COAR Annual Report 2023-2024

April 2024

COAR is an international association with over 130 members and partners from around the world representing libraries, universities, research institutions, government funders and others. COAR brings together individual repositories and repository networks in order to build capacity, align policies and practices, and act as a global voice for the repository community.

Underpinning all COAR activities is the notion that a distributed repository network plays a fundamental role in advancing the principles of diversity, equity, and inclusion in open science. This report covers the major activities of COAR for the previous year from April 2023 to March 2024.

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 collaboration across the global repository network

Highlights from 2023-2024

● Published the Good Practice Advice for Managing Multilingual and non-English Language Content in Repositories, which presents a series of recommendations that identify good practices for repository managers and repository software developers, and focus on the topics of metadata, multilingual keywords, user interfaces, formats, and licenses that will improve the visibility, discovery and reuse of repository content in a variety of languages.

● Achieved two major implementations of COAR Notify: (1) Peer Community In, HAL (the French national repository), and Episicience and (2) PRReview, eLife, bioRxiv, and Scielo Preprints. In addition, development is well underway in several open source software platforms including Dataverse, DSpace, and Open Preprint System.

● With OpenAIRE, LIBER, SPARC Europe, conducted a survey of the European repository landscape. The results of the survey are helping to shape a joint strategy to enhance and strengthen European repositories that will be developed over the next several months. The full report is available here.

● Working with SPARC to support the US Repository Network (USRN), which offers a community of practice and strategic vision for repositories in the
United States. In January 2024, the USRN launched a pilot project aimed at improving the discoverability of articles in repositories.

- Engaged and collaborated with Latin America and African initiatives through active participation in LA Referencia and LIBSENSE.
- Jointly organized with AISSMS a meeting in New Delhi, India at UNESCO headquarters entitled The Promise and Practice of Open Science
- Produced the COAR Annual Meeting in San José, Costa Rica in May 2023

**Strategic Directions**

Five strategic directions guide COAR’s activities:

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<td>Provide support for strengthening and modernizing repositories and repository networks</td>
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<td>3.</td>
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<td>Define and advance the adoption of new behaviours, technologies and roles for repositories and their interaction with other value added services</td>
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Activities

COAR’s activities are organized according to the five strategic directions.

1. Advocate for the important role of a distributed, international network of open repositories in advancing open science and bibliodiversity

Presentations and Keynotes: The COAR Executive Director, Executive Board, and COAR Notify Project Team delivered numerous presentations about the high level vision of COAR, the COAR Notify Project, Modernizing the Global Repository Network, and bibliodiversity, and other aspects of the COAR work. In addition, COAR staff, members and partners participated in numerous conferences, events and sessions related to open science, open access, and repositories.
2. Provide support for strengthening and modernizing repositories and repository networks

**United States Repository Network:** COAR has been working with SPARC to support the US Repository Network (USRN), which offers a community of practice and strategic vision for repositories in the United States. With the advent of the recent *OSTP Memorandum requiring Ensuring Free, Immediate, and Equitable Access to Federally Funded Research* – which directs government research funders and agencies to adopt policies that require adopt immediate public access to articles – the need has become more urgent, especially in terms of adoption of good practices and effectively tracking research outputs. In January 2024, the USRN launched a pilot project aimed at improving the discoverability of articles in repositories. This pilot project involves the use of CORE (a not-for-profit aggregator based at Open University in the UK) to evaluate and improve local repository discovery practices and expand the adoption of other good practices in US repositories. The project involves over 20 repositories representing a variety of institutions, software types and repository models and will result in concrete recommendations and best practice guidelines. The project will also lead to greater international interoperability of US research outputs. [Read more]

**Strategy for Strengthening Repositories in Europe:** In the spring of 2023, OpenAIRE, LIBER, SPARC Europe, and COAR conducted a survey of the European repository landscape. The survey found that collectively, European repositories acquire, preserve and provide open access to tens or possibly hundreds of millions of valuable research outputs and represent critical, not-for-profit infrastructure in the European open science landscape. They are well-placed to support the expansion of open science practices and research assessment reform across Europe. However, In
order to ensure the European repository network is fit for purpose and able to support the evolving needs of the research community, three areas of important work were outlined in the report: maintaining up-to-date, highly functioning software platforms; applying consistent and comprehensive good practices in terms of metadata, preservation, and usage statistics; and gaining appropriate visibility in the scholarly ecosystem. The results of the survey are helping to shape a joint strategy to enhance and strengthen European repositories that will be developed over the next several months. The full report is available here.

