

# *RDA Regional Partnership Processes Document*

**Version:** 2.2

**DOI:** DOI: <https://doi.org/10.15497/RDA00059>

**Authors:** Research Data Alliance

**Published:** 16 July 2022

**Abstract:** This document describes the regional partnership processes of the RDA.

**Language:** English

**License:** Attribution 4.0 International (CC BY 4.0)

**Citation and Download:** Research Data Alliance (2022): RDA Regional Processes Document, Version 2.2

DOI: <https://doi.org/10.15497/RDA00059>

# RDA Regional Partnership Processes Document

V1.0	Original version, published in October 2020
V2.0	Updated with GDP figures from 2020 in January 2021
V2.1	Updated with definition of New, Aspiring & Contributing regions
V2.2	Updated with new definition of regions: Interested, Engaged, Committed and Partner, as agreed at Regional Assembly meeting in March 2022, approved by RAB in May 2022 and by Council on 29 June 2022

*Abstract: This document describes Regional Partnership processes of the RDA.*

## Contents

RDA Regions	3
Becoming an RDA Region	3
RDA Regions	4
The Regional Assembly	8
Regional Assembly Membership	8
The Regional Advisory Board	9
RDA Regional Advisory Board (RAB)	9
Additional RAB Participants	11
RAB Membership Constraints	11
RAB Elections	12
Aim	12
Process	12
RAB Balancing	12
RAB Bootstrap Process	12
Appendix 1 - Template for Formal Partnership Arrangements	13
Appendix 2 – Memorandum of Understanding (MoU) Template	15
Appendix 3 - Examples of In-Kind Support	19
Appendix 4 - Regional Financial Contribution	21

## RDA Regions

The Research Data Alliance needs to act on multiple levels. As a global organisation, it provides a powerful, international forum to reach consensus on data standards and interoperability frameworks. The adoption of standards and practices happens at a local level, so a combination of global and regional activities is required to assist in the implementation of outputs. Regions also play a key role in representing the practices and interests of their communities within the RDA and placing these on a global stage. The Research Data Alliance and Regions have a symbiotic, mutually beneficial relationship. ***An RDA Region is loosely defined as a “national level” geographic entity or consortium of “national-level” entities.*** The RDA will not decide the level on which Regions should be formed. It is for individual countries or consortia in the regions to define what model best suits their context and culture. This decision should remain flexible and open to change as circumstances require. Other Groups that may convene around a non-geographic focus (e.g. Chemistry) should form structures according to the mechanisms of the RDA.

A Region organizes and orchestrates initiatives that support the work of RDA and encourages adoption of RDA Outputs.

## Becoming an RDA Region

Regions become RDA Regions through negotiation of a Formal Agreement with RDA. There will be no standard arrangement that covers all Regions. The Formal Agreement between the RDA Foundation and a Region will be tailored to the specifics of each context. However, based on the respective roles and responsibilities defined above, a generic template with a number of common sections can be created. The generic Partnership Agreement and Memorandum of Understanding templates can be found in Appendix 1 and 2 of this document.

RDA Regions are categorised under four types, with the following criteria:

- 1. Interested region:**
  - a. Interest in joining RDA as a national / regional partner
  - b. No dedicated group (web space)
  - c. No MoU or Partnership Agreement
- 2. Engaged Region:**
  - a. National / Regional group (web space) publicly available
  - b. No MoU or Partnership Agreement
- 3. Committed Region:**
  - a. National / Regional group (web space) publicly available
  - b. MoU for national group signed or under definition
  - c. No financial or in-kind contribution commitments
- 4. Partner region:**
  - a. Partnership Agreement with RDA Foundation
  - b. Financial and/or in-kind contribution commitment
  - c. Dedicated group (web space)

The table below provides an overview of the opportunities and benefits according to the different levels of engagement.

Description	Interested	Engaged	Committed	Partner
Regional Advisory Board (RAB)	✗	✗	✗	✓
Regional Assembly (RA)	✓	✓	✓	✓
Secretariat Staff support	✗	✗	✗	✓
Dedicated National Group web space	✗	✓	✓	✓
Dedicated National group mailing lists	✗	✓	✓	✓
RDA Branding & Logo Agreement	✗	✗	✓	✓
In-kind support staff	✗	✗	✗	✓
Financial Contribution	✗	✗	✗	✓
Partnership Agreement	✗	✗	✗	✓
Memorandum of Understanding	✗	✗	✓	✗

### RDA Regions

<b>Function</b>	To provide a Regional perspective on the work of the RDA. Regions are expected to run activities to support growth in RDA membership and adoption of outputs in the local area. Experience of building communities, running events, promoting standards, and having effective communication channels is a strength. Convening multi-stakeholder groups to administer and oversee Regional activities is preferred.
<b>Partnership</b>	Any region that negotiates a Memorandum of Understanding or Partnership agreement with the RDA can become an RDA Region and are known as a “Committed (MoU)” or “Partner (Partnership Agreement)” region.
<b>Joining</b>	Regions join RDA through a formal agreement that is initiated through discussions with the RDA Secretary General. Acceptance by the RDA of Regional Partnership is contingent on an agreed contribution, which can be monetary, in-kind, or both.

