COAR

Confederation of Open Access Repositories

Promoting greater visibility and application of research through global networks of Open Access repositories

COAR Annual Report 2016-17

Summer 2017
Public version

http://coar-repositories.org

Message from the Executive Director

Dear COAR members and partners,

It has been another productive year for the organization, with steady progress made in several important areas. In April 2016, we launched the Next Generation Repositories Working Group to help identify new functionalities for repositories. This will help to move the community forward in terms of the value of repositories both for the institution, but also at the networked level. In February, the first results of the group, 12 user stories, were made available for public comment. Once public feedback is incorporated, the next steps will be to map the functionalities described in the user stories to the necessary technologies and standards that are needed. This will be one of COAR's priorities for the coming year.

Additionally, we have continued our efforts to raise awareness of the need to align repository networks and have been working on practical agreements and activities between networks to support greater interoperability across the world. This interoperability is critical if we are to support the global nature of research; and it will also help to improve the visibility and branding of repositories in the scholarly ecosystem. Specific activities include the adoption of common vocabularies and metadata, data exchange across networks, and the implementation of common services across networks. In May 2017, the existing repository networks will demonstrate their support by signing an International Accord that outlines specific areas of collaboration. COAR has also been engaging with other regions and countries that do not yet have a repository network in order to help link them into international discussions, as well as to facilitate the local development of communities and technical networks in these regions.

Picture 1: COAR Infographic

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COAR has been working to strengthen our role in terms of capacity building. We launched the *COAR Webinar and Discussion Series* to help raise awareness of our activities as well as important trends for repositories. We have also been actively seeking opportunities to develop more concrete training activities for repository managers, through leveraging relationships with partners and looking for external funding opportunities. It is expected that we will be able to launch some training events in 2017, with a special focus on developing regions.

While sustainability and staffing continues to be a challenge for COAR, since the reduction of membership fees several years ago, we did gain several new members in 2016 and expect membership to continue to rise in 2017. We continue to benefit greatly from the voluntary participation of members and external experts in many of our activities, and these contributions are fundamental to COAR's progress. On behalf of the Executive Board, and the COAR staff, I want to thank you for your participation in COAR and I look forward to continued engagement and collaboration in 2017-2018 year.

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1   Introduction

COAR is an association with international representation of over 100 members and partners from around the world representing libraries, universities, research institutions, government funders and others. COAR brings together the repositories and major repository networks in order build capacity, align policies and practices, and act as a global voice for the repository community.

Four strategic directions guide COAR's activities:

>   i. Promote the development of a sustainable, global network of open access repositories as key elements of international research infrastructures in support of excellence in scholarship and education

>   ii. Provide support for the OA repository community and build local capacity for the development and management of repositories and repository networks

>   iii. Define and promote interoperability, common standards, and best practices for repositories, repository networks and with other related systems

>   iv. Stimulate the development and adoption of value-added services for repositories and repository networks

2   Programmatic Activities

COAR's programmatic activities for 2015-2016 year are organized according to the four strategic directions.

2.1   Strategic Direction i.

> **i. Promote the development of a sustainable, global network of open access repositories as key elements of international research infrastructures in support of excellence in scholarship and education**

COAR and UNESCO Joint statement on Open Access

In May 2016, COAR and UNESCO published a joint statement that outlined some of the concerns the international community has around the direction towards article processing charges (APCs) as the major solution for open access. The statement underscored the need for a variety of OA models to be implemented around the world. "As the world enters a new era of sustainable development, openness and inclusiveness in scientific research will become increasingly critical. While most governments agree on the underlying principles of open access, there is significant diversity in the way countries have approached its implementation. These differences reflect a range of perspectives, values, and priorities of the different regions. Clearly, there is no "one-size-fits-all" solution to

implementing open access." The full statement was published on May 9, 2016 in English (news on UNESCO website) as well as in Chinese, Spanish (español), and Portuguese (português).

Asia OA Community of Practice

In 2016 COAR launched a special forum, called Asia OA, to facilitate greater exchange in the Asian open access community. The community is dedicated to people working on open access in the Asian region and celebrates Asian cultural diversity and unique way of doing things. The group was launched in March 2016 with a meeting hosted by the National Institute of Informatics in Tokyo, Japan. A second meeting took place in Kuala Lumpur, Malaysia on November 14–15, 2016 with representatives from 8 Asian countries. The meeting, *Positioning Asia in the Global Movement of Open Science*, allowed participants to highlight and share activities in Asia around open access to publications and data. The meeting was well attended with over 100 participants and provided an opportunity for delegates from different countries to meet and network. A third meeting is being organized to take place in the fall of 2017.

