

COAR Strategy 2019-2021 and Work Plan 2020

Building a Global Knowledge Commons



December 16, 2019

COAR Strategy 2019-2021

COAR (Confederation of Open Access Repositories) is an international association with over 150 members and partners from around the world representing libraries, universities, research institutions, government funders, repository networks and others. COAR brings together individual repositories and major repository networks in order to build capacity, align policies and practices, and act as a global voice for the repository community.

Collectively, repositories form a sustainable foundation for a global knowledge commons that preserves and provides access to diverse and valuable research outputs (articles, data, etc.), in support of open scholarship, thereby advancing new discoveries, the social and economic impacts of research, and scientific transparency.

Vision A sustainable, inclusive, and trusted global knowledge commons based on a network of open access digital repositories

Mission To enhance the visibility and application of research outputs through a global network of open repositories based on international collaboration and interoperability

Strategic Directions 2019-2021

To realize our mission and advance our vision, COAR will focus on community, leadership and engagement at the international level. Five strategic directions will guide COAR's activities:

1. Advocate for the role of a sustainable and distributed network of open repositories as the foundation of a global knowledge commons
2. Provide support for the open repository community and build local capacity for the development and management of repositories and repository networks
3. Define and promote alignment and interoperability across repositories, repository networks, and between repositories and other systems and platforms
4. Advance the adoption of new behaviours, technologies and roles for repositories and repository networks
5. Increase the sustainability and effectiveness of the organization and strengthen the COAR brand

COAR Work Plan 2020

For the year 2020, COAR will deliver its strategic directions through the following work plan.

1. Advocate for the role of a global network of open repositories as the foundation of a global knowledge commons		
Objective	Actions	Responsible Parties
1.1 Promote the value of repository networks with important stakeholder communities	<p>Attend and present COAR's work and vision at relevant conferences</p> <p>Contribute to discussions on mailing lists and other online forums (when appropriate)</p> <p>Participate in working groups and other related initiatives that reflect COAR's strategic objectives</p> <p>Engage with cOAlition S to advocate for an expanded role for repositories and work with them on a roadmap for advancing the COAR vision</p>	<p>Executive Director</p> <p>Executive Board</p> <p>COAR Members</p> <p>COAR Office</p>
1.2 Become a key stakeholder in relevant international e-infrastructure	<p>Engage with other e-infrastructure organizations (e.g. RDA, ICRI, etc.) to ensure repositories are well represented</p> <p>Highlight the role of repositories in managing research data and position COAR as a major player in this domain</p>	<p>Executive Director</p> <p>Executive Board</p>
1.3 Raise awareness of the issues around sustainability and inclusiveness of the current system and help define appropriate alternatives	<p>With SPARC NA and SPARC Europe, Invest in Open Infrastructure Initiative, and through the Arcadia Next Generation Library Publishing project, validate and advance the adoption of principles for scholarly communication services in the library community</p> <p>With other stakeholders, prepare a white paper about why bibliodiversity is important and define an institutional strategy to promote investments in diverse scholarly communication services and infrastructure</p>	<p>Executive Director</p> <p>Executive Board</p>
1.4 Provide up-to-date information about the repository landscape at the international level	<p>With a working group, develop recommendations related to the governance, sustainability and architecture for a responsive and comprehensive international repository directory, and work with the community to implement recommendations</p>	<p>Executive Director</p> <p>Executive Board</p> <p>COAR Office</p> <p>COAR Consultant</p> <p>COAR Members</p>

2. Provide support for the open repository community and build capacity for the development and management of repositories and repository networks		
Objective	Actions	Responsible Parties
2.1 Undertake training and capacity building activities for repositories	<p>Plan events, workshops and seminars in conjunction with the General Assembly</p> <p>Produce a regular webinars about specific topics of interest for COAR members</p> <p>Maintain and enhance the COAR Repository Toolkit, which provides access to up-to-date resources for repository managers, with a focus on discoverability, interoperability, and next generation repositories</p> <p>Organize and participate in national and regional training activities with local groups and open source platform providers</p>	<p>Executive Director</p> <p>COAR Subject Experts</p> <p>COAR Consultant</p>
2.2 Support and strengthen regional repository networks	<p>Organize an Asia OA meeting for 2020</p> <p>Work with WACREN, LA Referencia and CARL to build capacity of repository networks in those regions through OpenAIRE Advance (see also 3.1)</p> <p>Work with Lyris (formerly Duraspace) to provide joint training sessions for repositories, with an emphasis on developing countries</p> <p>Identify new opportunities to work in other regions</p> <p>Launch a working group for national aggregators to share information and work together on common challenges</p>	<p>Executive Director</p> <p>Executive Board</p> <p>COAR Representatives from national and regional networks</p>
2.3 Facilitate topical discussions/groups that will address the needs of COAR member institutions	<p>Advocate for repository-friendly policies, and assist members in adopting good practices related to open access data and article repositories</p>	<p>Executive Director</p> <p>COAR Consultant</p> <p>COAR members</p>
2.4 Increase and formalize the COAR activities related to research data management	<p>Identify functional and operational requirements for organizations expanding to manage data</p> <p>Share information across the COAR network about best practices in RDM</p> <p>See also 3.3</p>	<p>COAR Research Data Management Interest Group</p> <p>Executive Director</p> <p>Executive Board</p>