<b>Leaving</b>	The relationship between RDA and an RDA Region can be terminated on request by either party.
<b>Duration</b>	There is no time limit on the agreement, duration and termination details are established in the MoU or partnership agreement directly.
<b>Rights</b>	<p>Ultimately, the RDA authorises and gives validity to the Regions. It is the RDA that provides the forum for the global community to connect and share knowledge that provides the context in which Regions operate.</p> <p>RDA supports the work of the Regions by various means.</p> <ul style="list-style-type: none"> <li>● Disseminating Regional efforts to the global RDA community: <ul style="list-style-type: none"> <li>○ promotion/communication of Regional activities via RDA Global website, listservs, social media, newsletter, and marketing materials.</li> <li>○ putting Regions on the global map and amplifying their activities to international audiences.</li> </ul> </li> <li>● Facilitating connections &amp; shared interests among Regions to support activities and growth by: <ul style="list-style-type: none"> <li>○ providing a forum for sharing knowledge across Regions and co-locating events.</li> <li>○ offering networking opportunities and supporting the sharing of expertise.</li> <li>○ assisting in adoption programmes across Regions.</li> </ul> </li> <li>● Supporting Regional leadership to build the RDA community and create impact by: <ul style="list-style-type: none"> <li>○ assisting in lobbying for data issues within the Region.</li> <li>○ leveraging Secretariat attendance at Regional events to help advocate for RDA.</li> <li>○ providing resources to help with advocacy and dissemination (e.g., sample slide decks, statistics and branding materials for reuse).</li> <li>○ offering small grants (or collaborate on the application for funding) to assist with the creation/development of Regional activities.</li> </ul> </li> <li>● Rotating Plenary locations, enabling international consensus to be built on issues of Regional importance.</li> <li>● Hosting Regional Assembly (RA) meetings. The views of RDA Regions are represented in the Council through the RAB Co-Chairs.</li> <li>● Providing advice to the Council through the RAB.</li> </ul> <p>The RDA also supports the Regions in their business activities in a variety of ways:</p> <ul style="list-style-type: none"> <li>● Supporting Regional development, administration, and leadership by: <ul style="list-style-type: none"> <li>○ liaising with the Secretariat on information (e.g., membership data) that needs to be gathered to inform and support their activities</li> <li>○ sharing monthly statistics on Regional membership and activity, as permitted by legal frameworks (e.g. GDPR), to enable engagement and growth.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ compiling wider statistics and other contextual information from a global perspective.</li> <li>○ featuring Regions and Regional activities in global RDA communications vehicles.</li> <li>○ developing joint arrangements with Regions to create a more formal collaboration.</li> <li>● Providing organisational support for Regionally hosted RDA Plenaries with: <ul style="list-style-type: none"> <li>○ Secretariat staff time.</li> <li>○ Plenary registration administration support.</li> <li>○ Plenary website hosting.</li> <li>○ communication and marketing support.</li> </ul> </li> <li>● Establishing a Regional Assembly and Regional Advisory Board to ensure Regions have an appropriate function/role and influence as outlined in the relevant sections of this document.</li> <li>● Inviting funders from Regions to participate in the Funders Forum.</li> <li>● Supporting Regional leadership to achieve fundraising goals.</li> <li>● Assisting in making the case to Regional funders and providing advocacy.</li> <li>● Providing inputs to proposals in which the RDA is being included as a partner.</li> <li>● Providing sample case statements, reusable text and statistics on RDA, impact stories.</li> <li>● Hosting Regional websites. <ul style="list-style-type: none"> <li>○ To build the RDA community by profiling Regions, adoption cases and calls/scholarship programmes, Regions will be provided with their own, customisable websites within an overarching RDA multi-site network.</li> <li>○ An RDA multi-site structure with Regions will demonstrate to funders the complementary and mutually beneficial relationship between the RDA and its Regions. Regional websites must remain part of the overarching RDA website to keep sight of the common WG/IG, mission, principles, and Plenary details.</li> </ul> </li> <li>● Providing official support and approval for use of the RDA brand in activities and efforts: <ul style="list-style-type: none"> <li>○ including permission to use the RDA logo and brand in the Formal Arrangement signed with Regions.</li> <li>○ providing a resource pack with logos and usage guidelines.</li> <li>○ offering marketing materials (flyers, posters, laptop stickers, slide decks) that can easily be tailored by Regions.</li> </ul> </li> <li>● Resolving and adjudicating conflicts by: <ul style="list-style-type: none"> <li>○ maintaining open and regular dialogue with Regions to avoid conflict between the RDA and Regional interests;</li> <li>○ providing Regional discussion fora and sharing of activities to pre-empt and reduce conflicts between distinct RDA Regional interests or competing groups within one Region;</li> <li>○ escalating conflicts to the Council to adjudicate if issues cannot be arbitrated via informal discussions.</li> </ul> </li> </ul>
--	--