Picture 2: Participants of the OA Asia Meeting

Global Sustainability Coalition for Open Science Services

COAR is participating in the newly launched Global Sustainability Coalition for Open Science Services (SCOSS), being lead by SPARC Europe. The initiative is trying to address the issue of sustainable funding for open access services, and aims to provide a coordinated, cost-sharing framework to secure the future of non-commercial OS services that underpin the development of

wider global open science. Other participating organizations are: Australasian Open Access Strategy Group, The Council of Australian University Librarians, The European Commission: DG Research & Innovation, The European Research Council (ERC), The European University Association (EUA), EIFL, The International Federation of Library Associations and Institutions (IFLA), LIBER, Science Europe, and SPARC Europe. More information is available on the SPARC Europe website.

Presentations

COAR participates in numerous conferences, events and sessions related to the open science, open access, and repositories, which are listed at the end of the report.

2.2 Strategic Direction ii.

> **ii. Provide support for the OA repository community and build local capacity for the development and management of repositories and repository networks**

Webinars

In July 2016, COAR launched a *Webinar and Discussion Series*, to helping members stay up-to-date with COAR activities as well as the trends and topics in open access and repositories. The following webinars were offered since the launch of the series:

- Vocabularios Controlados para Repositorios: Objetivos y Avances del Grupo de Trabajo COAR (in Spanish), 16 March 2017
- Publishing Controlled Vocabularies for Access and Reuse, 15 December 2016
- Linked Open Data (in Spanish), 7 December 2016
- Next Generation Repositories. 25 October 2016 (two presentations)
- Controlled Vocabularies, 4 October 2016
- Oya Rieger on the arXiv User Survey. 28 July 2016

A series of webinars are being planned for 2017. The webinars will reflect priority topics and areas for COAR such as research data management, next generation repositories and so on. As the speakers are confirmed, members will be informed via the COAR web site, mailing list and through social media channels. In order to reflect the regional diversity of COAR membership, some webinars will be offered in different languages and alternate time zones. All the webinar slides and the recordings are deposited in Zenodo.

Librarians' Competencies for E-Research and Scholarly Communication

The Librarians' Competencies for E-Research and Scholarly Communication Task Force is producing a number of competency profiles that will help build capacity in libraries for supporting new roles in the area of scholarly communication and e-research. The profiles can be used by library managers to identify skill gaps in their institution, form the basis of job descriptions, and act as a foundation for

the development of training programs. In June 2016, the Task Force published the first two profiles, and a third profile, Librarians' Competencies for Digital Humanities, will be published on the COAR website in April 2017.

- **Librarians' Competencies for Research Data Management**

  Research data management encompasses a wide array of activities across the research data lifecycle. Generally, it requires a high level of interaction with researchers and also working with other support services including technical services and research officers. View Full Profile

- **Librarians' Competencies for Scholarly Communication and Open Access**

  Library activities in scholarly communication and open access typically fall into one of four categories: scholarly publishing services; open access repository services; for copyright and open access advice; and assessment of scholarly resources. View Full Profile

Training and Capacity Building

Despite the continued growth in number of repositories around the world, many institutions find it challenging to implement and maintain local repository services, or to expand their operations to adopt new functionalities and services. While there are already a variety of information and training resources available for repositories, there are still significant gaps in terms of in-depth and in-person training programs for repository managers, especially outside Western Europe and North America. Additionally, existing training resources often require a high degree of self-direction by learners.

COAR has been looking for opportunities to develop and deliver training for both repository managers and aggregators. This will require extra funding beyond the existing COAR budget and therefore efforts to date have been focused on working with partners to develop proposals for external funding. So far, discussions for training have included the following topics:

- management of repository services and platforms
- research data management
- new technologies and services for repository networks and harvesters

We hope that one or more of these proposals will result in concrete training opportunities in 2017-2018. COAR also contributes training and capacity building through participation in events organized by others.

2.3   Strategic Direction iii.

> **iii. Define and promote interoperability, common standards, and best practices for repositories, repository networks and with other related systems**

COAR Controlled Vocabularies

The use of controlled vocabularies for bibliographic metadata "ensures that everyone is using the same word to mean the same thing". The adoption of controlled vocabularies is a way to enhance the interoperability across repositories and with other related systems such as harvesters, CRIS systems, data repositories and publishers. In October 2016, the COAR Controlled Vocabulary Editorial Board published the first COAR controlled vocabulary, "Resource Type" version 1.1. The Resource Type vocabulary defines concepts that identify the genre of a resource. The vocabulary supports a hierarchical model that relates narrower and broader concepts. It is available in 12 languages (English, Catalan, Chinese, Dutch, French, German, Italian, Japanese, Portuguese, Russian, Spanish, Turkish). The vocabulary was developed and translated by the COAR Controlled Vocabularies Editorial Board and is a community effort to improve cross-repository interoperability.

