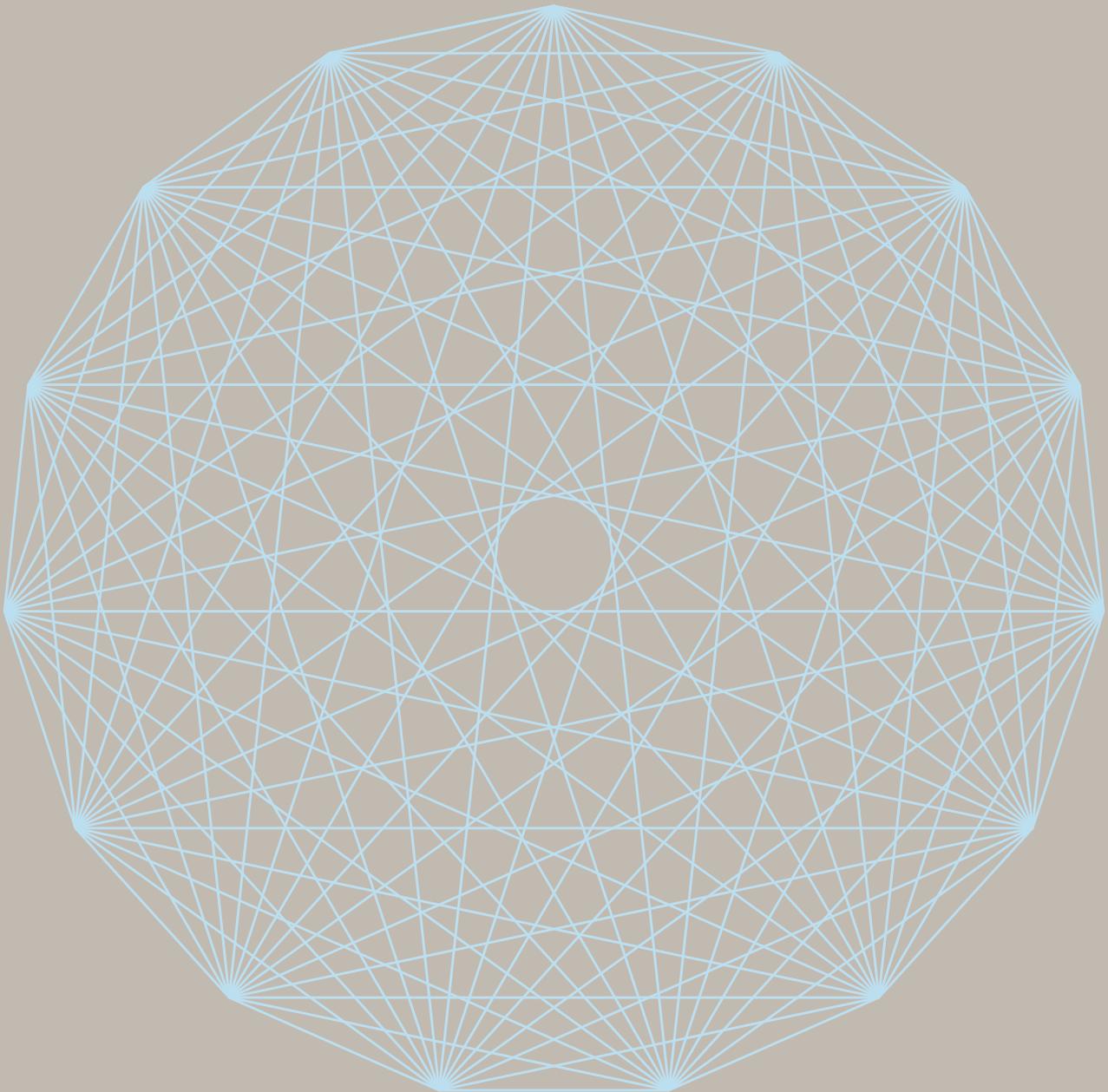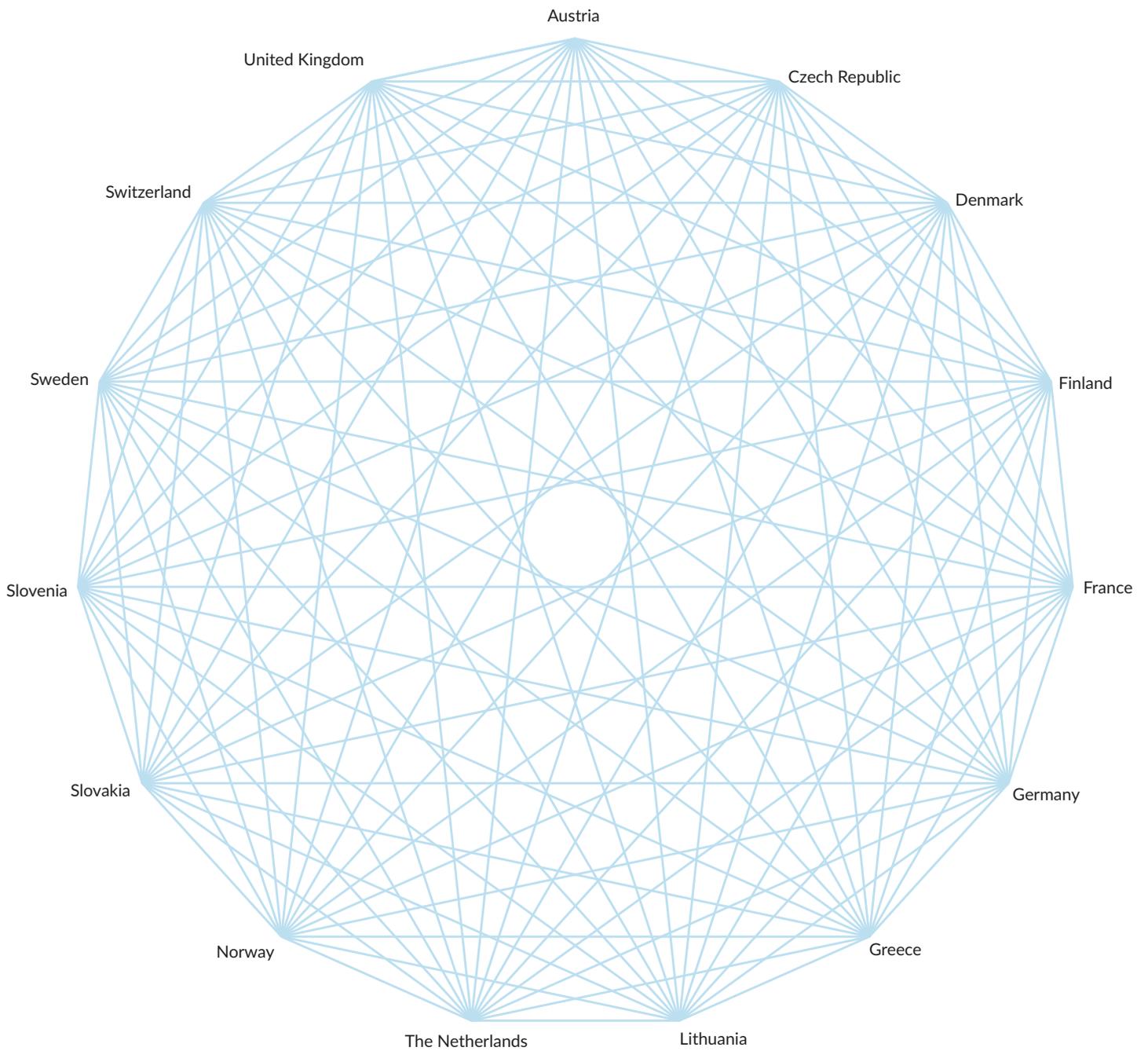# Annual Report 2015

cessda

Consortium of European
Social Science Data Archives

A network of 15 European countries working together by the end of 2015.

Austria
United Kingdom
Czech Republic
Switzerland
Denmark
Sweden
Finland
Slovenia
France
Slovakia
Germany
Norway
Greece
The Netherlands
Lithuania

Contents

Introduction

CESSDA featured in the European Strategy Forum on Research Infrastructures (ESFRI) Roadmaps of 2006 and 2008 as well as being listed as one of the ESFRI Success Stories under "Research Infrastructures in the implementation phase" in the Strategy Report on Research Infrastructures Roadmap 2010. In 2014, CESSDA was categorised as an already "implemented" project in Prioritisation of Support to ESFRI Projects for Implementation under "Social and Cultural Innovation Strategy Working Group".

