Research Data Alliance (RDA) Plenary Meeting Guidelines.V26

Researchers and innovators openly share and re-use data across technologies, disciplines, and countries to address the grand challenges of society

www.rd-alliance.org

The RDA Plenary meeting is the twice-annual meeting where the members[1] of the RDA meet to discuss possible new topics, hold working and interest group meetings, and to conduct RDA business. These plenary meetings serve as important milestones in the life of the RDA's working (WG) and interest groups (IG), especially in terms of achievements and outputs. Furthermore, the RDA coordination groups such as the Council, RDA Funders Forum (FF), Technical Advisory Board (TAB), Regional Advisory Board (RA), Organisational Advisory Board (OA), Secretariat and other RDA committees also take advantage of these face-to-face and virtual opportunities to interact with members on the current state, progress, achievements, and future plans.

TABLE OF CONTENTS

---

[1] https://rd-alliance.org/about-rda/who-rda.html

1   Global and Inclusive

The Research Data Alliance vision is "*Researchers and innovators openly share and re-use data across technologies, disciplines, and countries to address the grand challenges of society*" and the mission to achieve this vision is "*building the social and technical bridges that enable open sharing and re-use of data.*" As a global and inclusive community, RDA operates according to six fundamental guiding principles of Openness, Consensus, Inclusivity, Harmonization, Community-driven and Non-profit and technology-neutral[2]. RDA believes very strongly in equal gender representation for panels and keynotes, and aims to ensure diversity of participation. Economically reasonable steps will be taken to facilitate participation from Lower and Middle Income Countries (LMICs), both virtually and in-person. A good practice code of conduct will be prepared by the organisers.

2   Plenary Meeting Overview

Hosting an RDA Plenary Meeting is a possibility for any country/region/organisation and selection of region and venue is based on a bidding procedure. The meetings are held twice a year, one hybrid event in a different place around the world and one completely virtual. Plenary meetings are usually held in March-April and in September-November and cover a 3 day programme (ideally (but not necessarily). he main Plenary meeting programme (Plenary sessions with keynote speakers, breakout sessions) begin on a Tuesday & finishing on a Thursday) with a possibility to hold co-located events and coordination meetings organised before the plenary. Growth in terms of the number of delegates since the first plenary indicates that participation levels are around 500 delegates from 40 countries.

Meeting	Date	Venue	Hosted / Supported by	Delegates
Plenary 1	18-20 March 2013	Goteborg, Sweden	RDA Europe	241
Plenary 2	16-18 September 2013	Washington DC, US	RDA US	364
Plenary 3	26-28 March 2014	Dublin, Ireland	ANDS, DRI	497
Plenary 4	22-24 September 2014	Amsterdam, Netherlands	RDA Europe	555
Plenary 5	9-11 March 2015	San Diego. US	RDA US	395

---

[2] https://www.rd-alliance.org/about-rda

Meeting	Date	Venue	Hosted / Supported by	Delegates
Plenary 6	23-25 September 2015	Paris, France	RDA Europe	679
Plenary 7	29 Feb – 3 March 2016	Tokyo, Japan	RDA Japan	360
Plenary 8	15-17 September 2016	Denver (CO) US	RDA US (IDW)	580
Plenary 9	5-7 April 2017	Barcelona, Spain	Barcelona Supercomputing Center, RDA Europe	620
Plenary 10	19-21 September 2017	Montréal, Canada	Research Data Canada & Université di Montréal	430
Plenary 11	21-23 March 2018	Berlin, Germany	German Research organisations, RDA Europe	660
Plenary 12	5-8 November 2018	Gaborone, Botswana	International Data Week organised with CODATA & WDS	840
Plenary 13	2-4 April 2019	Philadelphia, US	RDA US / North America	445
Plenary 14	23-25 October 2019	Helsinki, Finland	Research Data Alliance Europe, CSC - IT Centre for Science, Aalto University, University of Helsinki, Federation of Finnish Learned Societies, and Finnish Meteorological Institute.	571
Plenary 15 Virtual	18-20 March 2020	(Melbourne, Australia), Virtual	Commonwealth Scientific and Industrial Research Organisation (CSIRO) and the Australian Research Data Commons (ARDC), Research Data Alliance Europe	2170
Plenary 16 Virtual	09-12 November 2020	(Costa Rica), Virtual	Research Data Alliance Europe, Consejo Nacional de Rectores (CONARE), Research Data Alliance - US and CANARIE	697
Plenary 17 Virtual	20-23 April 2021	(Edinburgh, UK), Virtual	Research Data Alliance Europe, The Digital Curation Centre in collaboration with Jisc and UKRI .	829

Meeting	Date	Venue	Hosted / Supported by	Delegates
Plenary 18 Virtual	03-11 November 2021	Virtual	Research Data Alliance Secretariat	626
Plenary 19 Hybrid (a part of IDW 2022)	20-23 June 2022	Seoul, Republic of Korea & Online	Local hosts (KISTI), International Science Council's Committee on Data (CODATA) and World Data System (WDS), and the Research Data Alliance (RDA)	827 (182 onsite & 645 online)
Plenary 20 Hybrid	21-23 March 2023	Gothenburg, Sweden & Online	Research Data Alliance Secretariat, Chalmers University of Technology, Chalmers e-Commons, and the University of Gothenburg, Swedish National Data Service (SND)	719 (489 onsite & 230 online)
Plenary 21 Hybrid (a part of IDW 2023)	23-26 October 2023	Salzburg, Austria & Online	Local hosts University of Salzburg, the Governor of Salzburg and Austrian Academy of Sciences - GIScience + International Science Council's Committee on Data (CODATA) and World Data System (WDS), and the Research Data Alliance	834 (702 onsite and 132 online)
Plenary 22, Virtual	14-23 May 2024	Virtual	Research Data Alliance Secretariat	511

