COAR STRATEGY 2012-2015

Final version, 10 September 2012

Who we are
The World Confederation of Open Access Repositories (COAR) is a young, fast growing association of repository initiatives and networks. COAR unites and represents more than 90 institutions worldwide (Europe, Asia, Latin America, the U.S. and Canada)

Vision
A global knowledge infrastructure, based on worldwide networked open access digital repositories

Mission
To facilitate greater visibility and application of research outputs through global networks of open access repositories based on interoperability and international cooperation

COAR Strategic directions 2012-2015

Overall, to fulfil our mission and reach our vision, COAR strategy will focus on Community, Leadership and Support at an international scope. Implementation will be guided by four 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
**COAR WORK PLAN 2012-2013**

For the years 2012-2013 COAR will deliver its strategy through the four areas of strategic directions.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Actions</th>
<th>Deliverable</th>
<th>Indicators</th>
<th>Deadline</th>
</tr>
</thead>
</table>
| Expand COAR membership in all regions of the World | Address relevant stakeholders in all regions, working with existing COAR members and further, liaising institutions and organisations | New members in all regions | A new COAR India group  
A new COAR China group  
Minimum of 8 Institutions from 8 LA countries implementing the COAR Latin-American group  
A new African COAR group  
New members in Europe, the U.S., Canada | Start(ed): ICTK, July 2012, Bangalore  
Start: October 2012, Beijing  
Signing ceremony in November 2012, Buenos Aires | March 2013  
Throughout 2012-2013 |
| Become a key stakeholder in relevant international e-infrastructure initiatives | Contribute to planning and implementation of the Data Web Forum, DWF, through liaison with the planning group and involved governmental agencies in EU, the U.S., CAN and AUST | COAR as representative of the OA repository community and active participant in the DWF | COAR as organisation and/or COAR member institutions represented in the governance and working structures | 1-2 Oct 2012, Washington  
Spring 2013, DWF Europe event |
2. To provide support for the OA repository community from institutions, countries, regions and disciplines, through international cooperation and information sharing

Responsible: Iryna Kuchma (Chair WG 3), Kathleen Shearer (Chair WG 1), Alicia Lopez-Medina (COAR Executive Director), N.N.

<table>
<thead>
<tr>
<th>Objective</th>
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</thead>
<tbody>
<tr>
<td>Provide training for repository managers and administrators</td>
<td>Compile a collection of training materials required to install, implement and deploy open repositories (including business and policy aspects)</td>
<td>A collection of training materials</td>
<td></td>
<td>End of June 2012</td>
</tr>
<tr>
<td>Launch a series of COAR webinars and support COAR members with on-site training events (by requests).</td>
<td>Webinars and on-site training events</td>
<td></td>
<td>Launch in September 2012, throughout 2012-2013</td>
<td></td>
</tr>
<tr>
<td>Ensure the quality and interoperability of repository managers and administrators training.</td>
<td>Define a general evaluation framework of repository managers and administrators training activities and materials</td>
<td>COAR training CERTIFICATE</td>
<td>Courses certificated</td>
<td>Spring 2013</td>
</tr>
<tr>
<td>Provide support services to OA repository managers and administrators</td>
<td>Launch an expert consultation services for COAR members</td>
<td>A database of experts; consultations to COAR members; FAQs</td>
<td></td>
<td>Spring 2013</td>
</tr>
</tbody>
</table>
### Provide support to populate repositories with content