COAR Controlled Vocabularies Editorial Board will be working on two more vocabularies in early 2017: Access Mode and Version Type Vocabularies, and is aiming to release the access mode vocabulary version 1.1 in advance of the COAR Annual Meeting in May. General and type-specific FAQs were prepared and added on the web site. Relevant group web pages were also reorganised and updated in early 2017.

Aligning Repository Networks

A major strategic priority for COAR is to align repository networks. COAR has been working with the regional and national aggregators, as well as representatives from other countries that do not yet have centralized services to promote and support greater alignment of repositories and repository networks. This activity, partially funded by the OpenAIRE2020 project, is being pursued through several avenues including bilateral agreements between networks, adoption of common guidelines, data exchange across networks, and awareness raining activities, as described below:

- **International Accord for Repository Networks**

  COAR has been building widespread support for an International Accord for Repository Networks. The purpose of the accord is to foster greater cooperation between regions by identifying common principles and areas of collaboration that can lead to concrete actions for repository networks. The accord will help to reinforce the important role of the regional and national networks, and act as a framework for greater collaboration across regions. Signatory organizations will agree to collaborate in the following areas:

  - Regular communications
  - Common APIs, standards, and protocols
  - Technology transfer and co-development of technologies

  There has been very positive feedback about the accord by existing networks and an official signing will take place in conjunction with COAR Annual Meeting in Venice on May 8, 2017.

- **Report of the Current State of Alignment and Roadmap**

  This report, published in December 2016, provides an overview of the current state of repositories, the status of alignment across repository networks, and a vision and roadmap for next steps. In terms of current global alignment, the international repository community

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is diverse and at different stages of maturity and development across regions, countries and institutions. That being said, there has been significant progress in terms of aligning repository networks over the last two years. The report contains a roadmap that outlines the next steps to further align repository networks and support greater interoperability and the adoption of improved functionalities and services. In the coming months, COAR will expand on this roadmap by identifying the specific actions that will support progress across specific objectives.

1. Increase the capacity and number of national and regional networks of repositories
2. Expand data exchange activities across repository networks
3. Increase the adoption of common vocabularies and metadata standards
4. Coalesce around a common vision for next generation repositories
5. Bring in other communities not yet engaged in discussions

- **Strategic Meetings**

On April 12, 2016, COAR hosted an Aligning Repositories Networks meeting in Vienna, Austria. The aim of the meeting was to discuss strategic directions for repository networks in different region, and share challenges. The meeting was attended by representatives from Africa, Canada, China, Japan, Europe, Latin America, and the United States. The next meeting is planned for May 8, 2017 in Venice, Italy.

- **Harmonizing metadata across repositories**

In September 2016, LA Referencia formally adopted the OpenAIRE Guidelines. This means that two of the largest repository networks are now aligned in terms of metadata requirements. COAR has also been discussing with other regions the feasibility of further internationalizing the guidelines beyond Europe and Latin America. This will eventually require that the guidelines are maintained and evolve with more international input and participation.

- **Metadata exchange across networks**

Latin America: In December 2016, OpenAIRE began harvesting records from LA Referencia, the large regional repository network that aggregates metadata of open access publications. LA Referencia contains over 1.2 million records of open access content from nine countries in Latin America: Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Mexico, and Peru. The records provide access to the peer-reviewed journal articles, and theses and dissertations in these countries across all research disciplines. This effort integrates the research outputs of the two regions and will significantly raise the visibility of Latin American publications outside the region.

Japan: OpenAIRE is harvesting the Japanese network of repositories through JAIRO, which is an infrastructure managed by the National Institutes of Informatics. This has been achieved using crosswalks across the two diverse metadata schemas of JAIRO and OpenAIRE. JAIRO now represents the third largest data provider in OpenAIRE. NII is looking at the feasibility of adopting some of the OpenAIRE Guidelines and will consider which elements may be useful in the Japanese context.

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Chile: OpenAIRE has been working on a pilot with a local funder in Chile, CONECYT to use OpenAIRE Service to support tracking CONECYT-funded research outputs.

