



DiSSCo Funders Forum Advisory Body

Information package

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Preface

The document provides information about the Funders Forum, the DiSSCo advisory body to be constituted early next year, divided into three main sections.

Section I describes the rationale and state of play that proves extremely necessary the constitution of the Funders Forum.

Section II includes a draft version of the rules (RoP) that might guide the operation of the body at its early stage and can be subject to discussion once the body is fully operational.

Section III gives you an overview of the principles, actions, and timeline the DiSSCo CSO follows in its advocacy strategy with national authorities and national nodes.

All sections are pieces of the same endeavour. However, the two first constitute the core part of it, necessary to understand the future advisory body and the work behind it.

I. FF: context

Entering together a new era for our European natural science museums

Data-intensive frontier research through unified access to European natural science collections information and expertise.

The Distributed System of Scientific Collections (DiSSCo) is an aspiring world-class research infrastructure aiming at bringing into the Open Science era the vast wealth of biodiversity and geodiversity data curated within Europe's natural science collections.

The DiSSCo RI works for the digital unification of all European natural science collection assets, under common curation and access policies and practices. The infrastructure aims at making data, derived from 1.5 billion unique biological and geological objects, easily Findable, more Accessible, Interoperable and Reusable (FAIR).

Data from natural science collections form a foundational/reference layer for analysing, modelling and interpreting data, like it is across the whole RI landscape especially in the domains of environment, health and climate change.

DiSSCo builds on the principles of Open Science to enable the transformation of a fragmented landscape of the crucial natural science assets and linked expertise, into an integrated knowledge base that provides interconnected hard evidence on our natural world.

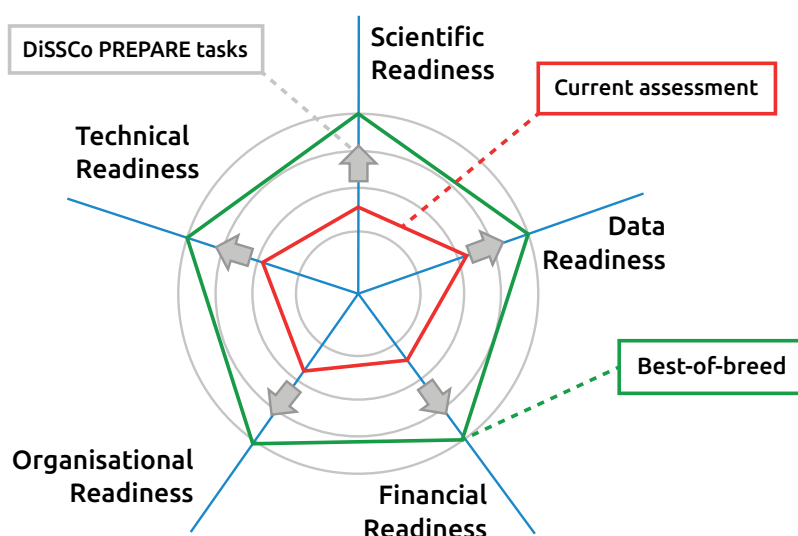
During its operation, DiSSCo will deliver unique world-class services anchored on trusted and precise data on our natural world, consistent with the needs of a diverse set of end-users and serving equally to science and society at large.

The state of play and interim (preparatory) governance

DiSSCo represents the largest ever formal agreement between natural history museums, botanical gardens and other collection-holding organisations in the world. The idea and need for a pan-European RI for collectively managing and accessing our European natural science assets started years ago, but it was not until August 2018, when the proposal for a new ESFRI project was accepted, that the vision started to take a tangible form. A few months later DiSSCo entered its ESFRI Preparatory Phase in good shape and with high expectations by its members but equally for the surrounding interested actors.

During the Preparatory Phase (2019-2022) DiSSCo leverages the investments made across several European- and facility-funded projects. These projects help the infrastructure reach its optimum Implementation Readiness Level (IRL) (Figure 1). The optimum IRL represents the required baseline maturity level of the infrastructure in order to productively embark on its Implementation Phase (planned for 2023-2025). Jointly, these projects currently employ more than 200 researchers and other professionals and are implemented with the contribution of partners across 30 countries. The projects are part of the DiSSCo Preparatory Phase Programme (Figure 2), which is governed by the DiSSCo facilities themselves across Europe, with the support of a dedicated executive team (DiSSCo Coordination and Support Office, CSO).

Figure 1. The Implementation Readiness Level (IRL) of DiSSCo analysed in five distinct dimensions: Scientific, Data, Financial, Organisational and Technical Readiness. For each dimension, actions are taken to improve the maturity of the infrastructure to reach an optimum (best-of-breed) level of readiness before the implementation phase of the infrastructure development.



