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**PROJECT PERIODIC REPORT**

**Grant Agreement number:** 288985

**Project acronym:** SERSCIDA

**Project title:** Support for Establishment of National/Regional Social Sciences Data Archives

**Funding Scheme:** FP7-CSA-SA

**Date of latest version of Annex I against which the assessment will be made:**

**Periodic report: 1st 🗹 2nd □ 3rd □ 4th □**

**Period covered: from** 01/01/2012 **to** 30/06/2013

**Name, title and organisation of the scientific representative of the project's coordinator****[[1]](#footnote-1):** Ms Lejla Somun-Krupalija, on behalf of Ms Andjela Lalovic, University of Sarajevo, Human Rights Centre

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**Declaration by the scientific representative of the project coordinator**

|  |
| --- |
| I, as scientific representative of the coordinator of this project and in line with the obligations as stated in Article II.2.3 of the Grant Agreement declare that:* The attached periodic report represents an accurate description of the work carried out in this project for this reporting period;
* The project (tick as appropriate) [[3]](#footnote-3):

🗹 has fully achieved its objectives and technical goals for the period; * + has achieved most of its objectives and technical goals for the period with relatively minor deviations.
	+ has failed to achieve critical objectives and/or is not at all on schedule.
* The public website, if applicable

 🗹is up to date* + is not up to date
* To my best knowledge, the financial statements which are being submitted as part of this report are in line with the actual work carried out and are consistent with the report on the resources used for the project (section 3.4) and if applicable with the certificate on financial statement.
* All beneficiaries, in particular non-profit public bodies, secondary and higher education establishments, research organisations and SMEs, have declared to have verified their legal status. Any changes have been reported under section 3.2.3 (Project Management) in accordance with Article II.3.f of the Grant Agreement.
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| Name of scientific representative of the Coordinator: ...Lejla Somun-Krupalija.....Date: 24/09/2013.For most of the projects, the signature of this declaration could be done directly via the IT reporting tool through an adapted IT mechanism and in that case, no signed paper form needs to be sent  |

***3.1 Publishable summary***

**3.1.1 Summary description of project context and objectives**

SERSCIDA is designed as a strategic project for supporting the cooperation and exchange of

knowledge between the EU countries associated within the Council of European Social Sciences

Data Archives (CESSDA) and the Western Balkan Countries (WBC) in the field of social science

data archiving. The project addresses the issues of potentials of usage of information-communication technologies for the benefits of scientific research and exchange of knowledge as laid down in the call for proposals topic. The project aims to produce tangible results and improve the capacities for exchange of knowledge and data collected through research in social sciences between the European countries and WBC involved.

The four main objectives of SERSCIDA are:

• to support the establishment of social science data archives in order to increase the level of sharing and preserving data collected through research in WB countries

• to identify potentials and infrastructures for establishment of social science data archives in WB

countries involved

• to enhance the exchange of knowledge and sharing of data collected through research in social

sciences in the WB countries and EU – CESSDA countries.

• to increase the level of understanding and support for open access policies through involvement of policy and decision makers in WB countries.

Currently, primary data collected through research in social sciences in Bosnia and Herzegovina,

Serbia, and Croatia, remains mainly in possession of researchers or research institutions that have

conducted specific research projects. Research conducted in the post conflict period in these

countries, especially in social science, are valuable for the European scientific community for it

addresses the issues of transitions in societies, historical legacies, post-communist struggles for societal transformations etc. Data collected through such research, although of high value for social scientists (both in these countries and internationally) for any further exploration, remain unavailable. There are no existing or sustainable social science data archives in these countries that would deal with issues of preservation and archiving of those primary data. Research institutions in WB countries are currently faced with the problem of possible loss of valuable research data forever due to the lack of infrastructure and capacities for archiving such data in an adequate manner in line with existing European standards. Today, in Bosnia and Herzegovina for example, there is no institution in charge of archiving data collected through the empirical research in social sciences or providing access to those data to other researchers/research institutions within a similar field of interest. At the same time, many European countries do have specialized institutions – data archives in social sciences – dealing with archiving and preserving data collected through research, as well as providing easier access to data for research and research institutions as needed. Member institutions of CESSDA provide access to more than 25,000 data collections for more than 30,000 researchers in social sciences and humanities within the European Research Area.

