Grant agreement no. 654139

LEARN

Leaders Activating Research Networks: Implementing the LERU Research Data Roadmap and Toolkit

Coordination & support action
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Lead beneficiary for this deliverable: *ECLAC*
Contributors: *UCL, UB, UNIVIE, LIBER*

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CO	Confidential, only for members of the consortium (including the Commission Services)	
CI	Classified, as referred to in Commission Decision 2001/844/EC	

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1. Version log

Version	Date	Released by	Nature of Change
First version	22-11-2016	UN ECLAC	
	14-12-2016	Rodney Amis UCL	Minor revisions
	07-01-2017	Ilaria Marsili (UCL)	Minor revisions
	09-01-2017	Paul Ayris	Final revisions and approval

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2. Definition and acronyms

Acronyms	Definitions
CLACSO	Latin American Council of Social Sciences https://www.clacso.org.ar/
LAC	Latin American Countries
LEARN	LEaders Activating Research Networks: Implementing the LERU Research Data Roadmap and Toolkit
LERU	League of European Research Universities
LERU Roadmap	Roadmap for universities and research organisations on how to tackle the challenges which research data poses. It also has a series of messages for researchers, support services, research institutions and policy makers.
LIBER	Association of European Research Libraries
RDM	Research Data Management
UB	Universitat de Barcelona
UCL	University College London
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNIVIE	Universität Wien
UN ECLAC	United Nations Economic Commission for Latin America and the Caribbean

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3. Introduction

Work Package 1 “Stakeholder Engagement” (Task 1.1) states that the LEARN Project will organise five Workshops to be organised in Europe and Chile. These Workshops form one of the main project activities. Speakers who are leaders in the field of RDM will address the Workshops. Attendees will come from the various sectors of the research community. The communities from which attendees will be sought will be identified by the project partners. The Workshops will be targeted to encourage attendance by all stakeholder groups in the research community – researchers themselves, data scientists/stewards, library and IT staff, faculty and University managers, research funders. The project partners will ensure that attendance comes from all stakeholder groups by using their influence in their own communities to encourage attendance. The mix of stakeholder groups will ensure that the Workshop presentations and discussions are broad and cover all relevant aspects of RDM. The Breakout Groups in the Workshops will help identify best practice and case studies which are significant to these sectors. These will then be gathered and published in the Toolkit.

This deliverable is the report on the 4th LEARN Project Workshop on Research Data Management entitled “*Implementation of policies and strategies in Latin America and the Caribbean”*, held in Santiago, Chile on 27th October 2016.

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4. Activities carried out and results

4.1 Organisation

The venue for the fourth Workshop was the Celso Furtado Conference Room, located at UN ECLAC headquarters in Santiago, Chile. The logistics for the event included catering, as well as photography and video recording of the event, provided by the UN ECLAC Conference Services Unit. The Workshop was publicised and promoted via the LEARN Project's website, Twitter feeds and direct mailings to relevant stakeholders identified in Latin America and the Caribbean, mailing lists and identified contacts supplied by all the Project partners.

Registration for the Workshop was carried out using two different methods: through email (after receiving a direct invitation to attend the event) and using the Eventbrite booking system (which was publicised using the LEARN website and Twitter feeds). Initially, a maximum ceiling of 80 registrants was set in order to limit the day's four break-out groups to no more than 20 people in each. However, considering the high level of interest manifested by the audience, the maximum was raised to 100 participants and the programme was modified accordingly.

In total, over 100 people registered for the event and the total number of participants that attended the Workshop reached 90.

There were participants from 11 countries, 7 of which were from the Latin American region. In regards to participating institutions, there were representatives from 54 organisations, with a high number of universities (25), followed by public institutions and funding agencies.The range of institutions represented by the registrants is listed in Appendix A.

A welcome pack was assembled providing each registrant with the Workshop programme, the LEARN flyer, a notice about photography and video recording during the event, a flyer with further information about Research Data Management prepared by the Hernán Santa Cruz Library staff and a UN ECLAC notepad (see 4.2.2 below).

