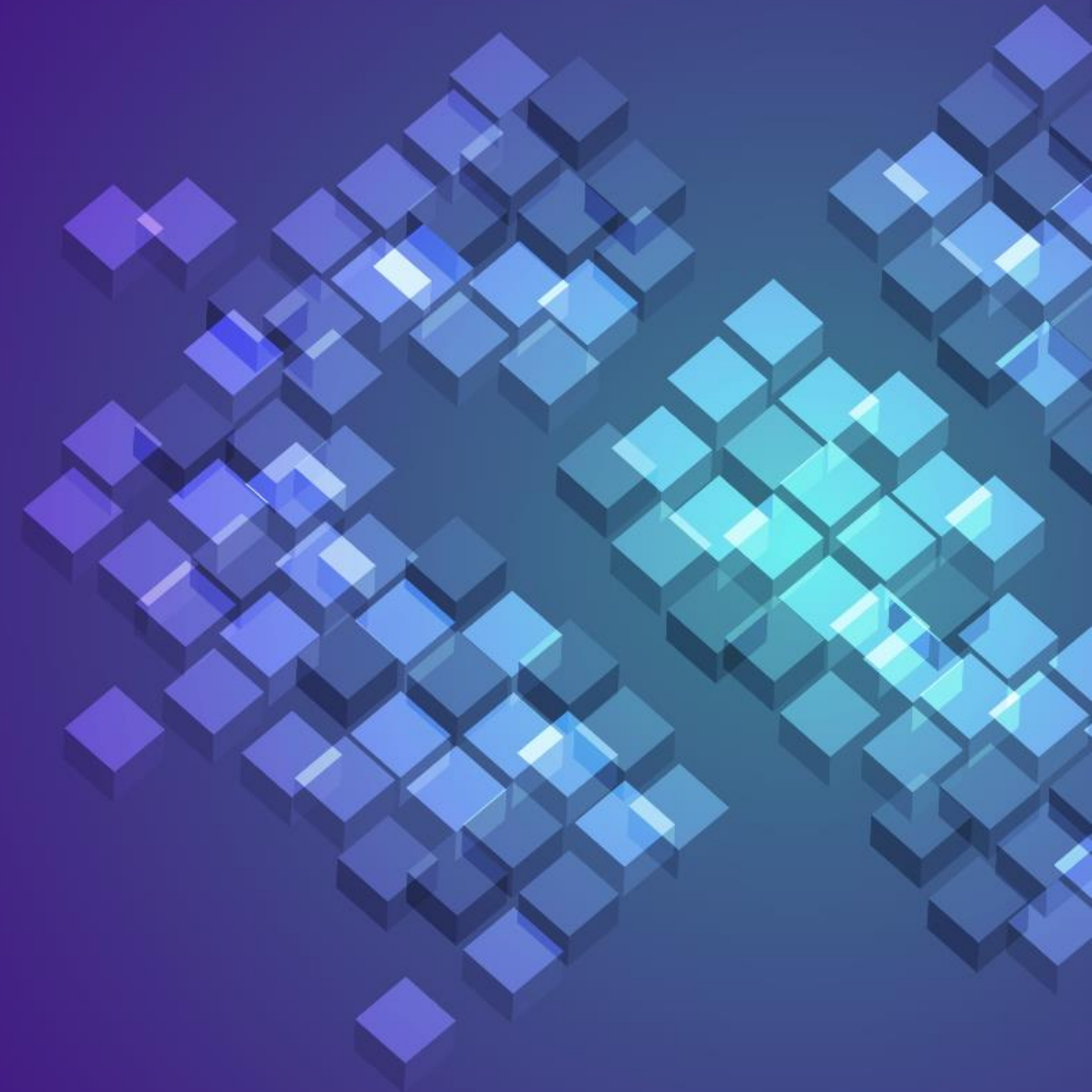
# 9th SDMX Global Conference

Empowering Data Communities

## Migrating to a fully SDMX compliant platform

David Barraclough, OECD Smart Data Practices Manager

SDMX Global Conference 2023 | Kingdom of Bahrain

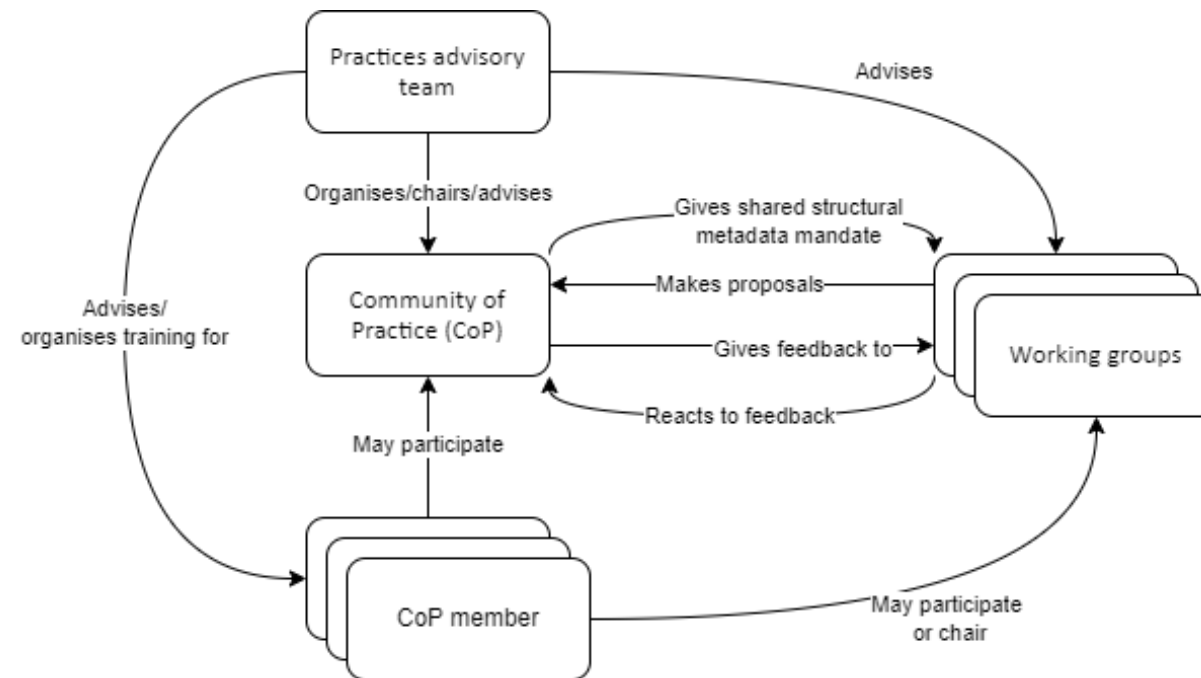


# Advantages of moving to a fully SDMX compliant platform

- SDMX is a **great standard for disseminating** aggregated statistical data
  - Standard annotations have been a huge addition for dissemination
- **Good base to build on:** SDMX has been implemented worldwide
- **Future-proofed** with SDMX 3.0, active SDMX community
- **Many tools exist** for integration. All open-source or free
- **Tried-and-tested methodology.** Reusable, cross-domain structural metadata
- Many **users already skilled** in SDMX

# Data migration planning and management process

- **Management should endorse** the migration to secure top-down support
  - Vision, methods, responsibilities
- Essential to **decide the governance** for structural metadata
- Design a **project plan for data managers** to follow from their side



## Building institutional SDMX knowledge: **Migration team**

---

- Know **SDMX and Dimension modelling methodology** and how to apply it
  - SDMX Information model, Content-oriented guidelines
  - Some content-matter, e.g. understand Account-based systems
- Know the **legacy and target platforms**
- The more **institutional knowledge** the better
  - How the agency is structured; Reporting lines and data managers
- **Communication** skills
  - Know how to present and convince data managers that new methods are better than legacy
- Adaptability and how to **develop methodology**
- **Coaching**
  - How to train others to be migrators, to spread the knowledge and load

# Building institutional SDMX knowledge: **Users**



# .STAT ACADEMY

Free!