CESSDA was fully established as a permanent legal entity known as CESSDA AS in June 2013 and had its official launch in Bergen, Norway on 5 December 2013. CESSDA AS is a Norwegian limited liability company solely owned by the Norwegian Ministry of Education and Research, and functions as the legal vehicle for the consortium. It is based on a Memorandum of Understanding (MoU) between the Ministry and each of the members. The consortium is organised as a distributed infrastructure where each member, represented by a national research authority, has a designated Service Provider (SP) that meets specific demands and requirements specified in the Statutes.

As of today fifteen European countries (Ministries) are members of CESSDA AS, with one Observer (see CESSDA Members). During the course of 2015, two countries joined the CESSDA network, Greece in June, later confirmed as the 14th member during the 5th CESSDA General Assembly (GA) meeting on 19 June 2015, and Belgium, which signed the Memorandum of Understanding on 10 November 2015.[1]

The vision of CESSDA, as stated in its statutes, is the following: *to provide a full scale sustainable research infrastructure that enables the research community to conduct high-quality research which in turn leads to effective solutions to the major challenges facing society today.*

The intention since its launch has been to progress rapidly to the European Research Infrastructure Consortium (ERIC) status.

CESSDA Strategic Plan

The purpose of the Strategic Plan is to form a bridge between the vision and objectives in the CESSDA (to be CESSDA ERIC) Statutes, and the annual work plan and budget decisions of the General Assembly.

The Strategic Plan should be outwards facing, informing the European Commission, ESFRI, data providers, researchers, and the users of social science results about the strategic objectives and goals of CESSDA over the next period, and what outputs in terms of products and services are expected to be delivered.

CESSDA is expected to become CESSDA ERIC in the course of 2016 or early 2017 and the Strategic Plan 2017-2021 will cover the first five years of operation under this new legal status.

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1. Belgium will be confirmed as a new member by the GA early 2016.

Organisation & Governance

Organisation

Main Office
The Main Office (MO) of CESSDA is located at Parkveien 20, in Bergen, Norway. In 2015 there were four employees in the Main Office:

Managing Director
Paul Jackson (until 31 July 2015)

Administrative Secretary
Nina Bakanova

Acting Administrative Manager
Ivana Ilijašić Veršić
(from 1 August 2015)

Senior Communications Officer
Eleanor Smith

CESSDA timeline 2006 - 2015

2006	2008		2010
ESFRI Roadmap	ESFRI Roadmap		ESFRI Success Stories
	2013	**2014**	**2015**
	CESSDA AS established as a legal entity and official launch in Bergen	CESSDA categorised as an implemented ESFRI Project; Main office opens	14 European countries are members of CESSDA

Service Providers in 2015
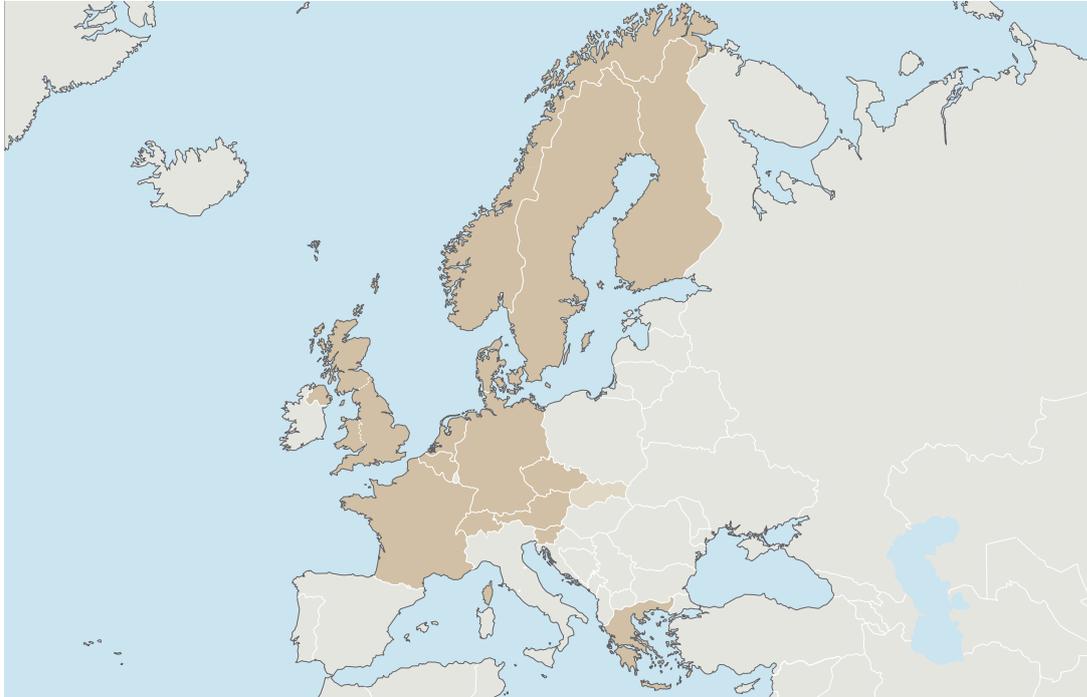
CESSDA Map. Countries in dark brown represent CESSDA Members and in light brown, CESSDA Observer.

Austria
a new Service Provider
will be announced in the near
future.

Czech Republic
Czech Social Science Data
Archive (ČSDA)

Denmark
Danish Data Archive (DDA)

Finland
Finnish Social Science Data
Archive (FSD)

France
PROGEDO Research
Infrastructure

Germany
GESIS – Leibniz-Institute
for the Social Sciences

Greece
Greek Research
Infrastructure for the Social
Sciences (So.Da.Net)

Lithuania
Lithuanian Data Archive
for Humanities and Social
Sciences (LiDA)

The Netherlands
Data Archiving and
Networked Services (DANS)

Norway
NSD – Norwegian Centre
for Research Data

Slovakia
Slovak Archive of Social Data
(SASD)

Slovenia
Slovenian Social Science Data
Archives (ADP)

Sweden
Swedish National Data
Service (SND)

Switzerland
Swiss Centre of Expertise
in the Social Sciences (FORS)

United Kingdom
UK Data Service (UKDS)

Read more about
CESSDA Members

Governance

CESSDA is governed by a General Assembly, a Board of Directors and managed by a Managing Director. Additionally, CESSDA is provided with two advisory bodies: the Scientific Advisory Board and the Service Providers' Forum, as well as four Working Groups.

General Assembly

The General Assembly (GA) is the ultimate authority of CESSDA setting the budget and the funding formula for the consortium. It consists of Ministry/Research Council representatives from each member country. It also has the responsibility of adopting strategic plans, audit reports as well as the reports from the Board of Directors and the Managing Director. In 2015, the General Assembly met on 14 January and on 15 June.

Board of Directors

The Board of Directors is responsible for implementing the strategies adopted by the GA and for executing the set budget. Furthermore, it is responsible for the financial planning and preparation of the yearly budget, and for the development of CESSDA's strategy and vision, to be adopted by the GA. In 2015, the Board of Directors had five meetings: in March, May, June, September and in December.

Service Providers' Forum

According to the CESSDA Statutes, it is mandatory for each CESSDA member country to assign their Service Provider (data archive). The Service Providers' Forum is the working body of CESSDA. It consists of representatives of every Service Provider and serves as an advisory body to the Managing Director and to the Board of Directors. Regular meetings are held twice a year, once in a member country and once in the host country (Norway). In 2015 Service Providers' Forum meetings were held on 21 April in Bergen, Norway, and on 11 November in Bucharest, Romania.

Scientific Advisory Board

The Members of the Scientific Advisory Board were appointed in 2014 and their regular meetings are held once a year. The Scientific Advisory Board offers its support in developing a CESSDA Scientific Strategy, deliverables over the same period and the CESSDA Strategic Plan. It advises to focus on new data sources, and new access methods, in particular 'borderless' data assets such as big data and remote access to such sources. In 2015, the Scientific Advisory Board had a video conference via Skype on 12 May and met in Bergen on 10 December in a joint meeting with the CESSDA Board of Directors.

CESSDA timeline 2015
Governance

January	March	April	May	June
General Assembly	Board of Directors	Service Providers' Forum	Board of Directors; Scientific Advisory Board	General Assembly; Board of Directors

	September		November	December
	Board of Directors		Service Providers' Forum	Boad of Directors; Scientific Advisory Board

International Cooperation

CESSDA's members can be found across the whole of Europe and therefore all of its activities are de facto international. However, CESSDA is also involved in a number of joint projects with external international partners.