<p><b>Responsibilities</b></p>	<p>RDA Regions will support the work of the RDA in various ways.</p> <ul style="list-style-type: none"> <li>● Supporting the vision, mission, and principles of RDA Global at the Regional level by: <ul style="list-style-type: none"> <li>○ hosting Regional workshops and events, using RDA branding;</li> <li>○ promoting RDA activities at other related data events in the Region;</li> <li>○ representing national activities in RDA Interest/Working groups;</li> <li>○ promoting the adoption of outputs by targeted activities profiling potential use cases.</li> </ul> </li> <li>● Fostering a diverse data community by engaging a wide range of stakeholders within the Region to grow RDA impact by: <ul style="list-style-type: none"> <li>○ demonstrating the value of the RDA to individuals in the Region to grow membership;</li> <li>○ developing Regional mentoring and training programs;</li> <li>○ engaging and build consensus on nationally important data issues;</li> <li>○ measuring the impact and adoption of RDA outputs within the Region.</li> </ul> </li> <li>● Supporting regional participation in Plenaries by: <ul style="list-style-type: none"> <li>○ facilitating the hosting of Plenaries with the goal of building the RDA community within the Region and building Regional presence within the RDA (Regions are not required, but encouraged in this role);</li> <li>○ leveraging RDA Plenaries within their Region to build the data community through side meetings, associated symposia, Regional sponsorships and scholarships, etc.</li> </ul> </li> <li>● Nominating an RDA Individual Member as representative to attend and vote in the Regional Assembly (RA) meetings.</li> </ul> <p>Regions will also support the business of the RDA in a variety of ways.</p> <ul style="list-style-type: none"> <li>● Providing financial contributions as described in Appendix 3.</li> <li>● Providing in-kind support: <ul style="list-style-type: none"> <li>○ skills, duration and details will be agreed in collaboration with the RDA to ensure the support offered can generate value (See Appendix 2 for Examples);</li> <li>○ each in-kind staff resource would be provided to the Secretariat at a minimum of 50% of their time;</li> <li>○ staff may be provided to complete contracted pieces of work (e.g., an analysis of outputs adoption to inform RDA strategy).</li> </ul> </li> <li>● Facilitating the hosting and organizing of Plenaries: <ul style="list-style-type: none"> <li>○ organisation of, and expenses for, Plenaries are the Region's responsibility;</li> <li>○ host Regions will make a contribution to the RDA in the event of a profit on the Plenary, and as agreed upon prior to the event;</li> <li>○ hosting governance meetings before, during, or after Plenary.</li> </ul> </li> <li>● Shaping future directions by: <ul style="list-style-type: none"> <li>○ interacting with national research funding bodies, ministries and other government officials to influence data policy and digital agendas;</li> </ul> </li> </ul>
--------------------------------	--

	<ul style="list-style-type: none"> <li>○ developing robust sustainability plans and business models in collaboration with national funders and governments to ensure continued contribution to the RDA;</li> <li>○ contributing to RDA business and strategy through multiple means including the Regional Assembly.</li> </ul>
--	---

## The Regional Assembly

The Regional Assembly (RA) is an open forum that allows interested, engaged, committed and partner Regions to gather, share information, and plan activities. The RA represents the interests of the Regions to the RDA. The RA will help connect parallel programmes across Regions and promote the creation and development of other Regions.

The RAB’s membership is drawn from representatives of the Partner Regions.

### Regional Assembly Membership

Each Region nominates an individual to become their representative on the RA. RA members represent their Region rather than their personal view.

- The RA meets at each RDA Plenary to discuss and share information on Regional activities and strategies, and how best to intersect with, and support the RDA.

<b>Function</b>	<ul style="list-style-type: none"> <li>● Inform and steer the RDA on regional issues.</li> <li>● Give a voice in the business and strategy of the RDA. The Regional Assembly will elect members to serve on the RAB.</li> <li>● Align Regional activities with the RDA vision, mission and principles.</li> <li>● Connect parallel programmes across Regions (e.g. ambassador, Early Career, technical expertise, maintenance, and adoption programmes).</li> <li>● Promote and support the creation and development of other Regions.</li> <li>● Support individual Regions to foster and coordinate the community of individual and organisational members within the regional communities.</li> </ul>
<b>Membership</b>	<p>The Regional Assembly will consist of one representative from each interested, engaged, committed and partner Region who must also be a member of the RDA.</p> <p>Regions may also choose to designate alternative representatives. Only one representative from each Region can vote at any RA meeting. RDA Regions may replace their Regional representatives or alternative representatives (i.e., a designated person who can replace the representative) at their discretion.</p>
<b>Duration</b>	There is no time limit on RA membership.

<b>Rights</b>	<ul style="list-style-type: none"> <li>• Directly inputs to the RAB and the Council.</li> <li>• Helps to shape the activities of the RDA via the Formal MoU / Partnership Agreements and contributions to Secretariat.</li> </ul>
<b>Responsibilities</b>	<ul style="list-style-type: none"> <li>• Organise and host Regional Assembly meetings to provide an opportunity for Regions to gather and share information.</li> <li>• Vote on proposed policies for consideration by the RDA Council, with one vote per Region.</li> <li>• Coordinate related activities, interests and initiatives.</li> <li>• Represent the interests of the Regions to the RDA.</li> <li>• Work with the RDA to compile Regional statistics and information.</li> <li>• Maintain the Regional Partnership Processes document (this document) to ensure it remains fit-for-purpose.</li> </ul>

## The Regional Advisory Board

Initially, the Regional Advisory Board (RAB) will be set up as a committee of the whole of the Partner Regions, until it is so large that it requires an executive subset. The RAB will elect two Co-Chairs to maximise the benefits of Regions to the RDA and the RDA to the Regions and to bring issues and concerns from Regions to the Council, and from the Council to Regions.

The RAB advises the Council on Regional issues and concerns and helps drive RDA strategies with regards to the regions, including interaction with regional funding bodies.

Upon termination of their term on RAB, a Co-Chair may continue to engage for a limited time, with the approval of Council members, to ensure a smooth, efficient, and timely handover to the new Co-Chair.

