

Annex I: Membership Fee Regulations

(according to § 6 No. 1 Articles of Association)

1 Principles

These Membership Fee Regulations set out the membership fees and according rules for the Association “Confederation of Open Access Repositories” (COAR). They are not part of the Articles of the Association. Changes to the regulations are subject to decisions of the General Assembly.

2 Decisions

The rate of the respective membership fees shall be set by the General Assembly (§6 No. 1 Articles of Association).

3 Annual Fees

a. **Institutional Members:** Institutional membership is open to institutions worldwide forming legal entities and which, for this purpose, are defined as not-for-profit institutions of higher education, research, infrastructure, technology.

The annual fee for a single member is 500 €.

b. **Consortia:** Consortium membership is open to library organisations, professional associations and consortia which consist of institutions as mentioned above. This category includes national associations of libraries or repository organizations.

The annual fee for a consortium depends on its size, at minimum eleven institutions. A discount is given to each institution; the fee calculated as laid out in the following table:

Number of Institutions forming the Consortium	Discount per institution	Fee per institution	Minimum Fee per consortium	Maximum Fee per consortium
11 to 30	10%	450 €	4.950 €	13.500 €
31 to 50	20%	400 €	12.400 €	20.000 €
51 to 70	30%	350 €	17.850 €	24.500 €
71 and more	35%	325 €	23.075 €	

According to § 3 No. 2.2 f) Articles of Association, the Executive Board can decide on a discount or cap for payments in the case of large-scale consortia from one country. A request in written form to the Executive Board is necessary for this purpose, to be submitted at least one week in advance of Executive Board meetings.

c. **Special Members:** Eligibility to Special Membership according to §3 No.3 Articles of Association shall be first and foremost granted to institutions from Least Developed Countries (LDCs) according to the list of the United Nations, see <http://www.un.org/ohrlls/>. Institutions from LDCs are exempt from regular membership fees, but expected to contribute via activities.

Further, the Executive Board can decide on policies for specific target groups.

Any other institution seeking special membership as laid out in § 3 No. 3 Articles of Association is obliged to prove the reasons for its technical or financial restraints, in writing, to the Executive Board.

d. **Partners:** Membership Fees Regulations do not apply to partners. According to §6 No. 4 Articles of Association, partners may contribute by sponsorship.

4. Billing procedure:

- a. Invoices for membership fees shall be sent to each member in the course of the calendar year succeeding the General Assembly.
- b. Institutions joining the association as members after September 1 of each year pay membership fees only from the succeeding calendar year on.
- c. Any bank charges for international payment of membership fees shall be added to the total amount and have to be covered by the member institution.

5. Responsibilities and Duties:

- a. Each member is responsible for their own payment. In case of consortia, the coordinator acts on behalf of the entirety of institutions and undertakes responsibility for full payment of the membership fee according to § 3 No. 2.2 c) Articles of Association.
- b. Membership fees must be paid immediately after receipt of the membership fee invoice and at the latest as indicated on the invoice. In case of payment arrear of more than two months and the necessity for reminders, an overdue charge of 15€ might be added to the invoice. Further, § 5 No. 3 b) Articles of Association apply.
- c. **Tax:** The Association exclusively pursues not-for-profit common public interest objectives in terms of the clause “Steuerbegünstigte Zwecke” (Purposes with Tax Benefits), under the German Tax Code (§ 2 No. 2 Articles of Association). Based on this, COAR requests tax exemption by the Göttingen tax office.

6 Account of the Association

Account holder: COAR e.V.

Account number: 608090700

BLZ: 26040030

IBAN: DE67 2604 0030 0608 0907 00

BIC-Code/SWIFT: COBADEFF260

Bank Address: Commerzbank AG, Prinzenstraße 2, D-37073 Göttingen, Germany

In case of changes in the bank details as long as these regulations are in force, the Executive Board (or on its behalf the Office) shall inform members in due course.

7 Duration and Termination of Membership

COAR membership is based on the calendar year. It will be automatically renewed each year in January for the respective year.

Termination of membership is only possible according to § 5 of the Articles of the Association.

8 Entry into Force

The Membership Fee regulations shall come into force on January 1, 2014 and therewith replace any earlier regulations.