

WG on Cost Recovery

Chairs:

Simon Hodson (CODATA) - presenter

Ingrid Dillo (DANS)



Contribution to strategic thinking in this area

- conducting research to understand current and possible cost recovery strategies for data repositories
- particular attention to data repositories' involvement in data publishing activities and examine such initiatives as a potential source of alternative revenue



Background

- Basic 'structural' funding of data infrastructure may not keep pace with increasing costs
- Need to consider alternative cost recovery options and a diversification of revenue streams
- Not just who will pay for public access to research data, but how these payments will be made

Objectives and Deliverables

- **A contribution to strategic thinking** on cost recovery by conducting research to understand current and possible cost recovery strategies for data centres
- **Report providing conclusions and recommendations** about the appropriateness of different cost recovery models to different situations and the potential of data publication initiatives fitting into a cost recovery strategy.
- What **business models** exist and are available for the data centres that provide public access and what options are open for data centres to diversify their income?
- What approaches to funding are available that may help ensure sustainability of data centres?

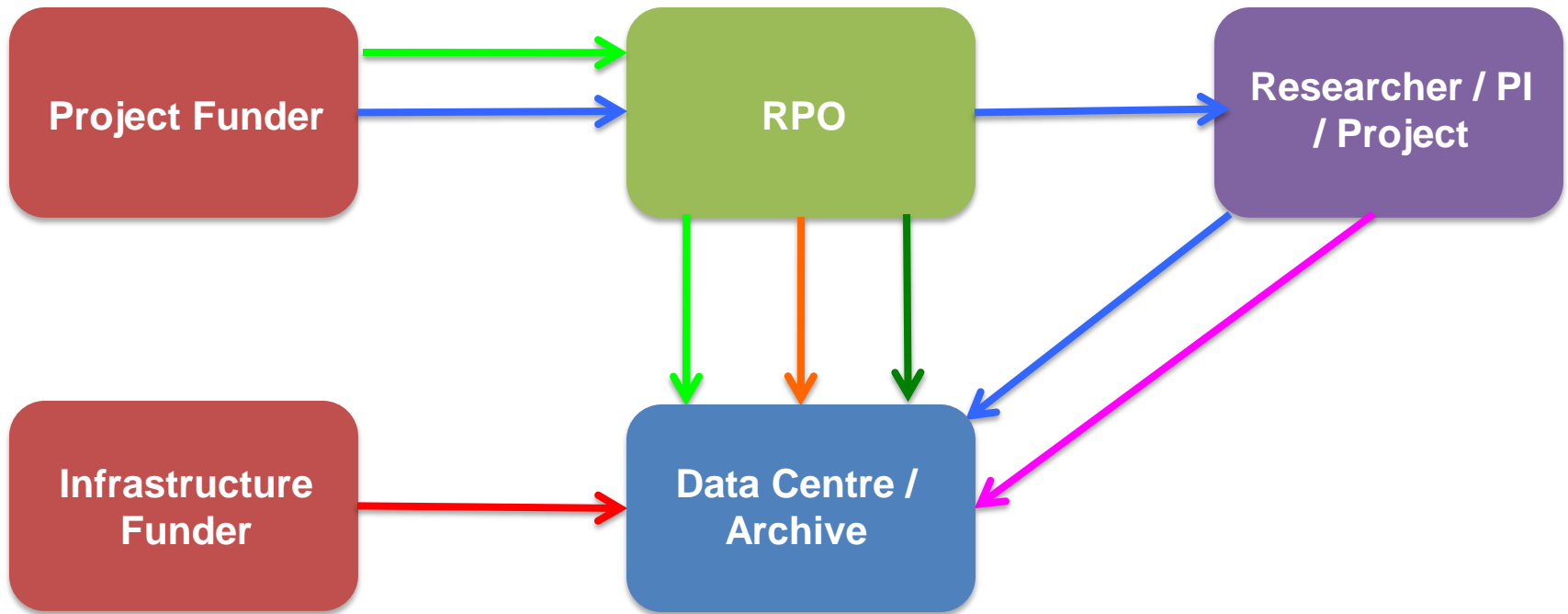
Work Packages

- **Work Package 1:** summary of current work on cost models (including recent work conducted by the 4C and APARSEN projects and by ICPSR);
- **Work Package 2:** summary of funding policies specifically relating to how the costs of data availability/publication may be recovered;
- **Work Package 3:** survey by means of short structured interviews and focus groups, of various existing approaches to cost recovery and available/possible business models;
- **Work Package 4:** detailed case studies of the cost recovery strategies of a limited set of data centres.
- **Work Package 5:** report and conclusions, *White Paper on Cost Recovery Options for Data Centres*

Discussion Sessions at RDA

- **IG RDA/WDS Cost Recovery for Data Centres 1**
- **BREAKOUT4 Tuesday 23 Sept 2014, 11.30-13.00**
- Discuss the Group's four work packages.
- Focused on the planned interviews and analysis and the payment model.

- **IG RDA/WDS Cost Recovery for Data Centres 2**
- **BREAKOUT5 Tuesday 23 Sept 2014, 14.00-15.30**
- A high level focus group involving a number of stakeholders - in particular funders and data archives/centres
- Two presentation on innovative examples (DANS, ICPSR) and a funder perspective (NIH)
- Brainstorm alternative cost recovery options and funding models



1. **Structural (central contract)**
2. **Hosting Support (indirect or direct support through institutional hosting)**
3. **Annual Contract (from depositing institution)**
4. **Data Deposit Fee**
5. **Access Charge**
6. **R&D Projects**

Next Steps

- Finalisation of the payment model and structure interviews.
- Conduct structured interviews with data centres between now and end-Feb 2015.
- Volunteers please!



Timescales

- Preliminary report on Interviews on Cost Recovery at RDA Plenary 5, March 2015
- Report on detailed Case Studies and draft recommendations at Plenary 6, Sept 2015
- Final Report and Recommendations, Plenary 7, March 2016

WG Membership

- **Ingrid Dillo (co-chair, DANS, NL)**
- **Simon Hodson (co-chair, CODATA)**
- Sarah Callaghan (BADC, UK)
- Mikael Karstensen Elbæk (OpenAIREplus)
- Jared Lyle (ICPSR, US)
- Jerome Pansanel
- Marcel Ras
- Ryan Scherle (Dryad)
- Barbara Sierman (KB, NL)
- Martina Stockhause (DKRZ, Germany)
- Mark Thorley (NERC, UK, observer)
- Anita de Waard (Elsevier, US)
- Eva Zanzerkia (NSF/GEO, US)