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)