Our goal is to obtain stable and consistent funding from across the globe to sustain open science infrastructure.
Signs of the times

MySpace server migration - loss of all content, 2003-2015

Altmetric, Bepress, Github, Mendeley, Publons, Figshare, SSRN purchased by large commercial publishers and companies

Lyrasis and DuraSpace merger by July 1, 2019

Sweden and UC consortium break Elsevier contract

OA2020 and harder negotiations on big deals – repurposing journal subscription budgets

Reports on publisher diversification
Research Consortia break Elsevier contracts (Sweden, Uni. California)

**Plan S** - Funders assert influence

**SCOSS** - The Global Sustainability Coalition for Open Science Services

**OPERAS** - European research infra for open schol comms in SSH

**Global Biodata Coalition** – funders to sustain open access to core data resources

**European Open Science Cloud (EOSC)** - a cloud for research data in Europe

**AmeliCA** - Open Knowledge for Latin America and the Global South

Times, they are a changing!
The funding context

Funding for open infrastructure is under pressure:

A **small number of foundations** fund open infrastructure today. Even that number is **dwindling** as programs are shuttered.

To date, the focus has been on providing **seed funding rather than operational funding**

**At the same time that the opportunity and need for open infrastructure is greatest, the sources of funding are on the decline**
The scholarly infrastructure context: What we know

**New policy mandates** means more dependency on OS infrastructure.

Scores of projects come to an end, prove their worth, but have **concerns with maintaining operational costs**.

**Boom in innovation & diversity**, but numerous “siloed” projects with unco-ordinated funding, function, goals….

**Commercial acquisitions** of key infrastructure.

**Platforms, tools & systems** critical to the full research lifecycle are increasingly **vulnerable** to exclusive commercial provision.
The scholarly infrastructure context: What we don’t know

Who are the players? What are their motivations?

Who are the critical nodes upon many depend?

Whose interests are being served, and what is left out?

What does the landscape look like now, and what have we created?

What does a healthy ecosystem look like?

How much does it cost, and how much should it cost?

How are we going to pay for it?
The risk of inaction

Imbalance between academy-owned and commercial infrastructure
(Privatization of Public knowledge)

Siloed behavior in a networked, interdependent world
(Loss of national / international competitiveness)

Increasing waste and redundancy
(Loss of resources & credibility)

Inability to serve as effective stewards of the scholarly & cultural record
(Loss of relevance, integrity & trust in our knowledge institutions)
Invest in Open Infrastructure
IOI: Who are we?

We are an international group of organisations, coalitions, and like-minded efforts that share mutual goals and in most cases have already been working towards similar objectives. We are coming together under IOI to coordinate and align our efforts.
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<tr>
<td>Ginny Barbour</td>
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<td>Arianna Becerril</td>
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<td>Maurice York</td>
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The desired end state

- Fully formed, end-to-end, open, community controlled infrastructure to support all aspects of science and scholarship, from research and experimentation through publishing, dissemination, discovery, and preservation.
- Sufficient funding to support the evolution, maintenance, operation and support of this infrastructure.
- Sufficient funding to support the innovation required for new infrastructure as needs and technologies change.
- Funding from a mix or sources, including scholarly and research institutions (through libraries, research offices, and other budgets), government agencies and private foundations. All supporting open projects that themselves have a mix of sustainability strategies.
Strategy — Collective Action at Scale

- Embracing a global consciousness
  A structured “network of communities and alliances”
  (Align towards interdependence)

- Enabling a coherence approach
  Structural elements to ensure interoperability & integration
  (Relate the parts to the whole)

- Enacting sustainable fiscal stewardship
  Reinvesting & being responsible with limited resources
  (Pool the risk & manage investment)
IOI’s Two Functions

Assess and Recommend
Provide a Framework to regularly survey the landscape of open scholarly infrastructure with respect to its functionality, usage, health and financial needs and make funding recommendations for that infrastructure.

Co-ordinate Funds
Following the recommendations of the Framework, explore how to co-ordinate financial resources from institutions, agencies and foundations, to increase the overall amount and impact of funding available to emerging and critical infrastructure.
3 key areas of focus currently

1. Developing the concept, and testing it out
2. Community- and relationship-building with existing global infrastructure initiatives, projects, you
3. Research
Research underway

1. **Census of Scholarly Communication Infrastructure**
   Purpose: to map the range of infrastructure that comprises the system of scholarly communication (*Launched Feb 2019*)

2. **Survey of Library Investments in Scholarly Communication Infrastructure**
   Purpose: Survey of colleges and universities to understand their current investment practices in this infrastructure (*Launching June 2019*)

Principal Investigators: Mike Roy, David W. Lewis
Consultants: Educopia Institute, TrueBearing Consulting
Generously funded by: The Andrew W. Mellon Foundation
The Next Six Months

1. Developing and implementing a governance model to support action on global open infrastructure with transparent processes

2. Engaging community feedback - request for comments from and invite others to join.

3. Developing global representation on the leadership/committee

4. Engaging with funders and stakeholders to build a robust strategy that supports open infrastructure long term

5. Developing a planning grant to hire staff and develop strategy of this group, focused on open infrastructure
Invest in Open Infrastructure

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