

DSpace and DSpace-CRIS Potential Merger

Strategy Planning Group

STRATEGIC VISION DOCUMENT

(Early Draft)

from Strategy Planning Group Charge:

Responsibilities:

Strategic Vision Development

- Draft, share, and communicate a Strategic Vision Document with both communities, outlining a long-term strategic direction and goals of a potential merged product (DSpace).
- Clarify that the goal of a potential merger is not to replace DSpace, but to enhance DSpace functionality and its technical aspects.

Deliverable:

Strategic Vision Document: A concise and aspirational statement of a potential merger's purpose and goals

Preamble

This is a brainstorming document of the Strategy Planning Group. Nothing written in this document is finalized until draft status is removed.

Mission (Charge)

To make recommendations to the DSpace Steering Group for a successful potential merger of the DSpace and DSpace-CRIS communities.

Introduction

The DSpace and DSpace-CRIS communities have evolved over two decades to serve diverse repository and research information management needs. Recognizing the growing overlap in codebases, use-cases, and users' expectations, we now stand at a pivotal moment: formally unifying these communities and platforms into a single, sustainable ecosystem. This Strategic Vision Document articulates the purpose, goals, and guiding principles for that merger from the perspective of combining the DSpace and DSpace-CRIS communities, laying the foundation for a robust, turn-key yet flexible solution that empowers institutions of all sizes to unlock the full potential of open source scholarship infrastructure.

Vision Statement

To create a unified, sustainable, and vibrant DSpace community consisting of all current users of DSpace and DSpace-CRIS, enabling institutions worldwide to preserve, share, and analyze scholarly outputs and research information in one turnkey repository platform.

Strategic Purpose

1. Empower Diverse Use Cases
 - Incorporate essential CRIS features into the merged DSpace platform
 - Preserve DSpace's ease-of-use while supporting specialized use cases
2. Strengthen Community and Governance
 - Encourage and support DSpace-CRIS users to transition to full participation within the DSpace Program, including DSpace membership and governance roles
3. Foster Collaboration and Transparency
 - Migrate and maintain documentation in a shared wiki environment, ensuring all community members can contribute
4. Ensure Sustainability and Collaboration
 - Streamline development workflows - making pull requests and reviews efficient to accelerate feature delivery

Guiding Principles

- **Community Driven:** Every decision, from naming conventions to feature prioritization, reflects the collective needs and voices of our global user base.
- **Equity & Inclusion:** Commitment and adherence to existing DSpace Governance structures creates a welcoming community that encourages participation from institutions of all sizes and regions.
- **Transparency & Openness:** channels and mechanisms are available for the Community to provide input into roadmaps and design discussions; and documentation is publicly accessible and collaboratively authored.

- **Sustainability & Stewardship:** We balance innovation with long-term maintainability, ensuring the platform thrives under volunteer and organizational support.

High-Level Goals

1. **By April 30, 2025** – Publish the first draft of the **Strategic Vision Document** and submit it to DSpace Governance for review. Allow two weeks for feedback and questions.
2. **By May 30, 2025** – Integrate comments and questions from DSpace Governance and publish the final version of the **Strategic Vision Document** on the DSpace wiki. Inform the DSpace and DSpace-CRIS communities about the publication of this document.
3. **By June 15, 2025** – Draft a first version of the **Communication Plan**, providing guidelines for engaging the broader DSpace Community, including communication milestones and channels. Submit to DSpace Governance for review and allow for two weeks to elicit feedback and answer questions.
4. **By July 15, 2025** – Finalize the **Communication Plan** and begin implementing actions as outlined in that plan.
5. **By July 31, 2025** – Create a first draft of the **Governance Transition Plan** and submit to DSpace Governance. Allow two weeks for feedback and questions.
6. **By August 31, 2025** – Finalize the **Governance Transition Plan** and take steps as outlined in that plan to receive community input and feedback
7. **Ongoing** – Conduct biweekly Planning Group meetings and refine the strategic roadmap periodically
8. **By December 31, 2025** – Unless directed otherwise by the DSpace Steering Group, conclude all activities of the Strategy Planning Group. Have implemented all actionable items as outlined in the Strategic Vision Document, the Governance Transition Plan, the Communication Plan, and in additional documentation created by the Strategy Planning Group

Roadmap Overview

Phase	Key Activities	Timeline
Information Gathering	Gather information about the differences between DSpace and DSpace-CRIS	Feb - May 2025
Planning		Jun - Aug 2025

Concerns

The Strategy Planning Group has identified two main concerns that will impact the speed and therefore the overall success of a merger of DSpace and DSpace-CRIS. This group recommends that the DSpace Steering Group discusses these concerns and finds possible solutions before embarking on the work of merging DSpace and DSpace-CRIS. Our main concerns are:

1. **Constraints in the process of reviewing and testing pull requests:** With the current number of volunteers, the review of DSpace-CRIS code as necessitated by the merger will create bottlenecks and slow things down considerably. We encourage Governance to find a way to speed up the review process in order to facilitate a timely merger of DSpace and DSpace-CRIS.
2. **Loss of community contributions:** DSpace development is dependent on contributions from its community. A merger would bring these contributions to a halt, at least momentarily (for the duration of the merger). How do we ensure that we do not lose enthusiasm within the community and discount community contributions that are being worked on?

Benefits and opportunities

Conclusion

This merger embodies our shared commitment to open scholarship and the long-term health of the DSpace ecosystem. By uniting our code, communities, and vision, we will build a platform that is both familiar and forward-looking. Together, we will steward a sustainable, inclusive, and agile solution that amplifies the impact of scholarship worldwide.