To ensure correct alignment and use of synergies among all those projects, DiSSCo is relying on a preparatory phase lightweight governance scheme that ensures the coordination and strategic steering of the current community efforts. To this end, DiSSCo has established an interim governance body (interim General Assembly), that consists of the facilities which are currently committed to the preparation of the infrastructure and work towards national-level development of DiSSCo nodes. In these hubs, all facilities of each country, which participate in

DiSSCo, join forces and align positions in the light of national strategies.

The role of this body is to provide oversight to the sophisticated programme of projects (DiSSCo-linked projects) as well as the DiSSCo CSO. The interim General Assembly is focusing on its current preparatory phase objectives and is going to yield decision-making powers to the structures decided to operate under the forthcoming DiSSCo legal entity.

Figure 2. The portfolio of DiSSCo-linked projects. Together they constitute the DiSSCo Preparatory Phase Programme. The programme includes the main preparatory phase project (DiSSCo Prepare), as well as a series of other large multi-partner projects. The projects are coordinated through appropriate governance structures, and all contribute to the improvement of the infrastructure Implementation Readiness Level (IRL).

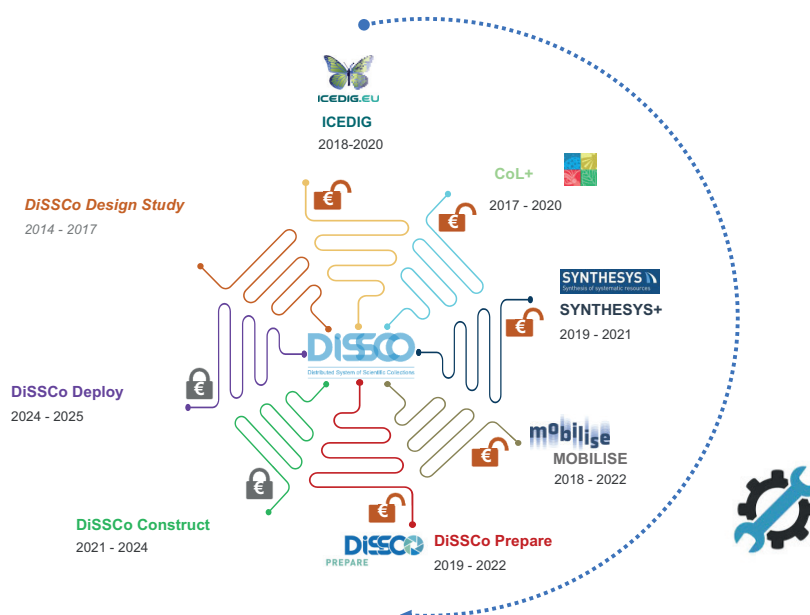
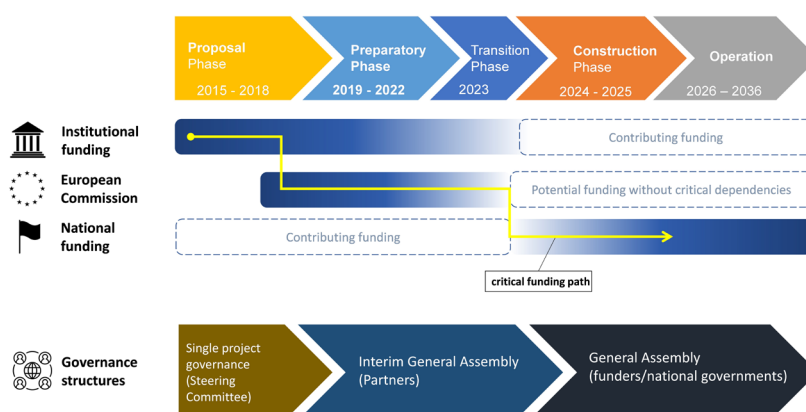


Figure 3. Presentation of the different phases of the infrastructure development (from the proposal phase to the operation phase) along with the funding sources for each phase and the corresponding governance model that serves each phase separately. The governance models implemented aim to meet the requirements deriving from the maturity and the financial scheme of each phase.



Timeline of the interim governance

As DiSSCo will approach the end of its Preparatory Phase (2022), the current interim governance model will be phased out and replaced by the permanent governance of DiSSCo to gather national commitments beyond the institutional representation and work. The implementation and operational phase governance needs to include the active engagement of governmental representatives.

That new governance will be stipulated by the provisions of the new DiSSCo legal entity statutes. Such a transition from facilities-based governance to country formal engagements to govern the Research Infrastructure also complies with the overall funding shift of DiSSCo from EC/consortium funding (during the Preparatory Phase) to national commitments (during implementation and operation).