## RDA Regional Advisory Board (RAB)

<b>Function</b>	<ul style="list-style-type: none"> <li>• Oversee the activities of the RAB/RA</li> <li>• Provide advice to the Council on issues of interest to the Regions.</li> <li>• Inform and steer the Council on regional issues.</li> <li>• Bring issues and concerns from RDA Regions to the Council, and from the Council to the Regions.</li> <li>• Seek consensus and resolve any differences of opinion across Regions.</li> </ul>
<b>Membership</b>	<p>RAB members are RA members representing Partner Regions that have been elected or appointed to the RAB.</p> <p>The RAB consists of up to 12 elected members including 2 Co-Chairs, and some additional participants as described below.</p> <p>RAB members are appointed for two years. Each year, the terms of half of the appointed RAB members expire. Until there is a full RAB with 12</p>

	<p>members, there are no restrictions on re-appointment. Once there is a full RAB, there will be a limit of at most one consecutive re-appointment, and a person can only be on RAB for a maximum of 4 out of 6 consecutive years.</p> <p>The RAB chooses one Co-Chair annually for a term of two years. The two Co-Chairs coordinate the work of the RAB.</p> <p>RAB Co-Chairs are elected by the RAB members, through a simple majority voting with one vote for each RAB member. RAB Co-Chairs are elected for 2 years at a time with a maximum of one consecutive re-election (i.e., maximum of 4 years). The Co-Chair elections are staggered so that one Co-Chair is elected each year. After their time as Co-Chair, regardless of whether they were elected a Co-Chair for one or two consecutive two-year periods, an RAB member is ineligible to be re-elected as an RAB Co-Chair for 2 years.</p> <p>The RAB Co-Chair elections are held immediately after the RAB annual appointments with voting by the new RAB members.</p> <p>If there is more than one candidate, each RAB Co-Chair is elected by simple majority voting with one vote for each RAB member.</p> <p>There is an exception for the first year of the RAB. The RAB members will agree on a process to ensure staggered terms for the RAB Co-Chairs.</p>
<b>Duration</b>	<p>Representatives of RDA Regions may serve on the RAB as long as their regions are Partner RDA Regions. The Council decides on Regional Member expiration (e.g., non-payment of contributions) and revocation (e.g., non-compliance with the RDA guiding principles and code of conduct) to the RAB.</p>
<b>Rights</b>	<ul style="list-style-type: none"> <li>● Directly provides input to the Council and the Secretary General.</li> <li>● At least one Co-Chair of the RAB participates as a non-voting consensus-forming member of the RDA Council.</li> <li>● The RAB is supported by the RDA Secretariat in executing its activities.</li> </ul>
<b>Responsibilities</b>	<ul style="list-style-type: none"> <li>● Ensure the smooth running of the RA &amp; RAB.</li> <li>● The RAB provides input to the Council on any aspect of RDA’s work, with a particular remit to consider Regional processes, structure, strategies, issues and concerns.</li> <li>● RAB members are expected to subscribe to the RDA Guiding Principles, Code of Conduct, Conflict of Interest Policy and attend the RAB meetings and RDA Plenaries.</li> <li>● RAB members are expected to act as conduits between their Regions and the RDA.</li> <li>● Elect RAB Co-Chairs to organize RAB meetings and participate in the</li> </ul>

	Council.
--	----------

**RAB discussion** will be via two channels – one open to all RA members, one open to RAB members only. Unless there is a specific reason not to do so, all communications should be made via the open list.

**RAB meetings** The RAB will decide on the frequency and mechanisms for its meetings. The quorum for a meeting should be half of the RAB voting members. RAB meetings will be supported by a member of the Secretariat. Notes will be made available through the open RAB list.

**RAB reports** to the Council at each Council meeting.

**RAB decision-making** – The RAB will make decisions by consensus where possible, or by vote if necessary. It will define its own procedures for operating and reaching consensus under the guidance of the Co-Chairs whose role includes encouraging and detecting that consensus. The decision and outputs of the RAB are openly discussed using the RDA platform.

## Additional RAB Participants

The role of the additional, non-voting consensus-forming RAB participants is to ensure coordination of the RAB with other RDA bodies. These participants include:

- a representative from the Secretariat, specifically the Secretary General or their delegate.
- a representative from the Technical Advisory Board (TAB), specifically one or both TAB Co-Chairs or their delegate;
- a representative from the Organisational Advisory Board (OAB), specifically one or both OAB Co-Chairs or their delegate;
- a secretary to RAB, from the Secretariat.

The RAB will decide on whether to invite other individuals to participate in their activities, for example individuals brought in for specific tasks if and when needed and agreed by the RAB. The RAB can revoke these invitations at any time.

Terms of non-voting consensus-forming RAB participants:

- non-voting consensus-forming RAB participants are appointed for the duration of their office. There is no term limit on their appointment.

## RAB Membership Constraints

### Overlaps Between RAB and Other RDA Bodies

- RAB members should be individual members of the RDA.
- RAB members should be officially associated with and nominated by a Partner RDA Region.

- An individual can only serve on one of the RDA governing and supporting bodies, as listed in the RDA Governance Document, at a time. Note that neither the RA nor the Organisational Assembly (OA) are such bodies.

### **RAB Resignation**

- RAB members can resign at any time during their term. If a place on the RAB is vacated during a person's term, it can be filled by co-option from the RA at the RAB's discretion or left open and one extra member elected at the next RAB election.
- RAB members will stand down from their position on RAB if they cease to fulfil the criteria of membership described above.

## **RAB Elections**

### **Aim**

RAB members are chosen from the RA for their expertise in regional activities. Considerations for selection may include operational and subject matter expertise, and willingness to serve. Membership should reflect the diversity of the RDA Regions.

### **Process**

The election process is run on a fixed 12-month cycle, with a fixed schedule for each stage. The cycle may be synchronised with or around a Plenary to make best use of face-to-face discussions.

Any RA member representing a Partner RDA Region can put themselves forward as a candidate for election to the RAB. RA members can discuss qualifications with the candidates.

When needed (i.e., there are more candidates than open seats), voting will take place in time for the RA meeting at a Plenary, so that newly elected members take office at the start of the Plenary. Each Regional Member has one vote. In the unlikely event of a draw the election will be held again and, if that does not resolve the tie, a decision will be made by lottery.

### **RAB Balancing**

The RAB should ideally reflect the breadth of Regions in the RA. There is no formal process by which this is enforced but the RA will encourage candidates to stand so that this can be achieved.

