THE MERIDIÀ PORTAL OF RESEARCH OBSERVATORY (OR-IEC): ANALYSIS, PROMOTION AND COMMUNICATION OF CATALAN SCIENTIFIC KNOWLEDGE

Llorenç Arguimbau,* Aldara Cervera,** Robert Latorre,*** Mercè Martí**** and Ricard Guerrero*****

The highly strategic research, development and innovation (R&D&I) cycle is fundamental to scientific knowledge and economic growth. For the cycle to function adequately, relevant R&D&I information has to be managed effectively. In recent years, the Institute of Catalan Studies (Institut d’Estudis Catalans, or IEC) has played an increasingly important role as a consultant to public bodies, primarily by preparing reports and expert opinions on strategic aspects of Catalan science policy. In 1995, the IEC was commissioned by the Autonomous Government of Catalonia (Generalitat de Catalunya) to produce the Reports de la recerca a Catalunya (Catalan Research Reports), describing the state of Catalan research in specific knowledge fields. Two volumes have been published to date, covering the six-year period 1990-1995 (24 reports) and the seven-year period 1996-2002 (27 reports). In 2003, in order to support the work involved in producing the second volume, the IEC founded the Catalan Research Observatory. Since then, the Research Observatory has gradually compiled data on the R&D&I system from all the Catalan linguistic-cultural regions. In 2008 the web portal MERIDIÀ was launched with the aim of serving as a useful and practical tool for a whole spectrum of users, ranging from researchers to interested members of the general public. Users are offered differing levels of access to the portal and its information, ranging from privileged access—by special agreement—for institutions and bodies to basic access for the public. Rather than offer comparative analyses of bodies or researchers, MERIDIÀ aims essentially to serve as a tool for transforming a large quantity of disperse and very different information on R&D&I activities in Catalonia into accessible knowledge.

KEY WORDS: R&D&I, Research Observatory of the Institut d’Estudis Catalans (OR-IEC), MERIDIÀ portal, scientific documentation, information service

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1. Introduction

Who is implementing nanotechnology projects? How has the number of chemistry and linguistics research staff contracted under the Ramón y Cajal Programme grown? How many patents for wastewater treatment have been applied for since 2000? How many doctoral dissertations have been written on the subject of the Catalan writer, Mercè Rodoreda? These are examples of just some of the questions that the Research Observatory of the Institute of Catalan Studies (OR-IEC) and the MERIDIÀ portal can answer.

Research and development (R&D) are two scientific and technological activities that lead to the creation of new knowledge, crucial to the advancement of society. Researchers mobilise economic, human and material resources as inputs, with a view to obtaining results, or outputs, in the form of research articles, doctoral dissertations, patents, etc. The cycle concludes with innovation as a third element in what is referred to as an R&D&I system—with innovation referring to the practical industrial application of results that leads to the development of new processes and products.

To enhance efficiency and ensure that the right scientific policy decisions are taken, it is fundamental to describe, measure, analyse and evaluate R&D&I systems.

The highly strategic R&D&I cycle is crucial to the creation of scientific knowledge and to economic growth in the information society. It is therefore fundamental, in a strongly competitive environment, to describe, measure, analyse and evaluate R&D&I systems in order to gauge achievements and
improve functioning, particularly by identifying strong and weak points. This will ultimately enhance the efficiency of the system and ensure that the right scientific policy decisions are taken.

Taking a broad but integrated perspective, the economist Isabel Busom defines the R&D&I system as “the set of agents (those who take decisions on R&D&I, whether companies, research centres or public bodies), values and rules (which condition individual decisions, whether implicit or explicit, public or private) and institutions (the legislative framework, the technology market, the qualified labour market, the financial market and the education system) that directly or indirectly have a bearing on collective R&D&I activities.”

Compiled information needs to reflect the complete R&D&I cycle and not just specific resources or results. It is often necessary to make a quantitative and qualitative analysis of research from a panoramic perspective, taking special care to maintain an equilibrium between all the components in the system. Furthermore, it is important to clearly define the underlying concepts and to use standardised classifications and methodologies. Information has to be comparable at different levels (geographic, institutional, thematic, etc) so as to be able to establish a suitable reference framework for studies. In this regard, of note is the work undertaken at the international level by bodies such as, for example, the Organisation for Economic Cooperation and Development (OECD) and the International Society for Scientometrics and Infometrics (ISSI), etc (which produce periodic publications such as Scientometrics, Research Evaluation, etc), and also at regular scientific conferences such as the International Conference on Science and
As in any other information sphere, the dynamics of data inflows, processing and outflows has to be organised in an efficient, responsive and accurate manner. A key role is played by documentalists in designing and implementing clear classifications and taxonomies and in fostering and communicating information on science and technology initiatives and their outcomes—thereby advancing the frontiers of knowledge. Effective internal management of information produced by R&D&I agents creates a free-flowing results-generation cycle that has the outcome of ensuring more competitive access to more resources.