The workshop and the highlights of each session were also communicated to a wider community using social media (Twitter). In total, 154 tweets using #LEARNsantiago16 were shared by 27 different contributors. An analysis of social media usage and impact was undertaken, concluding that there were 322.3k impressions and 2,093 potential impressions per tweet related to the LEARN Workshop.

4.2 Programme

The Workshop programme was developed to allow for three keynote speakers (two external and one from within the Project (UCL)), two panel sessions with a moderator and five panellists each, and a final presentation delivered by a key regional stakeholder (CLACSO representative).

Due to the large number of people registered at the event, a decision was made to replace the afternoon Breakout Groups with two extended Panel Discussions, providing additional time for questions and discussion with the audience.

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Efforts were made to organise the time slots assigned to keynote speakers and discussion panels in a manner that would allow the audience fully to understand Research Data Management and its challenges, starting with a more general perspective and progressively moving to the more specific issues within Latin America and the Caribbean.

The keynote speakers and panellists' presentation slides can be viewed and downloaded at http://learn-rdm.eu/en/workshops/4th-workshop/presentations/. They are linked to the project's Slideshare account. The full programme is shown in Appendix B

4.2.1 Keynote speakers

Keynote speakers were invited by virtue of their previous experience with the theme of the Workshop and the goals of the event. Profiles of all the keynote speakers can be viewed at:

http://learn-rdm.eu/en/workshops/4th-workshop/speakers-profiles/

4.2.2 Discussion panels

A total of ten panellists and two moderators participated in the two discussion panels of the Workshop. The panellists represented a variety of stakeholders in the RDM spectrum, as well as the regional diversity within Latin America and the Caribbean, and they were grouped according to their previous experience in regards to each of the two topics.

In order to ensure best use of available time, each panel had three sections:
1) Panellists presentations;
2) Questions to panellists by the moderator, and
3) Questions and comments from the audience and open discussions.
The two moderators were given written guidelines detailing the theme and topics to be covered in each panel and members of the UN ECLAC team acted as rapporteurs during each session.

Profiles of all the panellists can be viewed at:

http://learn-rdm.eu/en/workshops/4th-workshop/speakers-profiles/

4.3 Evaluation and feedback

All attendees were contacted in the week following the Workshop and invited to complete an online satisfaction survey. 54 of the 90 attendees completed the survey and the results were made available via the Project website. The evaluation report can be viewed at:

http://learn-rdm.eu/en/workshops/4th-workshop/evaluation/

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5 Conclusions

The fourth LEARN Workshop attracted a wide variety of participants including librarians, researchers, members of university and research institutions, research funders, and IT professionals.

The 90 participants came from a variety of countries. Although most attendees represented Chilean institutions, there were also present at the event organisations from Austria, Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, Peru, and international organisations (UN ECLAC, UNESCO and the regional network LA Referencia). The keynote speakers were from Argentina, Chile, United States and the United Kingdom.

The response rate to the evaluation survey was deemed satisfactory (60%), and the collected feedback was very positive, based on the average score that respondents gave to keynote presentations and panel discussions (4.5 out of 5 points). The comments provided by participants are mostly very positive, and in general they are related to the learning value of the event, as it allowed participants to get an overview of the current state of RDM in Latin America. Improvements were also suggested, in particular in regards to the time given to each section of the programme.

Although the Workshop did not include breakout groups as a session format, time was given after each session for questions and discussion with the audience. The main purpose was to gather information that could inform other Project deliverables (e.g. D3.1 the model policy and D1.6 the LEARN Toolkit).

Throughout the day, and in particular during the panel discussions, some recurrent topics that can be seen as particularly relevant within the region were identified. These topics are:

Advocacy

There was consensus on the need to promote a cultural change within the scientific community. It was mentioned that researchers have not yet adopted a “culture of sharing” -which is critical for RDM- and it was suggested that efforts should be made to promote the benefits that RDM can bring to the work of researchers. Advocacy for RDM policy development and implementation is also needed among research institutions and decision makers, as their participation in these processes will be critical for its success.

Usability of data

One issue that emerged during the discussions was the usability of data. It was commented that it is unclear how reusable the large amounts of data that have recently been made available to the public are, and it was questioned whether these data are being used to inform the development of public policies. It was suggested that efforts should be made not only to ensure the quality of available public data, but also to provide tools for easily obtaining and visualising data. This would have a significant impact in data reuse beyond academic communities and for the public good.