**3.1.2 Description of work performed and main results**

SERSCIDA has brought together four member institutions of CESSDA and three Western Balkan

institutions interested and committed to establishing data archives in social sciences in their

countries. Knowledge and experience between the CESSDA partners and Western Balkan

institutions has been shared through joint design and implementation of project activities, an

International Conference and joint analysis on the potentials data archives in Western Balkans.

The Western Balkan partner countries now have a sound knowledge of the required structural, legal and policy changes that need to take place in order for the establishment of data archives. It is clear what the tasks are and which institutions will need to be involved in the establishment process

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Infrastructures and institutions that will host the data archives are identified and these are the

SERSCIDA partners that will be working in collaboration with their host Universities or other

partners. The countries also have an idea of what is the scope of their future data archives when it

comes to services they will provide and kinds of data sets they will archive, as well as required

resources for this (staff, equipment).

The SERSCIDA project has been met with much appreciation and interest both by policy makers

(government institutions) as well as future data users (universities and researchers) which was

expressed in high participation at the SERSCIDA International Conference and 4 National Round

Tables. Government institutions recognise the potential for using research funds more efficiently, as data produced will be available for other researchers and policy makers. Government institutions also see a benefit of the establishment of data archives in getting better quality information about researchers involved in social science research. Researchers themselves are keen to share their data and to use secondary data for research and university teaching.

CESSDA partners are benefiting from the process in being able to develop clear models and

step-by-step manuals for data archive establishment that can be used as a resource for all other future data archives that will be established.

SERSCIDA has contributed to raising the awareness of the need of support for research in social

sciences, in general, and more specifically the understanding and significance for open access

policies. Open access has been discussed at the International Conference and 4 National Round

Tables, as open access to data as well as open tools for access to data.

**3.1.3 Expected final results and potential impacts**

SERSCIDA addresses the need for improved and open access to and dissemination of primary data collected through research in social sciences while at the same time trying to support reinforcement of the existing national strategies and structures and to contribute to development of new ones.

Additionally, it will enable exchange and dissemination of good practices (know-how of members of

CESSDA participating in the project), organization and management of joint or common initiatives

(initiative for establishment of national/regional social sciences data archives), and will impact the

creation of state of the art social science data archiving practice in the WB countries involved. With

reference to CESSDA standards, SERSCIDA will aim towards enabling the open access to all

information and collected data. Prototype databases as result of SERSCIDA will be based on an open access platform – researchers and other interested stakeholders will be able to access and download data online, free of charge, after signing an end-user contract. The data made available to researchers will consist of quantitative datasets in various possible formats (e.g., SPSS, Stata, SAS, Excel). The prototype systems developed as part of the project should also be able to store and disseminate qualitative data, provided that this does not conflict with the data protection laws of the WB countries involved. Researchers will also have open access to all supplementary materials that could support secondary analyses of data, such as questionnaires, methodology reports, user guides, and so on.

***3.2 Core of the report for the period: Project objectives, work progress and achievements, project management***

**3.2.1** **Project objectives for the period**

SERSCIDA is designed as a strategic project for supporting the cooperation and exchange of knowledge between the EU countries associated within the Council of European Social Sciences Data Archives (CESSDA) and the Western Balkan countries (WB) in the field of social science data archiving. The project addresses the issues of potentials of usage of information-communication technologies for the benefits of scientific research and exchange of knowledge as laid down in the call for proposals topic. The project aims to produce tangible results and improve the capacities for exchange of knowledge and data collected through research in social sciences between the European countries and WBC involved.

*CESSDA project partners proposed and the project agreed that the future term to be used will be “data services” rather than “data archives” as the former reflects the true nature of those institutions.*

All Project objectives for the reporting period were met:

* 1. Work Package 1 – Project Management
		1. Organize and implement the overall management of SERSCIDA.