Confirmed schedule for future plenaries:

Meeting	Date	Venue	Hosted / Supported by
Plenary 23, Hybrid	12-14 November 2024	San Jose, Costa Rica & Online	Research Data Alliance Secretariat, CONARE, Universidad de Costa Rica (UCR), Tecnológico de Costa Rica (TEC), Universidad Nacional (UNA), Universidad Estatal a Distancia (UNED), Universidad Técnica Nacional (UTN)
IDW2025	13-16 October 2025	Brisbane, Australia	Australian Research Data Commons (ARDC), International Science Council's Committee on Data (CODATA), World Data System (WDS), and the Research Data Alliance (RDA)
IDW2027	September 2027	Cape Town, South Africa	International Science Council's Committee on Data (CODATA), World Data System (WDS), and the Research Data Alliance (RDA)

3 Dates

RDA plenaries are typically organised in March/April & September/October each year. It is important to try to avoid local public as well as religious holidays as much as possible.

4 Tender Submission Procedure

Tenders are invited from organisations, agencies and countries worldwide. Bids, where relevant and feasible, should be prepared in agreement with the RDA Regional representative and have support from leading organisations in the region together with demonstrated connection with RDA.

5 Plenary Meeting Organisational Structure

5.1 Plenary Meeting Committees

The local host may choose what committees to set up, i.e. Programme Committee (PC), Organising Committee (OC), etc. At least one representative from each of the RDA Coordination groups must be included in these committees.

5.2 RDA Coordination Group involvement

The RDA Secretariat provides communications, web and organisational support for the plenary meetings and Irina Hope[3], RDA's Global Events Manager, is the official Secretariat Liaison for all Plenary Meetings and should be an official member & co-chair of the Organising (OC) & Programme Committees (PC). RDA also recommends that the PC chair or another member of the PC from the previous & future (if already identified) plenary meeting be involved in the PC.

5.3 Plenary Programme & Scheduling

The Plenary Meeting programme, while the responsibility of the Programme Committee, should include a series of RDA organisational presentations and should be circulated to the RDA Secretariat and TAB for feedback and discussion before being made public. Each day should have at least 1 plenary session for a duration of 90 – 120 minutes and scheduling should allow for different plenary presentations, including but not limited to:

- Welcome addresses Local, regional and / or national dignitaries, government representatives or local hosts with addresses lasting 10 minutes' maximum each;
- Keynote presentations with scientific or socio economic focus of relevance to RDA (maximum 2) lasting at the very most 45 minutes including Q&A;
- RDA recommendation, output & adoption highlights / demos (number and duration based on recommendations being showcased at the time of the plenary in question);
- RDA Business: report to members from Secretariat, TAB, OAB & Council (30-45 minutes)
- Joint WG / IG plenary sessions (45-60 minutes) the definition of those will be part of the breakout programme proposed and managed by the Secretariat & TAB;

---

[3] Irina Hope – Irina.Hope[at]rda-foundation.org

- RDA funder / policy panel (45 minutes) focusing on RDA regional government representation;
- Future plenary announcements (10 minutes per plenary) & Closing remarks (15 minutes) in the Final closing Plenary session.

5.4   Plenary Structure

Local organisers are encouraged to propose new and innovative structures of the plenary meetings; the results from the previous meeting's survey should be analysed to understand if there were specific requests from the participants. Ample time and space should also be considered for the Communities of Practice, Working and Interest group and Birds of a Feather meetings as well as the joint group sessions. One area where RDA has been experimenting is in having an unconference as part of the Plenary. This was trialled at Plenary 13 as a 3 hour add-on after the end of the Plenary, and integrated into the Plenary 14 program.

5.5   Poster Areas

Poster sessions for RDA Communities of Practice, Working Groups, Interest Groups, and Birds of a Feather as well as RDA support programmes and associated initiatives should be organised over the course of the meeting. At least 50 poster spaces should be made available during the in-person meeting and must be located in an area where catering is served to ensure visibility. RDA strongly encourages the local hosts to incorporate the poster session into a social / networking event organised at the conference venue over the course of the plenary meeting.

Virtual poster session was scheduled during the past virtual Plenaries with a poor outcome. Virtual poster sessions take a lot of planning resources with very little benefit to all. Networking within a virtual environment is challenging, therefore, fully virtual posters are not considered.

5.6   Exhibition / Demo Stands

Facilities for exhibition and / or demonstration stands are welcome and can be offered by the host as a benefit to sponsoring organisations or opened as a call to RDA members to demonstrate the working group outputs or other related initiatives. These stands should be in a central location at the meeting.

5.7   Networking Opportunities

Opportunities for plenary participants to network in informal and social surroundings must be included in the planning of the meeting. This includes pre-dinner cocktails, entertainment, dinners, breakfast meetings in addition to the coffee and lunch breaks.

