It’s high time to rethink how we pay for Open Science infrastructure

Focus on Open Science
Vanessa Proudman, Director SPARC Europe

Focus on Open Science, Vienna, 16 Nov 2018
SPARC Europe

**Key goal:** Making Open the default

Helping ensure that OA and OS is fully realized
SPARC Europe...

Working to create a climate in which Open Research and Education thrives
SPARC Europe is

* Driving policy development
  - Copyright reform, PSI and FP9 in Europe
  - Supporting policy development amongst Europe’s research institutions and funders
  - Policy reporting in Europe

* Providing advocacy guidance and tools

* Encouraging cultural change through engagement activities

* Supporting the sustainability of Open infrastructure
Plan S implementation 2018 & 2019

- Highlighting the rewards and incentives amongst national funders for more Open Science in Europe
- Clarifying and simplifying copyright and licensing for librarians and researchers
- Facilitating the funding of Open Access / Science infrastructure
Plan S: 10 ways libraries can support the implementation of Plan S

1. Continue to innovate the scholarly communication system and provide guidance to COAlition S on where to invest — be this in services or infrastructure

2. Work with the Plan S implementation group to explore collective funding approaches to subsidise Open Access to research

3. Provide information on strong alternatives and platforms for publishers for their institution models

4. Supply a stable, quality-controlled standardised infrastructure to deposit, curate, verify and disseminate a range of OA research outputs through their repositories

5. Supply information on local policies and implementation mechanisms that will support the local (Member State) implementation of Plan S

& Implementation guide delivered to the Plan S Task Force, Oct 2018
Increased policy development in Europe

- Competitiveness Council, European Council, 2016
- National policy: NL, N, FR, etc
- Increases in institutional policies. 2018: 559
- Funder OA / OS policies: EC, Wellcome, NWO
- Plan S and cOAlition S, Sept 2018
- Horizon Europe (under development)
More Open Access policy in Europe
= more dependence on a stable infrastructure
= additional costs
The context of OS infrastructure

- Short-term funding / seed-money for OS
- A large offering of scholarly comms solutions
  - Projects, start-ups & infrastructure
  - Longer-standing services & infrastructure
- Publisher / company diversification

Who’s next?

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The context of OS infrastructure

-* Short-term funding / seed-money for OS
-* A large offering of scholarly comms solutions
  - Projects, start-ups & infrastructure
  - Longer-standing services & infrastructure
-* Publisher / company diversification

Who’s next?

Etc.

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Need for a European regulatory body
4 signposts

1. We need a fair, stable and sustainable scholarly communication infrastructure

2. No more imbalanced commercial exploitation of science, through Open Access

3. There is no longer a place for monopolies to call the shots

4. Libraries and the research community takes more control over their scholarly communications
How do we as a community ensure that we have the infrastructure in years to come to support the implementation of Open Access and Open Science?
Locate the funds to meet ambitions
Support a range of business models
Leadership & co-ordination

- SPARC (NA)
- 2.5% / Invest in Open
- JROST
- OPERAS
- Human Frontiers Science Program
- Invest in Open Infrastructure
- SCOSS

All under development
Invest in Open / 2.5% 2018/2019

- Top slicing library budgets
- The need for investing in open infra

- Aggregating information on the key infrastructure ecosystem
- Estimating the costs of Open infrastructure
- Monitoring the library spend on Open infra
Joint Roadmap for Open Science Tools

A community working on a joint roadmap for open science tools.

Join our collaboration that started during the 2018 Mozilla Global Sprint.

Blog
Join & Communicate
Contribute
License
Meetings
Participants

Contact us: info@jrost.org
Wikidata: Q53729922

https://jrost.org/
Invest in Open Infrastructure: Who

We are an international alliance of organizations and like minded efforts that share these mutual goals and in most cases have already been working towards these objectives. We are coming together under IOI to coordinate and align our efforts in order to get there faster.

The alliance brings together Joint Roadmap for Open Science Tools (JROST), OPERAS, Open Research Funders Group (ORFG), Scholarly Commons (2.5% Commitment), SPARC Europe and SPARC NA
Funders of the life sciences should commit to the long-term shared responsibility to sustain open access to core data resources.
Global Sustainability Coalition for Open Science Services

Helping sustain Open Science infrastructure
Everything we have gained by opening content and data will be under threat if we allow the enclosure of scholarly infrastructures.
SCOSS is an Open Science community of organisations that promotes essential OS infrastructure recommending it to the user community for collective / crowd-funding.
Current SCOSS members, 9 Nov 2018

[Images of logos for LIBER, CAUL, SPARC Europe, Association of Research Libraries, CARL-ABRC, and Association of African Universities]
SCOSS definition of infrastructure

- SCOSS-supported open science infrastructure provides the scientific and scholarly community with resources and services to access, share, and assess research

- Unspecific to any discipline / OA or OS area

- Non-profit established infrastructure
SCOSS approach 1/2

* Developed by significant players in the research, Open Science & library community

* Forming a consolidated voice from trusted stakeholders and representatives of the international Open Science community

* Establishes a system to identify and evaluate OS services & recommend them for funding

Funding Appeal
SCOSS approach 2/2

- Creates a framework to increase efficiency for investors & addresses community needs
- Helps provide more transparency on costs and funding needs to enable the fair remuneration to sustain them
- Provides capacity building: e.g. knowledge on business models
Evaluation criteria

- General: scope, intentions, Neylon principles
- Value proposition
- Technical details
- Costs
- Governance
- Sustainability measures
- Foresight
- BATNA
- Score
Key results, 9 Nov 18

- Funding appeal launched late Nov ’17
  Current target reached 9 Nov 2018:
  €895,060 / USD 1,021,550 raised
- Capacity-building
- Changing the mindset of funding OS infra,
e.g. ICOLC, Invest in Open Infrastructure
Funding progress by continent, 9 Nov 18
Funding progress DOAJ, 9 Nov 2018

**Funding progress**

<table>
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<tr>
<th>Committed</th>
<th>Paid</th>
<th>Needed</th>
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<tr>
<td>73%</td>
<td>18%</td>
<td>27%</td>
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<tr>
<td>€710,560 of €970,000</td>
<td>€173,809.58 of €970,000</td>
<td>€259,440 of €970,000</td>
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</table>
2 key challenges for SCOSS

Pricing
Service capacities
2nd SCOSS funding cycle

- Autumn 2018
- Applications for expression of interest
  - OA or OS infrastructure
  - Non-profit
  - Of international interest
  - Issues with sustainability
- Evaluation of EoIs
- Invitation to apply: Begin 2019 (at the latest)
SCOSS and what you can do

1. Discuss pledging for OA/OS infra within
   - your institution
   - your consortium
   - your community

2. Pledge to Sherpa/RoMEO and/or DOAJ

3. Help promote investing in infrastructure

*Please don’t just rely on others to do so*
3 calls to action

1. Explore and invest in different business models.
   How sustainable is your infrastructure or the one you rely on 3 / 5 years from now?
3 calls to action

2. Raise awareness of the need for collective action around funding infrastructure in your community

3. Strive to *consistently* invest in Open Science infrastructure to support a fair and growing schol comms ecosystem
Join a growing community of action to fund Open Access and Open Science infrastructure!
Any questions?

www.sparceurope.org / www.scoss.org

vproudman@sparceurope.org

Please join us!
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