Towards a global network of open access repositories for research and scholarship
Research is becoming increasingly global, collaborative, networked, distributed.

Proportion of Repositories by Continent - Worldwide

- Europe: 44.4%
- Asia: 19.7%
- North America: 19.8%
- South America: 8.6%
- Africa: 4%
- Australasia: 3%
- Caribbean: 2%
- Central America: 1%
- Sonstiges: 0.5%

Total = 2881 repositories

OpenDOAR - 09-Jun-2015

OpenDOAR has over 2600 repositories listed
Open Access: Green and Gold
90-10 Gap: Only 10% of worldwide expenditure on health research and development is devoted to the problems that primarily affect the poorest 90% of the world's population (Global Forum for Health Research)
There are also very big inequalities in scientific publishing!

Gold Open Access APCs threaten to further marginalize developing countries

From: The World of Scientific Output According to Thomson’s ISI Science Citation Index (2007)
Our vision

A global knowledge infrastructure, built upon a network of open access digital repositories

...will enhance the provision, visibility and use of research outputs
New modes of research and scholarly communication

COAR aims to facilitate the vision by bringing together research repositories as part of a global infrastructure; to link across continents and around the world, enabling new forms of research and supporting new models of scholarly communication.

Research libraries have a central role to play.

Standards, policies, infrastructure, strategy, interoperability, support, awareness, integration…

Inspired by Tim Berners Lee
Factsheet

- COAR e.V., a registered not-for-profit association of repository initiatives according to German law, Office seat: Göttingen, DE, Host: Göttingen State and University Library
- Founded in Ghent, Belgium, October 21, 2009 (28 members), evolved out of the European DRIVER Project (EC, FP7)
- One Annual Meeting of all members with General Assembly
  Members & Partners (April 2015): about 100 member institutions (out of over 35 countries in all continents); 8 partner organizations
- Elected Executive Board:
  - Chairperson: Norbert Lossau, Göttingen University, Germany
  - Chairperson (forthcoming): Eloy Rodrigues, University of Minho, Portugal
  - Vice Chairperson: Carmen-Gloria Labbé, Cooperación Latinoamericana de Redes Avanzadas (CLARA), Uruguay
  - Treasurer: Márta Virágos, University and National Library of Debrecen, Hungary
  - Forthcoming: Oya Rieger, Cornell University, USA
  - Forthcoming: Wolfram Horstmann, Göttingen State and University Library, Germany
  - Forthcoming: Daisy Selematsela, National Research Foundation, South Africa
Members and partners

- Single Repository/University/Library organisations
  - i.e. University of Toronto Libraries, Canada
- Federation (national, regional)
  - i.e. Digital Repository Federation (DRF), Japan
- Research organisations (“Repository Provider”)
  - i.e. Chinese Academy of Sciences, National Science Library, China
- Governmental organisations, funders
  - i.e. Fundación Española para la Ciencia y la Tecnología, Spain
- Technology/Infrastructure Development
  - Uniwersytet Warszawski, Interdisciplinary Centre for Mathematical and Computational Modelling, Poland
- Service Provider
  - i.e. OCLC (Online Computer Library Center), U.S.
Strategic Directions

1. To promote the development of a global, sustainable network of open access repositories as key element of the evolving international scientific information infrastructure, including social sciences and humanities, in support of excellence in research and education

2. To provide support for the OA repository community from institutions, countries, regions and disciplines, through international cooperation and information sharing

3. To define and promote interoperability, standards, and infrastructure policies

4. To stimulate the development and take-up of user added-value services on top of the repositories.
Activities

Activity Area: Repository Content

• Promote emerging and best practices in content recruitment
• Identify and support the development of overlay and value-added services
• Publication: “Incentives, Integration, and Mediation: Sustainable Practices for Populating Repositories” (Disponible en español)

Related Task Forces and Interest Groups

Open Access Agreements and Licenses Task Force - Monitoring, evaluating and promoting the implementation of effective open access agreements and licenses
• Report: “Open Access Clauses in Publishers’ Licenses – Current State and Lessons Learned”

Repository Impact and Visibility Interest Group - Explore and document existing approaches for maximizing repository visibility and develop new strategies that can be adopted around the globe
Activities

Activity Area: Repository Interoperability

- Define and promote interoperability, standards and infrastructure policies
- Newly Published: “COAR Roadmap: Future Directions for Repository Interoperability” - identifies emerging issues and trends for repository interoperability and determines priorities for focusing future interoperability efforts.