### **RAB Bootstrap Process**

Until there are more than 12 Partner Regions, all representatives of Partner RDA Regions will automatically be members of the RAB. Once there are 12 Partner Regions, any representatives of new Partner Regions will not automatically become members of the RAB. An RAB election will be held at the next Plenary.

# Appendix 1 - Template for Formal Partnership Arrangements

There will be no standard arrangement that covers all Regions. The Formal Partnership Arrangement between the RDA Foundation and a Region will be tailored to the specifics of each context. However, based on the respective roles and responsibilities defined above, a generic template with several common sections can be created. A template structure is available in the RDA Regions Coordination group on the web site<sup>1</sup>. Items in the Formal Partnership Arrangement template should include:

## Contact Information

1. Regional contact (Name of region, type of organisation, contact information)
2. RDA Foundation and Secretariat contact (provided)

## RDA Regional Commitment and Information (to be completed by the Region)

1. Regional Strategic Efforts and Activities
  - a. Regional priorities/initiatives
  - b. Regional meetings
  - c. Regional activities/programs
2. Regional Contributions to RDA
  - a. Regional Monetary Commitment
    - i. Annual contribution amount
    - ii. Duration
    - iii. Date to be paid
    - iv. Terms and condition of contribution
  - b. In-Kind Contributions (see Appendix 2)
    - i. Level of contribution
    - ii. Role
    - iii. Person (if known)
    - iv. Secretariat effort
    - v. Estimated equivalent monetary value
  - c. Other Terms of Contributions

## RDA Foundation Commitment and Information (to be provided by the Foundation)

1. RDA Strategic Plan and Objectives
2. RDA Contributions to the Region
  - a. Regional website support
  - b. Recognition on RDA website, meetings, and other materials

---

<sup>1</sup> <https://www.rd-alliance.org/groups/rda-regions>

- c. Marketing and communication support
- d. Statistics on Regional engagement / membership
- e. Global statistics and other information
- f. Assistance in adoption programmes across Regions
- g. Assistance in lobbying for data issues in the Region
- h. Secretariat attendance at Regional events
- i. Resources and support for advocacy
- j. Small grants and collaboration on funding applications to assist with the creation/development of Regional activities
- k. Support for Regionally hosted RDA plenaries
- l. Branding and communications guidelines and procedures
- m. Benefits comparison table

## **Governance**

Outline of RDA reg

## **Code of Conduct**

- a. RDA code of conduct
- b. RDA Region code of conduct (if applicable)

# Appendix 2 – Memorandum of Understanding (MoU) Template

## MEMORANDUM OF UNDERSTANDING between the RESEARCH DATA ALLIANCE (RDA) and the [ insert organisation name]

This Memorandum of Understanding reflects the understandings of the Research Data Alliance (RDA) and [ insert organisation name] [ insert organisation short name] (“the Partners”),

Considering that:

1. The RDA was launched as a community-driven initiative in 2013 by the European Commission, the United States Government’s National Science Foundation and National Institute of Standards and Technology, and the Australian Government’s Department of Innovation with the goal of building the social and technical infrastructure to enable open sharing and re-use of data.
2. With more than 12,700 individual members from 146 countries (July 2022), RDA provides a neutral space where its members can come together through focused global Working and Interest Groups, as well as Communities of Practice, to develop and adopt infrastructure that promotes data-sharing and data-driven research, and accelerate the growth of a cohesive global data community that integrates contributors across domain, research, national, geographical and generational boundaries.
3. RDA addresses the need for open and interoperable sharing of research data and builds the social, technical and cross-disciplinary links to enable such sharing on a global scale. RDA Members come together through focused working groups, interest groups and communities of practice, formed by experts from all around the world – from academia, private sector and government. Participation in RDA is open to anyone who agrees to its guiding principles of openness, consensus, inclusivity and harmonisation, with a community-driven, non-profit and technology-neutral approach.
4. [ insert organisation overview, mission and goals]
5. The [ insert nation] RDA national group aligns the work of leaders in the country to improve the implementation and dissemination of RDA work. The concept is to increase the benefits to members while minimizing the burden of coordinated work.

In recognition that to support research data needs in a local context, we need to collaborate regionally and globally, the Partners have reached the following understandings:

- I. This Memorandum of Understanding seeks to establish effective mechanisms for collaboration between RDA and **[ insert organisation short name]** for the establishment of the Research Data Alliance of **[ insert country name]** implementing the principles of openness, consensus, inclusivity and harmonisation, with a community-driven, non-profit and technology-neutral approach, with the goal of building a social and technical infrastructure to enable open sharing and re-use of data between **[ insert country name]** and the rest of the world, to improve communication, to facilitate the exchange of resources, and technical capacities.
- II. **[ insert organisation short name]** through the Research Data Alliance of **[ insert country name]** will align some specific objectives from the **[ insert specific objectives and goals from the national open science, plans policies, strategies of relevance]** in order to enhance, foster and increase open science processes in **[insert country name]**.
- III. The RDA **[insert country name]** will be composed of **[insert details of national level organisation(s) and representatives coordinating and supporting the national group activity]**.
- IV. RDA **[insert country name]** primary responsibilities will include:
  - i. Facilitating national and transnational engagements, including the creation of formal Working and /or Interest Groups to address data-related issues critical to the **[insert country name]** research community and the public at large
  - ii. Organizing events and training to support the adoption of best practices in research data management across **[insert country name]**.
  - iii. Providing an incubation space for the development of shared services and common standards, including policy development, data management planning, and infrastructure interoperability requirements
  - iv. Serve as an information conduit and professional connector for regional activities.
  - v. Promoting local adoption of RDA recommendations with the support of RDA seed funding
  - vi. Connecting **[insert country name]** research data stakeholders.
- V. The specific goals for the RDA **[insert country name]** are:
  1. At least XXX members actively participating in RDA WG and IG before December 2022.
  2. At least two use case adoption by 2022, for example:
    - a. ...include examples of national level adoption
  3. Participation in RDA plenary meetings, training workshops and webinars.
  4. Organization of training workshops for **[insert country name]**.
- VI. This Memorandum of Understanding does not represent any transfer of intellectual property rights between the Partners. Personnel provided by each of the Partners for any joint activities should be understood as exclusively associated with the employing Partner, and that Partner should assume separate and exclusive responsibility for this concept. In no case should the other Partner be considered a de facto or substitute employer.
- VII. The present Memorandum of Understanding (a) is intended to become operative upon signature by the Partner, (b) may be revised or modified upon the written consent of the Partners, and (c) may be