5.8   Participant Communication

RDA will use Whova platform as a moderated mailing list to communicate with the confirmed (registered and paid) participants in advance of the event. The list is managed by the RDA Secretariat. Whova should be published for a minimum of 2 months prior to the plenary and access granted during the registration process.

6   Venue & Facilities

6.1 Venue

The plenary meeting venue should normally have a capacity of between 500 to 800 participants, be in an accessible location, well connected to the local transport system and have an international airport with excellent global connections within a short distance.

6.2 Accessibility

All venues should cater for participants with reduced mobility, requiring wheelchair access. Any eventual caveats to smooth accessibility (use of different access points, limitation on meeting room access, etc.) should be communicated to the Plenary OC in order to facilitate access to participants with reduced mobility.

6.3 Facilities

As a minimum, the venue should offer room facilities for:

- A large plenary (600–800 participants).
- Between 9-12 parallel breakout meeting rooms of varied sizes (35–50 and 50–150 participants per meeting).
- A registration area, poster and exhibition/demonstration areas, and catering/networking facilities (as described above). Where possible, venues with central networking areas are strongly preferred since they offer participants an opportunity to meet and interact.
- 1 staff room (10 people) with table and chairs
- For the RDA pre- and post-Plenary management meetings, please refer to **6.7 RDA pre- & post- Plenary meeting rooms**

Each room should be set in a theatre style)chairs in rows) except where specified otherwise. Each venue room should have audio–visual equipment as detailed in section **7.1. Audio–visual Equipment**

6.4 Virtual meeting facilities

To guarantee a seamless virtual experience, a professional virtual event platform[4] should be made available with the following facilities and functionalities:

Online Networking facilities including:

- Capacity for 10-12 parallel session
- Capacity for 'breakout rooms' in sessions
- Customizable matchmaking categories
- Filtering for attendees to find and contact other attendees (physically or virtually present)
- Ability for attendees to schedule meetings
- Ability to schedule meeting with multiple attendees
- Ability for attendees to move to different sessions
- Ability for attendees to see who is attending sessions

---

[4] RDA has conducted an in-depth analysis of the virtual meeting facilities available. Since VP17 RDA has successfully used Whova [hu:va] and has direct relations with their Sales team.

- Always-on social meeting space for breaks

Content features should include the following functionalities:

- Mobile-device friendly virtual conference platform, including programme and access to virtual meeting rooms
- Schedule, speakers, session descriptions
- Time zone widgets
- Session bookmarks by attendees and speakers
- Sync events with personal calendar
- Identify tracks/themes to sessions
- Interactive tools next to live streamed sessions, for example, live chat, Q&As, polls
- On-demand sessions
- Multiple simultaneous parallel sessions
- Panel discussions
- Speaker website
- Facility to apply an attendance limit to parallel sessions
- Backstage area for speakers to convene
- Embedded content on demand or live video into schedule
- Livestream session, recording and editing of all sessions
- Migration of content to RDA "institutional" website post event

Virtual Poster and Exhibition sessions

- Interactive e-Poster Session with live interaction and Q&A
- Virtual exhibition booths

Sponsor Areas

- Profile pages with ability to add video
- Traffic analytics
- Ability to list representatives
- Ability to schedule meetings
- Interactive chat
- Sponsor ads
- Ability to create breakouts within sessions

Customer service & Other

- Single sign on and integrated registration and payment facilities
- Publication of searchable attendee lists (respecting international privacy laws)
- Dedicated service manager
- Availability of technicians and support staff for all live meetings and posters / exhibits throughout the event
- Kickoff call, timeline, promotion

- Project management and task tracking functionality
- Event Branding
- Monitoring of users
- Consent of personal data and ability to link out to privacy policy
- Analytics and data access for organising representatives
- Direct email and multiple (physical vs. virtual) mailing list generation
- Announcement tools (pre, during and post event)

6.5   Catering

The hosts should, as a minimum requirement, factor in morning & afternoon coffee breaks with hot beverage, snacks and still (tap) water (as a minimum), lunches for all days of the main Plenary meeting dates and at least one social event (cocktail or dinner according to budget possibilities). Desirable additional catering services are breakfast, all day coffee and water stations, further networking options (cocktails, dinners, parties, etc.).

During registration participants are invited to indicate any eventual special dietary requirements e.g. vegetarian, vegan, gluten-free, lactose-free, nut allergies, etc., local caterers will be provided with a list of these dietary requirements. Special dietary requirement stations or distribution points during the catering should be set up. Ideally all ingredients should be clearly listed beside the food being served.

6.5.1   Social Dinner & Networking Reception

Local organisers should organise the social "dinner" and reception and both events must be able to accommodate all participants. Fees to subsidise the cost of organising the social events may be charged in addition to the registration fee (see section 9.3.8). Where possible, the social "dinner" should be a networking event where people can mingle and network, therefore a buffet / semi-seated set up is encouraged.

6.6   Co-located Events

Hosts are encouraged to support the organisation of collocated events around (but not in conjunction with) the RDA plenary meeting and agree an appropriate financial support model (commission fee for organisation, facilitating organisation at no extra cost to organisers, etc.) directly. Co-located events should be of direct relevance to RDA and all co-located events should be discussed and approved by the Programme Committee before official acceptance. Priority should be given to relevant applications from plenary host organisations, RDA organisational members and RDA affiliates.