Researchers’ barriers

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Researchers are a key stakeholder in RDM, but there are some barriers that can impede their active involvement in data management and sharing. It was suggested that public policies must take into account the interests of researchers, which are usually bound to external requirements and standards for scientific activities and productivity. Some potential barriers for researchers' engagement in RDM can be removed through the creation of policies compatible with such requirements.

Skills development

There was consensus that new roles have emerged in the RDM landscape, the "data scientist" being the most prominent one. Other roles, such as data librarian, data steward and requirements manager, were also mentioned. The panellists and the audience emphasised the lack of training opportunities in these areas in LAC. To address this issue, more educational programs should be created and, in particular, training opportunities tailored specifically for the library community, which will most likely be the one curating and managing access to research data.

Stakeholders' collaboration

Another issue that emerged several times was the need for collaboration among RDM stakeholders. The audience commented on the need for further dialogue and collaboration between professional groups and sectors of society. Among the groups that need to work collaboratively are libraries, academia (researchers and research institutions), IT professionals, government agencies and even the private sector. In that sense, the work that libraries have to do to reach the academic sector was highlighted. However previous collaborative experiences in related areas (i.e. Open Access) were highlighted; an example of the latter is the regional network LA Referencia. This type of experience could be replicated to foster development in RDM.

The role of libraries and librarians

The day concluded with an extended discussion about the role of libraries in RDM: the role that they have at present, and the one they should have in the future. As previously mentioned, the need for training in data science was stressed as, in general, was the necessity to develop technical skills. It was also mentioned that librarians need to work more closely with IT professionals and to consider how they interact with other stakeholders in organisations. In this context, it was highlighted that a key success factor is having support at the management level. There was agreement that libraries are appropriate units to promote and develop RDM in institutions, considering their historical role in providing access to scientific information, their current experience in the field of Open Access and their stability within research institutions.

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Appendix A

Institutions represented at the Santiago LEARN Workshop

- Biblioteca de la Corte Suprema, Chile
- Biblioteca del Congreso Nacional, Chile
- Biblioteca Electrónica de Ciencia y Tecnología y Sistema Nacional de Repositorios Digitales, Ministerio de Ciencia y Tecnología, Argentina
- Cámara Chileno Alemana de Comercio e Industria, Chile
- Centro Argentino de Información Científica y Tecnológica (CAICYT), Consejo Nacional de Investigaciones Científicas y Tecnológicas (CONICET), Argentina
- Centro de Documentación del Consejo de Monumentos Nacionales, Chile
- CNN, Chile
- Colegio de Bibliotecarios de Chile
- Comisión Chilena de Energía Nuclear (CCHEN), Chile
- Comisión Nacional de Investigación Científica y Tecnológica (CONICYT), Chile
- Conselho Nacional de Desenvolvimento Científico e Tecnológico (CNPq), Brazil
- Consorcio de Recursos de Información Científica y Tecnológica (CONRICYT, CONACYT), Mexico
- Departamento Administrativo de Ciencia, Tecnología e Innovación (COLCIENCIAS), Colombia
- Diagnofruit, Chile
- Dirección de Bibliotecas, Archivos y Museos, Chile (DIBAM), Chile
- Fundação de Amparo à Pesquisa do Estado de São Paulo (FAPESP), Brazil
- Grupo Amigos: Red de Instituciones Mexicanas para la Cooperación Bibliotecaria, Mexico
- Instituto Brasileiro de Informação em Ciência e Tecnologia (IBICT), Brazil
- IRADI, Chile
- LA Referencia, Regional network
- Ministerio de Obras Públicas, Chile
- Pontifica Universidad Católica de Chile, Chile
- Prodigio Consultores, Chile
- Red Universitaria Nacional (REUNA), Chile
- Servicio Nacional de Geología y Minería (SERNAGEOMIN), Chile
- Superintendencia de Bancos e Instituciones Financieras de Chile (SBIF), Chile
- Superintendencia de Valores y Seguros (SVS), Chile
- Superintendencia Nacional de Salud (Susalud), Peru
- UNESCO
- United Nations Economic Comission for Latin America and the Caribbean, ECLAC
- Universidad Adolfo Ibañez, Chile
- Universidad Andrés Bello, Chile
- Universidad Austral de Chile, Chile
- Universidad Católica de Valparaíso, Chile
- Universidad Católica del Norte, Chile
- Universidad de Antofagasta, Chile
- Universidad de Chile, Chile
- Universidad de Costa Rica, Chile