Participation in Regional Meetings

- **SHARE:** In July 2016, Kathleen Shearer attended the SHARE meeting. SHARE is a rapidly expanding network in the US that was launched by the Association of Research Libraries (ARL) and other university associations, and is managed by the Center of Open Science. COAR, along with OpenAIRE and LA Referencia, have been working with SHARE to encourage the adoption of common standards, increase information sharing, and promote data exchange across networks.

- **LA Referencia:** In September 2016, Kathleen Shearer and Eloy Rodrigues attended the LA Referencia Council Meeting. The meeting discussed the important strategic issues related to LA Referencia operations and future directions and offered an opportunity for COAR representatives to be more aware of the Latin American environment and context

- **Chinese IR Conference:** In September 2016, Kathleen Shearer, COAR Executive Director, attended the 4th annual Chinese Institutional Repository Conference, with the theme of "Rich functions and extended roles for institutional repositories". The conference was jointly organized by National Science Library, Chinese Academy of Sciences (CAS), CIRG (Chinese institutional repository implementation group), and Chongqing University Library. It attracted over 330 registered participants, reflecting the growing interest in repositories in the Chinese library community. At the conference, a new national repository group was launched, "China Academic Institutional Repository" (CHAIR). The group has 33 university members, and will enable greater information sharing and collaborative work on repositories across the Chinese universities. The conference offered an opportunity to present the work of COAR in China and make the case for closer ties and greater alignment across regions.

- **Canadian Association of Research Libraries:** In November 2016, COAR co-organized a strategic meeting on the future of repositories in Ottawa, Canada with the Canadian Association of Research Libraries. The aim of this meeting was to bring together library directors and decision makers to develop a strategy for repositories in Canada. At the meeting, COAR presented the strategy for aligning repository networks and also our vision for next generation repositories. The meeting identified several areas in which Canada could increase their international participation, and laid the foundation for future work between CARL and COAR.

CASRAI-UK Open Access Working Group

COAR is participating in a CASRAI-UK Open Access Working Group to identify a subset of open access terms. Open access to publications is a key component of the modern research ecosystem, but the international community lacks a clear and unambiguous shared understanding of the key terminology. The Working Group is developing a standard glossary of terms pertinent to open access (OA) and publications (including journal articles, conference papers, monographs and similar 'text-' or 'book-like' outputs). Terms will be matched, merged, mapped, and de-duplicated (ie. 'see also') as well as a draft standard definition published and maintained for each term.

2.4 Strategic Direction vi.

> **iv. Stimulate the development and adoption of value-added services for repositories and repository networks**

Next Generation Repositories

In April 2016, COAR launched a working group to help identify functionalities and technologies for the next generation of repositories. In order to leverage the value of the global repository network, we need to equip it with a wider array of roles and functionalities, which can be enabled through new levels of web-centric interoperability. One of COAR's major objectives for 2016-17 has been to identify the core functionalities for the next generation of repositories, as well as the architectures and technologies required to implement them; and to work with the repository community to help adopt these functionalities. The vision is to position repositories as the foundation for a distributed, globally networked infrastructure for scholarly communication, on top of which layers of value added services will be deployed, thereby transforming the system, making it more research-centric, open to and supportive of innovation, while also collectively managed by the scholarly community.

In February 2017, the working group presented 12 user stories that outline priority functionalities for repositories, for public comment. This elicited valuable feedback from the community that is being incorporated into the document after which the working group will begin to identify recommended technologies and architectures that will support new functionalities.

Research Data Management

In September 2016, COAR launched a Research Data Management (RDM) Interest Group to help the community expand their knowledge and services to support RDM. This group will provide a forum for discussion about managing research data, identify best practices and strategies, and support capacity building for RDM in the repository community. The Interest Group identified the following activities for 2016-2017:

1. Webinars
2. Develop an assessment framework to help institutions evaluate data repository systems
3. In December 2016, COAR undertook a brief survey of RDM activities within the COAR membership. The results of the survey are available on the website.
4. Identify and link to key training material and resources
5. Share collection policies for RDM in repositories
6. Recommend metadata standards for research data sets

COAR will be pursuing these priorities through a variety of activities in the coming year, including planning a number of webinars and a research data management session at the Annual Meeting in May.

In addition to these activities, COAR representatives have been participating in the Research Data Alliance (RDA) to ensure that institutional repositories are a recognized part of the ecosystem for research data at that we are aware of all relevant RDA recommendations, standards and practices that can be adopted in the repository context.