The role of Member State Governments during the preparatory phase

Nowadays, at this very early stage of DiSSCo RI development, the participation of representatives from the national governments is pivotal. DiSSCo RI pursues to establish communication and

engagement of governmental representatives through the set-up of the Funders Forum (FF). The role of the FF is to establish an open and productive dialogue with representatives of the future member state funders of the infrastructure.

The operation of the FF will:

1. provide **valuable guidance to the interim bodies** regarding preparatory phase activities of the infrastructure;
2. **improve the understanding of DiSSCo by the future funders** generally in the infrastructure-related and data-intensive research Pan-European landscape and also locally in the national context, and
3. **establish trusted discourse mechanisms** across interim (Preparatory Phase) and future (Implementation and Operation phase) DiSSCo management and governance bodies.

More specifically, the operation of the FF, during the Preparatory Phase, would allow for a continuous consultation on relevant operational, organisational and engagement matters. Input from the FF will guide the delivery of key outcomes for the RI during the preparatory phase and inform relevant decisions for the development of DiSSCo.

We would also encourage and support the FF to work closely together with the senior representatives from the DiSSCo national nodes. This collaboration would be a critical one, as it provides the necessary national triaging process

on the DiSSCo priorities. It will also enable the formation of national level views that are supported both from a national science-policy and an national implementation level perspective.

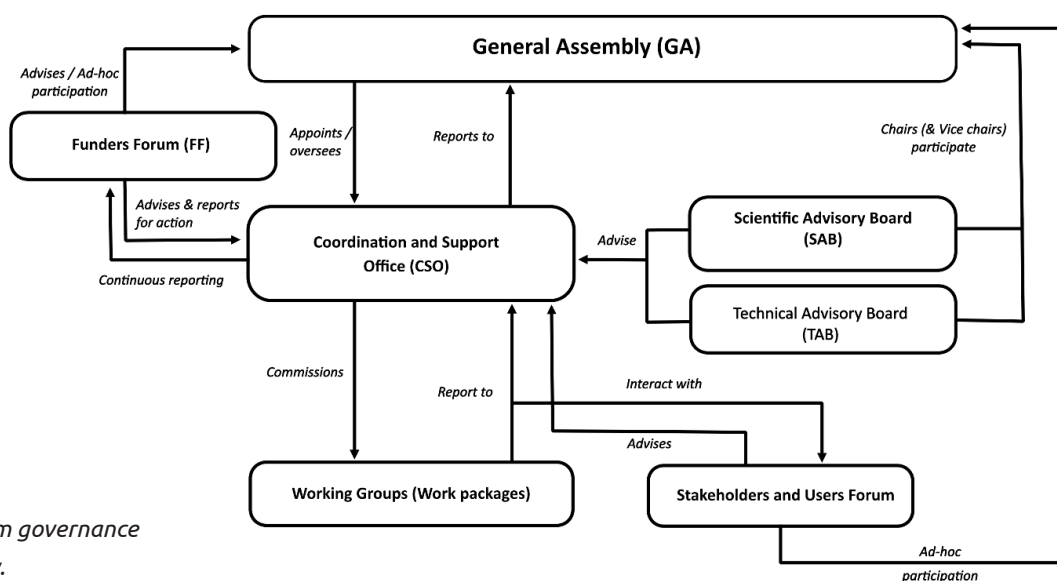


Figure 4. Interim governance model overview.

II. DiSSCo Funders Forum: Rules of Procedure

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Article 1: Definitions

Construction Phase means the period starting with the establishment of the DiSSCo legal entity.

Country Delegation means governmental representatives from countries signatories of the DiSSCo European Memorandum of Understanding.

DiSSCo Coordinator means the DiSSCo preparatory and construction phase coordinator, assigned by the GA, who takes responsibility for the implementation of the work programmes relevant to the development of the infrastructure and the transition to the operational phase.

DiSSCo Coordination and Support Office (CSO) shall have the same meaning and function as defined in Article 2.4 of Annex B of the DiSSCo European MoU (referred therein as Interim Support Office).

DiSSCo European MoU means the Memorandum of Understanding on Formation of the European Consortium for Participation in the Distributed System of Scientific Collections.

DiSSCo Prepare is an Horizon2020 funded project and the main vehicle during the preparatory phase of the Research Infrastructure, through which DiSSCo RI will raise its overall maturity to favorably position itself for construction in 2023.

DiSSCo Research Infrastructure means the Distributed System of Scientific Collections Research Infrastructure entered the ESFRI (European Scientific Forum Research Infrastructures) Roadmap 2018.

DiSSCo interim General Assembly means the ultimate decision-making body of DiSSCo during the preparatory and transition phases until the legal entity is constituted.

Preparatory and Transition phase means the period starting with the admission of DiSSCo onto the ESFRI roadmap and ending with the setting up of DiSSCo as a separate legal entity.