Specific Tasks Allocated to the German Service Provider

Annex 6 of the current CESSDA Statutes allocates specific tasks to the German Service Provider. One of the tasks, training, has been judged to be a permanent CESSDA activity with its own branding, CESSDA Training. It has been allocated a yearly budget cycle and a dedicated section on the CESSDA website. The rest of the tasks, namely PID services, Harmonisation, and Question Databank offer an annual activity and budgetary report. In 2015, the German Service Provider, GESIS – Leibniz Institute for the Social Sciences, conducted a series of activities based on the 2015 Work Plan. Activities in 2015 included:

Public Relations

In order to enable efficient work, CESSDA Training together with the Main Office (MO) created content for the CESSDA Training section of the new CESSDA website, launched in June 2015. The website now contains information and resources on digital preservation and research data management for the research and archiving community. These materials will be regularly updated to include more topics and new trends in the practice of data curation. CESSDA Training also conceptualised and prepared the implementation of a knowledge-sharing platform that will collect all relevant work of CESSDA Service Providers on Digital Preservation and Research Data Management. The implementation will be carried out through the CESSDA SaW project.

CESSDA Training contributed to the promotion of CESSDA by attending various conferences and meetings e.g. IASSIST 2015 in Minneapolis, USA, the DINI/nestor Workshop 2015 in Berlin, Germany, and the DPASSH conference 2015 in Dublin, Ireland and by redesigning the CESSDA Training Blog which features activities and relevant events in the context of research data management and digital preservation.

CESSDA Census

In order to better understand the CESSDA community and its needs, the CESSDA Census was initiated and questionnaires were developed, designed and internally pre-tested for the heads of the CESSDA member archives as well as for the members of staff involved in CESSDA activities. The first Census is planned to be carried out in 2016.

Workshops

CESSDA Training held two face-to-face trainings and one workshop at GESIS Cologne for staff

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CESSDA timeline 2015
International Cooperation

		March	April	May	June
		Introduction to Research Data Management for Social Scientists, Cologne, Germany	First Steps Towards Digital Preservation, Cologne, Germany	FORS workshop "LIVES doctoral programme", Lausanne, Switzerland	CESSDA Training section on new CESSDA website

members of institutions non-affiliated to CESSDA and to CESSDA's user community. As a part of the FOSTER-CESSDA project, CESSDA Training successfully cooperated with other workshop providers within CESSDA, and improved its own workshop materials. All training materials will be uploaded to the knowledge-sharing platform, once it is established.

Coding and Harmonisation of Statistics (CharmStats) in CESSDA

"Data harmonisation" refers to the process of transforming data from different sources into standard measures that facilitate undertaking research involving the comparison of sources. The future CESSDA ERIC should foster the use of free and open source software that directly stores and connects all the components of data harmonisation work, in particular ex-post data harmonisation. CharmStats – an abbreviation for 'Coding and Harmonisation of Statistics' – products are a digital solution to the problems of combining multiple types of metadata and information that are needed for harmonisation documentation. The improved and updated version of QuickCharmStats 1.1 (QCS) was presented in 2015. QSC is designed for those researchers who harmonise variables for use in publishable statistical analyses (QuickCharmStats 1.0 released in 2014). The software and supporting documentation can be accessed for free online.

A database server version of the software designed for large-scale survey variable documentation called CharmStats Pro was developed during the course of 2015. After internal feedback and bug testing, the new software is due to be released mid-2016. It will also be open source and free to the public.

Euro Question Bank in CESSDA

The CESSDA Question Bank is a part of a larger envisioned system which will allow sharing and reuse of many of the resources held by the CESSDA archives. The initial requirements collection for the Question Bank started in 2015, based on GESIS' Applications. Some coordination with CESSDA Work Plan tasks 2015 was undertaken to ensure a close collaboration on common tools and infrastructure for development and interoperability with other planned CESSDA developments.

CESSDA PID Services

The persistent identification (PID) of the data holdings of CESSDA Service Providers is a demanding issue. The functionality to unambiguously locate and access digital resources and associate them with the related metadata is becoming essential to allow the citation, retrieval and preservation of these data. CESSDA Service Providers need to introduce the use of PID for their data since maintaining and resolving PID is seen as a must for repository systems with a long term strategy.
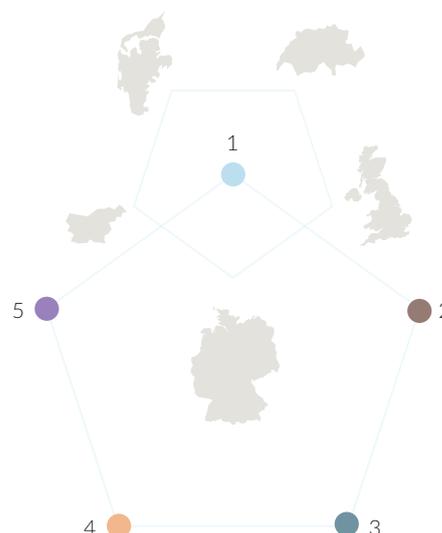
5 tasks allocated to the German Service Provider
1. Workshops in collaboration with Slovenia, Denmark, Switzerland and the United Kingdom.
2. CharmStats.
3. PID Services.
4. CESSDA Census.
5. CESSDA Question Bank.

| August	October	November	
Introduction to Research Data Management for Social Scientists Cologne, Germany	Introduction to Research Data Management for Social Scientists Tartu, Estonia	How to Write a Data Management Plan, Cologne, Germany	CharmStats Pro developed 2015 and to be released mid-2016

Work Plan Tasks

2015 Work Plan

The scope of the 2015 Work Plan was the allocation of work to Service Providers. Initially, twelve separate tasks were proposed for the work plan and five of them were selected for funding and are currently running (some of them beyond 2016).

CESSDA Technical Framework

The project is led by UKDS and involves four other CESSDA Service Providers in partnership (NSD, DANS, SND, and GESIS). The ambition of this project is to promote good software development practice across the Service Provider community, in respect of the provision of CESSDA products and services. Furthermore, it will ensure that the source code for every product is centrally available, so that all Service Providers can access it, thus increasing the options for maintaining and extending the various products, whilst protecting CESSDA's investment in the production of the given products. The publication of basic standards for source code quality will ensure Service Providers know what is expected of them.

CESSDA Data Access Policy

Both the existing CESSDA Statutes and the proposed Statutes for the CESSDA ERIC require CESSDA to have a Data Access Policy. The CESSDA Data Access Policy will be one of the foundational operation documents for the consortium and a highly significant statement of intent for CESSDA as it should demonstrate the consortium's commitment to both open science and to the fullest protection of the privacy of subjects and the rights of the data owners. The key ambition for the project led by UKDS is to provide a unified policy framework for CESSDA's data and metadata access policies. The policy framework will reference internationally recognised protocols, standards, and license conditions and will be developed in the course of 2016.
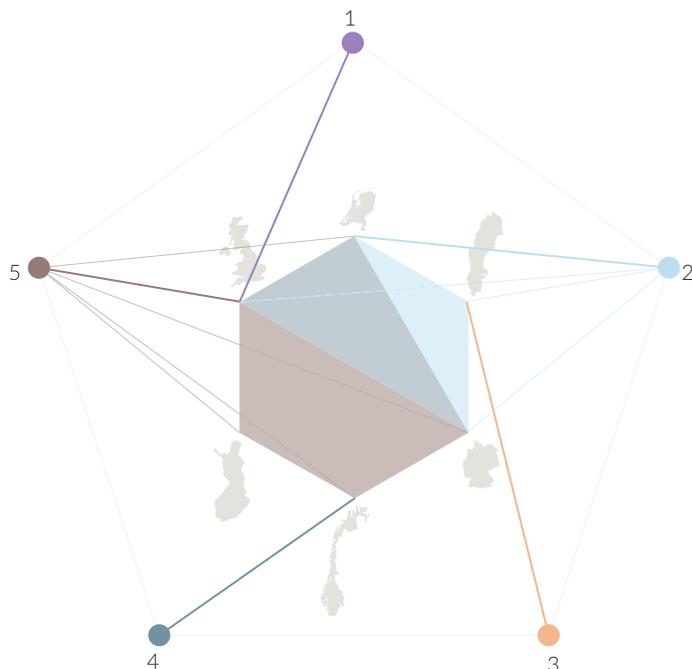
2015 Work Plan task overview
Funded projects and leading countries

Leading Countries
Netherlands–DANS
Finland–FSD
Germany–GESIS
Norway–NSD
Sweden–SND
United Kingdom–UKDS

Projects
—— 1. CESSDA Dara Access Policy
—— 2. Expert Seminar 2015
—— 3. Metadata Management
—— 4. Open Source Metadata Harvester
—— 5. Technical Framework

CESSDA Metadata Management

The goal of this project, led by FSD, is to produce the CESSDA Metadata Standards Portfolio. It will be standards-based and cover study-level metadata and variable/question-level metadata and support multilingual searches and data discovery, reflecting the needs of both Service Providers and researchers. This project will deliver a Phase 1 product, the CESSDA Metadata Standards Portfolio, and identify the areas of where further work is needed (suggested Phase 2). The Portfolio Version will cover the most urgent needs and first and foremost support building the Product and Service Catalogue and the Euro Question Bank.