Usage Metrics Interest Group

Scholarly communication is undergoing fundamental changes, in particular with new requirements for open access to research outputs, new forms of peer-review, and alternative methods for measuring impact. For every repository manager, collecting metrics is relevant to optimise, operate, and enhance their repository and to demonstrate the value of the repository to authors. There are several repository software platforms, like DSpace or ePrints, which offer add-ons with their core system. In addition, third parties like Google analytics, PIWIK or IRUS-UK offer services to count usage for repositories. Additionally, during the last 5 years another approach for measuring impact has appeared – altmetrics. One of the greatest challenges with all these services is the lack of standards for aggregating data, meaning the data cannot be compared across platforms.

The Open Metrics Interest Group is a discussion group that is reviewing and assessing existing initiatives in the area of measuring usage of scholarly resources, with the eventual aim of making recommendations about best practices to the repository community. The group plans to undertake an in-depth analysis of the current environment, which will result in a paper on this topic. The COAR Open Metrics Interest Group and the euroCRIS Task Group Indicators are also establishing closer links to facilitate information exchange and the development of joint recommendations for their members in the future.

3   Organisation & Governance

3.1   Membership

Membership in COAR has slightly grown over the past year, with eleven new institutions from nine different countries joining since March 2016 (Brazil, Canada, France, Italy, Latvia, Peru, Portugal, Turkey and the USA).

New members since GA 2016:
- Arts et Métiers ParisTech (France)
- Atilim University Kadriye Zaim Library (Turkey)
- Getúlio Vargas Foundation (Brazil)
- ISCTE - Instituto Universitário de Lisboa (Portugal)
- MIT - Massachusetts Institute of Technology (United States)
- Padova University Libraries (Italy)
- Queen's University (Canada)
- Universidad Peruana de Ciencias Aplicadas (Peru)
- University of Windsor (Canada)
- University Ca' Foscari Venice (Italy)
- University of Latvia

3.2   Governance Bodies

Executive Board

Eloy Rodrigues from University of Minho, Portugal has been COAR Chairman since October 2015. Eloy has been an active participant in COAR since its inception in 2009 and offers a wealth of

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experience with repositories and open access. He is known and respected around the world and brings a valuable strategic perspective about the role of repositories in the future of scholarly communication.

Other members of the Executive Board are Carmen-Gloria Labbé, Vice-Chair (CLARA, Chilé) and Marta Viragos, Treasurer (University of Debrecen, Hungary), Daisy Selematsela from the National Research Foundation (South Africa), Oya Rieger from Cornell University (USA) and Wolfram Horstmann from Göttingen University Library (Germany) who all contribute their considerable experience, knowledge and diverse perspectives to COAR governance and directions.

The Executive Board takes the lead on major strategic decision making regarding the activity areas of COAR as well the overall responsibility for the organization and its finances. A focus of discussions during the past year has been to increase COAR's funding to ensure greater sustainability and also expand efforts in other areas. These efforts involve raising the profile of COAR and actively recruiting new members, as well as identifying other external funding sources. The Executive Board meets every two-three months via teleconference with one face-to-face meeting during the COAR Annual Meeting.

Personnel

COAR personnel works from different locations. The main office is located in Germany at Goettingen State and University Library. The local team consists of Katharina Mueller, Kurosh Navabi, Arvid Deppe, and Maxie Gottschling. Kathleen Shearer is Executive Director, working from Montreal, Canada. In mid-2016, Ilkay Holt joined the COAR team as independent contractor.

Funding

COAR receives funding from the following sources:

- Membership fees
- European Commission
- Voluntary financial contributions
- Annual Meeting support
- In-kind contributions

The Annual Meeting 2016 was hosted by the University of Vienna in Austria. The Vienna University Library and Archive Services organized the framework and very generously contributed financially, logistically and through work time.

Göttingen State and University Library provides rent-free premises and infrastructure to the COAR Office. In 2016, the agreement between Göttingen State and University Library and COAR on the office operation has been amended to reflect the consolidation of organisational structures between the library and COAR after several years of operation.

Additionally, several member institutions provide significant work time of their staff contributing in the different activity groups.

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3.3 COAR Strategy 2016-2018 and COAR Work Plan 2017-2018

In spring 2017, the COAR Executive Board reviewed and updated the 2017-2018 work plan in order to assess progress and ensure its continued relevance. The updated work plan, which reflects COAR strategic priorities and resources available, has been presented to the members at the General Assembly on May 10, 2017 for discussion and approval. For 2017-2018, COAR will continue it's important work in the area of aligning repositories and interoperability, promote the adoption of next generation repositories, and expand activities to support local capacity building at individual institutions.

