The Open Platform Initiative: A proposal for coherence and interdependence in Community-owned Infrastructure

Lisa Carter, University of Wisconsin-Madison
Yolanda Cooper, Emory University
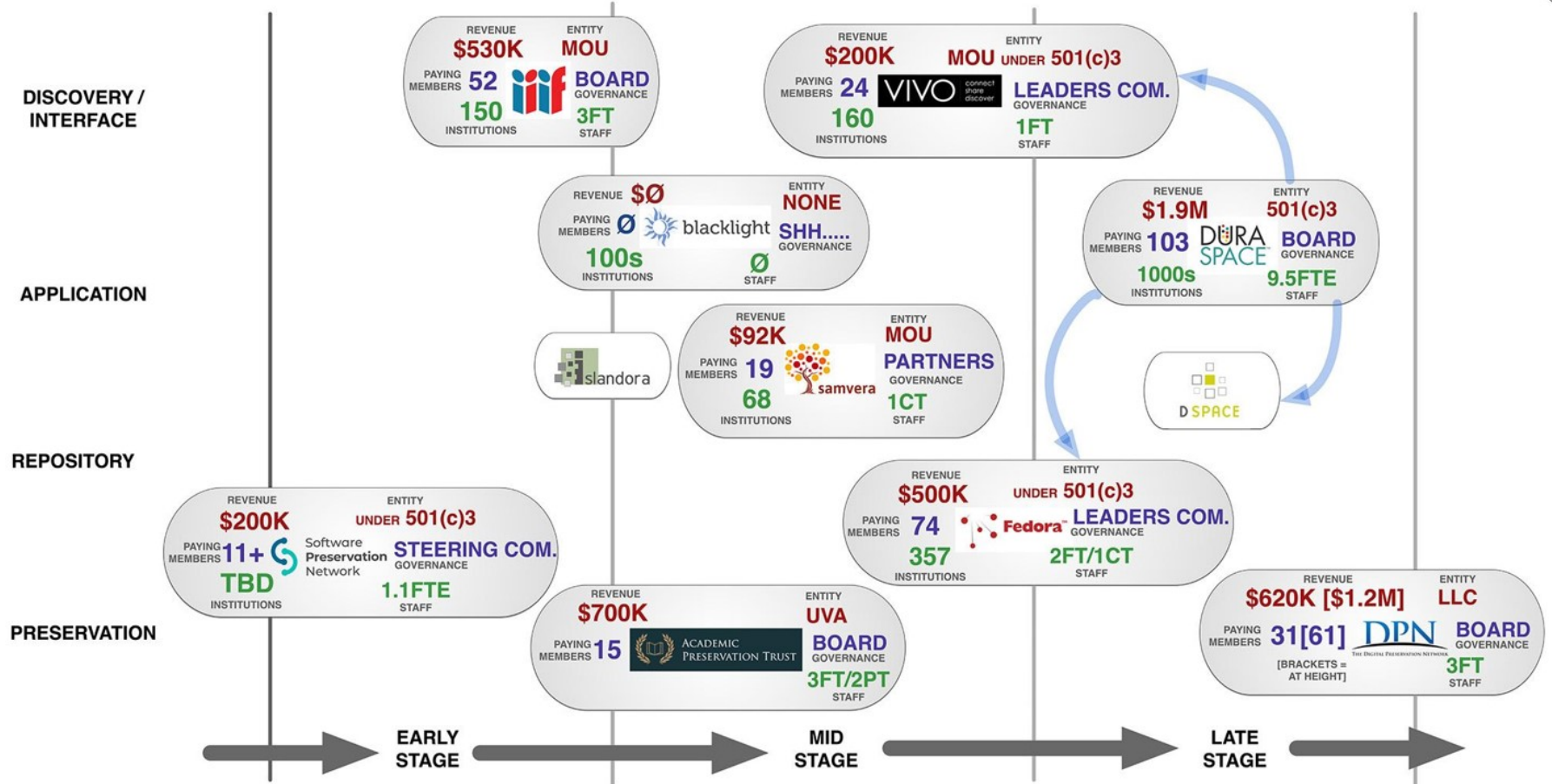Ann Thornton, Columbia University

OPEN PLATFORM CONVERSATION

For over 30 years, research libraries have invested in building the ecosystem of **open source communities and software** projects that support the **preservation and access** of digital content.

Based on a perceived **shared imperative** for the need to bring new thinking, **new funding models**, and **new commitments** to promoting **sustainable, interoperable infrastructure**, a small group has started a conversation aligned around **a seed concept for collective action and started a draft proposal**.