6.7   RDA pre- & post- Plenary meeting rooms

As part of the bid, local hosts should include the costs for rooms and catering services to cover the following meetings which are organised before or after the Plenary meeting:

Meeting	Duration	Approx Participants	Catering required	Pre / Post-main Plenary dates
RDA Council	1 full day	20 - 25	Coffee & lunch	Pre
RDA Funders Forum	4-5 hours, morning or afternoon	50	Coffee & lunch / reception	Pre
RDA Secretariat	1 full day	15	Coffee & lunch	Pre / Post
RDA TAB & WG / IG Chairs	4 hours	100+	Coffee	Pre
RDA for Newcomers	2-3 hours	100 - 200	Coffee / cocktail (if feasible)	Pre
RDA OA & OAB meeting	2-3 hours	65	Coffee	Post (usually PM directly after Plenary meeting finishes)
RDA TAB Debrief	4 hours	20	Lunch & Coffee	Post (usually PM directly after Plenary meeting finishes)

Any other RDA "business" meetings are an integral part of the breakout session programme and are managed by the Secretariat & TAB.

7 Capacity for Hybrid Format and Remote Participation, Audio-Visual Support

7.1 Audio–visual Equipment

The Plenary room must be equipped with a projector, large screens, a sound system for up to eight speakers on a panel, a lectern equipped with microphone, a laptop and laser pointer, and wireless microphones. Parallel breakout rooms must be equipped with projectors, screens, and sound systems as needed and according to the size of the room. All rooms should be broadcasting to the online virtual event platform and facilities for interactive participation of both physical and virtual attendees should be available.

7.2 Remote Participation Specifications

The remote participation should be configured in such a way that it does not interfere with the RDA Plenary Meeting event [WiFi network (Section 7.3)](#).

Local organisers must facilitate the remote participation of attendees to the parallel RDA sessions. An appropriate online meeting platform, as outlined in **section 6.4**, should be made available. From an audio viewpoint, all sessions should be linked directly to the audio system such that the quality is clear. All speakers and participants should have access to a microphone when they speak to ensure virtual attendees are involved and receive clear audio.

The local organisers must ensure that the following equipment is available in the physical meeting rooms to provide as interactive, immersive, and user-friendly virtual experience as possible:

- A laptop/personal computer from which the session can be broadcast by the physical participants.
- Screens broadcasting the virtual platform meeting attendees and their interactive tools
- Laptop / computer for physical speaker presentation
- An audio–visual system to which the broadcasting laptop/personal computer can be connected offering excellent audio quality.
- Hands-free microphones for speakers and participants to use at all times.
- A well-positioned video camera that captures the meeting room and the participants.

7.3 WiFi

A stable, reliable, and robust Internet service is required. It should have multiple access points, be able to support at least two devices per participant, and coverage should be throughout all conference facilities/venues.

7.3.1 Basic technical assumptions[5]

The number of physical attendees/participants at RDA is estimated to be 500. It is very common nowadays that the number of wireless devices is not one-to-one; that is, one wireless device for one individual. In most cases, there are three wireless devices per participant: one primary device, such as a netbook or laptop; one tablet; and one smartphone (iPhone, Android-based, Windows OS, etc.).

It is anticipated that not all participants will carry three devices, but the majority will carry at least two. These assumptions raise the number of distinct wireless devices distinguished by different MAC addresses to approximately 2400 devices (i.e., 800 x 3). Out of this potential number of 2400 wireless devices, 70%–80% of users are estimated to have their WiFi switched on, and no more than 50% of these devices will be active at the same time (smartphones usually have a timeout for their wireless after which they shutdown). Therefore:

800 attendees * 3 Wireless Devices/attendee = 2400 * 0.75 = 1800 * 0.5 = c.900 concurrent devices.

The requirement for the Minimum Acceptable per Connection Bandwidth (BW) is 1 Mbps per device; therefore, 0.9 Gbps will be the total bandwidth consumed if all connected devices are consuming the

---

[5] *Source: GRNET S.A.*

bandwidth simultaneously. In addition to this bandwidth, we should add an extra 100 Mbps of traffic generated by specific exhibitors that will be sharing hidden SSID(s). In general, the wireless devices will be 'scattered' in the venue.

Assuming a mixed pattern of 802.11g and 802.11a clients, a cell yields an aggregate throughput of 25 Mbps of bandwidth per radio approximately. As each of the Access Points used will support dual radios, a number of 40 devices per AP will be supported for the average aggregate 1 Mbps per client throughput. Taking under consideration the fact that frequency reuse will be active, the number of concurrent devices in a given location will be multiplied by the number of APs deployed in the specific location.

For each WiFi cell that will be created, the following stands true:

- All cells will be mixed service cells, as they will be servicing both 11n clients and legacy 11a/g clients. This mixture is not optimal, but it is the only way to serve both legacy devices and 11n devices together.
- In the same way, 11b client devices will not be supported since the throughput will suffer significantly with the presence of old 11b clients.
- For 11n clients, the channel bandwidth will be kept to 20 MHz instead of 40 MHz in order to be able to reuse more WiFi channels in both the 2.4 GHz and the 5 GHz band.

7.4 Power

Multiple power points and charging stations should be available in all meeting rooms, networking areas and plenary meeting facilities. Provision of power boards and extension leads is highly recommended.