University of Sarajevo – Human Rights Centre (HRC) invited all project partners to the Kick- Off Meeting in Sarajevo, Bosnia and Herzegovina, in Feb 2012. The Kick-off meeting brought together all project partners and the EU Project Officer to review the Project work packages, deliverables and define specific dates and task details. It was an opportunity for project partners to meet each other and establish a project Steering Board. It enabled all project partners to revisit the Work packages as planned in the Project document, discuss modes of communication and management details. The meeting resulted in a definition of a more detailed schedule for forthcoming activities. *Please see Deliverable D.1.1 Report from the Kick-off meeting* The Kick-Off Meeting was followed by a Steering Board Meeting in Belgrade, Serbia, in Nov 2012. It was dedicated to reviewing the first project research deliverables, as well as discussing the Belgrade Conference planned for 2013.

* + 1. Provide sound financial management of SERSCIDA.

Project partners developed a more detailed budget plan, as an internal financial monitoring tool to ensure sound management of finances. All major costs for WP implementation were discussed among project partners in order to reach the most efficient and cost-effective option. Equally, for all major costs, offers from at least three sources were sought and the most cost-effective offer chosen. Project partners already have an established coherent set of accounting procedures and standards which reveal that public monies are spent in accordance with due authority, that all transactions are recorded accurately, and that a complete audit trail exists to facilitate a post expenditure review.

* + 1. Communicate proactively with all project partners as well as the European Commission regarding the implementation and progress of the project including the reporting due.

Communication with all project partners was enabled through the setting up of a mailing list (serscida@mjesec.ffzg.hr) hosted by FFZG as the most technically equipped partner. The mailing list is used for daily communication between project partners and the list of individuals receiving the mailing list includes all those who are nominated as project team from each of the project partner institutions. Separate mailing lists are created when smaller groups of project partner staff need to communicate on specific issues, such as the WP4 task implementation (serscida-wp4@mjesec.ffzg.hr). Video and audio conferencing has been used in order to follow up on the project implementation and discuss specific task activities. These conference calls were usually organised by the Project Coordinator, or by the Task Leader of specific WPs. The calls were usually followed up by internal notes on conference meetings.

* + 1. Assure quality of the work carried out in all work packages.

A quality assurance plan was developed by the HRC and is used as a basis for project implementation and monitoring of deliverable quality output.

* 1. Work Package 2 – Mapping of existing potentials
		1. Develop methodology for analysis of existing potentials for establishment of social science digital data archives in the WB region

In order to analyse the existing potentials for establishment of social science digital data archives in the WB region, three main groups of stakeholders who can play important role in establishing, maintaining and using a data archive were identified:

* The research policy and funding bodies
* The research/data service infrastructures institutions
* The researchers

Due to the difference between the three groups, a general survey which would cover all groups was not practical. Instead, the survey instrument for each group was designed to fit the specific characteristics of that group. In producing the survey instruments SERSCIDA has benefited from experience from a similar survey conducted by the CESSDA PPP project and from national surveys conducted by CESSDA members in their own nations.

*The Interview guide for Research Policy and Funding Institutions* was developed for interviews with ministries with research policy mandates, as well as the major research funders. The purpose was to establish contact and determine the possibilities for financing a data archive both in the establishment phase and in the long term. This also included questions and discussions whether the funders had any requirements related to research data e.g. archiving of data or open access. It was conducted either face to face or via phone. Information was also sought as to whether the current science policy includes anything regarding archiving research data. Another crucial question in this case were the ministry’s and funders view of whether data archiving should be carried out at national or local level.

*The Questionnaire for Researchers* was designed to collect information on production, preservation and use of research data in the field of social sciences is an online survey questionnaire. The online survey was prepared using LimeSurvey software hosted by University of Zagreb University Computing Centre. The questionnaire collected information about the researchers' experience of documentation, re-use and disseminating of research data, but also about which type of statistical/analytical software packages, methodology and data are primarily used in their research. In addition to these areas the researchers were also asked if their institution had any policy regarding long term preservation and/or documentation of data. This provided a brief overview of the demand for data, training and support and the supply of data and of experience with documentation.