We are **seeking to expand the conversation**, improve it, and scale it to hundreds of institutions.
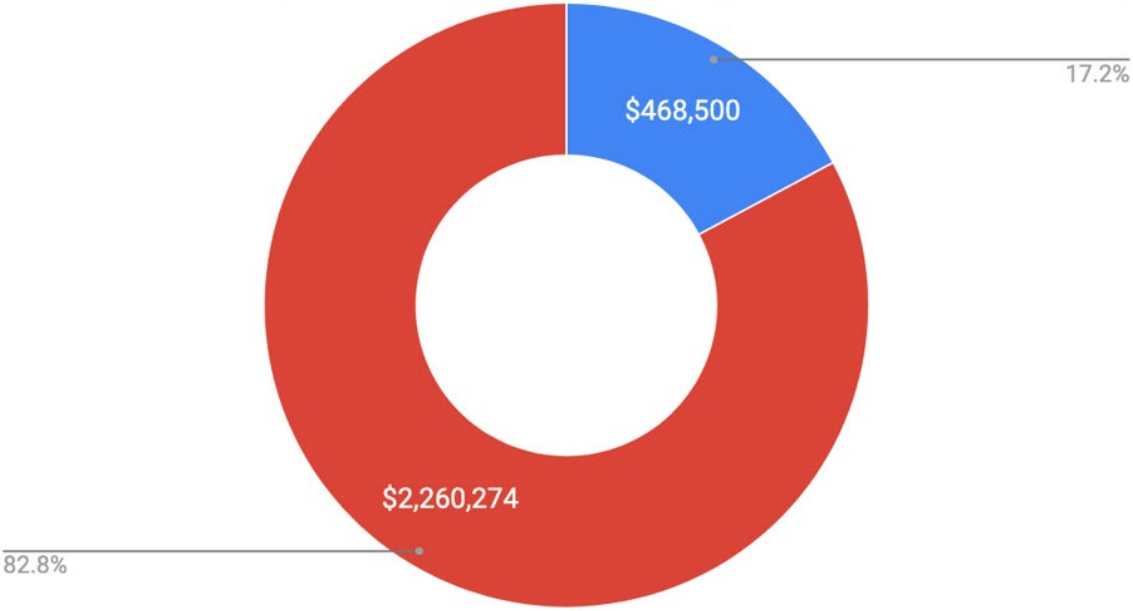
A **siloed landscape** of open infrastructure projects...

Overall Picture of Vulnerability:
TOO MUCH CONCENTRATION AND POOR INCLUSION

Investments in Open Interoperability vs. Individual Applications

$468,500

17.2%

$2,260,274

82.8%

THE RISK OF INACTION

Who controls knowledge? What is saved?
Who gets to see what, and on what terms? Who decides?

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)

For further context, see the April CNI presentation: **http://bit.ly/OP-CNI**

WHY DO WE NEED A NEW APPROACH?

The **systems, structures, and collaborative networks** necessary to support the knowledge ecosystem have **reached a level of complexity and scale** that has **overwhelmed the ability** of **existing methods** of funding, cooperation, and governance **to reliably support** shared open infrastructure.

OPEN PLATFORM INITIATIVE

PURPOSE

To **provide value** to a diverse community of higher educational and cultural institutions to safely and continuously **steward the digital content**
integral to academic inquiry, scientific knowledge, and cultural heritage by

- Promoting **shared capacities and services** that enable durability and persistence for content and data
- Providing **usable discovery and access** for users
- Building and enabling capabilities for staff to **effectively manage and curate** the knowledge stewarded by participating institutions

Open Platform—Desired Future Condition

Through collective action, we propose to create an **Open Platform** that brings **financial**, **strategic**, and **institutional coherence** to **community-built, interoperable, service-driven infrastructure** and software projects that support the **preservation and access of scholarship and knowledge**.

Partners will be inclusive of institutions, projects, communities, vendors, funders, and public & private enterprise.
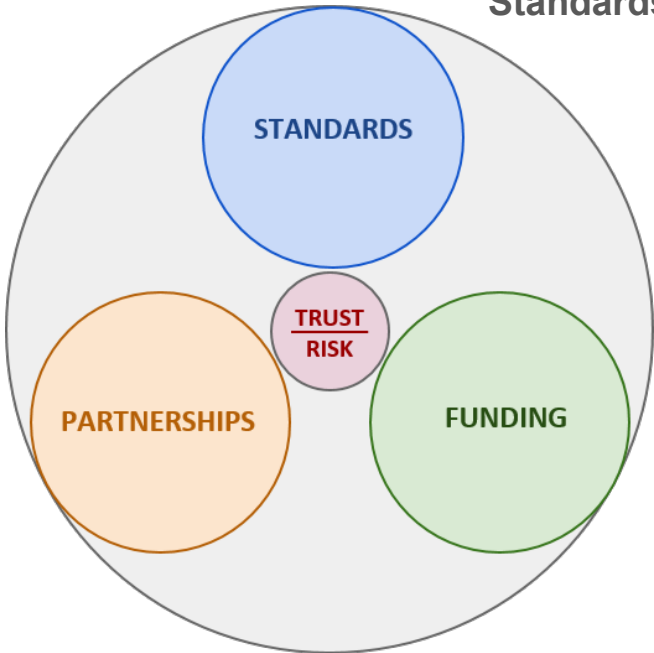
The Platform must have an intrinsic, **robust capacity** to execute, sustain, and scale.