Article 2: Mission and Objectives

2.1 Its mission is to provide expert advice to the governing and executive bodies of DiSSCo on key project outputs and developments on both, the strategic and the operational planning of DiSSCo during its preparatory phase, to align governmental needs with the RI development and ensure practical participation in the future RI .

2.2 The objective, as described in Section 2.1.6 of the DiSSCo Prepare Grant Agreement, is to ensure the right level of engagement with national representatives and understanding of the communities of practice specificities.

2.3 The Funders Forum shall :

2.3.1 inform on matters related to legal and financial recommendations of DiSSCo RI (i.e. legal form, business model and cost book, governance and financial structures, and legal sitting);

2.3.2 enable DiSSCo to effectively adjust its development to national and international priorities, as they are expressed through national RI roadmaps or national Smart Specialisation Strategies;

2.3.3 facilitate the key stakeholders endorsement of the core implementation and operational principles of the Research Infrastructure.

2.3.4 enable the national representatives to make informed decisions on their future financial commitment to DiSSCo and its relationship with the scientific member institutions.

2.3.5 enable a more consolidated degree of engagement and cooperation between DiSSCo RI and the scientific members institutions.

Article 3: Membership

3.1 Structure of the body

The DiSSCo Funders Forum comprises governmental representatives from countries signatories to the MoU.

3.2 Appointment

3.2.1 National authorities responsible for natural science collections management represented by members or associated members in the DiSSCo General Assembly, as defined in Article 3 and 4 of the General Assembly Terms of Reference, have a right to each appoint up to two members to the Funders Forum.

3.2.2 DiSSCo Coordinator participates ex officio and acts as liaison between the Funders Forum and the GA and other governance and management structures.

3.2.3 The DiSSCo Coordinator shall not be counted in the quorum of the members of the Funders Forum.

3.3 Principles for membership

It is advisable that the governmental representatives in the Funders Forum will meet the following profile characteristics which should not be considered as exhaustive and/or restrictive.

- Sound experience in the research policies, preferably in data-driven and/or environmental related research infrastructures;
- Strong knowledge of the research infrastructure data landscape at national and European level;
- Senior position in government departments, and ministries with direct involvement in decision-making processes.

3.4 Conflict of interest

Nominated Funders Forum members are expected to declare all actual, potential and perceived conflict of interest. Specifically, perceived conflict of interest occurs where it could reasonably be perceived, or give the appearance, that a competing interest could improperly influence the performance of the Funders Forum member. Conflicts of interests are to be declared formally (in written communication) to the Secretariat as soon as they become apparent to the nominated Funders Forum member.

Article 4: Chair

4.1 The Funders Forum shall elect a Chair and a Vice-Chair from among the members during the inaugural meeting.

4.2 Once appointed, a Chair (and Vice-Chair) serves for a duration equal to two years. Mid-term retiring chairs are replaced by the vice-chair for time equal to the remaining time of their original term. Mid-term retiring vice-chairs are not replaced. If no vice-chair is available to replace a mid-term retiring chair, a new chair and vice-chair are appointed through the process described in the beginning of this section.

4.3 The Vice-Chair shall replace the Chair in cases of absence, resignation, inability to act or in cases of conflict of interest. When acting in accordance with this paragraph, the Vice-Chair shall be subject to the provisions of these Rules of Procedure and shall have the same powers and responsibilities as the Chair, until the Funders Forum appoints a new Chair.

4.4 The Chair shall:

- convene the meetings of the Funders Forum;

- determine the place and time of the next meeting following consultation with the Secretariat.
- approve the proposed agenda to be circulated in advance of the meeting, taking account of proposals submitted by the members
- ascertain that the quorum required under Article 34(2.3) is present for the meeting and that the majority required in each vote is met;
- determine the place and time of the next meeting following consultation with the Secretariat.
- approve the proposed agenda to be circulated in advance of the meeting, taking account of proposals submitted by the members;
- open and close the meeting and put forward proposals to advise;
- act on behalf of the Funders Forum and responds to public or consortium enquiries regarding items of Funders Forum business.

Article 5: Rules of participation

5.1 Frequency of the meetings

The Funders Forum will convene twice a year co-located with the DiSSCo Prepare Project Council meetings. Those meetings may take place either physically or remotely. In the latter case, the DiSSCo CSO will ensure adequate access and correct performance of the meeting as to enable all participants to take active part in the meeting.

5.2 Inaugural meeting

The inaugural meeting of the Funders Forum shall be convened by the DiSSCo Coordinator until the Chair is elected.

5.3 Attendance

- 5.3.1** The Chair records attendance and apologies of Funders Forum members.

This information is included in the minutes of each meeting.