*The Interview Guide for Research Infrastructure Institutions* was designed for the research infrastructures was a semi-structured interview/survey. It was conducted either face to face or via phone with representatives of research infrastructures and research institutions with in the social science. The National Statistical Institute was also contacted. The respondents were asked to answer questions about whether they could provide technical infrastructure or research service. They were also asked whether institution had any policy or competences for long-term preservation and documentation of data. The institutions and infrastructures were also asked whether they had any available technical capacity or data collecting services which could be valuable for the establishment of a data archive. The survey was also a way of getting in touch with potential future collaborators with the data archive.

* + 1. Analyse existing potentials and infrastructure for data archiving in the WB countries involved

The three country teams set to mapping the potentials for establishment of social sciences digital data archives in Bosnia and Herzegovina, Croatia and Serbia. The process was supported by CESSDA members who contributed to the development of the analysis methodology and provided feedback on the report drafts. *Please see Deliverables D.2.1, D.2.2 and D.2.3*

* + 1. Provide recommendations for making use of the existing potentials, if any

Recommendations were prepared for each of the three WB countries, that serve as a follow up for the process of establishing Data Services in each of the countries. Existing potentials were identified in the WB countries as well as CESSDA partner countries. The potentials include expertise in different government and university institutions, funding opportunities from government sources and vested interest among researchers, archivists and librarians from project partner institutions. The identified potentials were the basis for planning networking of key stakeholders in the WB countries and organisation of Round Tables and the International Conference within WP3. These recommendations were the basis for the development of an Establishment Plan of Data Services in WB countries within WP4. *Please see Deliverables D.2.1, D.2.2 and D.2.3*

* 1. Work Package 3 – Policy dialogue and conference on establishment of soc. science digital data archives in the region
		1. Support the establishment of basic network of relevant stakeholders (data users, data producers, research financing institutions, CESSDA members)

The project partners in WB countries, using the identified institutions and potentials from WP2, organised further meetings and Round Tables in order to further discuss the establishment of data services. These Round Tables were also used to achieve objective 1.3.3 as the Round Tables conclusions and recommendations were to set up social science data services in WB countries. The results of the Round Tables were that they increased knowledge on the need for data services and affirmed and promoted the key stakeholders for the process of their establishment. The achievement of this objective also contributed to the achievement of objective 1.3.4 as Round Tables included presentations on Open Access by country experts.

* + 1. Support exchange of knowledge and transfer of experiences between members of CESSDA and potential actors from the Western Balkan countries in establishing data archives

The International Conference “Opening Data Services in Social Sciences” took place on March 21-22 in Belgrade, Serbia. The main objectives of the Conference were to:

* Offer presentations on the models of data services, benefits of data services for government, researchers and academic institutions and share plans for the development of new data services in the project partner region;
* Promote the exchange of ideas and experiences among existing data services in Europe and those that are being developed in project partner countries;
* Help strengthen the network between data services, government institutions and experts in the project partner countries.

The Conference was attended by 108 participants, majority of whom were researchers/lecturers from Western Balkan (WB) countries, attending the Conference as participants. The Conference was attended by high level government officials: Minister of Education, Science and Technical Development of the Republic of Serbia, Minister of Science and Technology of the Republic Srpska and Deputy Minister of the Education and Science of the Federation of Bosnia and Herzegovina. Twelve representatives of the CESSDA countries participated at the Conference, the majority of them as the Conference speakers. In total, 25 representatives of data infrastructure were present at the Conference, among them 16 from WB countries, mostly representatives of statistical offices, national libraries and university computing centres (which were recognized as important stakeholders in the establishment of data archives).