CESSDA Open Source Metadata Harvester

The ambition of this project led by NSD is to produce an easy to use metadata harvesting service that has a plugin architecture for inputs and outputs, so that a wide range of metadata sources can be harvested and data in a variety of metadata standards (including the Metadata Management Standard defined by the Metadata Management task) can be emitted. It will be administered using existing Open Source tools, in order to reduce development and ongoing maintenance costs (compared to building a bespoke administration User Interface). The benefits to the CESSDA Research Infrastructure are that by providing the metadata harvester as a service means it is distributed (available to all) and borderless (location independent) and authorised clients at any location can use it. Also the Open Source approach enables extensibility and maintainability, with both Service Providers and others able to enhance the core and create new plugins. This is a very cost-effective means of promoting sustainability.

CESSDA Expert Seminar 2015

DANS organised the CESSDA Expert Seminar 2015 on 30 November – 1 December in The Hague, The Netherlands, in cooperation with FSD, GESIS and UKDS. The aim of this seminar was twofold: creating awareness and knowledge of trust issues in general, and exchanging and developing ideas on unresolved trust issues (non-DSA Annex 2 obligations, CESSDA Trust Support Working Group). The intention was to create awareness and knowledge of trust issues generally and, more in particular, to exchange and develop ideas on how to solve some of the issues in the field of trustworthy digital repositories for the social sciences. These contain questions on how to put into effect the obligations of the Service Providers in the "Annex 2 to the CESSDA statutes" and what tasks a CESSDA Trust Support Working Group should perform.

CESSDA timeline 2015
Work plan tasks

			October	November	
			Start of CESSDA Technical Framework; Start of CESSDA Data Access Policy	Start of CESSDA Metadata Management; Start of CESSDA Open Source Metadata Harvester; Expert Seminar 2015	

CESSDA Working Groups

CESSDA has four working groups with the main function of providing advice and support to the Board of Directors and Managing Director in conduct of the work plan. They were formally established in December 2015.

CESSDA Trust Support Group

This group was established within the CESSDA SaW project. The CESSDA Trust Support Group consists of a core group of five persons representing five CESSDA Service Providers (SPs) with comprehensive experience with certification, and a wider assessment group representing all CESSDA members and aspirant members. The goal of the activities of the group is to support and advise members and aspirant members in all trust issues (DSA, Annex 2 and more). This group acts as an advisory Body to the CESSDA Managing Director and Board of Directors concerning all matters regarding DSA certification, and in particular supporting new members; it cooperates with other working groups regarding the Annex 2 obligations; it assists all SPs (including those of aspiring members) in acquiring and prolonging the DSA certification and complying to the Annex 2 obligations.

CESSDA Technical Group

This core group aims to monitor and advise on needs regarding technical services. CESSDA's technical infrastructure and services will be technology intensive but decentralised, requiring a common platform to ensure interoperability and an efficient and sustainable model for the future. The group aims to review the state of the 2015 Work Plan Tasks and the output from the active CESSDA Technical Framework project in the work plan, as well as prioritise and suggest different schedules for launching new tasks, with advice on allocation of budget. The group is also in place to provide input for the revised 2016 Work Plan and monitor and contribute to future work plans. Furthermore, it monitors activities in CESSDA's ongoing external and internal projects regarding technical services and advancements. In this respect, the group will cooperate closely with and serve as advisors to the future Chief Technical Officer in the Main Office.

CESSDA timeline 2015
Working Groups
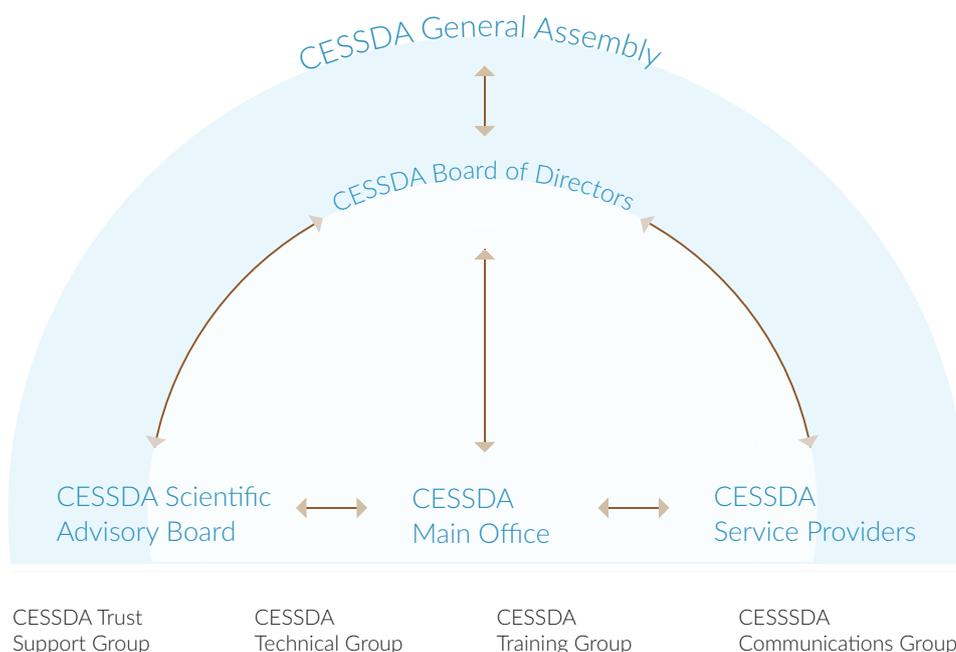
December
Four working groups designated

CESSDA Training Group

The new training group for CESSDA acts as an advisory body to the work of <u>CESSDA Training</u> and has three main functions: identifying the training needs of the CESSDA community and its users and supporting CESSDA Training to prioritise these needs; promoting training harmonisation across training providers within the CESSDA community; identifying new trends in training across the community. This group will maximise the potential of each SP's training offering and promote harmonisation and knowledge transfer amongst these SPs.

CESSDA Communications Group

The need for close and effective collaboration between CESSDA Main Office and its national data Service Providers in terms of communication activities across CESSDA quickly became apparent, which led to the setting up a Communications Group. The purpose of this group, as well as the other working groups, is ultimately to help deliver the vision and mission of CESSDA, and making the CESSDA collaboration more visible to its target audiences is a key part of that. The Communications Group consists of one representative working in communications from each country that is a Member or an Observer that represent the CESSDA Service Provider(s) as well as other potential members of CESSDA. When such a person is not employed, the member of the group may also be a member of CESSDA's Service Providers' Forum.

CESSDA General Assembly

CESSDA Board of Directors

CESSDA Scientific Advisory Board   CESSDA Main Office   CESSDA Service Providers

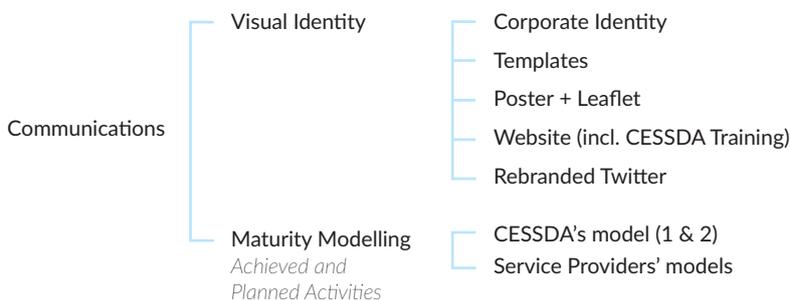| CESSDA Trust Support Group | CESSDA Technical Group | CESSDA Training Group | CESSSDA Communications Group |

Communication

CESSDA begun by creating a new visual identity and the various types of templates displaying CESSDA's new corporate identity were produced in the first half of 2015 and shared within CESSDA, followed by a leaflet and a poster. The main achievement in communications for 2015 was the launch of an entirely new website on 1 June 2015 (www.cessda.net). The CESSDA Training Twitter account was then rebranded as @CESSDA_Data in time for the launch of the CESSDA SaW project in October 2015 and currently serves as an account for CESSDA as a whole, reporting not only on CESSDA Training, but also on other activities related to CESSDA and its projects. CESSDA also began work on a broad communication strategy, planned to be adopted in 2016.