8   Branding, Communications & Media

The plenary meeting main organiser is RDA with the *support of* and *co-organisation of* by other organisations and all communications should clearly indicate all organisers and supporters. Communications about the plenary meeting must include the RDA logo, links to both the RDA web site and plenary meeting pages and where appropriate state clearly the RDA mission statement and / or vision:

> **VISION**: *"Researchers and innovators openly share and re-use data across technologies, disciplines, and countries to address the grand challenges of society".*

> **MISSION**: *"RDA rapidly builds the social and technical bridges that enable open sharing and re-use of data."*

8.1   RDA Branded Material

RDA will supply branded RDA pop-up / roll-up banners, flyers and posters to be used at the event. Support and contributions on the promotional texts, articles, and news pieces will be provided by the RDA secretariat.

8.2   Event Branding

RDA will support the hosts in defining a brand image for the meeting to be used in all promotional material leading up to the event and during the plenary itself. This includes a logo, PowerPoint template, flyer and poster design. The design should be included on the badge, programme and any other material produced for distribution at the meeting.

8.3   Delegate Packs

Hosts should cover the costs of documentation for the delegates, including badges, lanyards and hand-outs. To keep paper to a minimum, RDA plenary meetings provide a badge, holder, lanyard and printed programme outline (supplied in the badge) to each delegate and the costs should be covered in the budget. Hosts are free to provide delegate bags, notepads, pens, USB keys and other items that are sponsored directly or paid for from surplus budget. The cost of these items should not be included in the event budget. Virtual delegate packages that include sponsor, exhibition, programme and poster materials are welcomed, but care should be taken to ensure that the contents of delegate bags are ethical, environmentally friendly and useful, rather than throwaway items.

8.4   Other Documents

Chair documents for the plenary sessions including the speaker line-up, presentation details, bios and other relevant information should be prepared and distributed to the plenary chairs prior to the event in electronic form and at the start of the event in paper form.

8.5   Signage

Posters, logos, lectern signs, breakout room signs, plenary speaker name places, daily programme signs and posters, etc. should be produced by the hosts. All signage should be of adequate size and visibility in the venue.

8.6   Press & Media Partnerships

Hosts are encouraged to arrange partnerships with local, national and international press and media to cover the meeting. Press packs and press conferences can be organised in close collaboration with RDA Secretariat & Communications Liaison[6]. Press briefings and releases are prepared by RDA.

8.7   Social Media

Dynamic and innovative ways of leveraging social media coverage of the meeting is encouraged, for example twitter walls, slide share presentations, social media curation, etc. Engaging with local universities or colleges with Social Media study programmes is a good way to identify volunteers to work on this activity as part of their course work. RDA has its own social media accounts that are managed directly by RDA Secretariat & Communications staff.

9   Registration processes and finances

The local organisers accept complete financial responsibility for the event costs. Costs are offset by partnerships with pertinent local organisations, registration fees, and by sponsorship. RDA will

---

[6] https://www.rd-alliance.org/groups/rda-secretariat.html

provide organisational support, mainly through their PC and OC representatives. For the purposes of tracking, analysis, and future planning, the founding organisations should have access to the overall budget file and the final version should be provided post-RDA plenary meeting for their records.

9.1 Memorandum of Understanding and Financial Responsibility

The local organisers behind the winning bid will be required to sign a Memorandum of Understanding (MoU) with RDA Foundation. **The MoU will specify that sole financial responsibility is taken by the local organisations for RDA Plenary Meeting.** RDA undertakes to make all best efforts to raise sponsorship, assist in obtaining governmental support, and promote the event. **However, it will not financially underwrite any shortfall in the event budget.**

The RDA web platform (rd-alliance.org) provides all the facilities needed to manage registrations (except the payment gateway – see below). Registration fee management and on-line payment is covered under the [financial section 9.3](#). Use of an external web site is not permitted for the following reasons:

1. RDA plenary meetings are for members and therefore all participants register as members to RDA and accept the guiding principles[7] in the event of an external system being used then some mechanism for having the participants who are not already members sign up should be put in place
2. RDA Plenary meetings give web traffic & visibility and many of the WGs & IGs work directly on the web platform during the event, moving participants between 2 separate web platforms would be confusing
3. RDA Plenary meetings should create awareness, engagement & visibility to RDA via the web platform
4. the RDA web platform provides real time participant lists on-line, statistics for analysing participation to tracks, social events etc. and has the added value of not asking registered members to complete their contact data once again

The web support team[8] will provide all assistance to create, maintain and manage the plenary meeting content on the web site.

9.2 RDA Plenary Registration Database

To facilitate management of the meeting and registration fee tracking, RDA as Data Controller (Trust-IT as data processor) must abide by certain data privacy conditions under the GDPR. When people register to both the RDA platform and the event the use and management of their contact details must be clear and respect EU[9] and local legislation. Therefore, details shared with plenary committees must agree to NOT reusing the contact details circulated for any other activity and must

---

[7] https://www.rd-alliance.org/get-involved.html
[8] secretariat[at]rda-foundation.org
[9] RDA web site content and contact details are stored in data centres located in Europe.

agree not to share the database with others. The participant list, including Name, Surname, Organisation & Country is published on the RDA web site once 100+ registrations are reached and can be used as a reference for providing information on participants.

9.3 Registration Fees

Conference costs should be covered by a combination of registration fees, sponsorship, and support from the local organisations, government, and so on. **It is a significant responsibility of the local organiser and partners to obtain governmental and sponsorship support**.