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<thead>
<tr>
<th>Complexity</th>
<th>Short term</th>
<th>Medium term</th>
<th>Long term</th>
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<tbody>
<tr>
<td>Low</td>
<td>• Exposing Citation Formats</td>
<td>• Exposing Persistent Identifiers</td>
<td>• Extending Usage of Visualization Tools</td>
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<td>• Supporting Data Export Functions</td>
<td>• Supporting Authorization and Authentication</td>
<td>• Supporting Linked (Open) Data</td>
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<td>• Supporting Author Identification Systems</td>
<td>• Improving Platform Stability</td>
<td>• Extending/Replacing Metadata Exposition Protocols</td>
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<td>• Supporting Search Engine Optimization (SEO)</td>
<td>• Supporting Institutional Services</td>
<td>• Handling of Complex/Compound/Nested Repository Objects</td>
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<td>• Exposing Publication Lists</td>
<td>• Extending End-User Usability</td>
<td>• Supporting Long-term Preservation and Archiving</td>
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<td>• Integrating Different Persistent Identifiers</td>
<td>• Validating Repository Metadata</td>
<td>• Supporting Enhanced Publications</td>
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<td>Moderate</td>
<td>• Exposing Bibliometric Information</td>
<td>• Exposing Versioning Information</td>
<td>• Extending Usage of Visualization Tools</td>
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<td>Complexity</td>
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<td>• Supporting Linked (Open) Data</td>
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<td>• Improving Registry Infrastructure</td>
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<td></td>
<td>• Monitoring Open Access Mandate Compliance</td>
<td>• Handling of Complex/Compound/Nested Repository Objects</td>
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<tr>
<td>High</td>
<td>• Exposing Usage Statistics</td>
<td>• Publication of Research Data</td>
<td>• Supporting Long-term Preservation and Archiving</td>
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<tr>
<td>Complexity</td>
<td>• Supporting Additional Metadata Format(s)</td>
<td>• Improving Metadata Quality (Data Curation)</td>
<td>• Supporting Enhanced Publications</td>
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<td>• Processing Related Full Text</td>
<td>• Extending Usage of Visualization Tools</td>
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<td>• Supporting Deposit Protocols</td>
<td>• Supporting Linked (Open) Data</td>
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<td>• Defining Architectural Recommendations for Repositories and their Interoperability</td>
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9 Issues with high relevance

• Exposing Citation Formats
• Supporting Data Export Functions
• Supporting Author Identification Systems
• Supporting Search Engine Optimization (SEO)
• Exposing Publication Lists
• Integrating Different Persistent Identifiers
• Exposing Bibliometric Information
• Exposing Usage Statistics
• Supporting Additional Metadata Format(s)
What’s next?

• COAR is already working to advance interoperability in several of the priority areas including author identification systems, publication lists, persistent identifiers, usage statistics and bibliometric formats.

• Still many challenges, i.e. standardization across vocabularies, metadata and indicators, both within the repository environment as well as with other systems.

• Success of future repository services depends on the seamless alignment of the diverse stakeholders at the local, i.e. institutional, national and international community level.
Related Task Forces and Interest Groups

• **Interest Group “Usage Data and beyond”** - Collecting experiences from several projects in order to standardise the transfer protocol and data format

• **Interest Group “Controlled Vocabulary for Repository Assets”** (info:eu-repo) - Establishing workflow for vocabulary maintenance & adopting mainstream web practices for vocabulary encoding
Activities

Activity Area 3: Repository and Repository Networks
Support and Training

• Facilitate a community of professionals through a global forum for the exchange of information and experiences
• Collect and share training materials developed elsewhere
• Produce training events: webinars, workshops, etc.

Related Task Forces and Interest Groups
• Joint Task Force on Librarians' Competencies in support of e-Research and Scholarly Communication - outline the competencies needed by librarians in this evolving environment (by ARL, CARL, COAR & LIBER).
Activities

**Aligning Repository Networks**

Existing networks are being developed based on different policies, requirements, metadata standards and vocabularies

…creating SILOS
Activities

The full potential of digital content, stored on thousands of repositories around the world can only be exploited once they are connected.
Aligning Repository Networks

Meeting, April 16, 2015, Porto, Portugal

Meeting, March 2014, Rome, Italy
How can repository networks align?