3. Define and promote alignment and interoperability across repositories, repository networks, and between repositories and other systems and platforms		
Objective	Actions	Responsible Parties
3.1 Increase interoperability across publication repositories	<p>Undertake a campaign to improve the quality and interoperability of metadata and vocabularies in repositories, through comparing different metadata schemas and requirements; and assist community members in identifying priorities and adoption of good practices</p> <p>Promote interoperability standards within the context of training resources, events and other COAR presentations</p> <p>See also #4 - promote the Next Generation Repositories' behaviours and technologies</p>	COAR Consultant Executive Director COAR Controlled Vocabulary Editorial Board
3.2 Increase alignment across regional and national repository networks	<p>Facilitate communication across repository networks through the strategic and technical meetings at COAR and other possible venues</p> <p>Lead the OpenAIRE Advance work package 5</p>	Executive Director Representatives from regional and national repository networks Executive Board
3.3 Increase interoperability between research data and articles	<p>Engage with RDA and the data repository community to identify and adopt interoperability mechanisms to connect articles and research data</p> <p>Establish the conditions for institutional repositories to be considered appropriate venues for deposit and preservation of research data</p> <p>Promote the NGR recommendations in the data community</p>	Executive Director Executive Board COAR Members and Subject Experts
3.4 Advance and pilot the protocols and standards for overlay publishing functions on the distributed repository network	<p>See 4.3 for integration with NGR overlay publishing services</p>	Executive Director COAR Partners

4. Advance the adoption of new behaviours, technologies and roles for repositories		
Objective	Actions	Responsible Parties
4.1 Advance the implementation of NGR technologies and protocols in open source repository platforms	<p>Work with open source repository platforms to help implement NGR technologies and protocols, including helping to find technical and financial resources and collecting more use cases</p> <p>Monitor the environment for new technologies</p>	<p>Executive Director</p> <p>Executive Board</p> <p>NGR Expert Group and COAR Consultant</p>
4.2 Support the advancement of NGR use cases	<p>Develop a forum to support developers in profiling NGR use cases</p> <p>Facilitate the launch of pilot projects that demonstrate NGR functionalities and define practices that can be generalized</p> <p>Highlight and promote projects that demonstrate NGR functionalities</p>	<p>Executive Director</p> <p>COAR Consultant</p>
4.3 Advance the use case for overlay publishing functions on distributed repository content	<p>Aggregate, develop and share emerging practices for overlay journal publishing services</p> <p>Through the Arcadia project, manage and disseminate the scan of existing infrastructures and tools for repositories and publishing</p> <p>Host a meeting of technological experts and development projects to define the architecture and protocols to support distributed and scalable peer review on repository content</p> <p>Promote the overlay model and Pubfair widely through engagement with our community and with others</p>	<p>Executive Director</p> <p>Executive Board</p> <p>Subject Experts</p>

5. Increase the sustainability and effectiveness of the organization and strengthen the COAR brand		
Objective	Actions	Responsible Parties
5.1 Provide more activities that engage COAR members and offer benefits individual institutions	See Objective 2: Facilitate topical discussions/groups that will address the needs of individual institutions and repositories	Executive Director Subject Experts
5.2 Enhance the COAR brand	Actively seek opportunities to contribute to research infrastructure and scholarly communication events and discussions such as RDA, Force 11, etc	Executive Director Executive Board COAR Task Group
5.3 Increase COAR membership by 10%	Promote the work of COAR widely	Executive Board Executive Director
5.4 Consolidate and strengthen the COAR operations	Revise the COAR Statutes Develop a plan for a permanent location for the COAR office	Executive Board Executive Director