Registration fees should be set at a rate that the market can bear and that is appropriate for the community. The founding organisations suggest that a base registration fee in the range of 500–800 EUR is appropriate for onsite participants, and 150–250 EUR for online participants. There should be a reduction for participants from Low and Middle Income Countries (LMICs) and for students (Sections 9.3.2 and 9.3.3). A late registration fee (no earlier than four weeks before the event) increase of up to 25% of the Early Bird rate, and an 'on the day' registration fee increase of up to 60% of the Early Bird rate for those joining once the event has started, may be charged to cover extra administrative costs.

The registration must remain open throughout the Plenary days.

A cancellation policy should be clearly defined and implemented when registration is launched, with the terms of the policy agreed upon in advance with the founding organisations. Local organisers may, if deemed suitable, charge an extra fee to cover the social reception/dinner costs (Section 7.3.8).

9.3.1 Previous RDA plenary Fees

The table below gives an overview of the previous registration fees charged. They should be used as indicative figures only. RDA strives to maintain a low registration fee for members to attend as they already invest considerable effort & travel resources.

	Venue	Currency	Early Bird	Full Fee	On-site
P1	Goteborg, Sweden	Euro	€ -	€ -	€ -
P2	Washington DC, US	USD	$ 100.00	$ 100.00	$ 100.00
P3	Dublin, Ireland	Euro	€ 100.00	€ 120.00	€ 160.00
P4	Amsterdam, Netherlands	Euro	€ 175.00	€ 225.00	€ 300.00
P5	San Diego, US	USD	$ 200.00	$ 250.00	$ 325.00
P6	Paris, France	Euro	€ 240.00	€ 300.00	€ 380.00
P7	Tokyo, Japan	YEN	JPY 25,000.00	JPY 30,000.00	JPY 40,000.00
P8	Denver, US	USD	$ 300.00	$ 400.00	$ 400.00

	Venue	Currency	Early Bird	Full Fee	On-site
P9	Barcelona, Spain	Euro	€ 225.00	€ 275.00	€ 350.00
P10	Montréal, Canada	CAD	$ 340.00	$ 385.00	$ 460.00
P11	Berlin, Germany	Euro	€ 300.00	€ 350.00	€ 400.00
P12[10]	Botswana, Gaborone	Pula	BWD 6,000.00	BWD 7,000.00	BWD 9,000.00
P13	Philadelphia, US	USD	$ 365.00	$ 445.00	$ 580.00
P14	Helsinki, Finland	Euro	€ 459.00	€ 533.00	€ 620.00
P15	Melbourne, Australia (Virtual)	N/A	N/A	N/A	N/A
P16	Costa Rica (Virtual)	USD	$ 150.00	$ 225.00	N/A
P17	Edinburgh, UK, Virtual	GBP	£ 150.00	£ 250.00	N/A
P18	Virtual	GBP	£ 100.00	$ 160.00	$ 160.00
P19 [part of IDW 2022]	Seoul, South Korea (Hybrid)	KRW (virtual)	₩ 297,500.00	₩ 297,500.00	N/A
		KRW (onsite)	₩ 654,500.00	₩ 892,500.00	₩ 892,500.00
P20	Gothenburg, Sweden (Hybrid)	SEK (virtual)	SEK 2200	SEK 2200	N/A
		SEK (onsite)	SEK 4850	SEK 6350	SEK 6350
P21 [part of IDW 2023]	Salzburg, Austria	EUR (virtual)	EUR 390	EUR 390	N/A
		EUR (onsite)	EUR 670	EUR 795	EUR 795
P22	Virtual	USD	$ 100	$ 150	N/A

9.3.2 LMIC Registration Fees

Local organisers are encouraged to offer reduced registration fees for LMIC participants where possible. The reference for LMICs is World Bank Data[11].

---

[10] Upper level fees for the 4 day event organised in collaboration with IDW2018 and Student & LMIC fees were also available.
[11]
https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups

9.3.3 Student Registration Fees

Criteria for student fee eligibility should be defined, and the relevant documentation should be described and requested upon registration to ensure valid applications.

9.3.4 Remote Participation / Virtual Registration Fees

Facilitation of remote participation has become increasingly important, even before the COVID-19 pandemic. In particular, the different locations of RDA Plenary meetings require a significant proportion of potential attendees to travel long distances, and the environmental impacts of such travel is increasingly becoming a deterrent. There are furthermore financial limitations on many potential attendees. The technical requirements outlined in Section 5.3 that enable the event to offer a professional, interactive experience should be covered by charging a registration fee for remote (online) participants. Depending on the freedom to travel at the time of the planned event, it is suggested to offer those choosing remote participation the option to 'upgrade' to onsite participation. This may reduce the need for partial refunds should circumstances change.

9.3.5 Special Fee Participants

RDA has agreements with some of its members and funders for discounted and advantageous registration fees. These agreements will be recognised, and the cost for discounts and waivers taken into account in the event budget. RDA Organisational Member[12]s are entitled to pay the Early Bird registration fee up to and including 'on the day' registration.

9.3.6 Non-paying Participants

All participants, including local organisers and the staff of RDA, are expected to pay the registration fee. A series of non-paying participants (i.e., having free registration and dinner) should be factored in, and can include:

- European Commission and other governmental staff.
- Dignitaries and keynote presenters for plenary sessions.
- Press and media representatives; only upon a clear agreement about the media coverage of the event and tangible outputs.
- Student and other volunteers supporting both online and onsite logistics.
- Other participants at the discretion of the local organisers.

