Invest in Open
Infrastructure

Investing in Open Infrastructure for Networks

Presentation for Strategies for Open Collaboration in Library Consortia (SOCLC)
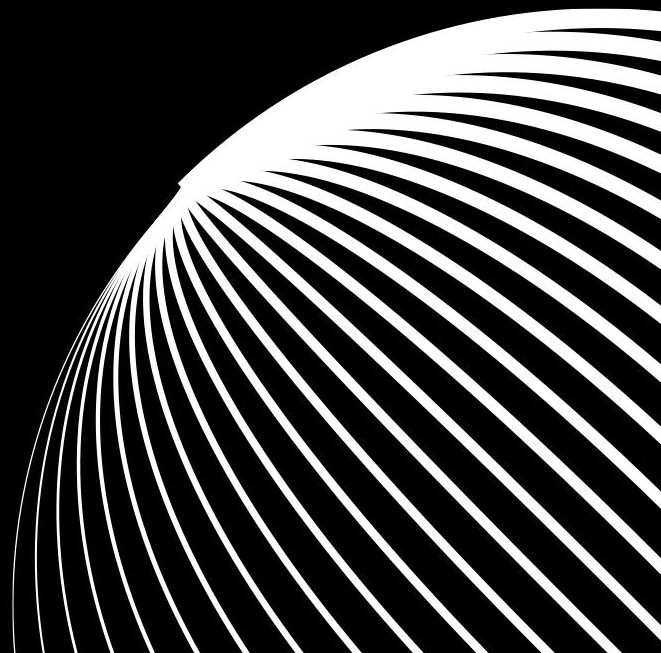
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We work to increase the investment in and adoption of open infrastructure to further equitable access and participation to research.

For open knowledge to flourish, our systems need to be similarly designed. Our work seeks to advance a vision where open infrastructure is the default in research and scholarship.

Our approach

We employ a research-driven approach

to guide strategies and action designed to increase adoption of and investment in open infrastructure.

We provide resources and analysis

to help funders and budget holders assess, evaluate, and make investment decisions about open infrastructure.

We pilot solutions and coordinate stakeholders

to increase the sustainability of the sector, to further a shared agenda for making open infrastructure the default in research

What this looks like in practice

Catalyzing Investment:

- Increase the amount of funding and diversity of those investing in open infrastructure to ensure we're building towards a healthy, resilient, sustainable future for research and scholarship

Strategic Support:

- Tailored engagement with providers, funders, and institutions to implement IOI research recommendations and further adoption of open infrastructure

Data Room:

- "Productized" and fully operational research and strategy offerings that institutions and funders utilize and can rely upon to guide their investment (e.g. COIs, funding dashboards and reporting)

Costs & characteristics of OI

Catalog of Open Infrastructure Services (COIs)

#Research   #Projects

The **Catalog of Open Infrastructure Services (COIs)** is a step towards addressing the information asymmetries that exist in understanding and assessing open infrastructure projects. This effort is designed to model a means of standardizing information about core open infrastructure services for decision makers and members of the community.
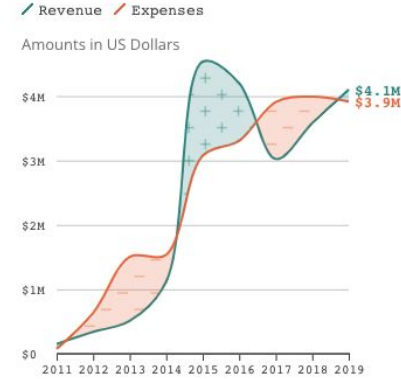
https://investinopen.org/research/catalog/

Overview | Organization | Finances | Delivery

Overview

Service summary

DSpace is an out-of-the-box open source software package for creating repositories focused on delivering digital content to end users and providing a full set of tools for managing and preserving content within the application.

Transformative influence

Eight properties drawn from IOI's concept of transformative influence:

■ Yes   ■ Partial   ■ No

- Open code repository
- Open data statement
- Technical user documentation
- Governance structure and processes
- Governance activities
- Web accessibility statement
- Transparent pricing & cost expectations
- Commitment to equity and inclusion
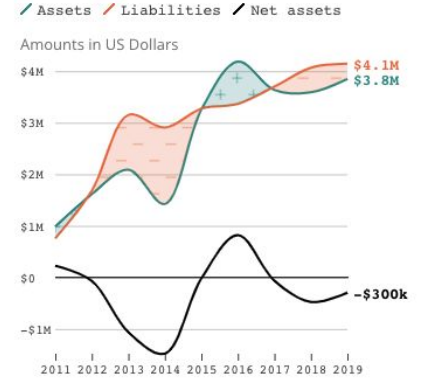
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Research Questions

- What key information do decision makers look for to guide investment? What's missing?
- What surfaced in this work that may not be obvious to the broader community that feels important to share?
- What trends & observations do we notice? Have these been reported before? Why/why not?

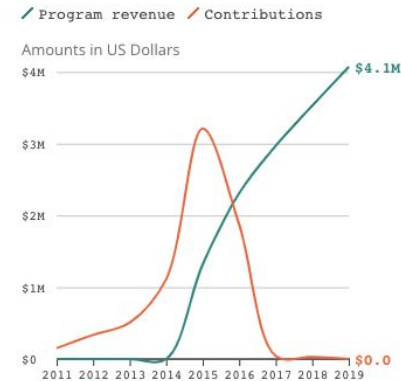# Open values education is lacking in many contexts.

"We build awareness in those countries about the vision and objectives of infrastructure, so that our members in those countries which are very pro commercial solutions become aware of alternatives."

- Research Network, Global South

"We need to make it possible for them to have alternatives to traditional closed...journals, and so we have to make that intelligible to somebody who in the provost office doesn't even look at the publishing world that way."

- University, Global North

Exploring the Values of COIs (2023)

There is a need to make discovery (& due diligence) more open.

"I only know about (Zenodo) because a friend of mine - y'all are in a better position to keep your finger on the pulse of what is coming out.

Even if we said, hey, we haven't done an analysis yet, but here's one we are looking at - that helps me understand what we should assess."

- University, Global North

Relationship building across the ecosystem is an area of opportunity.

"Are there partners we can cofund with in the future?"

- Philanthropy, Global North

"The knowledge of who these people are has many use cases; this is just one. For example if I want to find an expert."

- Philanthropy, Global North

Exploring the Values of COIs (2023)

Sharing success stories can help advocacy for the entire ecosystem.

"What we all lack as a community is someone who can stand up and advocate publicly for more people to come to the table."
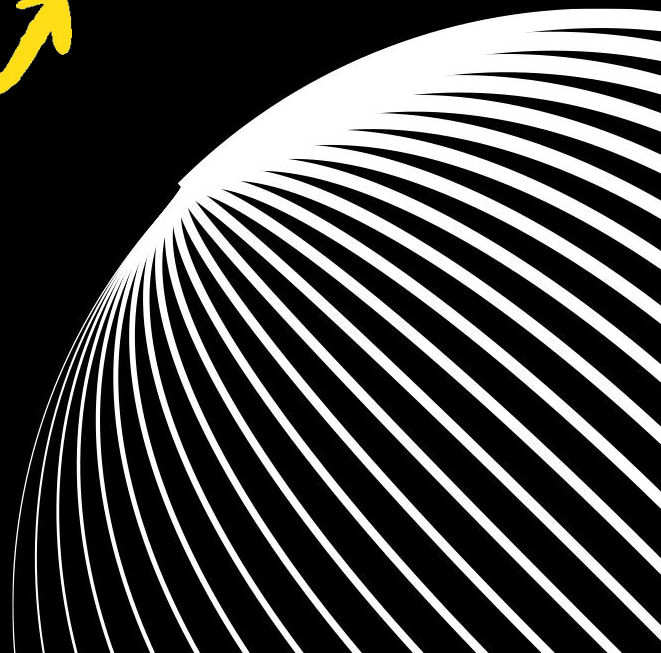
- Philanthropy, Global North

What's next?

...scaling the catalog and making it more actionable for those looking to fund and adopt open infrastructure

- **Increasing the number of services represented** from 10 to 50+ by end of 2023.
- **A focus on infrastructure that furthers open, immediate access to content and data**, in line with UNESCO's Open Science Declaration, the Nelson memo, G7 Communique, and EU Council guidance
- **Integrations with more data sources to increase the robustness of information presented**, further aiding those looking to COIs to support their decision making
- **Expanded functionality**, including discovery improvements, security and quality control enhancements, and ability to compare across offerings
- [*In development*] **Ways to financially support or "bundle" services together** to contribute to more efficiently and directly

The Open Infrastructure Fund aims to strengthen sustainability and resilience and increase the adoption of open infrastructure that underpins research and knowledge creation.

For open knowledge to flourish, our systems need to be similarly designed. Our work seeks to advance a vision where open infrastructure is the default in research and scholarship.

Overview

Areas:
Capacity building, Strengthening community governance, Critical shared infrastructure

Where you are based: anywhere in the world; 60% funds reserved for individuals, organizations, and projects in Low and Middle Income Economies (LMIEs).

Level of funding:
5,000-25,000 USD

Duration of award: projects of any duration up to 2 years, starting between November 1 and December 31, 2023.

Deadline for applications:
July 31, 2023

Capacity building

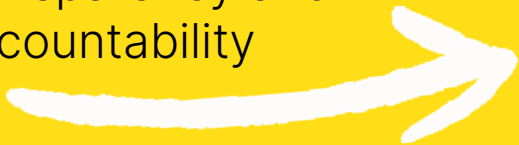to improve the technical reliability and security of open infrastructure services

This includes activities such as but not limited to:

- Creating and updating documentation to make it easier to onboard new contributors, maintainers, and users.

- Training institutional staff and users on implementing and using (a new version of) the infrastructure.

- Organizing events to strengthen relationships/networks among contributors, maintainers, and/or user communities.

Strengthening community governance

to ensure that the infrastructure service acts in accordance with its values of openness, transparency and accountability

This includes activities such as but not limited to:

- Organizing community workshops to discuss governance needs and (re)design governance structures.

- Convene a dedicated committee/working group of key stakeholders to lead work on diversifying governance.

- Work on improving governance processes, e.g. reviewing and evolving bylaws and other policies.

Critical shared infrastructure

Efforts that would push people to directly collaborate across and work with existing systems

Examples of such efforts include:

- Shared technical development across two or more open infrastructure teams to enhance interoperability.

- Adaptation and customization of existing infrastructure service(s) to serve a local community's needs, including language localization.

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Thank you

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