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C4.2.3

Report on methodologies to investigate users

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Dissemination Level (“X” in the relevant box)		
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PP	Restricted to other programme participants (including the Commission Services)	X
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Introduction

The overall objective of EDIT is to integrate European taxonomic effort within the ERA and to build a world leading capacity to provide better access to taxonomic research information for other taxonomists and for stakeholders outside taxonomic academia, in particular those working in biodiversity research and policy. In the day-to-day work in EDIT the concept of stakeholders covers: (1) users of taxonomic information (taxonomists and those working in other disciplines using taxonomic information), (2) taxonomic information provider's (organisations that provide access to taxonomic information), (3) related networks working on/with taxonomy/biodiversity and (4) funding agencies supporting taxonomy.

Work Package 4 in EDIT tackles the subject of users of taxonomic information under activity 4.2 *liaison research and users of taxonomic information*. In particular this activity wants to answer the following questions:

- Who are the users of taxonomic information?
- What do they need from taxonomy?
- How can we integrate them in EDIT's strategic developments?

Interaction with the broad taxonomic user community should improve the accessibility and social/economic applicability of taxonomy and taxonomic information for these users and so contribute to new innovations. This component runs through the different *methodologies* WP 4 used during the second year to assess those three questions. We started from the assumption that methodologies are not just a tool, their very nature structures the type of questions one is able to cover and the outcome of an assessment. Therefore we think it is important EDIT uses a variety of techniques in parallel, to get a more complete insight in the users of taxonomic information. Next, the methodologies used under 4.2 and their advantages and drawback are discussed.

Literature study

One of the first activities carried out within 4.2 was an investigation of stakeholder engagement in other biodiversity projects (Stakeholder Report 1, 2007). The aim of such an investigation was to develop a quick overview of why projects engage with stakeholders, what methodologies they use and if the interaction worked out satisfactory. Furthermore, by learning from others, a reinvention of the wheel had to be avoided. The undertaking of the literature was more labour intensive than expected. Partly due to the fact that only a view projects had used a systematic approach when investigating and engaging with stakeholders.

As intended, lessons were learnt from the experiences of other projects. One of the conclusions we draw from the literature study was that EDIT should avoid choosing randomly the users they want to interact with. Based on the experiences in other projects, these will turn out to be the 'usual suspects' and in general the 'usual suspects' are not the one's that will open up new trajectories for taxonomic innovation. The WP 4 investigation concludes that for various reasons joint activities with users (some might be usual suspects) will be fruitful and should start soon - but urges as well, to carry out a systematic investigation of users. The systematic approach should provide insights who will be strategic users in taxonomy e.g. the users in other scientific disciplines. A systematic analysis, with help of bibliometric methodologies of citation patterns (discussed below), test if this is an appropriate methodology to map strategic users of taxonomy.

Expert meeting

WP 4 organised a meeting with two people from EDIT who gained experience of working with users in previous projects and with WP 2 who is working on engaging the taxonomic amateur community in EDIT. The aim of the meeting was to get input on how WP 4 should prioritise which users to engage with. This is crucial the users community is so wide that everyone down to citizens level is could be describe as a user of taxonomy. The expert meeting produced a workable framework to priorities and clustered different user groups (see minute's Expert meeting, November, 5, 2007). The matrix can be seen as a basic tool to prepare future users meetings and help in taking decisions which users to bring together and what topics to discuss.

In general, the expert meeting contributed to better insights in what kind of 'in-house' expertise EDIT has on the subject of user engagement, which should improve the quality of the output under 4.2 and prevent WP 4 will reinvent the wheel. Furthermore, receiving input from experts and working together on this subject during one full day, was inspiring for WP 4 and WP 2. It created an efficient setting to progress on a subject that has various stumble blocks if one does not think two steps ahead.

E-conference

The possibility of organising an e-conference to investigate user's needs has been explored in WP 4. Taxonomists from EDIT institutions would be invited to participate with two hats: as suppliers of taxonomic information and as users of this information - to meet electronically with users from other fields (ecology, genomics, agriculture, conservation etc). The conference would aim to reveal where the taxonomic community could fill gaps of information for the broader user community.

However, the subject of users seemed too premature in EDIT for an electronic discussion. Brining together various communities who do not know each other very well, who work in different professional contexts, using different discourses, was thought to need a common meeting first. The main drawback of the e-conference methodology is the absence of nuances in speech and body language, important when one meets for a first time. The advantages of an e-conference are clear: it is a relatively cheap and environmental friendly way to bring ideas together from anywhere in the world. The format circumvents the potential problems of group meetings. It is less demanding for participants as one has the possibility to be selective in which discussions subjects one wants to participate and to develop a responds over several days.

Hence, it was decided in WP 4, that the time was not ripe to have an electronic meeting on this topic. Interaction with the broader user community seemed not yet on the agenda of the majority of the researchers in the EDIT institutions. Furthermore, at the occasions when the users and the user needs were discussed, a wide diversity of views on who our users are, was expressed in EDIT. However, WP 4 believes that the vision on user engagement, as recently described by the Future Scoping Group (FSG, 2008) provides a very solid common vision on the direction of user engagement and will therefore take in consideration if an e-conference should be organised later on in EDIT.

Workshop

Because for the reasons mentioned on 'e-conference' WP 4 organised together with WP 1 a workshop with /on users during the EDIT General Meeting (User Workshop Report 1, 2008). The central aim was to put the subject of identification of users from outside taxonomic academia and their needs, on the work agenda of the EDIT members, therefore the EDIT General Meeting was a perfect setting. It was the first time that EDIT brought together users from outside taxonomic academia (plant health/pest management, conservation management, archaeozoology).

The organisers did not seek to suggest that the work and the use of taxonomic information, as described by the speaker's, covered every possible kind of use of taxonomic information. Clearly, the key-note speakers were not a representative sample of the users of taxonomic information. Most of all, WP 4 wished to motivate EDIT members, to take ownership of the subject and become more proactive in engaging users when organising future EDIT activities.

The workshop turned out to be a fruitful first introduction, that helped to provide insides on how some users work with taxonomic information and generated a discussion on common concepts related to users needs, e.g. a need to distinguish between 'taxonomy as a science' and 'taxonomic services'. More over, from the workshop output several future activities could be proposed which will be further developed during the third year (cf. User Workshop Report 1, 2008)

Bibliometric analysis

Only recently WP 4 started to explore the potentials of bibliometric analysis for mapping users of taxonomic information. This analysis is work in progress and if successful will continue to be carried out in the course of the following three years in collaboration with the Rathenau Institute in the Netherlands. Citation statistics will be used to analyse scientific communication networks and not to draw conclusions on scientific quality or scientific impact. The first study is an analysis of the field of taxonomy, based on the citation patterns of taxonomic journals. By doing this we will be able to see what other journals (e.g. from other disciplines) show similar 'citation behaviour' as a specific taxonomic journal which will give an indication that they are using taxonomic publications, and therefore the journal might represent an interesting speciality for taxonomy to collaborate with in the future. Other angles will be an analysis of co-word and co-author citations.

References

- Prototype of web platform for e-conferences [C4.2.1 – cancelled]
- Future Scoping Group report, 2008 [C1.2.3]
- Minutes Expert Meeting. Users of taxonomic information, 2007 [M4.2.3a]
- Stakeholder Report 1, 2007 [C4.2.1Bis]
- User Workshop Report 1, 2008 [M4.2.3b]