3.4 Annual Meeting

The major themes for 2016 COAR (Confederation of Open Access Repositories) Annual Meeting and Conference were new roles for open access repositories, value-added services, improving the flow of research knowledge and international collaboration. The meeting was held at the University of Vienna on April 12-13, 2016. Additionally, the annual General Assembly, dealing with the business matters of COAR, took place on April 12.

Picture 3: Participants of the COAR Annual Meeting 2016 in Vienna, Austria

The programme provided a valuable opportunity for participants to make connections, and learn best practices from colleagues around the world. The conference was attended by eighty participants from Asia, Africa, North and South America and Europe. The full meeting report is available here: https://www.coar-repositories.org/files/COAR-2016-Annual-Meeting-report.pdf.

3.5   Communications

COAR's major outreach activities involved presentations about the work of the organization through public reports, presentations at conferences and meeting, the webinar series, and the website and social media.

Social Media, Website and News

The COAR website was reviewed and updated to ensure the content in all sections was relevant. A new section to the website was added that allows detailed comments from readers, using "CommentsPress". The functionality was used to collect public comments on the Next Generation Repositories User Stories, and will be used in future activities in cases where we are seeking input from the community. In the coming year, COAR will work to improve the visual presentation of the website. COAR also uses social media venues including Twitter and Facebook to announce new items, publications, and other activities.

COAR Infographic

In April 2016, COAR published an infographic with the aim of giving an overview of all COAR activities in one visual. The infographic is used in presentations and can be printed out to inform people about COAR activities.

3.6   Publications

Cabezas, Alberto (2016): Report of current state and roadmap for implementation of guidelines in Latin America. Open Access Infrastructure for Research in Europe towards 2020, Deliverable Code D3.2. https://www.openaire.eu/d3-2-la-referencia-roadmap-final/download

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Schmidt, Birgit; Calarco, Pascal; Kuchma, Iryna; Shearer, Kathleen (2016): Time to Adopt: Librarians' New Skills and Competency Profiles. In: Loizides, Fernando; Schmidt, Birgit (Ed.): Positioning and Power in Academic Publishing: Players, Agents and Agendas: Proceedings of the 20th International Conference on Electronic Publishing. http://dx.doi.org/10.3233/978-1-61499-649-1-1

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Subirats, Imma; Solodovnik, Iryna; Budroni, Paolo; Ganguly, Raman; Hudak, Rastislav (2016): COAR Case Study Controlled Vocabularies and PHAIDRA International. In: Loizides, Fernando; Schmidt, Birgit (Ed.): Positioning and Power in Academic Publishing: Players, Agents and Agendas: Proceedings of the 20th International Conference on Electronic Publishing. http://dx.doi.org/10.3233/978-1-61499-649-1-16

Statements, Meeting Reports, Posters etc.

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COAR Next Generation Repositories Working Group (2017): Next Generation Repositories – Introduction, Rationale and User Stories. Draft for public comment. https://www.coar-repositories.org/files/COAR-Next-Generation-Repositories-February-7-2017.pdf

Joint COAR-UNESCO Statement on Open Access (9 May 2016). https://www.coar-repositories.org/files/coar_unesco_oa_statement-1.pdf
- in Chinese: https://www.coar-repositories.org/files/UNESCO-COAR-Statement-Chinese.pdf
- in Spanish: https://www.coar-repositories.org/files/Declaracio%CC%81n-conjunta-COAR-UNESCO-sobre-Acceso-Abierto-mayo-2016-2.pdf
- in Portuguese: https://www.coar-repositories.org/files/coar_unesco_declaracao_AA.pdf

Kuchma, Iryna; Mueller, Katharina; Deppe, Arvid; Ross-Hellauer, Tony; Beucke, Daniel; Shearer, Kathleen; Schirrwagen, Jochen (2016): The Role of Collaboration in Building a Global Knowledge Commons: COAR Annual Meeting and Conference 2016. Report. https://www.coar-repositories.org/files/COAR-2016-Annual-Meeting-report.pdf

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Müller, Katharina; Deppe, Arvid (2016): Repositorien auf dem Weg zur globalen Vernetzung. Poster presented at Open Access-Tage, October 2016. https://doi.org/10.5281/zenodo.153924

Semanek, Brigitte; Finta, Anna-Maria, Blumesberger, Susanne (2016): Jahrestagung und Konferenz der COAR (Confederation of Open Access Repositories) 2016 (Wien, 12.–13. April 2016). In: Mitteilungen der Vereinigung Österreichischer Bibliothekarinnen und Bibliothekare, [S.l.], vol. 69, no. 2, p. 329-336, Sep. 2016. ISSN 1022-2588. https://ojs.univie.ac.at/index.php/voebm/article/view/1644