During the Conference, country assessment reports resulting from previous project activities, were presented by WB SERSCIDA teams’ representatives and discussed by the Conference participants. WB SERSCIDA teams proposed, supported by the Conference Participants and based on empirical evidence from reports, the establishment of individual country data services based on a country specific organizational model rather than a regional one. In general, participants at the Conference agreed that the establishment and financing of data services in WB countries should be primarily supported by government institutions, mainly ministries in charge of science. However, there was no full agreement on how WB countries should go about motivating researchers to share their data. One of the most discussed topics at the Conference was data security issues, more specifically, controlled access to sensitive data, remote access and confidentiality and appropriate use of micro-data.

*For further details, please see deliverables D.3.1*

* + 1. Support reaching agreement on setting up social science digital data archives in WB countries involved

The process of selecting Round Table participants, as well as participants for the International Conference, was a most useful tool for reaching out to key stakeholders required to support the establishment of data services in the three WB countries (objectives 1.3.1 and 1.3.2 above). It can be said that there is agreement across all concerned stakeholders – researchers, policy makers and funders – that data services need to be established and that they will be established in each of the WB countries.

It is evident that each country would have a separate data service, but that all three would work jointly in providing smooth access to data for all researchers using the languages of WB countries, primarily, as well as all other researchers interested in WB social science research. Further models of data service functioning, individually and in the joint SERSCIDA portal, will be defined during WP5.

* + 1. Ensure the support and understanding for open access of policy and decision makers in WB countries

Each Round Table and the International Conference had presentations and sessions dedicated to Open Access policies. The International Conference’s fourth session dealt with the open access initiative, where WB country representatives gave snapshots on the current state of open access in each of the three WB countries. *For further details please see Deliverable 3.1 pages 21-23.*

* 1. Work Package 4 – Building capacities for establishment of social science digital data archives
		1. Support the elaboration of a detailed action plan (with all aspects included) for establishment of social science digital data archives in the region

Following the Belgrade conference, the SERSCIDA partners met in Ljubljana, Slovenia in May 2013 to discuss lessons learned, prospects for new data services, and a draft structure for the roadmaps.

Support was provided to complete initial "roadmaps" or "blueprints" to guide the establishment and operation of new data services in the three WB countries. The general aim of the roadmaps is to detail all activities deemed as necessary prerequisites for functional data services, including: definition of institutional scope and organizational structure; staffing and training; technical infrastructure (e.g., computers, software, and telecommunications); archiving policy and procedures; and outreach and communications. The establishment roadmaps were designed to facilitate and formalize the steps required to realize all of the preliminary conditions needed to "go live" with new data services, work to be carried out in WP5 of the project, to begin in January 2014.

The current establishment plans are presented the *Deliverable 4.1*. The plans are each divided into four major sections: 1. Definition of organisation and internal structure; 2. Human resources; 3. Technical infrastructure; and 4. Policy, quality control, and workflows. For each activity there is a description that provides further detail.

* + 1. Provide initial training for identified potential institutions on how to set up social science digital data archives

Plans for this objective are already in place, although actual implementation of it will follow up in the forthcoming period.

In addition to four visits to CESSDA SERSCIDA partner countries and two trainings at CESSDA SERSCIDA partner institutions, project partners from WB countries participated in other CESSDA-related events: DwB FP7 project First Regional Workshop in Ljubljana in April 2013 (also included a presentation on the SERSCIDA project) and the IASSIST 2013 Conference in Cologne in May 2013 (also included a whole session dedicated to the SERSDICA project).

* + 1. **Work progress and achievements during the period**

**3.2.2.1 Work package 2** Mapping the existing potentials

*Summary:*

**T2.1 Development of methodology and key questions to address.** This task was started by identifying the required areas of research and necessary methods to acquire the data in order to understand in more detail what the potentials for the establishment of a social science data service in the three WB countries. The project team, greatly supported by FORS and UEssex, as well as UGOT and UL) agreed that there will have to be three sets of questions and three sets of methods for the targeted information sources: researchers, policy makers/funders for the data services and potential data service host institutions. A proposed contents page for the report preparation was provided by HRC.