**RDA Data Repository Attributes Working Group:** COAR has been participating in a Research Data Alliance Working Group, which has produced a list of common attributes to describe a research data repository. After 18 months of work and consultation, the WG submitted a list of common descriptive attributes for data repositories for community review in January 2024. The results were accepted and endorsed as an official RDA output in March 2024. Moving forward, COAR will promote the adoption of these attributes with the broader community for uptake and adoption. Read more

**Asia OA:** Asia OA is a special forum hosted by COAR in which members of the Asian open access community can share information, meet each other and build relationships. It has a mailing list and organizes meetings to facilitate greater exchange beyond national boundaries. The Asia OA community has created a tool for assessing repositories based on the COAR Community Framework. In addition, COAR and the AISSMS jointly organized a meeting in New Delhi, India at UNESCO headquarters, entitled The Promise and Practice of Open Science. The meeting increased awareness of open science and the critical role of repositories in support open science practices in India. As an outcome, the aim is to launch a community of practice for repositories in India in conjunction with INFLIBNET, a national library organization.
**LIBSENSE Africa:** COAR is a partner in the [LIBSENSE](#) project, an initiative that is led by WACREN (West and Central African Research and Education Network). LIBSENSE brings together the major players in Africa to advance the adoption of open science on the continent, bridging across countries and stakeholder communities. COAR contributes to LIBSENSE by bringing in an international perspective to those discussions, assists with the development of the LIBSENSE strategy, participates in committee meetings, and provides expertise about repositories and related topics when needed. In the last year, COAR participated in several meetings organized by LIBSENCE to advance open science policy development in Ghana and [Nigeria](#). COAR also contributes subject expertise to a network of experts that has been formed by LIBSENSE to advance open science policies in the region.

**Collaboration with LA Referencia, Latin America:** LA Referencia, the open access network representing ten Latin American countries, is an important partner for COAR and provides a mechanism for engaging with the repository community in that region. All LA Referencia members are members of COAR. COAR works closely with LA Referencia, ensuring that the Latin American perspective is reflected in international alignment activities, and that LA Referencia has strong connections with other regional networks. In May 2023, COAR, LA Referencia, and CONARE (Consejo Nacional de Rectores, Costa Rica) organized the COAR Annual Meeting in San José, Costa Rica. In addition, COAR Executive Director participated in a Lyrasis-LA Referencia workshop to address the challenges of managing open source software in Latin America on March 18-19, 2024 in Rio de Janeiro.
3. Promote alignment and interoperability across repositories, repository networks, and between repositories and other systems and services
Supporting multilingual and non-English content in repositories: In August 2022, COAR launched the COAR Task Force on Supporting Multilingualism and non-English Content in Repositories to develop and promote good practices for repositories in managing multilingual and non-English content. In June 2023, the Task Force published an initial set of draft recommendations for community review. The consultation resulted in a wide range of input, which was reviewed by the Task Force and incorporated into a second version of the recommendations. In October 2023, COAR published the Good Practice Advice for Managing Multilingual and non-English Language Content in Repositories, which presents a series of recommendations that identify good practices for repository managers and repository software developers, and focus on the topics of metadata, multilingual keywords, user interfaces, formats, and licenses that will improve the visibility, discovery and reuse of repository content in a variety of languages.