CESSDA carried out a maturity modelling exercise showing achieved and planned activities across all listed communication areas, once in 2014 and a second time in August 2015. The second maturity exercise showed considerable improvement. The CESSDA maturity model is updated on a yearly basis. The first task set to the Communications Group was for each Service Provider represented in the group to carry out their own maturity modelling exercise for the communication activities of their organisations. This exercise was carried out in the first half of 2015, and was intended to help CESSDA to find out about its Service Providers in terms of their communication activities and objectives, and thus establish where CESSDA could be an added value for achieving those goals, and where CESSDA's work, as the hub, should be focused (e.g. international workshops, web, storytelling through different media & academic publications, etc.). In concrete terms, the aim of this exercise was to prepare for the next stage: writing the Terms of Reference of the Communications Group, which began in autumn 2015 and which will set the scope of the group and help plan and prioritise future work.

Communications overview

Communications

— Visual Identity
  — Corporate Identity
  — Templates
  — Poster + Leaflet
  — Website (incl. CESSDA Training)
  — Rebranded Twitter

— Maturity Modelling
  Achieved and Planned Activities
  — CESSDA's model (1 & 2)
  — Service Providers' models

CESSDA timeline 2015
Communication

June
Launch of new
CESSDA website

August
Second maturity model
for communications
by CESSDA

European Union Funded Projects

CESSDA and its data Service Providers take part in a number of international projects of relevance to its mission. CESSDA AS is a grant beneficiary in three Horizon 2020 projects as follows:

Big Data Europe
Empowering Communities with Data Technologies

CESSDA's role is to coordinate the input of the members of the Societal Challenge 6: Europe in a changing world – Inclusive, reflective and innovative society, through workshops, in order to build a requirements specification for a new Big Data Aggregator. Once built, the Aggregator will be used by CESSDA members and others in order to explore the value of big data, as well as to evaluate the benefits of these new data sources to the social sciences and humanities, and learn the implications of managing and preserving these sources of data from the perspective of an archive. A project overview can be seen here.

CESSDA SaW
Strengthening and Widening the European Infrastructure for Social Science Data Archives

CESSDA AS is the coordinator of the CESSDA SaW project. This is a 2-year project with the primary ambition to establish the conditions for a seamless social science data archive service for the whole of the European Research Area (ERA), capable of supporting the research needs of the next generation of social scientists wherever they may be. The overarching impact of the project will be to initiate the transformation of the user experience of social science data in the ERA, resulting in a transformation of the evidence and insight available to those tackling the social and economic issues of Europe.

As project coordinator, CESSDA is heavily involved in all aspects of the project. Tasks to be carried out by the project will range from the establishment of a knowledge-sharing platform for ERA data archives and a hub, delivering a state of play evaluation of social science data archives and services in European Economic Area countries, identifying gaps and bottlenecks in existing services and producing national development plans to close the gaps and overcome present barriers. Another objective of the project is to enlarge and strengthen CESSDA through knowledge exchange between current members and potential or aspiring members. This will involve benchmarking CESSDA against a leading inter-institutional consortium of data archives, initiating a permanent forum for knowledge and information exchange as well as exploring and seeking support for an international curriculum for the professional development of practitioners in social science data services. A project overview can be seen here.

CESSDA timeline 2015
EU funded projects

January	February	March			
Start of Big Data Europe	Big Data Europe Kick-off meeting	Senior Project Manager joined the CESSDA Main Office			
July	August	September	October		
Start of SERISS	Start of CESSDA SaW	SERISS Kick-off meeting	CESSDA SaW Kick-off meeting		

SERISS - "Synergies for Europe's Research Infrastructures in the Social Sciences"

SERISS is a 4-year project which brings together three research infrastructures in the social sciences: the European Social Survey (ESS), the Survey for Health Ageing and Retirement in Europe (SHARE) and the Consortium of European Social Science Data Archives (CESSDA). Also involved in SERISS are non-ESFRI research infrastructures: Generations and Gender Programme (GGP), European Values Survey (EVS) and the Wage Indicator Survey. It aims to exploit potential synergies and overcome existing fragmentation across infrastructures in order to enhance the key role played by these infrastructures, which form the bedrock of empirical social science in Europe. SERISS will focus on three broad themes: addressing key challenges for cross-national data collection, breaking down barriers between infrastructures and embracing the future of social sciences.

CESSDA's involvement in the project covers a number of areas, from empirically assessing the quality of thesaurus keywords for questionnaire items, to interactive tools for cross-national surveys, such as a survey Project Management Portal and a Data Harmonisation Platform. An important aim of the SERISS project is also to share learning and expertise between project infrastructures and with the wider social science community. Finally, the project will address the major legal and ethical challenges facing cross-national social science research, which relies on access to large-scale data on an individual level. A project overview can be seen here.
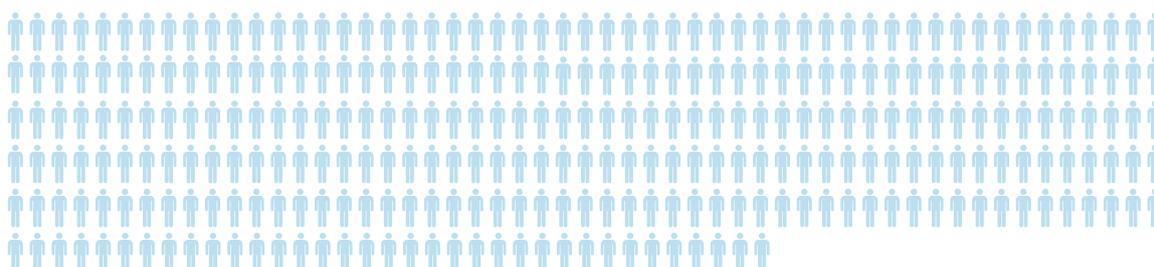
Other Forms of Collaboration

IASSIST

IASSIST is an international organisation of professionals working in and with information technology and data services to support research and teaching in the social sciences. CESSDA Service Providers have been actively involved in the annual conferences of IASSIST for several years. Furthermore, a number of staff of CESSDA Service Providers are members of IASSIST, which brings together 300 members from a variety of workplaces, including data archives, statistical agencies, research centres, libraries, academic departments, government departments, and non-profit organisations.

RDA

RDA (Research Data Alliance) is working on building the social and technical bridges to facilitate data sharing and re-use. Given that data and scientific collaboration are global, it is only natural that this activity must be executed within a global framework. Bridges must also be built across disciplines as increasingly research questions can only be addressed and answered if data and knowledge from various disciplines are included. Even though RDA is still a relatively young initiative - launched in March 2013 - the first outputs of the start-up working groups have been produced and are now entering a subsequent phase focusing on testing these outputs in several real community applications, encouraging communities to adopt solutions and adapting the outputs based on concrete implementation cases.

In addition to engaging with all European stakeholders, communities and organisations alike, through events, papers, presentations, interviews (etc.), CESSDA was invited to the 2015 RDA Plenary meeting as a potential partner in the consortium.