- 5.3.2** Funders Forum members failing to attend more than three consecutive regular meetings are requested by the Chair to justify their extended absence and, if necessary, the Chair will communicate to the Secretariat the need for replacement by a new national representative.

- 5.3.3** The meeting shall be quorate if at least 50% of the members are represented at the meeting. If the quorum is not met and the agenda includes items that require a decision making, the Chair shall convene another meeting to discuss these agenda items, following a new invitation, not sooner than 10 calendar days later.

5.4 Decision making process

The Funders Forum members provide expert opinion on matters arising based on their best judgment. The Chair strives to develop an internal consensus on matters. However, in the case of diverging views, the Chair is responsible for recording all expressed opinions on the matters discussed. A consensus view of the Funders Forum on business matters is expected but not required. A simple majority rule applies if the Chair considers that a decision needs to be made.

5.5 Notice of modifications in the delegation

Funders Forum members are expected to inform the Secretariat by written communication (e-mail or letter) of any changes in the composition of the country delegation. The new composition becomes immediately effective, and the Funders Forum members informed. New representatives will be formally invited to the next Funders Forum meeting.

5.6 Order of the business and agenda

5.6.1 Introduced topics

The Funders Forum will inform on matters related to legal and financial recommendations of the preparatory phase (i.e. legal form, business model and cost book, governance and financial structures, etc.);

The agenda for each meeting is defined by the Chair, in consultation with the Secretariat and taking into consideration any other member's suggestions duly communicated. The Secretariat circulates the agenda of the meeting, along with supporting documentation two weeks before the meeting.

5.6.2 Standing topics

New additions to the agenda items can be provided by any member in writing (via an email addressed to Chair with the Secretariat in copy) and circulated accordingly by the member(s) not later than four calendar days prior to the meeting. Further items can be added to the agenda the day of the meeting, following the approval of the Chair.

5.7 Minutes

The minutes are the formal record of the most relevant aspects of the discussion and include a list of recommendations and tasks agreed to follow up during the period until the next meeting.

The Secretariat will prepare and circulate a draft of the minutes of the meeting for the approval of the members within seven (7) working days after the meeting. If the Chair receives no other considerations within ten (10) working days after the distribution, the draft shall be deemed to be approved.

Article 6: Secretariat

The DiSSCo Coordination and Support Office (CSO) will act as Secretariat of the Funders Forum facilitating the organisation of the meetings and the preparation of the agenda and complementary documentation in support to the Chair and Vice-Chair responsibilities and to their request.

The Secretariat provides the necessary access to services, including access to communication and project management services, for the seamless operation of the Funders Forum.

The Secretariat may be called upon by the Chair to contact a country delegation for replacing a current member, should the case be as per 4.3.2 above.

Article 7: Interaction with other DiSSCo bodies/structures

DiSSCo Funders Forum will keep abreast with developments and recommendations of the DiSSCo Scientific Advisory Body (SAB) and DiSSCo Technical Advisory Body (TAB). To that end, periodic reports will be prepared by the DiSSCo Coordination and Support Office and circulated to members. Specific requests are to be channelled through the DiSSCo Coordinator.

Recommendations and reports from the Funders Forum are presented for action to the DiSSCo Prepare Project Council, the DiSSCo Coordination and Support Office and for acknowledgement to the interim General Assembly during its periodic meetings. The Chair of the Funders Forum may participate ad hoc in the interim General Assembly meetings when necessary and based on the agenda items of the meeting.

Article 8: Final provisions

- 8.1** Meetings, documents, notices and procedures of the Funders Forum shall be conducted in the English language.
- 8.2** Members attending meetings shall cover their own costs of participation, with the exception of the travel costs of the Chair's invited experts, which shall be covered by the DiSSCo Prepare budget. No honorarium shall be paid to attendees of the Funders Forum meetings.
- 8.3** Changes or amendments to these Rules of Procedure may be proposed by any member to the Chair of the Funders Forum at any time and be subject to voting.
- 8.4** These Rules of Procedure shall come into effect the day after their adoption by the Funders Forum, and shall come to an end following the successful transition of DiSSCo to the Construction Phase.
- 8.5** Should the Funders Forum decide unanimously to continue, at their own expenses and responsibilities, as an advisory body to facilitate smooth and coherent transition from the Preparatory to the Construction Phase of DiSSCo, a new Rules of Procedure as voted and adopted by this body will be implemented. The DiSSCo Coordination and Support Office will assist the Funders Forum in its extended implementation and its further embedment into the governance model approved for the Construction Phase.

III. Advocacy Strategy in the DiSSCo RI preparatory phase

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1 Introduction

The DiSSCo Research Infrastructure (DiSSCo RI) established an institutions-based governance model during its preparatory phase based on an interim General Assembly confirmed by institutional signatories to the European Memorandum of Understanding. The institutions-based model emphasizes the importance of communities of practice in supporting the new research infrastructure and translates into participation and financial support from institutions and experts from 120 Natural Science Collections (NSC) across Europe.