discontinued by written consent of the Partners or by either Partners upon at least 90 days prior written notice to the other of the intended date discontinuance.

- VIII. This Memorandum of Understanding is not binding and does not create any enforceable rights and duties for the Partners. Nothing in this Memorandum of Understanding constitutes a commitment or obligation of funds on the part of either Partner. All activities referenced in this Memorandum of Understanding are subject to the availability of funds.
- IX. The activities completed in the execution of this Memorandum of Understanding will be reviewed to evaluate the partnership in [month, year], according to the following criteria:
1. Adoption and Implementation of RDA Recommendations
    - a. Case studies
    - b. Metrics and KPIs
  2. Membership
    - a. Year-to-date growth (actual and relative to previous years; professional types of members)
    - b. Year-to-date engagement (actual and relative to previous years; professional types of members)
  3. Calculate Return on Investment and Social Return on Investment
    - a. Cost of conducting each activity
    - b. [https://en.wikipedia.org/wiki/Social\\_return\\_on\\_investment#The\\_principles](https://en.wikipedia.org/wiki/Social_return_on_investment#The_principles))
- X. Use of RDA branding and web site section. The RDA will facilitate the creation and technical implementation of a dedicated RDA **[insert country name]** web section to be hosted under National groups section of the global RDA web site. As part of this MoU, RDA **[insert country name]** is authorised to create and use an RDA [insert country name] specific logo. Use of the logo and RDA branding is governed by the RDA Endorsement and Logo Usage Guidelines<sup>2</sup> and the MoU. Upon termination of this MoU, the branding and web are no longer authorised and any eventual use must be justified and approved in writing by the RDA Secretary General.
- XI. As an official RDA national group, **[insert country name]** will be invited to attend the RDA Regional Assembly, a global forum representing the regional perspectives, as outlined in the RDA Governance document<sup>3</sup>. The Regional Advisory Board (RAB) is restricted to RDA regional partners who have signed a formal partnership agreement with the RDA Foundation, as outlined in the RDA Governance document. RDA national / regional groups should aspire to forming a regional partnership agreement, as outlined in the RDA Regional Processes Document (v2.2 - July 2022)<sup>4</sup>. Furthermore, representatives from RDA **[insert country name]** will be invited to participate in the RDA Funders Forum<sup>5</sup>, a group of funding organisations / representatives with an interest in research data and related data policies.
- XII. Partners contacts;

---

<sup>2</sup> <https://www.rd-alliance.org/about-us/communication-kit/rda-endorsement-and-logo-usage-guidelines>

<sup>3</sup> Citation and Download: Research Data Alliance (2020): RDA Governance Document, Version 2.8. DOI: 10.15497/RDA00001

<sup>4</sup> Citation and Download: Research Data Alliance (2022): RDA Regional Processes Document, Version 2.2. DOI: <https://doi.org/10.15497/RDA00059>

<sup>5</sup> <https://www.rd-alliance.org/about-rda/organisational-bodies/rda-funders-forum>

- i. Research Data Alliance (RDA) designates Ms. Hilary Hanahoe, Secretary General, CEO, hilary.hanahoe@rda-foundation.org
- ii. **[ insert organisation and short name name]** designates **[ insert representative name]**, **[ insert representative role name]**, **[insert representative email]**

In witness whereof we sign in the place and on the day indicated below:

---

**Research Data Alliance (RDA)**

Hilary Hanahoe  
Secretary General  
Place and date:

**[insert organisation name]**

**[ name of signatory]**

**[signatory role]**

Place and date:

## Appendix 3 - Examples of In-Kind Support

The Secretariat is responsible for the daily operations of the RDA on a global level, supporting both the Business and the Work. Skill sets and experience for the Secretariat are varied, examples of the type of profiles and competences required are listed below. The operational language of the RDA Secretariat is English, so all support staff should have fluent written and spoken English. In-kind support will be agreed between the RDA Foundation and the Region as part of the partnership agreement:

### **Profile: Communications and Marketing Expert**

*Role: support RDA global communications and marketing activities*

Skill Set: experience in communications, stakeholder engagement, marketing with considerable knowledge of the research data management landscape.

### **Profile: Outputs and Adoption Expert**

*Role: support RDA global adoption and impact analysis in multidisciplinary and multi-organisational environments*

Skill Set: knowledge and understanding of the research data landscape, organisational insights and technological comprehension.

### **Profile: Technological Expert**

*Role: support RDA working and interest groups in “translating” their work for stakeholders, support eventual standardisation efforts*

Skill Set: technological knowledge and understanding of the research data interoperability, standardisation insights and technological comprehension of infrastructure and implementing organisations.

### **Profile: Event Manager**

*Role: support coordination, management and execution of bi-annual RDA Plenary meetings and other RDA events*

Skill Set: experience in the design, management and execution of global complex conferences, workshops and meetings.