**T2.2 Collection of relevant data for analysis (fieldwork).** An online survey with structured open-ended but mainly closed questions was used for the researchers, while semi-structured interviews were used for the other two groups of information sources. The online survey had almost 650 complete responses (Serbia 322, Bosnia 139, and Croatia 186) from researchers which provided an input on the kind of data they produce, how and where they keep them after the research is completed and to what extent they are interested in using and contributing to a data service. Face-to-face method of interviewing was completed by HRC, FFZG and IEN for the policy makers/funders and potential data service host institutions as the interviews had to more in-depth and as, in particular for government institutions, a high response rate for an online survey was not anticipated. FFZG made particular contribution to the technical development of the online survey and provided support in use of the survey results to all project partners.

**T2.3 Analysis/study of existing potentials and recommendations.** The Project WB teams also prepared analysis of the legal and policy frameworks in each country, analysed the data from T2.2 and prepared first drafts. The first drafts were then shared with the Project CESSDA members and feedback was provided, based on which final drafts were prepared.

*Significant results:*

The three Analysis of existing potentials for the WB countries have provided the project with clear understanding of the legal and policy frameworks for each country, understanding of which institutions could be potential hosts for data services, as well as the proof that researchers in each country do not maintain their research data in a safe and systematised fashion that could enable secondary research. These Analyses also showed that there IS great interest among the participating researchers in the use of a data service, as well as that there ARE no obstacles legally for the establishment of a data service. These three reports also provided an input to the Project in terms of identifying stakeholders for forthcoming work packages and activities.

*Deviations to Annex I:*

All tasks were implemented in their entirety and the only deviation was that the deliverables were submitted past their deadline. The methods (T2.1) were not in place before the end of month 6, making field work (T2.2) difficult to complete during months 7 and 8 (July and August) spilling field work into month 9 and 10 and making completion of final analysis before month 12 impossible.

*Failure to achieve to critical objectives*

NONE

*Use of resources*

The planned use of resources for this work package reflects the original plan.

*Proposed corrective actions*

NONE

**3.2.2.2 Work package 3** Policy dialogue and conference on establishment of soc. science digital data archives in the region

*Summary:*

**T3.1 Preparatory activities and series of round-table sessions**

The three country analysis and mapping of existing potentials were the basis for the development of the plans for Round Tables and International Conference. In total 4 Round Tables took place in Zagreb, Croatia in December 2012; Belgrade, Serbia in January 2013 and in Mostar and in Sarajevo, Bosnia and Herzegovina in April 2013. Two Round Tables took place in Bosnia and Herzegovina because education and science are separated constitutionally into the mandate of two entities and are not state-level areas of governance. The Round Tables were the first opportunity for WB project partners to promote the SERSCIDA project, provide more insight into the required stages for data service establishment and seek supporters, patrons and advocates for data service establishment. The Round Tables provided confirmation of the purpose of SERSCIDA project as all were met with continued government support and researcher interest.

**T3.2 Conference organization**

The International Conference preparation started in 2012 with selection of venue, speakers and participants lead by IEN in close cooperation with the project partners. The CESSDA project partners provided support in identifying a key note speaker as well as relevant speakers for other Conference sessions. The Conference programme was developed by HRC and it reflected the WP objectives: sharing of knowledge between CESSDA and WB countries on data services, promoting the Open Access policies and defining further steps for the process of the data service establishment in WB countries. The Conference was also used to promote the results of WP2, the three country reports and their findings. The Conference organisation was successful as it provided the participation of all relevant stakeholders: high level representatives from government structures, research institutions and researchers and media.

**T3.3 Conference report**

The Conference Report was prepared and submitted as *Deliverable 3.1*.

*Significant results:*

The Round Tables and International Conference provided a high profile for the SERSCIDA project and its aim of establishing data services in the three WB countries. These events were significant as they enabled the project partners to bring together key stakeholders necessary to support the data service establishment. The participation of CESSDA project partners and their experts further heightened the significance of the establishment of data services and was crucial for the expertise and information exchange between EU and WB countries.

*Deviations to Annex I:*

All tasks were implemented in their entirety and the only deviation was the time frame of activities. The Round Tables (T3.1) did not all take place prior to the Conference, but 2 took place prior to the Conference and 2 after. The International Conference (T3.2) took place in month 15 as originally planned and the deliverable (T3.3) was submitted on time in month 16.