IASSIST: Staff in CESSDA Service Providers are members of IASSIST, which brings together 300 professionals from a variety of workplaces.
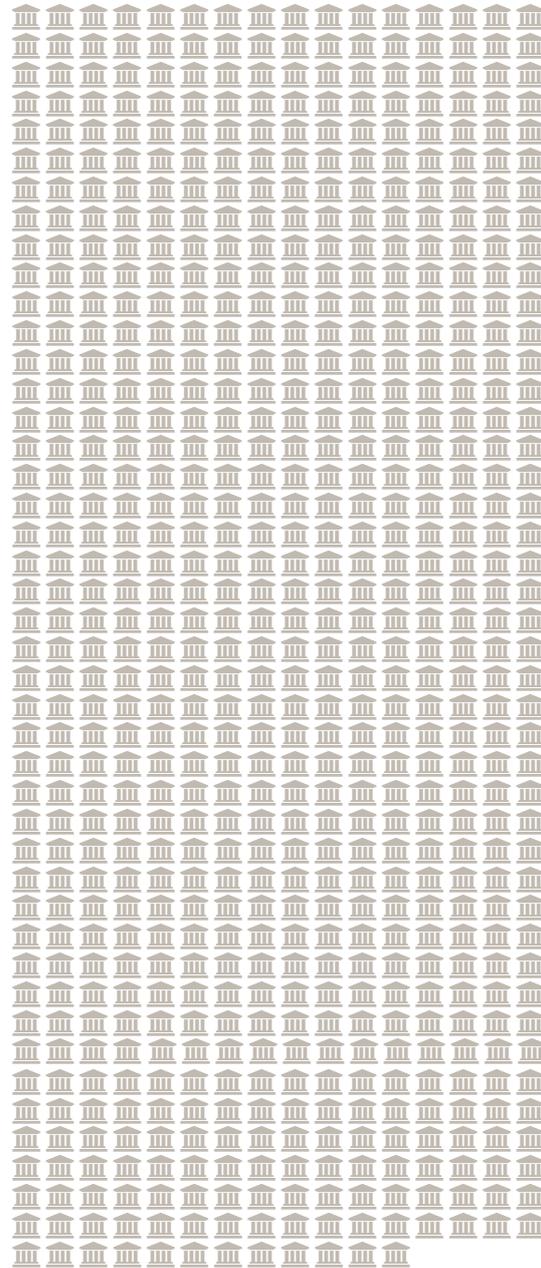
CESSDA timeline 2015
Other forms of collaboration

				May	June
				RDA plenary meeting in Amsterdam	IASSIST2015: Bridging the Data Divide: Data in the International Context, Minneapolis, USA

ICPSR

ICPSR (Interuniversity Consortium for Political and Social Research) is an international consortium of more than 700 academic institutions and research organisations. ICPSR provides leadership and training in data access, curation, and methods of analysis for the social science research community. CESSDA is actively involved in regular ICPSR meetings, and regular communication channels are established with the Main Office which led to joint participation in European Horizon 2020 project CESSDA SaW (Strengthening and Widening) where the ICPSR will serve as the "industry best" or "gold standard" organisation against which CESSDA will be benchmarked. CESSDA has a standing invitation to the ICPSR Council Meetings.

Eurostat

In 2014, Eurostat started to work on a research strategy for European statistics microdata together with the European Statistical System (ESS). On a meeting held in February 2015, CESSDA was asked to present possibilities for future cooperation. A draft proposal on opportunities to have a permanent working relationship between CESSDA and the European Statistical System was prepared in June 2015. The final cooperation proposal paper was presented by Eurostat to the European Statistics System Committee (ESSC) during their 26th meeting held on 24 September 2015 in Lisbon. The first Big Data Europe project workshop in the domain of social sciences took place at the offices of Eurostat in Luxembourg in November 2015. A videoconference between CESSDA and Eurostat was held in December 2015. Details of the future cooperation as well as the signing of Memorandum of Understanding will be addressed during 2016.

ICPSR (The Interuniversity Consortium for Political and Social Research) is an international consortium of more than 700 academic institutions and research organizations.

CESSDA timeline 2015
Other forms of collaboration

	February				June
	Eurostat meeting: CESSDA asked to present possibilities for future cooperation				Draft proposal for a permanent working relationship between CESSDA & European Statistical System
	September				December
	Final cooperation proposal paper presented by Eurostat to ESSC				Videoconference CESSDA and Eurostat

Looking Ahead
ERIC Process

The process of transformation from CESSDA to CESSDA ERIC (European Research Infrastructure Consortium) started in early 2015 with Step 1 application submitted in April 2015. In June 2015, the CESSDA General Assembly decided a future structure for the ERIC with a Managing Director and a General Assembly as the governing bodies. Updated submission materials (CESSDA ERIC Statutes, Technical and Scientific Description of CESSDA with annexes) will be submitted to Step 2 application in 2016. It is expected that a majority of the current members of CESSDA will become founding members of CESSDA ERIC, to be established by the end of 2016 or early 2017.

Upcoming Initiatives and Priorities for 2016

Work carried out in 2015 as part of the 2015 Work Plan has to be followed up and upgraded in 2016. Most of the projects funded in 2015 will be carried over to 2016 and beyond, and 2016 Work Plan projects will be approved by the General Assembly. The Technical Framework project will continue its second phase of development. CESSDA Product and Service Catalogue is scheduled to start in early 2016, as well as further work on the CESSDA tasks allocated to the German Service Provider GESIS – Leibniz Institute for the Social Sciences. Cooperation with Eurostat is an important part of future planned activities in the framework of current and newly submitted EU funded projects as well as future work plans. All four working groups will either continue and upgrade their work, as is the case for the Communications Group and the Technical Group, which have been running since 2014, or kick-start their activities in early 2016.

Future Membership

CESSDA is constantly strengthening its current membership, while at the same time seeking to widen it so as to include new member countries and appointed Service Providers, thus expanding its pan-European coverage in providing access to data in the social sciences to the research community. Current activities in that area are predominantly carried out in the framework of the CESSDA SaW project, on the one hand trying to establish general standards in research data management among current Service Providers (strengthening), and on the other, providing clear criteria for joining CESSDA for all future member countries and their data archives

(widening). In parallel to that process, CESSDA is approached every year by several archives making efforts to join the consortium. Greece became a member of CESSDA on the day of the General Assembly meeting of June 2015. Belgium signed the Memorandum of Understanding in November 2015 and will be confirmed as a new member of CESSDA by the General Assembly early 2016.

The following countries are in contact with CESSDA concerning membership: Bulgaria, Croatia, Estonia, Hungary, Ireland, Italy, Poland, Portugal, Romania, Serbia and Ukraine.
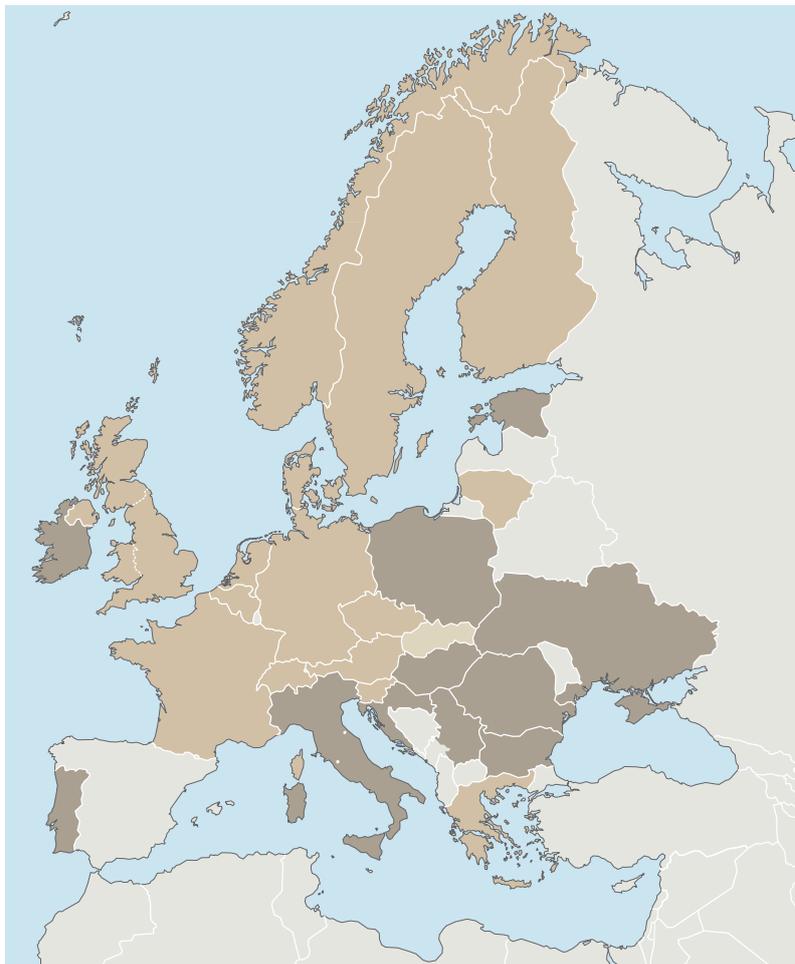
Dark brown: countries in contact with CESSDA concerning membership: Bulgaria, Croatia, Estonia, Hungary, Ireland, Italy, Poland, Portugal, Romania, Serbia and Ukraine.