### **Profile: Community Engagement Expert**

*Role: support coordination, management and execution of RDA community engagement strategy*

Skill Set: Understanding of scientific data challenges, knowledge of RDA organisation, knowledge of RDA outputs, experience in interacting with different stakeholders.

### **Profile: Operations / Process Expert**

*Role: Interaction with the RDA governance and membership to define, strategise, publish*

*and maintain the organisational processes and procedures*

Skill Set: organisational processes and procedures expert

### **Profile: Project Manager**

*Role: support the coordination, management and execution of RDA grants (directly linked to the RDA Foundation)*

Skill Set: project management, knowledge of international funding grant processes and procedures.

## Appendix 4 - Regional Financial Contribution

Regions will contribute to the cost of RDA business operations through financial and in-kind support. The level of contribution that is appropriate for each region will be agreed bilaterally between the RDA and the region. The broad principles of the model are described below, however, the model should flex and scale given the context of each Region to enable engagement.

- **Providing Financial Contributions**

- Each Partner Region will make a yearly financial contribution towards the operating costs of RDA. The amount will be on a sliding scale so that large economies pay more than small economies and will be calculated from the GDP of the region according to the algorithm described below.
- While every Partner Region may contribute a different amount, a monetary contribution established in a formal arrangement between the Region and RDA is an essential part of being considered as an RDA Region.
- The source(s) of the funds will be different for the different regions.
- The amount of the contribution will be calculated by a linear interpolation between given points. These points are:

GDP from (USD Millions)	GDP to (USD Millions)	Contribution from (USD)	Contribution to (USD)
0	80,000	1,250	5,000
80,000	400,000	5,000	20,000
400,000	2,000,000	20,000	80,000
2,000,000	10,000,000	80,000	200,000
10,000,000	50,000,000	200,000	500,000

### Alphabetically Sorted

*Note: Suggested Contribution is Cash only (does not include in-kind staff donation) The GDP figures below are 2020 figures provided by the International Monetary Fund (IMF)<sup>6</sup>.*

<sup>6</sup> <https://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEOORLD/BRA/ATG/DOM>

Country	GDP (USD Millions)	RDA Annual Contribution (USD)
Afghanistan	\$19.006	\$2.141
Albania	\$14.034	\$1.908
Algeria	\$147.323	\$8.156
Andorra	\$3.013	\$1.391
Angola	\$62.724	\$4.190
Antigua and Barbuda	\$1.389	\$1.315
Argentina	\$382.760	\$19.192
Armenia	\$12.813	\$1.851
Australia	\$1.334.688	\$55.051
Austria	\$432.894	\$21.234
Azerbaijan	\$41.666	\$3.203
Bahamas, The	\$11.560	\$1.792
Bahrain	\$34.624	\$2.873
Bangladesh	\$317.768	\$16.145
Barbados	\$4.630	\$1.467
Belarus	\$57.708	\$3.955
Belgium	\$503.416	\$23.878
Belize	\$1.556	\$1.323
Benin	\$15.292	\$1.967
Bhutan	\$2.587	\$1.371
Bolivia	\$38.938	\$3.075
Bosnia and Herzegovina	\$18.893	\$2.136
Botswana	\$15.872	\$1.994
Brazil	\$1.363.767	\$56.141
Brunei Darussalam	\$10.647	\$1.749
Bulgaria	\$67.917	\$4.434
Burkina Faso	\$16.082	\$2.004
Burundi	\$3.131	\$1.397
Cabo Verde	\$1.870	\$1.338
Cambodia	\$26.316	\$2.484
Cameroon	\$39.036	\$3.080
Canada	\$1.600.264	\$65.010
Central African Republic	\$2.321	\$1.359
Chad	\$10.510	\$1.743
Chile	\$245.414	\$12.754
China	\$14.860.776	\$236.456
Colombia	\$264.933	\$13.669
Comoros	\$1.200	\$1.306
Congo, Republic of	\$9.964	\$1.717
Costa Rica	\$59.645	\$4.046
Cote d'Ivoire	\$61.502	\$4.133
Croatia	\$56.768	\$3.911
Cyprus[n 7]	\$23.246	\$2.340
Czech Republic	\$241.975	\$12.593

Country	GDP (USD Millions)	RDA Annual Contribution (USD)
Democratic Republic of the Congo	\$46.062	\$3.409
Denmark	\$339.626	\$17.170
Djibouti	\$3.408	\$1.410
Dominica	\$545	\$1.276
Dominican Republic	\$77.883	\$4.901
Ecuador	\$93.078	\$5.613
Egypt	\$361.875	\$18.213
El Salvador	\$24.784	\$2.412
Equatorial Guinea	\$10.028	\$1.720
Estonia	\$30.468	\$2.678
Ethiopia	\$95.588	\$5.731
European Union	\$14.926.538	\$236.949
Fiji	\$3.932	\$1.434
Finland	\$267.856	\$13.806
France	\$2.551.451	\$88.272
Gabon	\$15.145	\$1.960
Gambia, The	\$1.806	\$1.335
Georgia[n 8]	\$16.316	\$2.015
Germany	\$3.780.553	\$106.708
Ghana	\$67.337	\$4.406
Greece	\$194.376	\$10.361
Grenada	\$1.074	\$1.300
Guatemala	\$76.191	\$4.821
Guinea	\$14.238	\$1.917
Guinea-Bissau	\$1.392	\$1.315
Guyana	\$6.806	\$1.569
Haiti	\$8.347	\$1.641
Honduras	\$23.984	\$2.374
Hong Kong	\$341.319	\$17.249
Hungary	\$149.939	\$8.278
Iceland	\$20.805	\$2.225
India	\$2.592.583	\$88.889
Indonesia	\$1.088.768	\$45.829
Iran	\$610.662	\$27.900
Iraq	\$178.112	\$9.599
Ireland	\$399.064	\$19.956
Israel	\$383.425	\$19.223
Italy	\$1.848.222	\$74.308
Jamaica	\$14.228	\$1.917
Japan	\$4.910.580	\$123.659
Jordan	\$42.609	\$3.247
Kazakhstan	\$165.730	\$9.019
Kenya	\$101.048	\$5.987
Kiribati	\$194	\$1.259
Korea, Republic of	\$1.586.786	\$64.504