*Failure to achieve to critical objectives*

NONE

*Use of resources*

The planned use of resources for this work package reflects the original plan.

*Proposed corrective actions*

NONE

**3.2.2.3 Work package 4** Building capacities for establishment of social science digital data archives

**T4.1 Elaboration of detailed action plan**

The purpose of task 4.1 of WP4 was to complete initial "roadmaps" or "blueprints" to guide the establishment and operation of new data services in the three WB countries. This work follows in a logical progression the earlier steps of the project, specifically mapping the research, policy, and legal landscapes within the three countries (WP2), and then publicizing findings and promoting social science data services among key stakeholders by way of an international conference (WP3), which was held in Belgrade in March 2013. The work of WP4.1 has been conducted in parallel with ongoing training activities (WP4.2 – so far, one instance held in July 2013 at the UK Data Service in Colchester). The establishment roadmaps were designed to facilitate and formalize the steps required to realize all of the preliminary conditions needed to "go live" with new data services, work to be carried out in WP5 of the project, to begin in January 2014. It was also decided in at the first meeting to Elaborate the detailed action plan (in Ljubljana May 2013) that while three separate national data services is the most realistic approach, important synergies can be generated by relying on some shared infrastructure, databases, standards, and a regional data portal that will allow for discovery of data and research information from all three services. Further, the data services will share skills and specific expertise in different areas (e.g., IES on how to handle complex economic data and BH on treating qualitative data). Commonalities of approach will also be necessitated to some degree by specific requirements of the Council of European Social Science Data Archives (CESSDA), since the three data services will be committed to aligning themselves with the operational obligations for CESSDA service providers. This will facilitate the entry process should the newly established data services wish to seek membership within CESSDA.

As for the roadmap structure, the meeting in Ljubljana led to important revisions of the document, specifically with respect to the features of both the establishment plan and for the operational plan. Besides these revisions, the three regional teams started work at the meeting filling in the details, with support from the CESSDA partners present (from the UKDA, ADP, and FORS). It is now clear that while there are significant commonalities between the three countries, there are also national specificities that make it necessary to produce three separate establishment plans. The weeks following the meeting have involved completion and refinement of the establishment plans, with iterative feedback from CESSDA partners and subsequent revisions.

*Significant results:*

The focus of this task is the establishment plans for new data services within each of the three regional countries, since this falls squarely within the scope of SERSCIDA, whose primary aim is reflected in its acronym: Support for the Establishment of national/regional social SCIence Data Archives. However, we also have made an effort to envision what will be needed after the establishment of new data services for their daily operation, maintenance, and sustainability. This is provided in the "operational plan", also in the appendix, which for the moment figures in a single generic spreadsheet. In sum, the Establishment Plan will serve as a basis for upcoming work and for preparing a time-limited plan for continued development in the near future. It provides a source of information for the tasks that will need to be funded after SERSCIDA to ensure sustainability and it will also serve the purpose of demonstrating to stakeholders how much has already been achieved toward establishing new data services in the WB countries.

*Deviations to Annex I:*

NONE

*Failure to achieve to critical objectives*

NONE

*Use of resources*

The planned use of resources for this work package reflects the original plan.

*Proposed corrective actions*

NONE

* + 1. **Project management during the period**

*CUT 3 PAGES*

**3.3 Deliverables and milestones tables**

**3.4** **Explanation of the use of the resources and financial statements**

1. Usually the contact person of the coordinator as specified in Art. 8.1. of the Grant Agreement. [↑](#footnote-ref-1)
2. The home page of the website should contain the generic European flag and the FP7 logo which are available in electronic format at the Europa website (logo of the European flag: <http://europa.eu/abc/symbols/emblem/index_en.htm> logo of the 7th FP: <http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos>). The area of activity of the project should also be mentioned. [↑](#footnote-ref-2)
3. If either of these boxes below is ticked, the report should reflect these and any remedial actions taken. [↑](#footnote-ref-3)