Universidad de la Frontera, Chile
Universidad de los Andes, Chile
Universidad de Los Lagos, Chile
Universidad de Magallanes, Chile
Universidad de Playa Ancha, Chile
Universidad de Santiago, Chile
Universidad de Valparaíso, Chile
Universidad del Desarrollo, Chile

Universidad Diego Portales, Chile
Universidad Mayor, Chile
Universidad Metropolitana de Ciencias de la Educación, Chile
Universidade Federal de Pernambuco, Brazil
Universität Wien, Austria
University College London, UK
University of California Davis, USA

Appendix B

learn

4th LEARN Workshop on Research Data Management
Implementation of policies and strategies in Latin America and the Caribbean
Santiago, Chile, 27 October 2016

Programme

ECLAC | *Celso Furtado Conference Room* | Avda. Dag Hammarskjold 3477, Vitacura, Santiago.

09:00-09:45 | Registration and coffee

09:45-09:55 | Inauguration: **Raúl García-Buchaca**, Deputy Executive Secretary for Management and Programme Analysis, ECLAC

09:55-10:00 | Welcome address: **Wouter Schallier**, Chief of the Hernán Santa Cruz Library, ECLAC

10:00-10:45 | Conference: "Data for Development – the value of data for research and society", **Dr. Martin Hilbert**, University of California

10:45-11:30 | Conference: "The Data Deluge: the role of research organisations in a brave new world", **Dr. Paul Ayris**, University College London (UCL)

11:30-13:00 | Discussion panel "Research Data Management in Latin America and the Caribbean: Best practices and challenges"

Moderator:	**Jorge Alejandro Patiño**, Division of Production, Productivity and Management, *ECLAC*
Panelists:	**Margarita Ontiveros**, Consorcio de Recursos de Información Científica y Tecnológica (CONRICYT), CONACYT, Mexico
	Alberto Apollaro, Biblioteca Electrónica de Ciencia y Tecnología y Sistema Nacional de Repositorios Digitales, MINCYT, Argentina
	Fabio Kon, Fundação de Amparo à Pesquisa do Estado de São Paulo (FAPESP), Brazil
	Patricia Muñoz, Programa de Información Científica, CONICYT, Chile

Edward Mezones, Superintendencia Nacional de Salud (SUSALUD), Peru

13:00-14:30 | Lunch

14:30-15:15 | Conference: “Datos Abiertos en el mundo de las ciencias”, Universidad de Chile / Center for Semantic Web Research (CIWS)

15:15-16:45 | Discussion panel “Getting ready for implementing Research Data Management policies and strategies in Latin America and the Caribbean”

Moderator: **Wouter Schallier**, Hernán Santa Cruz Library, *ECLAC*

Panelists: **Patricia Muñoz**, LA Referencia, International

Lourdes Epstein, Grupo Amigos: Red de Instituciones Mexicanas para la Cooperación Bibliotecaria, Mexico

Fernando López, Centro Argentino de Información Científica y Tecnológica (CAICYT), CONICET , Argentina

Miguel Ángel Márdero Arellano, Instituto Brasileiro de Informação em Ciência e Tecnologia (IBICT), Brazil

Nicolás Fuertes Segura, Centro de Estudios sobre Desarrollo Económico (CEDE), Universidad de los Andes, Colombia

16:45-17:15 | Coffee

17:15-17:45 | Presentation of the International Accord "Open Data in a Big Data World", **Fernando López**, Universidad Metropolitana para la Educación y el Trabajo (member of CLACSO), Argentina

17:45-18:00 | Closing remarks: **Wouter Schallier**, Chief of the Hernán Santa Cruz Library, ECLAC

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