Medium brown: CESSDA members: Austria, Czech Republic, Denmark, Finland, France, Germany, Greece, Lithuania, The Netherlands, Norway, Slovenia, Sweden, Switzerland and The United Kingdom.

Light brown: CESSDA Observer: Slovakia.

CESSDA timeline 2015
Looking ahead

	April	June
	Step 1 application submission to transform CESSDA to CESSDA ERIC	CESSDA General Assembly decided future structure for the ERIC

Director's Report 2015

Business Enterprise Organisation Number: 912 125 912

CESSDA Board of Directors

The Consortium of European Social Science Data Archives (CESSDA) was fully established in June 2013 as a permanent pan-European distributed research infrastructure that aims to provide large scale, integrated and sustainable data services to the social sciences. The main objective of CESSDA is to provide seamless access to data across data archives, national borders, languages and research areas and to increase the impact of the activities that are happening at a national level. CESSDA AS (Main Office) is a Norwegian limited liability company solely owned by the Norwegian Ministry of Education and Research, and functions as the legal vehicle and the coordination hub for the consortium. It is located in Bergen, Norway.

Activities

As foreseen in its statutes, the mission of CESSDA is to provide a full scale sustainable research infrastructure that enables the research community to conduct high-quality research which in turn leads to effective solutions to the major challenges facing society today. The intention since its launch has been to progress rapidly to the European Research Infrastructure Consortium (ERIC) status. At a European level, CESSDA plays an important role in several major projects funded by the European Commission's Horizon 2020 research and innovation programme, thus setting the standard in data management and access in the social sciences and humanities.

Funding

In 2015, CESSDA is a consortium consisting of 14 European member countries and one observer country. According to the CESSDA Statutes, the funding scheme shall be based on each country's GDP. Germany and Norway have offered to pay disproportional annual amounts of respectively 750,000 and 800,000 Euros. The annual member fee contribution in 2014 was 1.9 million Euros, based on 13 member countries. In 2015 Greece joined CESSDA and the annual fee increased accordingly reaching 1.933 million Euros for 2015. There was therefore a surplus from the 2015 budget resulting from underspent means in 2015. A substantial carry over into the 2016 Work Plan budget is expected.
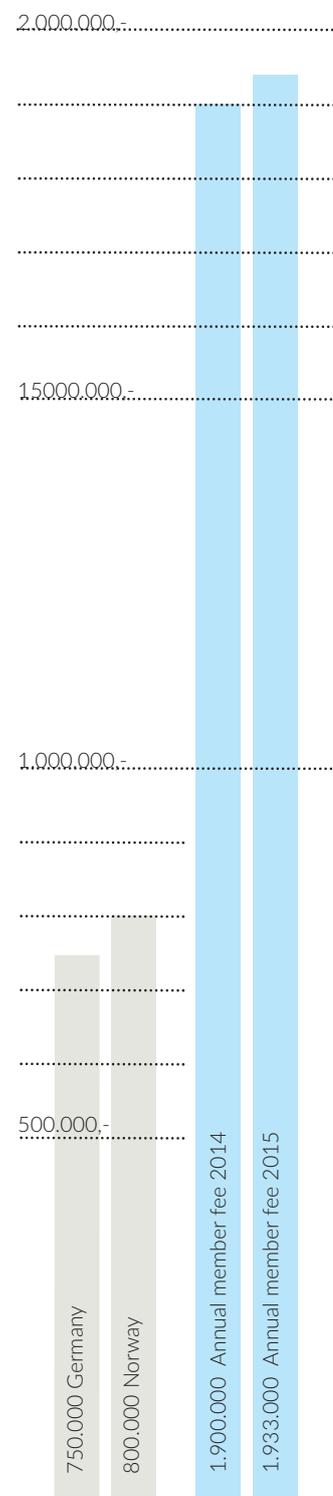
Funding: annual contributions and member fees in Euros.

The Working Environment and the Natural Environment

The Main Office of CESSDA, at Parkveien 20, 5007 Bergen, had four employees in 2015:

Managing Director – Paul Jackson (until 31 July 2015), Acting Administrative Manager/Senior Project Manager – Ivana Ilijašić Veršić (from 1 August 2015), Administrative Secretary – Nina Bakanova, and Senior Communications Officer – Eleanor Smith.

CESSDA employees work in an office environment with computers as their most used working tool and they are also required, on occasions, to travel abroad to perform their duties.

The amount of days of short-term sickness absence was equal to zero days in 2015. Long-term sickness absence was not registered in 2015. No injuries or accidents were registered. CESSDA's activities have not polluted the natural environment.

Staff by Age and Gender

The gender distribution was three women and one man in 2015. There was a higher proportion of female employees (75%) in 2015. CESSDA endeavours to achieve an even gender distribution by hiring additional staff in the Main Office in the near future. CESSDA emphasises diversity and encourages qualified candidates to apply for jobs, regardless of age or cultural and ethnic background.
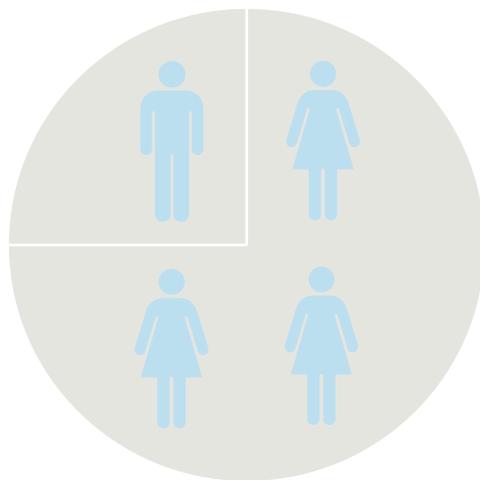
Staff by gender: 75% female and 25% male.

Annual Accounts

The financial performance for 2015 is positive. CESSDA is financially sound, and the company's prospects are good. The Board confirms that the requirements of the ongoing concern assumption are met. Annual net profit for 2015 was 0 NOK. Pursuant to the company's Statutes, no dividend is distributed.
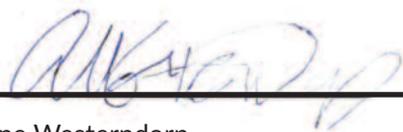
Bjørn Henrichsen
Chair

Matthew Wollard
Vice-Chair
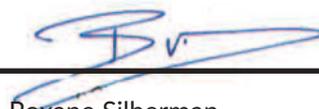
Dana Hamplova

Hans Jørgen Marker

Anne Westerndorp

Roxane Silberman

Ivana Ilijasic Versic
Acting Administrative Manager

Financial Statement

Business Enterprise Organisation Number: 912 125 912

CESSDA Board of Directors

CESSDA AS Profit & Loss Statement

	NOTE	2015	2014
Operating income and expenses			
Other operating income	6	9 152 196	7 966 857
Operating income		9 152 196	7 966 857
Payroll expenses	1	3 274 722	919 358
Depreciation and amortisation expense	4	65 400	42 276
Other operating expenses	1	7 669 009	8 181 044
Operating expenses		11 009 131	9 142 678
Operating profit		-1 856 935	-1 175 821
Financial income and expenses			
Other interest income		15 108	31 967
Other financial income		2 474 644	1 144 942
Other Interest expenses		2 178	0
Other financial expenses		630 639	1 088
Net financial income and expenses		1 856 935	1 175 821
Annual net profit		0	0

NB: values in NOK

CESSDA AS Balance Sheet

Assets	NOTE	2015	2014
Fixed assets			
Tangible fixed assets			
Equipment and other movables	4	155 600	221 000
Total tangible fixed assets		155 600	221 000
Total fixed assets		155 600	221 000
Current assets			
Debtors			
Accounts receivables		185 789	17 268
Other receivables		204 099	459 576
Total debtors	5	389 888	476 844
Cash and bank deposits			
Cash and bank deposits	7	28 673 556	19 521 192
Total current assets		29 063 554	19 998 035
Total assets		29 219 045	20 219 035

NB: values in NOK

CESSDA AS Balance Sheet

Equity and liabilities	NOTE	2015	2014
Equity			
Restricted equity			
Share capital	2,3	50 000	50 000
Total restricted equity		50 000	50 000
Total Equity	3	50 000	50 000
Liabilities			
Current liabilities			
Trade creditors		141 418	515 479
Deduction of tax and other public liabilities		150 360	271 525
Other short-term liabilities		4 624 032	5 022 912
Deferred income	6	24 253 235	14 359 119
Total short term liabilities	5	29 169 045	20 169 035
Total liabilities		29 169 045	20 169 035
Total equity and liabilities		29 219 045	20 219 035

NB: values in NOK

Notes to the Financial Statements

Accounting Principles
The accounts have been prepared in accordance with the Norwegian Accounting Act and good accounting practice in Norway. The accounting principles are described below.

