



*Greater visibility and application of research through global networks of  
Open Access repositories*

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**COAR Strategy 2019-2021  
AND  
COAR Work Plan 2019**

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<http://coar-repositories.org>

# COAR STRATEGY 2019-2021

The Confederation of Open Access Repositories (COAR) is an international association with over 140 members and partners from around the world representing libraries, universities, research institutions, government funders, repository networks and others. COAR brings together the repository community 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 the foundation of 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 functionalities in repositories and repository networks
5. Increase the sustainability and effectiveness of the organization and strengthen the COAR brand

## COAR WORK PLAN 2019

This document will be reviewed in late 2019 to ensure activities remain relevant in the rapidly evolving environment.

For the year 2019, 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>Develop promotional material that can be used in local contexts (e.g. European repository flyer)</p>	<p>Executive Director</p> <p>Executive Board</p> <p>COAR Subject Experts</p> <p>Aligning Repository Networks Committee</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 and COAR's role is understood and acknowledged.</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 other stakeholder organizations, develop and publish a set of principles for scholarly communication services and infrastructure to help the community assess whether they want to use and invest in different services</p> <p>Participate in discussions about redistributing library funds towards open infrastructure and services</p>	<p>Executive Director</p>
1.4 Provide up-to-date information about the repository landscape at the international level	<p>Leverage COAR's international membership to establish and maintain a broad-based international directory of open repositories, in consultation with other stakeholder organizations</p>	<p>Executive Director</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 webinar series about specific topics of interest for COAR members.</p> <p>Maintain and enhance a repository toolkit that 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 2019</p> <p>Work with WACREN, LA Referencia and CARL to build capacity of repository networks in Africa and Latin America (see also 3.1)</p> <p>Organize topical webinars/meetings for repository networks to support information sharing and strengthening of services</p>	<p>Executive Director</p> <p>Executive Board</p>
2.3 Facilitate topical discussions/groups that will address the needs of COAR member institutions	<p>Develop a plan for COAR to address the highest need areas identified in the COAR 2018 survey: user engagement, repository advocacy, and policy</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>With other stakeholders, identify best practices for interoperability between publications and datasets, and between datasets from different domains and promote their adoption in repositories</p> <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 repositories	<p>With input from repository networks, develop and implement a roadmap for the adoption of common vocabularies, metadata elements, and the use of Persistent URLs across repositories</p> <p>Promote interoperability standards within the context of training resources, events and other COAR presentations</p> <p>See Objective 4 - promote the Next Generation Repositories' behaviours and technologies</p>	<p>COAR Consultant</p> <p>Executive Director</p> <p>COAR Controlled Vocabulary Editorial Board</p>
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 at other possible venues</p> <p>Organize topical webinars for repository networks to support information sharing and</p> <p>Lead the OpenAIRE Advance work package</p>	<p>Executive Director</p> <p>Representatives from regional and national repository networks</p> <p>Executive Board</p>
3.3 Increase interoperability across repository types	<p>Approach domain repositories - arXiv, PubMed Central, other preprint repositories - to ensure greater interoperability</p> <p>Engage with data repository community through RDA and other avenues to ensure interoperability between "institutional repositories" and research data repositories</p>	<p>Executive Director</p> <p>Executive Board</p> <p>Subject Experts</p>
3.4 Increase the horizontal interoperability of repositories with other open source platforms and services	<p>Work with OJS, as well as other new scholarly communication platforms (e.g. OPERAS, OpenAIRE) to develop a plan for better integrating repositories and publishing functionalities</p> <p>Continue to engage with the CRIS community through EuroCRIS, CASRAI and others</p> <p>See 4.2 for integration with NGR overlay services</p>	<p>Executive Director</p> <p>COAR Partners</p>

4. Advance the adoption of new behaviours, technologies and functionalities in repositories and repository networks		
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>Facilitate and support regional and national NGR implementation groups that will advance the NGR vision in their local environments</p> <p>Monitor the environment for new technologies</p>	<p>Executive Director</p> <p>Executive Board</p> <p>Subject Experts</p>
4.2 Promote the adoption of value added services in NGR network functionalities with repository networks	<p>Promote the NGR recommendations and network use cases with repository networks at relevant meetings (COAR Annual Meeting, regional meetings, topical meetings)</p> <p>Identify and track existing services that demonstrate NGR value added services in peer review, usage statistics, social networking and enhanced discovery</p> <p>Facilitate the launch of pilot projects that demonstrate NGR functionalities and define practices that can be generalized</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  Provide key COAR resources in other languages	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, EOSC, ICRI, Global Research Forum, OECD, etc.  Develop an “elevator speech” and other types of marketing material that succinctly express the COAR vision and activities  Refresh the COAR website and logo	Executive Director Executive Board COAR Task Group
5.3 Increase COAR membership by 15% (from 140 to 160)	Liaise with national, regional and international library associations around the world  Send letters of invitation to join COAR to targeted institutions  Produce a “Benefits of joining COAR” advocacy leaflet based on the SWOT analysis and feedback from the 2018 membership survey	Executive Board Executive Director
5.4 Consolidate and strengthen the COAR operations	Review and revise COAR Statutes  Develop a plan for a permanent location for the COAR office  Review COAR office staffing situation  Review role of Executive Board and Interest Groups to ensure maximum engagement with COAR	Executive Board Executive Director