Not restricted to .Stat Suite!

Not restricted to SIS-CC community!



## An introduction to SDMX for data producers

In this course, you will learn about the Statistical Data and Metadata eXchange standard and how it is applied in the .Stat Suite context.



David Barraclough

31

401



## SDMX vocabulary for beginners

In this course, you will learn about routine SDMX vocabulary to describe and define statistical data tables.



Jens Dossé

22

162



## An introduction to SDMX structural modelling for data producers

In this course, you will learn about the Statistical Data and Metadata eXchange data modelling and how to practically apply it in the .Stat...



David Barraclough

75

186



## SDMX vocabulary for data managers

In this course, you will further extend your understanding of basic SDMX terms for general data related processes.

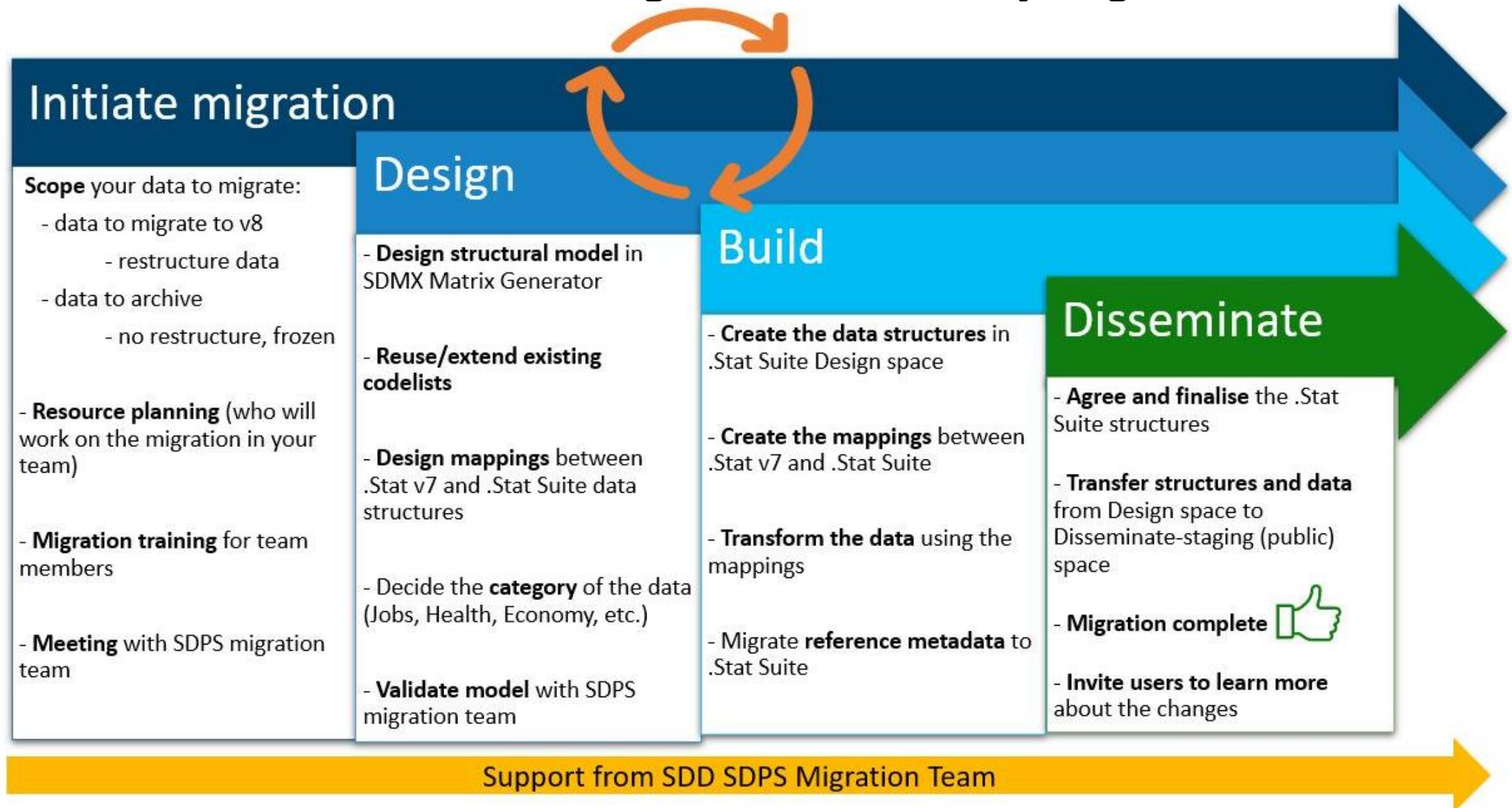


Jens Dossé

21

23

# Guide for data managers to successfully migrate



# Tools for migration success (OECD example)



## .Stat Suite

- Data warehouse
- Manage data
- Data browser

## SDMX Matrix Generator

- Design phase
- Redesign data structures
- View dependencies
- SDMX structural generation

## Sharepoint

- Communication
- Review/approval

## Gitlab

- Issue tracking
- Best practices
- Content collaboration
- Automating data processing with **Pipelines**

## FMR

- Mapping authoring
- Data transformation

## Python

- Scripting for
  - Automation
  - One-off tasks

# Collaboration and communicating decisions

- Migration **Community of Practice (CoP)**
  - Use a content-management system to **share knowledge** with data managers
  - **Mandate** and **promote** shared structural metadata
- Git repositories for **collaboration** on:
  - Structural models for bilateral work
  - Shared codelists, concepts
  - Best practices
- **Bilateral work** with migration team and data managers
  - Ensure data managers complete basic training before migration team meeting
  - Certification-based interactive training is perfect for this (can check if they passed 😊)
- **Quality** control