Country	GDP (USD Millions)	RDA Annual Contribution (USD)
Kosovo	\$7.484	\$1.601
Kuwait	\$108.656	\$6.343
Kyrgyz Republic	\$7.480	\$1.601
Lao P.D.R.	\$18.653	\$2.124
Latvia	\$33.015	\$2.798
Lebanon	\$18.734	\$2.128
Lesotho	\$1.906	\$1.339
Liberia	\$3.068	\$1.394
Libya	\$21.805	\$2.272
Lithuania	\$55.064	\$3.831
Luxembourg	\$68.613	\$4.466
Macau	\$26.348	\$2.485
Macedonia	\$11.338	\$1.781
Madagascar	\$14.199	\$1.916
Malawi	\$8.330	\$1.640
Malaysia	\$336.330	\$17.015
Maldives	\$4.712	\$1.471
Mali	\$17.685	\$2.079
Malta	\$14.290	\$1.920
Marshall Islands	\$225	\$1.261
Mauritania	\$7.428	\$1.598
Mauritius	\$11.341	\$1.782
Mexico	\$1,040.372	\$44.014
Micronesia, Fed. States of	\$395	\$1.269
Moldova[n 9]	\$11.241	\$1.777
Mongolia	\$13.385	\$1.877
Montenegro	\$4.943	\$1.482
Morocco[n 5]	\$112.220	\$6.510
Mozambique	\$14.557	\$1.932
Myanmar	\$70.890	\$4.573
Namibia	\$10.252	\$1.731
Nauru	\$114	\$1.255
Nepal	\$32.158	\$2.757
Netherlands	\$886.339	\$38.238
New Zealand	\$193.545	\$10.322
Nicaragua	\$11.905	\$1.808
Niger	\$12.971	\$1.858
Nigeria	\$442.976	\$21.612
Norway	\$366.386	\$18.424
Oman	\$62.305	\$4.171
Palau	\$251	\$1.262
Panama	\$60.286	\$4.076
Papua New Guinea	\$23.283	\$2.341
Paraguay	\$35.606	\$2.919
Peru	\$195.761	\$10.426

Country	GDP (USD Millions)	RDA Annual Contribution (USD)
Philippines	\$367.362	\$18.470
Poland	\$580.894	\$26.784
Portugal	\$221.716	\$11.643
Qatar	\$147.791	\$8.178
Romania	\$248.624	\$12.904
Russia	\$1,464.078	\$59.903
Rwanda	\$10.428	\$1.739
Saint Kitts and Nevis	\$871	\$1.291
Saint Lucia	\$1.770	\$1.333
Saint Vincent and the Grenadines	\$777	\$1.286
Samoa	\$829	\$1.289
San Marino	\$1.410	\$1.316
São Tomé and Príncipe	\$417	\$1.270
Saudi Arabia	\$680.897	\$30.534
Senegal	\$24.409	\$2.394
Serbia	\$51.999	\$3.687
Seychelles	\$1.198	\$1.306
Sierra Leone	\$4.140	\$1.444
Singapore	\$337.451	\$17.068
Slovak Republic	\$101.892	\$6.026
Slovenia	\$51.802	\$3.678
Solomon Islands	\$1.551	\$1.323
Somalia	\$4.918	\$1.481
South Africa	\$282.588	\$14.496
Spain	\$1,247.464	\$51.780
Sri Lanka	\$81.120	\$5.053
Sudan	\$32.576	\$2.777
Suriname	\$2.538	\$1.369
Swaziland	\$4.409	\$1.457
Sweden	\$529.054	\$24.840
Switzerland	\$707.868	\$31.545
Tajikistan	\$7.898	\$1.620
Tanzania[n 6]	\$64.123	\$4.256
Thailand	\$509.200	\$24.095
Timor-Leste	\$1.920	\$1.340
Togo	\$5.719	\$1.518
Tonga	\$503	\$1.274
Trinidad and Tobago	\$22.718	\$2.315
Tunisia	\$39.226	\$3.089
Turkey	\$649.436	\$29.354
Turkmenistan	\$47.986	\$3.499
Tuvalu	\$45	\$1.252
Uganda	\$37.733	\$3.019

<b>Country</b>	<b>GDP (USD Millions)</b>	<b>RDA Annual Contribution (USD)</b>
<b>Ukraine</b>	\$142.250	\$7.918
<b>United Arab Emirates</b>	\$353.899	\$17.839
<b>United Kingdom</b>	\$2.638.296	\$89.574
<b>United States</b>	\$20.807.000	\$281.053
<b>Uruguay</b>	\$54.135	\$3.788
<b>Uzbekistan</b>	\$59.771	\$4.052
<b>Vanuatu</b>	\$864	\$1.291
<b>Vietnam</b>	\$340.602	\$17.216
<b>West Bank and Gaza</b>	\$14.750	\$1.941
<b>Zambia</b>	\$18.909	\$2.136
<b>Zimbabwe</b>	\$14.002	\$1.906