At the end of the preparatory phase, however, DiSSCo will become a legal entity which implies a new governance model based on strong national political and financial commitments. Essential to achieving this is the need to equip the DiSSCo Research Infrastructure with mechanisms to avoid misalignments with the national scientific priorities and guarantee long-term sustainability in the scientific, technical, governance and financial dimensions.

With this objective in mind, DiSSCo is in the early stages of working towards sound commitments at a national level across 21 countries already engaged with the research infrastructure by implementing collaborative communication and advocacy strategies in multiple dimensions with its national nodes. The commitment of the national authorities to DiSSCo will depend on how early and consistently DiSSCo engages with national interests and how it is perceived as one of the key facilitators of scientific excellence benefiting socio-economic developments as a whole.

To ensure the DiSSCo RI effectively fulfills specific national needs and to customise its message, DiSSCo will establish a new advisory body, the Funders Forum (FF). The FF's objective will be to

keep national authorities informed and prepare them to take over the responsibility of governing the DiSSCo RI once the legal entity is in place.

The advocacy strategy for the Funders Forum (hereafter, the Funders Forum strategy) presented in this document aims to establish a continuous procedure to ensure national authorities actively participate in both the strategic and operational planning of DiSSCo and commit to supporting it during the construction and operational phases. The Funders Forum strategy provides a description of the activities needed to set-up and operate the Funders Forum and the advocacy actions needed during the preparatory and transition phases to guarantee sufficient commitment to the DiSSCo RI construction and operation phases.

2 The Funders Forum Advocacy Strategy

This report will define the audiences, expected changes, principles and actions of the advocacy strategy. The Funders Forum strategy aligns with ongoing efforts carried out by the Communication and Engagement team and provides steps and tools to move further, specifically for the Funders Forum and other governmental advocacy actions.

2.1 The Framework

In an effort to ensure that DiSSCo's interaction with national authorities is constructive and fruitful, the CSO-CE plans to combine communication, dissemination and advocacy actions. The Funders Forum strategy is a piece of and complements DiSSCo's advocacy strategy that also includes engagement with Stakeholders.

Awareness

Ongoing CSO-CE activities are mostly devoted to keeping NNs aware and informed about DiSSCo. Although this audience is already committed to DiSSCo, it is expected that nodes will show

different levels of maturity or readiness. It is also expected that they will not share the same opinions about the research infrastructure nor have a convincing narrative. Therefore, communication tools and NN meetings (as described in DiSSCo's communication and dissemination strategy) have been implemented to keep NNs aware of the importance of their role in the process, and to provide them with communication tools and sound narratives.

Willingness to take action

Keeping the audience well-informed, however, does not automatically ensure their advocacy for the cause. It is also essential that NNs develop a strong opinion and vision justifying why DiSSCo is critical to the RI landscape and should be supported, and be able to proactively advocate for it. It is therefore incumbent upon the CSO-CE to combine communication with advocacy, to instill a sense of need and importance that effectively moves both the nodes and national authorities towards the expected level of commitment.

DiSSCo's communication and dissemination strategy includes tools and clear objectives to empower the NNs narrative when discussing DiSSCo's relevance with national authorities. Furthermore, three-layered communication between DiSSCo, the institutions and national authorities will complement the flow of information needed for other communication modes such as the website, thematic workshops, and international fora and will serve as a resource for advocacy strategy, including the Funders Forum strategy. Sustained communications will also build on trust among individuals engaged in the DiSSCo mission and ensure transparency of national nodes.

The advocacy strategy for the Funders Forum establishes cooperation between the DiSSCo CSO,

DiSSCo NNs and Funders Forum representatives with a twofold objective: (1) to build tailored advocacy strategies at the national level that foster national commitments for the operation of DiSSCo and (2) to help shape the strategic and organisational developments of the research infrastructure during its preparatory phase. Activities will be spread over two phases in a time period of approximately four years when the legal entity will be in place. This document is considered a working document to be updated whenever necessary. The timeline (Annex 1) covers till the end of 2021.

Set up and operation of the Funders Forum (FF) and the Stakeholders Forum (SF)

The Funders Forum advisory body will constitute a key body in the overall government of DiSSCo. Its input will ensure the appropriate level of national funder engagement and allow DiSSCo to adjust according to (changing) national and international priorities.

Simultaneously, DiSSCo Prepare, the preparatory phase project, will similarly include the formation of a Stakeholders Forum. The Stakeholders Forum will be a forum for discussion and interaction among all related stakeholders, including RIs. It will provide critical feedback in the overall decision-making process across the five dimensions of implementation readiness of the infrastructure: science, data, finance, technology, and organization.