  - Ensure the modelling rules are clear, accessible, communicated, and mandated
  - Both sides must agree on the structures before finalisation and publication



# Keeping the data owners motivated



- Migration is a **massive** opportunity to improve data and user experience
- .Stat Academy self-teaching with certification can be **rewarding**, e.g. for trainee's CVs
- Migration team **always available for support** (technical and motivational 😊)
- Regular **communication**
- **Fresh material** on CoP site and quarterly meetings



- **Top-down support**, communication and mandates help in making decisions
- **Deadlines**, e.g. to retire the legacy system clarify the timeline and priorities
- Draft an **annual objective** for data manager reviews

# When starting a migration...

---

- Ensure that the migration team is formed, trained and can **commit**
- Identify **capacity building** for data managers, promote and **insist** on it
- Decide **structural metadata governance** early
- **Don't make SDMX shortcuts**, e.g. Respect SDMX versioning.
  - It's there to honour compatibility and data contracts. End users will thank you
- Make effective use of **maintenance agencies** for editing permissions, roles
- Decide a **communication plan** for data managers early
- Implement tools and processes for **collaboration** and **communication**

# Finally, some lessons learnt

---

- Identify and motivate data modelling/SDMX **evangelists** and use them
- **Avoid giving bilateral basic training** to every statistician
  - Use self-training material such as .Stat Academy
  - Insist that users complete training before meeting migration team -> massive time saver
- **Be ready to adapt** – your initial best practices may have to change
- A repository such as **Git-based is essential** for effective collaboration
- **Be prepared** for
  - sharp rise in demand on the migration team nearer the deadline
  - some resistance to migration, especially based on legacy arguments

# 9th SDMX Global Conference

Empowering Data Communities

Thank you for your attention!

SDMX Global Conference 2023 | Kingdom of Bahrain

