

COAR

Confederation of Open Access Repositories

A truly international effort to build
a worldwide repository network

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The **Berlin Declaration** requests

Free and unrestricted access to sciences and human knowledge representation worldwide

(October 2003)

Open access = unrestricted access + use

⇒ Needs a **global**, interoperable, trusted, long-term repository infrastructure



Research in the digital world is global, collaborative, networked, distributed... How can repositories allow researchers to use open publications and data to do useful and interesting work?



OA Repositories around the globe, need to operate similar policies, terms & conditions, data schemas etc. to build a (seamless) content resource based on a worldwide repository network

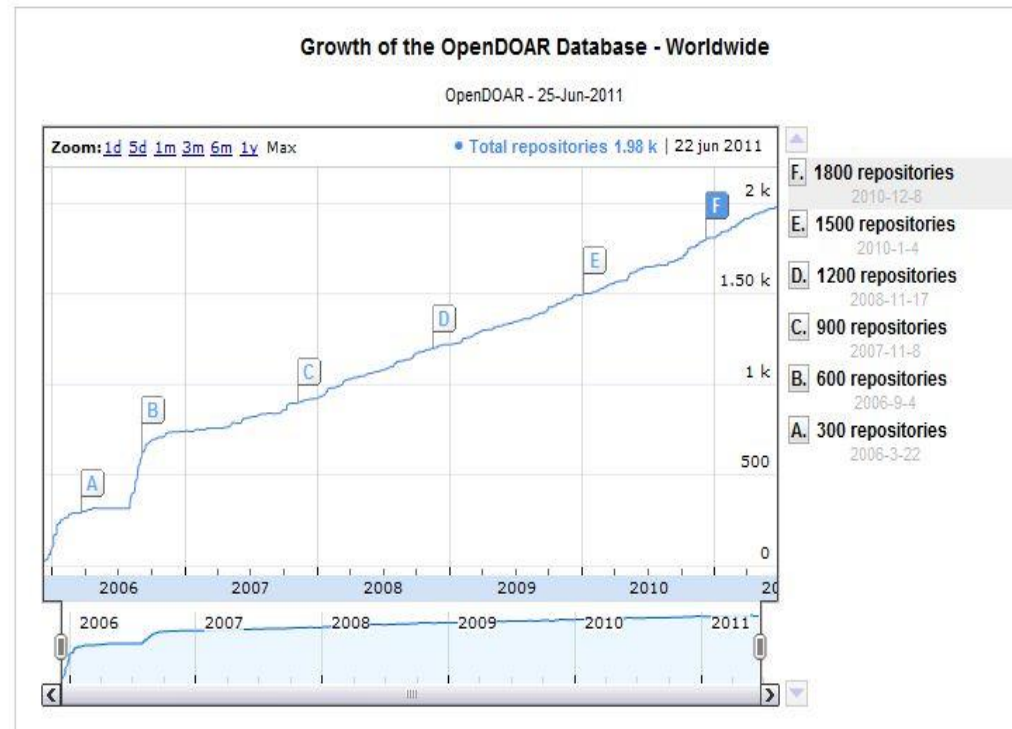


So many efforts....