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<tr>
<th>Political</th>
<th>Technical</th>
<th>Services</th>
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<tbody>
<tr>
<td>• Advocacy and promotion</td>
<td>• Metadata standards</td>
<td>• Harvesting/discovery</td>
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<tr>
<td>• Principles</td>
<td>• Usage statistics</td>
<td>• Monitoring publisher policies</td>
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<tr>
<td>• Objectives</td>
<td>• Standard vocabularies</td>
<td>• Repository directories</td>
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<tr>
<td>• Policies</td>
<td>• Author identifiers</td>
<td>• Monitoring research output</td>
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<td></td>
<td>• Persistent identifiers</td>
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<td></td>
<td>• Cross-system transfer</td>
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Advocacy and Promotion

New: Statement against Elsevier’s Sharing Policy
For immediate, barrier free access to publications without embargo periods or non-commercial licenses!

*** NEW *** SIGN NOW ***

https://www.coar-repositories.org/activities/advocacy-leadership/petition-against-elseviers-sharing-policy

Statement about Embargo Periods
May 14, 2014: “We endorse the policies and practices that enable Open Access – immediate, barrier free access to and reuse of scholarly articles…

***Signed by numerous organizations from around the world.***

Promoting OA Clauses in your publishers licenses
e.g. “Authors from authorised institutions are permitted free of charge to promptly store their articles appearing in licensed journals generally in the form published by the publisher (e.g. PDF) in an (institutional or discipline-specific) repository of their choice and to make them available in Open Access.”

***Finland, Germany, Sweden, California, World Bank and others have already successfully negotiated these clauses into their licenses***
Technical Alignment

COAR is working with the major repository networks to facilitate greater interoperability:

• controlled vocabularies
• metadata schemas for open access
• usage statistics, assessment measures
• integrating repositories with other systems

Services

COAR is working with the major networks to develop shared services (harvesting and tracking research output)
Other Activities

Repository Observatory
• To help open access repositories to anticipate and respond the constant state of rapid evolution.
• Identify trends and future scenarios in the context of the use of repositories in research and education

RDA Long Tail of Research Data Interest Group
• Develop a set of good practices for managing research data archived in the university context.

RDA Libraries for Research Data Interest Group
• to build capacity within the library community around research data management, ensure libraries are aligned with other RDM service providers, and share practices as RDM library services evolve and mature
Why join COAR?

Pursue a common vision

COAR:

• Advocates at the international level to ensure that repositories are a recognized part of the global research infrastructure.

• Demonstrates to policy makers that institutions are already working together to create this infrastructure.

• Develops relationships with other stakeholder organizations with common objectives.
Why join COAR?

Monitor trends and network with international colleagues

COAR:

• Acts a forum for international cooperation and knowledge exchange regarding repository management and repository infrastructure

• Serves as your reference point for repository standardization efforts

• Facilitates your participation in international projects
Why join COAR?

**Develop skills and knowledge**

COAR

- Engages members in new developments and trends in repository roles and developments.
- Helps to organize training programs for repository managers.
- Supports a community of practice of repository managers, through workshops and other training events.
If you share the vision of an open, global research repository infrastructure, we would be delighted to welcome you as a member of COAR!

Participants of the COAR Annual Meeting in Porto, Portugal, 2015
How to join COAR?

An organization may become a member at any time

• as a single institution (for only 500 EUR per year)

• organizations with lots of members may consider to establish a Group Consortium – with discount on membership fee.

• as a Special Member (“fee waiver option” for institutions from the least developed countries)

...or become a Partner
Where can you get more information about COAR?

• Visit the COAR Website:
  www.coar-repositories.org

• Contact COAR Executive Director, Kathleen Shearer, for more information:
  kathleen.shearer@coar-repositories.org

• Contact the COAR office to register your interest in becoming a member of COAR
  office@coar-repositories.org

• Follow us on Twitter: #COAR_eV
• Find us on Facebook: https://www.facebook.com/COAReV