9.3.7 Liaising on Registration Fees

Before their definition and publication, registration fees and deadlines should be clearly transmitted to the OC, who will interface directly for any eventual negotiation and will provide a final agreement in writing.

---

[12] https://www.rd-alliance.org/get-involved/organisational-membership/rda-organisational-affiliate-members

9.3.8 Social Event Financial Contribution / Cost

A further financial contribution to the cost of attending the social event (dinner) can be requested to avoid no-shows and waste (i.e., food and drink not consumed). This fee may be increased for those registering onsite to cover additional administrative costs. Local organisers should identify a process for validating and checking social dinner guests and should clearly indicate on event signage (dinner tickets, guest list, etc.) how the validation process will take place. The table below gives a **suggestion** on possible social dinner costs.

Social Dinner contribution	Online fee	On-site Fee
Participants	€55.00	€70.00
Accompanying guests	€65.00	€90.00

9.4 Registration Fee Payment Gateways

As part of the integrated, virtual event platform, local organisers should set up appropriate and secure online payment channels. Participants should be made aware that they need to register on this (or any other external) site separately, but that it provides a secure payment system. Participants should be able to pay by **bank transfer, credit card, paypal, and via an invoice**. Note that the local organisers should clearly define the commission costs for online fee payment and either factor them into the overall registration fee or **clearly** indicate them on the registration page **before** payment. A currency converter link should be included to facilitate participants' understanding of the costs in their own currency.

In the event that the payment gateway is separate, the personal details requested should be sufficient to match a participant's registration with their payment, but the main information on participation (events, contact details, etc.) must be on the RDA virtual event platform

9.5 Invoices / Receipts

Local organisers are required to provide individual invoices/receipts for registration fees.

9.6 Certificate of Attendance

Local organisers are required to provide attendance certificates for participants. To minimise administrative overhead, these should be issued only upon direct request by the participant in question.

9.7   Financial Contributions from RDA regional bodies

Regional bodies (RDA-US, RDA EU, ARDC), where possible, may contribute to some plenary related activities. Some examples include reimbursing travel and subsistence for regional representatives in the role of working and interest group chairs or early career scientists and researchers, journalists to attend plenary meetings, etc. These contributions are implemented and managed directly by the regions.

9.8   Contribution to RDA Foundation

RDA requests the local organisers to include 5% of registration fee revenue (after commission) to be paid to the RDA Foundation after the event. Payment is made via an invoice. In the event of a financial loss by the local organisers, this fee can be negotiated with the RDA Foundation – represented by the Secretary General.

9.9   Profit & Loss

Careful financial planning is necessary to avoid profit-and-loss scenarios. Where possible, excess budget should be used to offer increased onsite services in terms of technical support, catering, social events, event giveaways, and so on. **RDA and its affiliates do not take any financial responsibility for the event organisation.**

9.10 Sponsors

Sponsorship of RDA plenary meetings is welcomed, but must be agreed with the OC in all cases, and **particularly in the case of commercial organisations**. Visibility at the event and in advance is allowed, but should be agreed with OC before publication. The sponsorship package developed by local organisers should outline distinct levels of visibility and corresponding financial (or other) contributions, and should factor in what is offered both online and at the venue.

10 Local Staff Support

Many different types of "on the ground" support is required organised by the local hosts at the plenary meetings:

- Registration Staff: Hosts should secure 3-4 staff to manage the registration desks at peak times (opening day and mornings).
- Breakout Meeting Staff: to manage the door sign changes, breakout participant lists, interacting with meeting chairs for support.
- Social Media coverage: local social media students write press articles, generate blogs, curate social media, etc.
- Technical Support: the venue should provide at least 2 permanent technicians to provide audio visual support in the meeting facilities
- Internet / WiFi: an official representative of the internet provider should be available on-site at all times during the meeting and in particular during the first day.

Local hosts are strongly encouraged to engage with local / national universities and institutions to seek student volunteers enrolled in relevant courses e.g. data science, computer science, IT, etc. to provide support during the event.

11 Other

11.1 Accommodation

All plenary meeting participants will pay their own travel & subsistence. Hosts should facilitate the identification of accommodation close to the venue or within a reasonable distance and should offer a range of different hotel categories. Hosts may organise and manage accommodation requests directly or through a local agency, the costs of which should not be included in the event budget.

11.2 Photographer

A photographer covering the dignitaries, plenary sessions and networking events arranged by the hosts should be engaged and should provide digital copies of the photos to the organisers. RDA and the organisers should have full access and usage rights to these photos clearly referencing the photographer in all cases.

11.3 Event Programme App

Local organisers should consider using an existing smart device apps / mobile conference assistant to provide on-line / real time programme information to the participants. The use of such technology provides important, up-to-date information in real time and saves considerable printing costs. One example, frequently used in Europe, is Conference4Me (http://conference4me.psnc.pl/) developed by the Poznan Supercomputing & Networking Center, Poland.

11.4 Visibility Opportunities for RDA members & others

Opportunities like poster sessions, material distribution, elevator pitches, etc. should be organised as much as possible. RDA members, early career grant recipients and newcomers can be offered visibility to showcase their activities to the participants.