2.2 Audiences

Two audiences are identified as subjects of the advocacy actions as either main actors and/or target audiences are

- DiSSCo national nodes (NNs¹),
- National authorities responsible for NSCs, ESFRI representatives, and/or Research Infrastructures.

¹ NN may be a national consortium of signatories of the DiSSCo European MoU, or natural science collection-based organisations from countries where a node has not been formed yet.

National authority representatives with major roles in decision-making processes will be the final target audience while the NNs play an essential role through the entire process of engagement. NNs will participate in defining the advocacy strategy (Phase 1) and act as DiSSCo ambassadors at national level (Phases 1-2).

2.3 Objectives (Changes)

The Funders Forum strategy's main objective is to obtain national commitment to DiSSCo's construction and operation phases. This should be a long-term financial and political commitment based on DiSSCo's position as a large-scale research infrastructure of European and national interest.

Interim objectives

It is essential that DiSSCo works collaboratively with target audiences in defining interim objectives not only to tailor them to meet national needs but also to accommodate changing circumstances. Collaborating on interim objectives may avoid the unfair perception that the strategy failed at a certain moment if the objective is not fully achieved within a certain timeframe. Furthermore, interim objectives can be tracked to determine where adjustments might be necessary. Some possible interim objectives may include: stronger coalitions among institutions without a formed node, increased communication coverage (media coverage), increased advocacy capacity (e.g. DiSSCo champions), better monitoring tools for national roadmap developments, etc.

2.4 Mode of operation - A strategy in two phases

Implementing the Funders Forum advocacy strategy will consist of two consecutive phases with different objectives, modes of operation, and use of resources.

2.4.1 Phase 1

Timeframe: July 2020 - February 2021

Objective: To create the Funders Forum (once approved by DiSSCo GA) and organise its inaugural meeting in early 2021 with sufficient representation.

Lead: The CSO team with the support of interested node representatives from institutions and national authorities.

Target audiences: Both, NNs, and national authorities.

Advocacy activities (see Annex 1 Gantt chart of activities)

Advocacy strategy activities are predicated upon continuous collaboration with the NNs and their alignment with the communication and dissemination activities carried out by DiSSCo CSO-CE.

2.4.1.1 Identifying the final target audience

National authorities responsible for NSC, ESFRI delegates and/or research infrastructures represent the main target audience in the policy process. The backing and endorsement of senior representatives with an active role in decision-making is essential to obtaining national funding commitments.

The CSO-CE has recently initiated activities aimed at customizing DiSSCo's messaging to senior decision-makers. It has disseminated two questionnaires to NNs with the objective to gather accurate information on national priorities to enable the positioning of DiSSCo and DiSSCo nodes towards the targeted audience (national authorities).

Activity: Analysis of the information provided by the NNs will inform preparations for the communication campaign to be launched in September 2020 and the calendar of bilateral meetings.

Tools: Analysis of NN questionnaire responses, NNs meetings, other communication tools.

Lead: CSO-CE

2.4.1.2 Identify underlying assumptions and beliefs

Designing an advocacy strategy requires one to have an in-depth knowledge of how the policy making process works at a national level and the best way to approach it. In addition, one needs to understand the perception of DiSSCo by both the NNs and national authorities. It will be essential in early discussions with NNs to identify competing or misaligned assumptions about DiSSCo's services, position in the RI landscape, or its processes. This will help the NNs in developing and customizing their own advocacy strategies.

Activity: Through analysis of NN questionnaire responses and bilateral meetings (or regional meetings as a first stage), the NNs together with the CSO will collaboratively define assumptions that fit their national reality.

Tools: Analysis of NN questionnaire responses, key messages from the communication campaign, calendar of bilateral/regional meetings.

Lead: CSO-CE

2.4.1.3 Identifying common practices

In shaping the communication campaign, the next step is identifying common practices among countries. For instance, regions may share commonalities in their modes of administrative operation (e.g., South-Europe or among the Scandinavian countries).

Activity: Based on the answers from the questionnaires, the CSO-CE will establish a matrix of different readiness levels across the NNs. That matrix will serve as a basis for establishing current readiness levels, best practices and actions to enhance the capacity of the NNs in their communication with their national authorities. Thematic workshops targeting specific audiences can be organised.

Tools: Analysis of NN questionnaire responses, key messages from the 1st communication campaign, bilateral/regional meetings & workshops.

Lead: CSO-CE

2.4.1.4 Tailoring advocacy strategies (including a contingency plan)

The core of the advocacy strategy is to use narratives that speak to specific national priorities and these will be developed in collaboration with the NNs and interested national authorities.