COAR Community Framework for Best Practices in Repositories, Version 2: Version 2 of the COAR Community Framework for Good Practices in Repositories was published in July 2022. The Framework provides a global, multidimensional framework for good practices in repositories that can be applied to different types of repositories (publication, institutional, data, etc.) and in different geographical and thematic contexts. Since it was published, we have seen the uptake and reuse of the framework criteria in a number of other contexts including USRN Desired Characteristics for Publication Repositories and a tool for assessing repositories based on the COAR Community Framework, developed by the Asia OA community and National Institute of Informatics.

COAR Resource Type Vocabulary: In early 2024, the COAR Vocabularies Editorial Group launched a major review of the Resource Type Vocabulary. The review resulted in over 60 recommendations for new / revised terms and definition / translations of terms. The Editorial Group is in the process of assessing the input and will soon begin revising the Resource Type vocabulary, a new version of which will be available by June 2024.
4. Define and advance the adoption of new behaviours, technologies and roles for repositories and their interaction with other value added services

The COAR Notify Initiative: The COAR Notify Initiative is developing and implementing a standard protocol for connecting the content in the distributed repository network with peer reviews and assessments in external services. In May 2022, COAR was awarded a US$4 million grant from Arcadia (a charitable foundation that works to protect nature, preserve cultural heritage and promote open access to knowledge) towards the initiative. The funding from Arcadia has allowed COAR to accelerate the adoption of COAR Notify by providing assistance to implementing partners with financial and technical support for implementing COAR Notify Protocol. Over the last year, two major implementations of COAR Notify went live which involved (1) Peer Community In, HAL (the French national repository), and Episcience and (2) PREreview, eLife, bioRxiv, and Scielo Preprints. In addition, development is well underway in several open source software platforms including Dataverse, DSpace, and Open Preprint System. A new website was launched in March 2024, which contains a growing number of resources to support the adoption of COAR Notify, including the specification, use cases, and guidance documents.
5. Increase the sustainability and effectiveness of the organization and strengthen the COAR brand

Presentations, Statements and Community Engagement: COAR is an active participant in community dialogue related to open science. COAR representatives attend numerous conferences, events and sessions related to open science, open access, and repositories. These activities ensure that the visibility and recognition of COAR continues to increase over time.

New Jurisdiction for the Legal Seat of COAR: In May 2023, COAR members voted to dissolve the COAR e.V. and continue the activities of COAR as a Stichting (Foundation) based in the Netherlands. The transition, which was originally planned for January 1, 2024 is being postponed for a year (until January 1, 2025) to ensure all the organizational requirements are in place in the Netherlands before the COAR e.V. is dissolved.
Organisation & Governance

Membership

As of April 15, 2024, COAR had 145 members.

Our full list of members is available on the [COAR website](https://www.coar.net).

**New members since the April 2023:**

Single members:

- Zurich University of Applied Sciences
- J. Willard Marriott Library, University of Utah
- Tshwane University of Technology
- Royal Danish Library
- Nanyang Technological University Library
- Alma Mater Studiorum Università di Bologna
- University of Jos
**Governance**

**Executive Board:** The COAR Executive Board takes the lead on major strategic decisions regarding the activity areas of COAR as well the overall responsibility for the organization and its finances.

**COAR Executive Board 2024**

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<tr>
<td>Martha Whitehead</td>
<td>Chairperson</td>
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<tr>
<td>Kazu Yamaji</td>
<td>Vice-Chairperson, Professor</td>
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<td>William Nixon</td>
<td>Treasurer, Assistant Director</td>
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**General Board Members**

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<tr>
<td>Bianca Amaro</td>
<td>General coordinator, Brazilian Institute of Information in Science and Technology</td>
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<tr>
<td>Virginia Barbour</td>
<td>Director, Open Access Australia</td>
</tr>
<tr>
<td>Isabel Bernal</td>
<td>DIGITAL.CSIC Repository Manager, Spanish National Research Council</td>
</tr>
<tr>
<td>Iryna Kuchma</td>
<td>Programme Manager, EIFL LITHUANIA/UKRAINE</td>
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<tr>
<td>Omo Oaiya</td>
<td>Chief Strategy Officer, WACREN (West and Central African Research and Education Network)</td>
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**COAR Office**

The main administrative tasks for COAR are managed by the University of Minho in Portugal. While the legal seat and permanent contact point of COAR is at the Göttingen State and University Library, Göttingen, Germany, which continues to manage the legal affairs of COAR through in-kind contributions.