Shearer, Kathleen; Yamaji, Kazu; Repanas, Kostas (2016): Asian Open Access Meeting Report. https://www.coar-repositories.org/files/Open-Access-Asia-Report.pdf

3.7 Presentations

Date	Conference/Meeting	Presenter
4 March 2016	Asian Open Access Meeting, Tokyo, Japan	Kathleen Shearer (COAR), Kazu Yamaji (NII)
7-8 March 2016	Attendance of SPARC Meeting on Openness in Research & Education, San Antonio, Texas, USA	Kathleen Shearer (COAR)
9-10 March 2016	Presentation "La biblioteca universitaria y el acceso abierto" at V Congreso Internacional de Bibliotecas Universitarias (CIBU 2016) Presentacion "Hacia una red global de repositorios de acceso abierto para la investigación y la ciencia)", ceremonia de Lanzamiento de la Red Nacional de Repositorios Digitales de CTI de Acceso Abierto Lima/Peru	Eloy Rodrigues (U Minho)
20-22 April 2016	Attendance of Open Scholarship Initiative, Fairfax, Virginia, USA	Kathleen Shearer (COAR)
24-25 May 2016	22nd INFORUM Conference, Praque, Czech Republic	Marta Viragos (U Debrecen)
7 -9 June 2016	ELPUB 2016, Göttingen Germany: • Poster Presentation "Stepping Up Towards Greater Alignment of Repository Networks" • Presentation: "Time to adopt: Librarians' new skills and competency profiles" • Presentation: "Controlled vocabularies and PHAIDRA International"	Katharina Mueller (COAR), Birgit Schmidt (U Goettingen), Iryna Kuchma (EIFL), Imma Subirats (FAO)
8 - 11 June 2016	Attendance of euroCRIS Conference "CRIS2016", St. Andrews, Scotland, UK	Kathleen Shearer (COAR)
13 - 16 June 2016	Open Repositories Conference 2016 • Poster Presentation "Current State of Metrics for Repositories – an Overview" • Presentation "COAR Resource Types – a SKOSified Vocabulary for Open Repositories" • Panel "Accuracy, comparability and standardisation of usage statistics in Open Access institutional repositories" • Panel "Next generation repositories: building the repository of the future"	Stefan Amshey (IRUS-UK), Daniel Beucke (U Goettingen), Joseph W. Greene (IRUS-UK), Salima Rehemtula (Universidade Nova de Lisboa), Eloy Rodrigues (U Minho), Jochen Schirrwagen (U Bielefeld), Kathleen Shearer (COAR), Imma Subirats (FAO), Paul Walk (EDINA)

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office@coar-repositories.org

12-14 July 2016	Attendance of SHARE Meeting in Charlottesville, Virginia, USA	Kathleen Shearer (COAR)
28 July 2016	Webinar "Future Directions for arXiv. User Perspectives"	Oya Rieger (U Cornell)
1 August 2016	Presentation "COAR Next Generation Repositories Working Group" at Repository Fringe 2016, Edinburgh/UK	Paul Walk (EDINA)
13-19 August 2016	The three legged stool of research data management, 82nd World Library and Information Congress, Columbus, Ohio, USA	Kathleen Shearer (virtual presentation)
2-4 September 2016	Presentation "Balance de acciones realizadas en un año. LA Referencia, Proyectos." and "Avances de alineamiento internacional y tareas futuras." at LA Referencia Council Meeting, San Luis de Potosi, Mexico	Alberto Cabezas (LA Referencia), Eloy Rodrigues (U Minho), Kathleen Shearer (COAR)
6-9 September 2016	Presentation "Tendencia mundial del acceso abierto" at RENATA Conference, Bogotá, Colombia	Kathleen Shearer (COAR)
21-22 September 2016	Presentation "Leveraging the global network of repositories to create positive change in scholarly communications" at 4th Chinese Institutional Repository (IR) Conference, ChongQing City, China.	Kathleen Shearer (COAR)
4 October 2016	Webinar "Controlled Vocabularies" https://doi.org/10.5281/zenodo.159431 https://doi.org/10.5281/zenodo.159432	Jochen Schirrwagen (U Bielefeld), Timo Borst (ZBW)
10-11 October 2016	Poster presentation "Towards Greater Alignment of Repository Networks" at "Open-Access-Tage" (Open-Access Days) 2016 in Munich, Germany	Arvid Deppe (COAR)
15 October 2016	Workshop at DC-2016 "COAR Controlled Vocabularies – enhancing interoperability across repository networks"	Imma Subirats, Jochen Schirrwagen, Pedro Príncipe
25 October 2016	Webinar "Next Generation Repositories"	Kathleen Shearer (COAR), Eloy Rodrigues (U Minho), Paul Walk (EDINA), Pandelis Perakakis (Granada University)
31 October - 4 November 2016	Presentation "Tendencia mundial del acceso abierto y de los repositorios " at XIV Congreso Internacional de Información, La Habana, Cuba.	Kathleen Shearer (COAR)
10 November	Co-organisation and presentation "What's next for repositories?" at Next Generation	Kathleen Shearer (COAR)

