Federation 2.0 Working Group Meeting Notes

Fed2 WG Google folder:
https://drive.google.com/drive/folders/1vr728JXAFVH3agjnbueV9NLjB_OKHdET?usp=sharing

Meeting https://internet2.zoom.us/j/8853848902

time:
https://www.timeanddate.com/worldclock/fixedtime.html?msg=REFEDS+Federation+2.0+Conference+Call+%28every+two+weeks%29&iso=20190626T11&p1=179&ah=1

Tasks

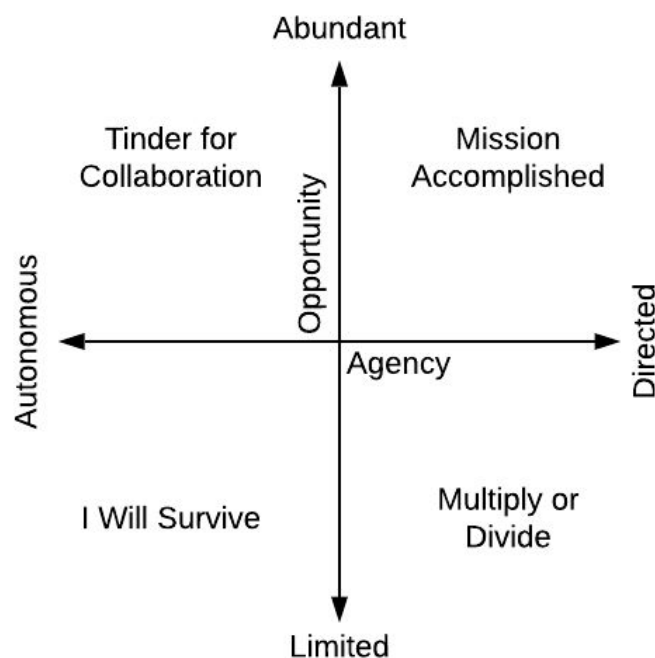| Who	What	When	Status
Laura Paglione	take a step at mapping stakeholders to quadrants.	July 9	
David Walker	draft some first points of the "success factors"	July 9	
Story teams	continue/complete work on the initial stories	July 9	

Wednesday, June 26, 2019

Attending: Tom, David Walker, Judith Bush, Richard Frovarp, Alan Buxey, Pål Axelsson (first 20 minutes), Sander Engelberts, Arnout Terpstra, Laura Paglione, Shannon Roddy, Warren Anderson, Lucy Lynch

Regrets: Maarten Kremers, Nicole Harris

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Agenda:
1. Workshop review
    a. All materials are in the Workshop folder, including subfolders for each of the four scenarios.
        i. Workshop Agenda
        ii. Workshop Meeting Notes (excellent work by Heather Flanagan!!)
        iii. The axes that were selected and story titles for each scenario

    b. Remarks by those who were there
    c. Questions by those who weren't
    d. The draft initial versions of the four stories/scenarios (*If you don't see the folders in the workshop folder, click these links to go directly to the stories - which may reveal the directories.*)
        i. Autonomous-Limited "I will survive"
        ii. Autonomous-Abundant "Tinder for Collaboration"
        iii. Directed-Limited "Multiply or Divide"
        iv. Directed-Abundant "Mission Accomplished"
2. Discussion of stories/scenarios
3. Next steps
4. Other business

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Notes: Tom oriented everyone to the output from the workshop from last Thursday. Note that the axes emerged from the discussion in reviewing the survey summaries. Tom characterized this as a Irreproducible process.

Autonomous-Limited **"I will survive"** Arnout shared their process was to determine definitions of the axes. Most challenging was opportunity, which they considered as financial resourcing. They examined whether limited resourcing meaning limited to some (less for some, more for others vs less overall). They recognized that the extremes were not interesting: they started the story at the extremes, but moved the story towards the middle. "When you spend a little bit of your resources to make tools to share with others, research benefits as a whole." "Agency" was easier to reach a consensus understanding.

Directed-Limited **"Multiply or Divide"** (Laura and Alan shared) Again chose the extreme then moved towards center. Opportunity: the ability to collaborate, open versus proprietary standards. Direction was from the government. You are told what to use. Story initiated with an event that isolates the country to create the context of governmental direction.

Autonomous-Abundant **"Tinder for Collaboration"** Sander shared they thought the interesting story would be in the middle of the quadrant. The resources could come from governments as well as companies. They easily found the positive things and then redirected into the risks and concerns that such abundance and autonomy would lead to (the problems of everyone doing their own thing). Individual autonomy … "necessity is the mother of invention" thus the absence of necessity led to lack of innovation. The positive aspects of the quadrant were "too easy" and not as interesting.

Directed-Abundant **"Mission Accomplished"** *No one on today's call*

Possible follow-ups:
- Answer the "oracle" questions from the survey using the stories
- Get feedback on initial stories from survey respondents, others
- map stakeholders' present location in the quadrants, ie, graph them.
    - Even individual federations
- Hints that a scenario is happening (eg news headlines) or that the future is trending in that direction: collect news stories that point to that quadrant. This can give motivations for the stories, and help define the axes.
- What are the critical success factors (pros and cons, positives and negatives) to emphasise the positive aspects in each quadrant? What do we control that can give more success? What is common to success in the different quadrants?

Lucy says we would map current stakeholders to the quadrants where they sit now, eg Chinese government in upper right, and make sure all the stakeholders and players are included and contextualized. **Where they are now and where do they want to be?** Eg: currently limiting funds to control, perhaps moving to less control….

What are the roles of professional societies? The roles of the academic social organizations, discipline allegiances... The researchers discovering researchers. Federations part of the Academy, yes. Collaboration platforms >> discovery of collaborators. In the pub? Tinder for collaboration. Engineer the platforms for serendipity.

The "opportunity" axis is harder to understand for Warren: finding people to collaborate with was never something for which there was external input.

Next: Are we ready to evaluate the critical success factors in each quadrant? We need a little more definition of what the evaluation uncovers ("Does it foster research?")