- Coordinate Licensing Task Force

### Coordinate Licensing Task Force

- A series of recommendations to institutions maintaining repositories

### A series of recommendations to institutions maintaining repositories

- Recommendations published

### Offer an International Annual Meeting

- Organise the COAR International Annual Meeting

### Organise the COAR International Annual Meeting

- One Annual Meeting a year

### One Annual Meeting a year

- Until June 2013

### Set up a series of COAR regional meetings

- Organise and participate in COAR regional meetings

### Organise and participate in COAR regional meetings

- COAR presentation/workshop

### COAR presentation/workshop

- at least one per year per region

### at least one per year per region

- Asia
  - India
  - China

### Asia
- India
- China

- Latinamerica
  - Argentina
  - Colombia

### Latinamerica
- Argentina
- Colombia

- Europe
  - Turkey

### Europe
- Turkey

- Africa
  - South Africa
  - Botswana

### Africa
- South Africa
- Botswana

- Northern America
  - Canada

### Northern America
- Canada

### Asia
- India
- China

### Latinamerica
- Argentina
- Colombia

### Europe
- Turkey

### Africa
- South Africa
- Botswana

### Northern America
- Canada

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

**Responsible: Eloy Rodrigues (Chair WG 2), Alicia Lopez-Medina, N.N.**

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<thead>
<tr>
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<tr>
<td>To provide guidance and tools for promoting and enhancing repository interoperability, quality of content and metadata visibility</td>
<td>Produce and disseminate documents and tools</td>
<td>COAR Roadmap on Repository Interoperability – Version I</td>
<td>January 2013</td>
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<tr>
<td></td>
<td></td>
<td>Part I – State of the Art</td>
<td>31 August 2012</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Part II – Future Directions</td>
<td>31 December 2012</td>
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office@coar-repositories.org
<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>To establish synergies between institutional and data repositories</td>
<td>Liaise with Data Web Forum activities</td>
<td>2013</td>
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<td></td>
<td>Participate in DWF WGs related with interoperability</td>
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<td></td>
<td>Participate in at least one DWF WG</td>
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<td></td>
<td>Include data repositories in the interoperability Roadmap</td>
<td>December 2013</td>
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<tr>
<td></td>
<td>COAR Roadmap on Repository Interoperability – Version 2</td>
<td></td>
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<td></td>
<td></td>
<td>December 2013</td>
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<tr>
<td>To embed repositories within research information infrastructures</td>
<td>Liaise and establish partnership with euroCRIS</td>
<td>MoU</td>
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<td></td>
<td>Establish regular communication and joint activities between COAR WG2 and euroCRIS CRIS-IR TG</td>
<td>Start September 2012</td>
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<tr>
<td>To explore collaboration opportunities with publishers and societies to create a robust and reliable system to link different versions of research papers (e.g., pre-print, published, revised, etc.) and to enable deposit of supplementary materials such as images and data sets</td>
<td>Identify functionalities and standards required to create a seamless ecology of scholarly outputs</td>
<td>Spring 2013</td>
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<tr>
<td></td>
<td>Write a white paper to identify and articulate partnership opportunities with publishers and societies in support of an open information environment that supports the needs and norms of scientists</td>
<td></td>
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</tbody>
</table>
4. To stimulate the development and take-up of user added-value services on top of the repositories

Responsible: Alicia Lopez-Medina (COAR Executive Director), Xiaolin Zhang (COAR Strategic Committee), Donatella Castelli (COAR Strategic Committee), Peter Burnhill (COAR Strategic Committee), N.N.

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<tr>
<td>To identify trends and future scenarios in the context of the use of</td>
<td>Repository Observatory</td>
<td>A section in the Newsletter: Reports, articles,</td>
<td>Newsletter Section</td>
<td>Ongoing</td>
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<tr>
<td>repositories in research and education</td>
<td></td>
<td>links</td>
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<td>To link open access repositories with open software repositories program</td>
<td>Partnership with Open Repositories Conference</td>
<td>COAR representation in OR Program Committee</td>
<td>MoU</td>
<td>December 2012</td>
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<tr>
<td>developers.</td>
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<td>COAR/OR co-branded Conference</td>
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<tr>
<td>To identify user added-value services that exploit repository content,</td>
<td>Survey</td>
<td>Survey results report</td>
<td></td>
<td>Spring 2013</td>
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<td>provided for a range of stakeholders including libraries/archives,</td>
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<td>publishers/societies, domains specific scientific organizations, funders</td>
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<tr>
<td>To identify new user services exploiting the content published by</td>
<td>Survey</td>
<td>Survey results report</td>
<td></td>
<td>Spring 2013</td>
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<td>cross-disciplinary repositories</td>
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