Operating Income and Expenses
Dividends from investments in stocks and shares are recognized in the year in which they are received. Gains and losses are recognized in the year of realization, except when recognition in an earlier period is in accordance with good accounting practice.

Expenses are recognized in accordance with the matching principle. This means that expenses are recognized in the same period as the related income.

Classification of Assets and Liabilities
Assets meant for long-term ownership or use are classified as fixed assets. Other assets are classified as current assets. Outstanding receivables to be repaid within one year are classified as current assets. The classification of liabilities is based on analogous criteria.

Fixed assets are valued at acquisition cost. Fixed assets which have a limited economic life shall be depreciated in accordance with a reasonable depreciation schedule. Fixed assets shall be written down to their fair value when a decline in value is not expected to be temporary. The write down shall be reversed when the basis for the write down is no longer present.

Current assets are valued at the lower of acquisition cost and fair value. Liabilities are appraised at the nominal value on the acquisition date.

Currency
Assets in foreign currency are translated at the exchange rate on the balance sheet date, NOK/EUR = 9,0365 for 2014 and NOK/EUR = 9,6190 for 2015.

Taxes
Since the business is a not for profit organization it is not liable for corporation tax in accordance with Tax Law § 2-32.

Pension
The company has established a defined benefit pension scheme. The pension premium is classified as payroll expenses.

Note 1 – Payroll Expenses, Numbers of Employees, Loans to Employees etc

Payroll expenses consist of:

	2015	2014
Wages and holiday allowance	2 362 492	756 522
Payroll tax	404 182	106 734
Pension premium	239 726	0
Other benefits	268 321	56 102
Total	3 274 722	919 358
Average number of full time equivalent	3	1

NB: values in NOK

Three employees were hired during the autumn of 2014.

The total remuneration paid to directors was € 126 253. The company changed directors in 2015. The fee paid to Members of the Board was € 24 951. Each board member was paid € 3 119 and the chairman of the board was paid € 6 238.

The company is obliged to have a pension scheme according to the Norwegian Law of compulsory occupational pension scheme and have established a defined benefit pension scheme which satisfies the requirements.

Amounts paid to the company's auditor were € 5 783 for audit and € 5 809 for other services.

Note 2 – Ownership Structure

The company's share capital is NOK 50 000. The share capital comprises of 10 shares with a nominal value of NOK 5 000. The shares have equal voting rights.

On the 31 December the company had the following shareholders:

	Number of shares	Holding
Kunnskapdepartementet	10	100%

Note 3 – Changes in Equity

	Share capital	Total
Shareholders' equity 01.01	50 000	50 000
Profit for the year	0	0
Shareholders' equity 31.12	50 000	50 000

NB: values in NOK

Note 4 – Tangible Fixed Assets

	Fixtures, fittings and equipment
Acquisition cost 01.01	266 276
Purchase in accounting year	0
Acquisition cost 31.12	266 276
Accumulated depreciation	110 676
Book value 31.12	155 600
Annual depreciation	65 400
Expected economic life	3-5 years

NB: values in NOK

Note 5 – Maturity of Receivables and Payables

Liabilities that fall due more than five years after the end of the accounting year are € 0.

Receivables that fall due more than one year after the end of the accounting year are € 0.

Note 6 – Breakdown of Income

Income in the year was derived from the following sources:

	2015	2014
Funding from Norwegian Research Council	7 410 640	6 582 960
Other grant income	11 635 672	8 987 991
Total	19 046 312	15 570 951

Available as future operating budget:

	Deferred income
Deferred income pr. 01.01	14 359 119
Grant income in accounting year	19 046 312
Operating expenses	-11 009 131
Net financial income and expenses	1 856 935
Deferred income until 31.12	24 253 235

NB: values in NOK

Note 7 – Fixed Assets

In the cash and bank deposits record are fixed tax deduction funds included with NOK 200 000.

Bodies of CESSDA

General Assembly

York Sure-Vetter Germany – *Chair*
Kari Balke Øiseth Norway – *Vice Chair*

Matthias Reiter-Pázmándy Austria
Petr Ventluka and Jindrich Krejci Czech Republic
Steen Ousager and Troels Rasmussen Denmark
Sami Borg and Petteri Kauppinen Finland
Jacques Dubucs and Bertrand Jouve France
Brunhild Spannhake Germany
Algis Krupavicius Lithuania
Wieske Bressers and Peter Doorn The Netherlands
Kari Bjørke Norway
Miloslav Bahna and Robert Klobucky Slovakia
Albin Kralj Slovenia
Susanna Bylin and Elisabeth Thomson Sweden
Peter Farago and Brian Kleiner Switzerland
Paul Meller and Hilary Beedham United Kingdom

Board of Directors

Bjørn Henrichsen Norway – *Chair*
Matthew Woollard United Kingdom – *Vice Chair*

Dana Hamplova Czech Republic
Hans Jørgen Marker Sweden
Markus Quandt (until 17.12.2015) Germany
Roxane Silberman France
Anne Westendorp The Netherlands

Scientific Advisory Board

Myron Gutmann United States – *Chair*

Bernt Aardal Norway
Denise Lievesley United Kingdom
Nancy Pedersen Sweden
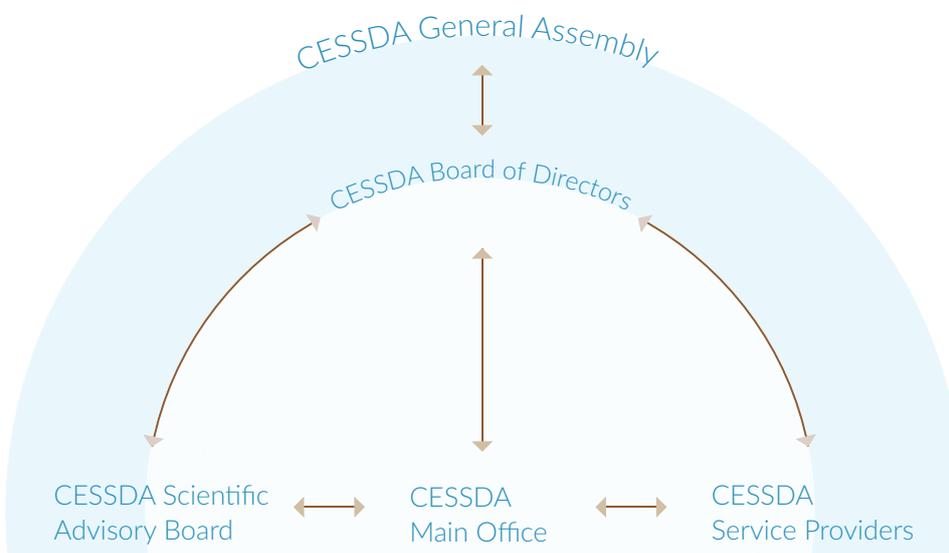**Simon Hodson** France
Tomaz Smrekar Slovenia

Service Providers' Forum

Austria Matthias Reiter-Pázmándy
Czech Republic – CSDA Jindřich Krejčí & Yana Leontiyeva
Denmark – DDA Anne Sofie Fink
Finland – FSD Sami Borg & Helena Laaksonen
France – CNRS Roxane Silberman
Germany – GESIS Alexia Katsanidou
Greece – So.Da.Net Dimitra Kondyli
Lithuania – LiDA Algis Krupavicius
The Netherlands – DANS Marnix van Berchum
Norway – NSD Vigdis Kvalheim
Slovakia – SASD (observer) Miloslav Bahna
Slovenia – ADP Janez Stebe & Irena Vipavc Brvar
Sweden – SND Hans Jørgen Marker
Switzerland – FORS Brian Kleiner
United Kingdom – UKDS John Shepherdson

Non-members (CESSDA)

Belgium – VUB Johan Surkyn
Estonia – ESSDA Rein Murakas
Hungary – TARKI Foundation Tamas Rudas
Ireland – ISSDA John Howard
Portugal – APIS Claudia Oliveira
Romania – RODA Adrian Dusa

CESSDA Organisational Chart