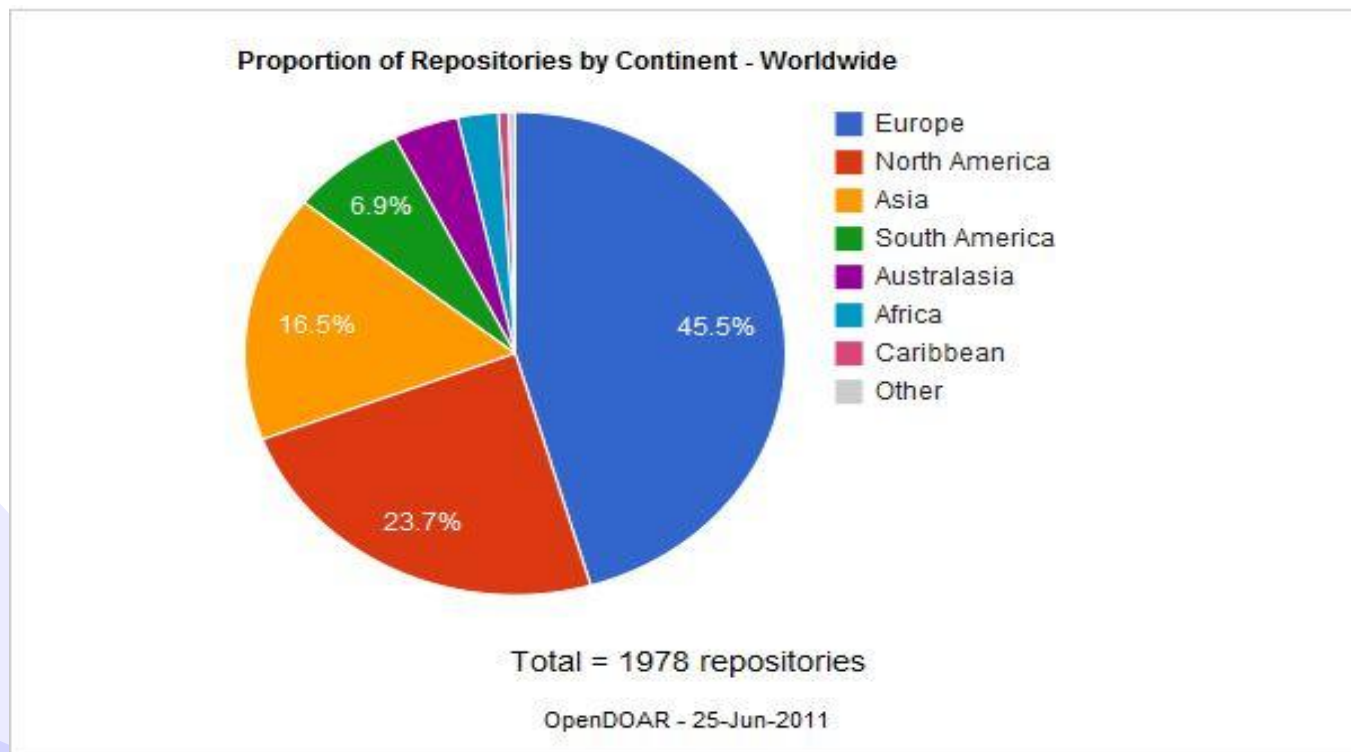
OpenDOAR

Directory of Open Access Repositories
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Growth of the OpenDOAR Database - Worldwide



Worldwide



Background: from DRIVER Confederation to COAR

- DRIVER II: has created the core of an Open Access repository confederation
- A process of consultation has revealed the need for an organisational model of partners representing the **repository community**, comprising organisations and individuals that represent a common strategic interest in Open Access scholarly communication rather than in a common technology.

Main conclusions:

- Launch a new organization to **work globally** at the spread of Open Access Repositories, influencing policy development, providing guidance and training, and lobbying



Factsheet

- COAR e.V., a registered not-for-profit association of repository initiatives according to German law, Office seat: Göttingen, DE
- Founded in Ghent, BE, October 21, 2009
- Members & Partners (31 March 2011): 59 member organisations (87 institutions, 23 countries= Europe, Japan, Latin-America, Canada, China, USA)



Our vision...



Thanks to Tim Berners Lee

To enhance greater visibility and application of research outputs through global networks of Open Access digital repositories.

A global knowledge infrastructure, networking open access digital repositories



Who we are?

- Single Repository/University/Library
- Research organisations
- Federations (national, regional)
- Governmental organisations, Funders
- Further organisations & initiatives (supporting repositories and open access)

Partners



Growing interest in many countries...



COAR principles

- **Subsidiarity:** focuses on what cannot be done effectively at national level, collaboration with national and regional initiatives
- **Holistic approach:** COAR needs to take a differentiated approach for its activities depending on the country situation, which again is expected to be dynamic. A holistic view on repository relevant topics.
- A **bottom-up** organization: (though with some excellent links to top decision makers) COAR will depend on the in-kind contributions of its members. Activities will be initiated and driven by members with support of the overall organisation. This concept enables COAR to address multiple objectives in parallel and to run at low cost
- **Synergy** among like-minded global initiatives, **collaboration** with international organisations like SPARCs, LIBER, IFLA as well as disciplinary infrastructures