COAR currently has approximately 2.5 FTE (Full Time Equivalent) in total staffing, split over several persons and locations. Kathleen Shearer is Executive Director and co-PI for the COAR Notify Initiative. Carla Marques, head of office and Judite Dias are based at the University of Minho Library. COAR also contracts with other subject experts / consultants for programme support and technical consultancy.
**COAR Community Groups**

**COAR Controlled Vocabularies Editorial Board:** This group aims to develop and maintain controlled vocabularies for repositories to enhance the interoperability across repositories and with other related systems such as harvesters, CRIS systems, data repositories and publishers.

**COAR Task Force on Supporting Multilingualism and non-English Content in Repositories:** Is developing and promoting good practices for repositories in managing multilingual and non-English content. The task force is focusing on identifying good practices for metadata, multilingual keywords, user interfaces, translations, formats, licenses, and indexing that will improve the visibility of multilingual and non-English content across the world. Some of the use cases that are driving the recommended practices are as follows.

**Repository Assessment Working Group:** This working group maintains the COAR Community Framework for Good Practices in Repositories.

**Asia OA:** Asia OA is a special forum hosted by COAR in which members of the Asian open access community can share information, meet each other and build relationships. It has a mailing list and organizes meetings to facilitate greater exchange beyond national boundaries. It celebrates Asian cultural diversity and unique ways of doing things. The aim is to support information sharing through a mailing list and organize regular in-person meetings in Asian countries.

**COAR Notify Project Team:** The COAR Notify Team manages the COAR Notify Initiative and consists of four PIs: Kathleen Shearer, Paul Walk (Antleaf), Martin Klein (Los Alamos National Laboratories) and Eloy Rodrigues (University of Minho) as well as Tamy Nakano, the project coordinator.
**Funding**

From May 2022-April 2023, COAR received funding from the following sources:

**Membership Fees:** All regular members contribute through the annual fee of 750 EURs. Invoices are sent to members in the 1st quarter of the year. A small number of supporting members pay an additional fee of 2000 EURs. Funding through membership fees supports the permanent functioning of the association and represents about two-thirds of the annual budget.

**Arcadia Funding for the Notify Project:** COAR received the second of four installments of the grant from Arcadia in January 2024.

**Annual Meeting Registration Fees:** A small amount of funding was received by in-person participants, which covered some of the costs of catering for the meeting.

**Benefits In-kind:** Several institutions provide significant staff time in contributing to the different activities of COAR. Especially generous contributions have been made by Göttingen State and University Library, which is the legal seat of the organization, the University of Minho Library, Portugal for providing rent-free office space and infrastructure, and the University of Vienna Library, which is hosting the COAR Controlled Vocabularies.
COAR Annual Meeting 2023: The COAR Annual Meeting 2023 took place in Costa Rica on May 16-18, 2023. The meeting was hosted by Consejo Nacional de Rectores (CONARE) and is being jointly organized by CONARE, COAR, and LA Referencia. The theme of the meeting is **Sustainability and Innovation in Scholarly Communications**. This location is the perfect backdrop for such a meeting as Costa Rica is a leader in environmental sustainability, with 99 percent of its energy from renewable sources. Moreover, Latin America has been a beacon for both sustainability and innovation in our field, with a long history of publicly-funded publishing infrastructure and collective approaches to scholarly communications. The presentations and zoom recordings are available on the [meeting web page](#).

**COAR Resources**

- [COAR Community Framework for Best Practices in Repositories, Version 2](#)
- [COAR Controlled Vocabularies](#)
- [COAR Notify Protocol Technical Documentation](#)
- [COAR Repository Toolkit](#)
- [COAR Website](#)
- [Directory of Open Access Preprint Repositories](#)
- [Ten Recommended Practices for Managing Preprints in Generalist and Institutional Repositories](#)