11.5 Visa Applications

It is very important to outline clearly the visa application details, and provide links to the correct national organisations / bodies that provide official information and relevant forms and timelines. Host organisations should identify which local, official organisation will issue the visa invitation letter and a specific email (plenaryX-visa@rd-alliance.org) will be set-up to coordinate the visa application process.

12 Tender Submission Outline

The bid should be provided by email to Hilary Hanahoe, RDA Secretary General, at hilary.hanahoe[at]rda-foudation.org in electronic editable format and not exceed 15 pages. It should include the following details and sections:

12.1 Host Organisation Details

Names, affiliations, and email contact information for the main organisers. Please also describe the host organisation and its capacity for hosting and promoting a major international event and whether there is any level of government commitment (not a requirement, but sometimes appropriate).

12.2 Venue & Facilities

A detailed description of the venue(s) proposed outlining the facilities in terms of delegate capacity, meeting rooms' available, plenary capacity, networking areas, wifi capacity, catering facilities, audio visual equipment, accessibility (local transport, international airport connections, on-site reduced mobility access) and accommodation.

12.3 Programme

A draft outline of the schedule for the plenary meeting including proposed dates, start and end times, plenary & breakout timings and proposed networking events. Hosts may already suggest names and candidates for the Programme Committee at this stage.

12.4 Costs

A draft budget including eventual sponsorships, local, national, regional financial support and the proposed registration fee and eventual excess cost estimates to be covered. Details on the payment gateway and any related costs should be outlined in this section.

12.5 Media Coverage

A brief outline of local, national, regional & international plans for publicising the plenary meeting.

13 Annex RDA Endorsement and Logo Usage Guidelines[13]

13.1 Logo Usage

The RDA Logo are registered trademarks of the Research Data Alliance Foundation. To ensure consistent adherence to RDA Principles, permission is generally required to use the RDA Logo and branding. Permission is granted by the Secretary General (or designee) in consultation with the Council co-chairs. Typically, logo use is granted along with endorsement of a product or activity (see below). Requests to use the logo should be sent to enquiries@rd-alliance.org.

In the following situations, explicit permission is *not* required, but notification of the use is appreciated.

- Current Organisational Members and Affiliates may use the logo on their web sites and other promotional material to demonstrate their support of RDA.
- Organisations that adopt RDA Recommendations may use the logo on relevant media to indicate they are using RDA Recommendations in a particular product or service (i.e. a sort of "powered by RDA" concept).
- Current, endorsed Working Groups and Interest Groups may use the logo on materials related to official Group activity such as meetings outside formal Plenaries, RDA product promotion, community engagement activities, etc.
- Regional RDAs may use their version of the logo (see below) as they see fit as long as the logo user adheres to RDA Principles.

RDA encourages broad use of the RDA logo to promote RDA products, activities, and principles, but retains the right to deny usage in any situation deemed inappropriate by the Secretary General in consultation with Council co-chairs.

13.2 RDA Endorsements

As appropriate, RDA endorses or supports events, products, statements, and occasionally proposals and projects. Unless otherwise noted, the Secretary General in consultation with the Council Co-chairs decide whether to endorse something. Endorsement allows the use of the RDA logo and includes help with promotion and coordination but does not include financial support. RDA also formally recognizes and collaborates closely with funded national or regional RDA initiatives (e.g. RDA/Europe, RDA/United States).

13.2.1 Events

Upon request, RDA endorses an event if the event:

- helps advance or lower barriers to data sharing, and
- involves one or more RDA officials (Chairs, TAB, OAB, Council, Secretariat) in the organisation or conduct of the event.

Note: Individual WGs and IGs may endorse events on behalf of their own groups.

---

[13] https://www.rd-alliance.org/group/rda-secretariat/wiki/rda-endorsement-and-logo-usage-guidelines.html

13.2.2   Products

Typically, product endorsement is limited to formal RDA Recommendations, but, on request, RDA may endorse particular products that especially highlight other RDA deliverables or emphasise RDA principles.

13.2.3   Statements

Upon request, RDA endorses documents, whitepapers, statements of principle, etc. that advance data sharing and RDA principles and demonstrate broad community consensus (e.g. the Joint Declaration of Data Citation Principles). The endorsement of such principles requires approval of the full RDA Council.

13.2.4   Projects and Proposals

Unless it is a project that explicitly advances RDA organisational objectives, RDA only provides generic support. Requests for proposal letters of support must include a clear statement of how they will use RDA to further their project objectives as well as an agreement to adopt RDA principles. Letters of support issued by the Secretary General (or designee) typically take the following form:

Dear [colleague]

The Secretariat of the Research Data Alliance (RDA) actively supports and encourages all projects that advance research data sharing and adhere to RDA principles of openness, harmonisation, balance, and consensus with a community-driven, non-profit approach. We provide communication tools and services, facilitation and coordination of global efforts, and a ready forum and neutral place for engaged work and discussion.

The [project] proposed to [agency] meets these criteria, and I look forward to working with you if it is successful. The broader Secretariat staff and I will actively help the group form and operate RDA Interest and Working Groups, as appropriate. This should help advance the work of the group and provide focus to certain deliverables in a broad and balanced international context.

13.2.5   Regional RDAs

A regional RDA is a geographically based branch of RDA committed to RDA principles and directly contributing to achieving the RDA vision and mission. Regional RDAs are approved and recognized in negotiation with the RDA Council. RDA Regional logos are a replica of the RDA brand with the region indicated in blue underneath, example shown: