

Infrastructures & Sustainability

Open Scholarship Infrastructures and Sustainability Panel
Oxford Festival of Open Scholarship 2022

March 17th 2022 – 14:00-15:30

Neil Jefferies
Head of Innovation
Open Scholarship Support



This session will be recorded



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POSI

- Principles of Open Scholarly Infrastructure
<https://openscholarlyinfrastructure.org/>
- Breaks down the structuring of an “Open Scholarly Infrastructure” service into three key areas:
 1. Governance – ensuring transparency, independence and focus
 2. Sustainability – useful infrastructures need to persist
 3. Insurance – ensuring that infrastructures can meet their obligations

...more details on the website!

Sustainability Principles

- **Time-limited funds are used only for time-limited activities** – day to day operations should be supported by day to day sustainable revenue sources. Grant dependency for funding operations makes them fragile and more easily distracted from building core infrastructure.
- **Goal to generate surplus** – organisations which define sustainability based merely on recovering costs are brittle and stagnant. It is not enough to merely survive, it has to be able to adapt and change. To weather economic, social and technological volatility, they need financial resources beyond immediate operating costs.
- **Goal to create contingency fund to support operations for 12 months** – a high priority should be generating a contingency fund that can support a complete, orderly wind down (12 months in most cases). This fund should be separate from those allocated to covering operating risk and investment in development.
- **Mission-consistent revenue generation** – potential revenue sources should be considered for consistency with the organisational mission and not run counter to the aims of the organisation. For instance...
- **Revenue based on services, not data** – data related to the running of the research enterprise should be a community property. Appropriate revenue sources might include value-added services, consulting, API Service Level Agreements or membership fees.

Speakers

Chair: Neil Jefferies
Head of Innovation, Open Scholarship Support

Petr Knoth
CORE

Alex Freeman
Octopus

Matthew Buys
DataCite

Ed Pentz
CrossRef