2016	Repositories Workshop, with Canadian Association of Research Libraries, Ottawa, Canada	
14-15 November 2016	Co-organisation and presentation "Building a global knowledge commons through open access and open science" at Asia OA Conference, Kuala Lumpur/Malaysia	Kathleen Shearer (COAR), Kazu Yamaji (NII)
14-16 November 2016	Presentation "Del acceso abierto a la ciencia abierta: donde estamos y por donde vamos?" and Workshop "De local a global : normas e interoperabilidad para repositories" at Universidade Nacional Meeting with Research Vice-Rectors at Consejo Nacional de Rectores (CONARE) Heredia and San José, Costa Rica	Eloy Rodrigues (U Minho)
17-18 November 2016	Presentation "Developing a Global Knowledge Commons" at A World Beyond APCs, Lawrence, Kansas, USA	Kathleen Shearer (COAR)
22 November 2016	Workshop "COAR Controlled Vocabularies: Improving consistency of repository metadata" at MSTR-conference, Göttingen/Germany	Jochen Schirrwagen (U Bielefeld)
4-5 December 2016	First African DSpace-CRIS workshop, NRF National Facility the iThemba Labs, Cape Town, South Africa	Lazarus Matizirofa/Daisy Selematsela (NRF); Andrea Bollini (4Science:Italy)
7 December 2016	Webinar "Linked Open Data" (in Spanish)	Víctor Saquicela (Universidad de Cuenca)
15 December 2016	Webinar "Publishing Controlled Vocabularies for Access and Reuse"	Rowan Brownlee, Australian National Data Service (ANDS)
16 March 2017	Webinar: "Vocabularios Controlados para Repositorios" (in Spanish)	Isabel Bernal (CSIC), Paola A. Azrilevich (MinCyT)
27 March 2017	Presentation "Developing institutional networks to support capacity building in open science", Supporting Campus Libraries to embed NREN Services and e-Infrastructure, Abdijan, Cote d'Ivoire, Africa	Kathleen Shearer (COAR)
7 April 2017	Presentation "International trends in open access and repositories" SIS Conference on Open Access: The Road to Freedom, Kolkata, India	Kathleen Shearer (COAR)

3 Appendix: Governance Bodies 2016/17

Executive Board

Picture 4: Executive Board - Front row: Oya Rieger, Eloy Rodrigues, Márta Virágos; Back row: Wolfam Horstmann, Carmen-Gloria Labbé, Daisy Selematsela

Chairperson: Eloy Rodrigues, University of Minho, Portugal

Vice Chairperson: Carmen-Gloria Labbé, Cooperación Latinoamericana de Redes Avanzadas (CLARA), Chile

Treasurer: Márta Virágos, University and National Library of Debrecen, Hungary

Oya Rieger, Cornell University, United States

Daisy Selematsela, National Research Foundation, South Africa

Wolfram Horstmann, Göttingen State and University Library, Germany

Staff

Executive Director

Kathleen Shearer

Office

Arvid Deppe

Maxie Gottschling

Katharina Müller

Kurosh Navabi

Independent Contractor

Ilkay Holt

Interest Group and Task Group Chairs

Controlled Vocabularies:

Jochen Schirrwagen, Bielefeld University Library, Germany

Imma Subirats, FAO

Open Metrics:

Daniel Beucke, Göttingen State and University Library, Germany (until December 2016)

Astrid Orth, Göttingen State and University Library, Germany (from January 2017 on)

Task Force on Librarians' Competencies in Support of E-Research and Scholarly Communication:

Pascal Calarco, Association of Research Libraries, Canada

Iryna Kuchma, EIFL

Next Generation Repositories:

Eloy Rodrigues, University of Minho

Research Data Management:

Kathleen Shearer, COAR