Activity: To this end, the first communication campaign (between DiSSCo, the institutions and national authorities) to be launched in September 2020, will be the starting point. Key messages together with the analysis of national readiness levels will support the definition of customized national advocacy actions through a calendar of bilateral consultations (End September-November 2020). Also a contingency plan will be developed in close collaboration with the NNs.

Tools: The Funders Forum information package, analysis of NN questionnaire responses, key messages from the communication campaign, calendar of bilateral meetings, thematic workshops, identification of interim objectives.

Lead: CSO-CE

2.4.1.5 Shaping the Funders Forum advisory body

Establishing the Funders Forum is a unique exercise in engaging national authorities to advise on RI development while simultaneously keeping the project rooted in institutional support and the actors leading the initiative. This exceptional balance requires an in-depth understanding of the role of the Funders Forum as a precursor to the country-based RI governance model and therefore requires the input of future responsible individuals as early as possible. Participation and engagement of the national authorities relies heavily on this understanding.

Activities: It is important that the national authorities understand and participate in shaping the role and function of the advisory body. To this end, the CSO-CE has produced an initial Funders Forum information package including a draft of the Funders Forum Rules of Procedure. This package provides a comprehensive view of the roles and responsibilities of the advisory body and will serve as the CSO's basis for communication with the targeted audiences starting with the NNs. Comments and suggestions will lead to a final information package that will then be discussed with the national authorities of the twenty-one countries in DiSSCo in a second round of bilateral meetings.

Tools: Funders Forum information package, NNs meetings, NNs comments on the information package, calendar of bilateral meetings.

Lead: CSO

The case of The Netherlands

The Netherlands, as the hosting country of DiSSCo during its preparatory phase, provides significant political and financial support through Naturalis Biodiversity Center. Early in the preparatory phase representatives of the Ministry of Education, Culture and Science manifested interest in following the progress of and participating in development of certain documents for the Funders Forum. This has provided an excellent opportunity to strengthen collaboration with the hosting country and set up a model of cooperation that will be applied to other countries.

Therefore, the CSO will share with the Ministry, the Funders Forum information package also containing a report framing the rationale of the current governance model of the Funders Forum together with the Rules of Procedure.

2.4.1.6 Coordination with the Stakeholders Forum

The perception of the DiSSCo RI at a national level is directly influenced by how DiSSCo and other RIs and initiatives cooperate to foster socio-economic resilience and how synergies translate into wiser investments of resources and policies management. Currently, DiSSCo actively participates in discussions in the research and technical domains at both the European and international levels and works collaboratively with several RIs and other data-driven initiatives.

To consolidate and continue these activities, DiSSCo plans a broad consultation across the preparatory phase that will be driven by a Stakeholders Forum. The objective will be for stakeholders to provide critical feedback in the overall decision-making process of the preparatory phase across the readiness dimensions of the infrastructure. This feedback will be integrated and duly considered in coordination with the Funder's Forum input.

Activities: The Chairs of both the Funders Forum and Stakeholders Forum will be invited regularly to attend the meetings of both bodies. It is foreseen that they will report on certain common issues.

Lead: CSO

2.4.2 Phase 2

Timeframe: March 2021 -

establishment of DiSSCo legal entity

Twofold objective: (1) to expand the number of participants in the body and therefore, DiSSCo's role in national roadmaps, and (2) to start bilateral agreements with national authorities for political and financial support to the DiSSCo RI.

Lead: The CSO together with the support of the national DiSSCo nodes.

Targeted audience: National authorities participating in the Funders Forum.

Advocacy activities (see Annex 1)

2.4.2.1 Bi-annual Funders Forum meetings

The Funders Forum will meet twice per year on a regular basis to advise and report on strategic and organisational planning during the preparatory phase. Reports will be conveyed by the CSO to the DiSSCo General Assembly for acknowledgement and will trigger action for the CSO and the DiSSCo Prepare Project Council.

The Funders Forum meetings may take place in a way that optimizes alignment with the Scientific and Technical Advisory Boards and the Stakeholders Forum. The latter plays a key role motivating national engagement. DiSSCo's alignment with other RIs and international initiatives will show how cooperation among RIs boost cost-effective national investments while delivering scientific excellence benefiting society.

Lead: CSO

2.4.2.2 Monitoring progress through periodic bilateral meetings

The calendar of bilateral meetings is expected to involve changing actors and topics. These meetings guarantee a continuous collaborative mode of operation and fluent communication and are an effective tool to monitor the readiness and willingness of the countries to join.

Lead: CSO.

2.4.2.3 Preparation of agreements with national authorities

Bilateral agreements between DiSSCo RI's new legal entity and the national authority will guarantee a commitment for at least 3 years, to financially and politically support the construction and operation phases of the RI.

Lead: CSO. It may be necessary to engage external legal advice.



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