Aims, Objectives, and Common Public Interest of the Association

- *promoting and putting into effect free accessibility (open access) to as well as visibility and availability of scientific research outputs in global networks of digital repositories;*
- *promoting the construction and development of digital repositories, of interoperability and their interconnections with complementary electronic infrastructures on a national and international basis;*
- *supporting chosen regions world-wide to establish and interconnect open access repositories;*
- *visualising the benefits of open access repositories and informing stakeholders and decision makers thereof;*
- *promoting interchange between all parties interested in maintaining, using or enhancing open access repositories;*
- *conducting projects as contracting party which are supported resp. funded by third parties, as far as the statutory aims of the association are directly pursued thereby.*



Organisation

- **Elected Executive Board:**
 - Chairperson: Norbert Lossau, Göttingen State and University Library, DE
 - Vice Chairperson: Sugita Shigeki, Otaru University of Commerce Library, JP (repres. DRF Japan)
 - Treasurer: Alicia López Medina, Universidad Nacional de Educación a Distancia, ES
- **General Assembly (Madrid, 2010; Debrecen, Hungary, 2011)**
- **Working Groups:** Supported by the COAR Office in communications, presenting outcomes and organizational issues



COAR Work Plan 2010–2012

Objectives:

1. Promote the role of OA repositories and raise their profile / Be the strategic partner of regional, national and international OA initiatives *as a representative, authoritative voice*
2. Populate repositories with content: Collect, assemble and disseminate *best practices* for the inception, operation and growth of OA repositories
3. Facilitate the discussion on *interoperability* among OA repositories and as part of a wider e-Infrastructure
4. *Support* regional and national repository initiatives; promote the repository manager profession
5. Promote the concept, design and implementation of an *OA information commons* (incl. the question whether COAR should provide concrete services, such as the (meta-)Data-Store)



Implementation Activities –

Objective 1 (COAR Board members, Working Group leaders, All members)

- Be the strategic partner of regional, national and international OA initiatives *as a representative, authoritative voice*
 - Comment to White House Office of Science and Technology Policy (OSTP) public consultation on Public Access to Federally Funded Research, U.S. (21 January 2010)
 - Comment to Slovenian Ministry of Higher Education, Science and Technology public consultation on the Research Infrastructure Development Plan 2011-2020 (1 March 2011)
 - Letter of support for the Ministry of Science, Technology and Innovation (MinCyT) of Argentina's open access policy legislation draft (to be signed in March 2011)



Implementation Activities – Objective 1

Building up COAR Latin America

- The Latin American organization RedCLARA and the network of CoLaBoRa signed a **Memorandum of Understanding** committed to work towards the establishment of a **regional branch of COAR**. Within the worldwide structure of COAR, this regional approach will build upon existing Open Access activities in Latin America and encourage and support the development of new initiatives. At the same time, the new distributed network structure would recognize the national and regional legal, organizational, cultural, language and communication challenges.



Working Groups

- In the First General Assembly, 2010, COAR Executive Board appointed the following working groups for objectives 2 to 4:
- WG 1 “Repository Content” (14 members)
- WG 2 “Repository Interoperability” (10 members)
- WG 3 “Repository and Repository Networks Support & Training” (10 members)



Working Group 1

**Kathleen Shearer (Chair; CARL, CAN), Neil Jacobs
(Co-chair; JISC, UK)**

*To populate repositories with content:
Collect, assemble and disseminate best
practices for the inception, operation and
growth of OA repositories*



WG 1: Work Plan 2011-2012 (Selection)

- Compile best practices for populating repositories
- Develop guidelines for funding agencies on implementing open access policies
- Pool of expertise from COAR membership available for those at the beginning stages of implementing repository networks
- Compile case studies to assist others in implementing archiving language into licenses
- Work with SPARC Europe to develop an open access program at ICOLC (International Coalition of Library Consortia) in September.