The Open Platform is not simply a collection of software and tools, but a fluid ecosystem—a set of technologies, shared principles, and standards that includes both open and commercial solutions.

STANDARDS, INTEROPERABILITY & CERTIFICATION

Develops & Promotes Interoperability
Documents the components of the Platform
Maintains Alignment with International Standards

STANDARDS

TRUST RISK

PARTNERSHIPS

FUNDING

STRUCTURED SERVICES, PARTNERSHIPS & ALLIANCES

Cultivates Relationships
Facilitates Share Services
Works for the Whole

FUNDING & SUSTAINABILITY

Gathers & Distributes Funding
Evaluates Investment Needs
Sustains Core Capacities, Seeds Innovation

STEWARDSHIP

Articulates the message
Pools the Risk

ONGOING ACTIVITIES & CONVERSATIONS

Outlining further details of the **funding model, commitments, agreements, and standards** necessary to make this work

Drafting a **case for change** with **examples of working efforts** as well as **gaps & challenges**

Assembling further **data & analysis**

Related Initiatives:
Mapping Scholarly Infrastructure Census (Mellon)
Invest in Open Infrastructure / JROST
Lyrasis merger with DuraSpace

EMORY UNIVERSITY   NC STATE UNIVERSITY   INDIANA UNIVERSITY

PRINCETON UNIVERSITY   UNIVERSITY OF IOWA

UNIVERSITY OF COLORADO-BOULDER   UNIVERSITY OF MICHIGAN

VIRGINIA TECH

PENN STATE UNIVERSITY

JOHNS HOPKINS UNIVERSITY

COLUMBIA UNIVERSITY   STANFORD UNIVERSITY

NEW YORK UNIVERSITY
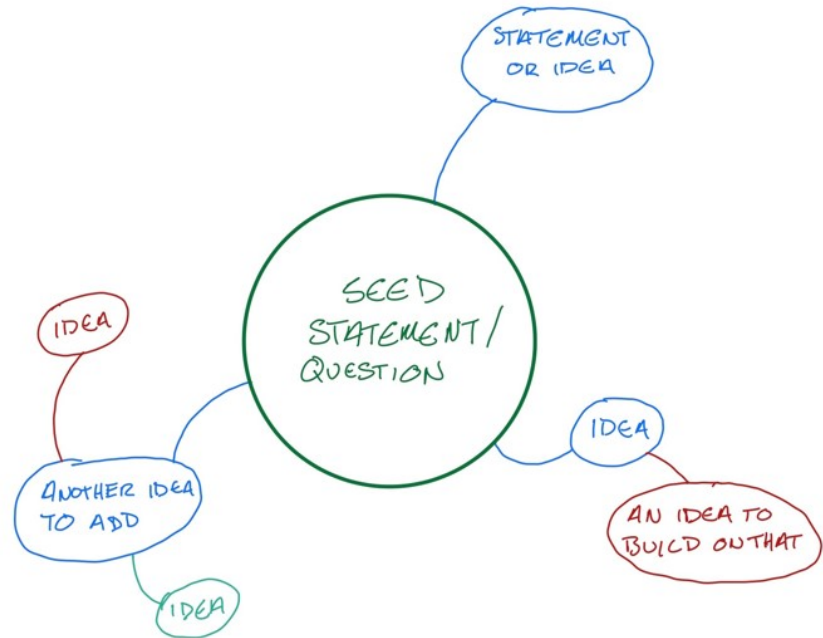
OHIO STATE UNIVERSITY

NORTHWESTERN UNIVERSITY   UNIVERSITY OF WISCONSIN-MADISON

SPEED-STATING

A METHOD FOR RAPID IDEA-SHARING

Remember you are **communicating**
with the people at your table!

1. Build on what you read
2. Add an idea, then pass to your right (on cue)
3. Write statements, rather than questions
4. Compact and pithy is easier to read than looooong
5. Write first, then circle, then connect
6. Write legibly!

REPORT OUT:
PATTERNS & OBSERVATIONS

Seed prompts:
- A. Entities who should be engaged
- B. What must we get absolutely right?
- C. Ideas and elements that should be included
- D. Things that would help make this compelling to my institution
- E. Possible blind spots or gaps

NEXT STEPS

Further ideas and more detail are forthcoming
Get updates and join the conversation—
Fill out the form at:
http://bit.ly.OP-FORM

Results and synthesis of this session will be poster in a
shared drive folder:
http://bit.ly/OP-DRIVE