Working Group 2

Eloy Rodrigues (Chair; U Minho, PT), Syun Tutiya (Co-chair; DRF, JP)

*Facilitate the discussion on interoperability among
OA repositories and as part of a wider
e-Infrastructure*



WG 2: Work Plan 2011-2012 (Selection)

- **COAR Guidelines on Repository Interoperability**
 - **Inventory/wish list of interoperability functionalities**
 - **Evaluation of Existing Guidelines**
 - DRIVER Guidelines <http://www.driver-support.eu/managers.html>
 - DINI Certificate <http://www.dini.de/english/dini-certificate/>
 - OA mandates & grant reporting – OpenAIRE Guidelines <http://bit.ly/hLi5L2>
 - Knowledge Exchange Usage Statistics Guidelines <http://wiki.surffoundation.nl/display/standards/KE+Usage+Statistics+Guidelines>
 - PEER Guidelines for publishers and repository managers on deposit, assisted deposit and self-archiving http://www.peerproject.eu/fileadmin/media/reports/D3_I_Guidelines_v8.3_20090528.Final.pdf
 - Knowledge Exchange CRIS interoperability project <https://infoshare.dtv.dk/twiki/bin/view/KeCrisOar/WebHome>
 - **Drafting/Discussing/Publishing COAR Guidelines (4th Quarter 2011-1st Quarter 2012)**
 - **Integration of services based on COAR compliance (2012)**



WG 2: Work Plan 2011-2012

- “Briefing paper” on repository interoperability
 - July 2011
- ***Making the case for repository interoperability***
 - Define repository interoperability
 - Identify the added value and the services that can be available, for the research community, through different levels of interoperability



Working Group 3

Iryna Kuchma (Chair; eIFL), Marnix van Berchum (Co-chair; SURF, NL)

- *Support regional and national repository initiatives*
- *Foster the exchange of ideas and expertise within the repository community*
- *Facilitate the professionalization of repository manager*



WG 3: Work Plan 2011-2012 (Selection)

- Training materials on operational issues required to install, implement and deploy open repositories
- Overview of national helpdesks
 - contact information and expertise;
 - readiness to share expertise, training materials, FAQs and to participate in the international helpdesk programme for repository managers
- Facilitating translation of training materials (“Kit de Políticas de Acceso Abierto”, Eloy Rodrigues, available at RCAAP)
- Support services involving national helpdesks
- COAR Training events
 - Online webinars;
 - On-site training events



Communication

COAR Newsletter

No. 1 – March 2011



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From Sweden, we welcome the Digitala Vetenskapliga Arkivet (DiVA), a consortium representing 28 universities and colleges in Sweden.

From France, the Centre National de la Recherche Scientifique (CNRS) joined our association in February.

In March, the Chalmers University of Technology, Gothenburg University, Swedish



Some reasons to join COAR

- A global forum for exchange of information and experiences (pool of experts, mentors, best practices & case studies, training)
- Community building and support
- A strong reference authority in repository networking and infrastructure development
- You can participate in COAR International training programs for repository managers



Some reasons to join COAR

- COAR can help to raise the profile of your repositories and make a strong case of repositories for your policy makers – work together with various communities, encourage funding agencies to develop mandates/policies, work with publishers, etc.
- COAR can be your reference point for repository standardization efforts
- You will find new possibilities for international cooperation and knowledge exchange regarding repository management and repository infrastructure



But the main reason

- Repositories as components of networked information infrastructure
- so that scientists can find new ways to address the grand research challenges that face society.
- Only as a global network (infrastructure), across continents and around the globe, will repositories enable new forms of research and support new models of scholarly communication.

COAR

A truly international effort to build a worldwide repository network



COAR and the changing role of libraries

- Think & Act locally, nationally **AND** internationally
=> from local stacks to globally networked repositories
- See publication-repositories as component of a wider knowledge infrastructure (research data, learning objects, cultural heritage etc.)
- **Accept research data** as core element of our future information & service portfolio
- **Assume responsibility to support the complete research cycle** (where required by researchers)
- **Intensify collaboration with research communities**, discipline-specific research infrastructures, computer scientists and further relevant stakeholders
- **Include OA-agreements** as key elements in licensing contracts **with publishers**



Joining COAR as...

An organization may become a member as a

single Full Member

or can build up a **Group**.

Groups can have 2 to 10 members and each group, independent of its size, has one active vote.

Moreover, organizations with lots of members may consider to establish a **group consortium** – as a special type of group membership.

a **Special Member**

a **Partner**



If you are engaged in the development of repositories and their networks, we would be delighted to
Welcome you as a new member of COAR!



Where can you get more information about COAR?

- COAR (temporary) Portal (new website will be relaunched in July)
<http://coar-repositories.org/>
- Contact the COAR office to register your interest in becoming a member of COAR
coar-office@sub.uni-goettingen.de