2. The Institute of Catalan Studies (IEC)

The IEC is the Catalan national academy of sciences and humanities. It was founded in 1907 with the mission of developing and promoting research policy and disseminating knowledge. Following a long period of clandestinity (during the dictatorship of General Franco), a Royal Decree passed in November 1976 granted official recognition to the IEC as an academic body with the mission of performing advanced scientific research and whose scope embraced all the Catalan linguistic and cultural regions. The IEC nowadays fosters research programmes and activities in all knowledge fields through a number of divisions and subsidiary societies. It has also created a Research Committee and Science Secretariat to follow up on these activities.

Some of the aims of the statutes that reflect the core mission of the IEC include the planning, coordination, performance and publication of research in a range of science and technology fields. In recent years the role of the IEC as a consulting body for public authorities has come to the fore, through its preparation of preliminary and expert reports on various strategic aspects of science policy, including R&D&I.

Some of the aims of the statutes that reflect the core mission of the IEC include the planning, coordination, performance and publication of research in a range of science and technology fields.

In 2004, the IEC made public an institutional position statement on research that was the outcome of reflection and a series of talks and debates undertaken by the members of the different IEC divisions under the theme Perspectives del segle xxí: recerca i país [Perspectives on the 21st century: research and the nation]. The statement concluded with the following recommendation: «The Institute of Catalan Studies has a key role to play in research itself and in programmes for overseeing and evaluating research, in following up the results of initiatives proposed to foster research, and, most particularly, in socially disseminating and promoting science and research. The results of science must be promoted and disseminated in..."
society, both by fostering activities that have as their aim the communication of science and by improving the social status of research and academic staff as key elements for progress. The IEC, along with its five divisions and 26 subsidiary societies,\(^5\) and also in view of its geographical coverage and international presence, has a key role to play in this undertaking».\(^6\)

In late 1983, the IEC was commissioned by the Autonomous Government of Catalonia (Generalitat de Catalunya) to draw up a balance sheet of scientific and technological research in the country and intended as a first step towards scientific planning. The creation of this report, which was to be a white paper on research in Catalonia, was interrupted due to a lack of resources. The project was relaunched eventually, thanks to assistance from the Interministerial Commission for Research and Technological Innovation (CIRIT). Finally, in 1990, a report on scientific and technological research in Catalonia (La recerca científica i tecnològica a Catalunya\(^7\) ) was published that was essentially an inventory of research activity in Catalonia and a description of the existing situation. The report was published in three volumes; the first volume consisted of individual essays on the state of research in a number of fields and also a sociological study of the research community, and the second and third volumes described the research groups already up and running in Catalonia.

Rounding off these initiatives, in 1995 the Permanent Council of the IEC agreed to launch a project entitled Reports de la recerca a Catalunya (Catalan research reports), aimed at publishing studies on the state of research in Catalonia that would apply internationally recognised criteria. Commissioned by the previous Generalitat’s Commission for Universities and Research and coordinated by the Science Secretariat of the IEC, these reports were structured as a regular series of studies of each of the areas into which scientific activity is divided; they were, moreover, drawn up by teams of reputable researchers in each field.

The first edition of the Reports de la Recerca,\(^8\) published with funding from the Interministerial Council for Research and Technological Innovation (CIRIT), was organised into 24 thematic areas covering the period 1990-1995. From 2003—this time with funding from the Generalitat’s Ministry of Universities, Research and the Information Society—the Science Secretariat continued with the task of coordinating the Reports de la recerca. The second edition,\(^9\) which was published in early

\(^5\) With the inclusion of the Association of Catalan Sociolinguists and the Catalan Association of Terminology in 2008, the IEC now has a total of 28 subsidiary societies.
\(^6\) Institut d’Estudis Catalans, 2006a.
\(^7\) Institut d’Estudis Catalans, 1990.
\(^8\) Institut d’Estudis Catalans, 1996-2002.
\(^9\) Institut d’Estudis Catalans, 2006b.
2006, covered the period 1996-2002 and this time included 27 thematic areas (see Table 1). Both editions are now available from the IEC website.\textsuperscript{10} Also available for the second edition reports are summaries in both Catalan and English, and some of the reports have been translated for publication in an IEC English-language publication entitled Contributions to Science.\textsuperscript{11} As for the future of Reports, a third edition covering the period 2003-2008 is projected that will include an even broader range of knowledge areas.

Note that the Reports de la recerca a Catalunya do not aim to conduct a comparison between institutions, groups or individuals; the aim is, rather, to furnish an overall but also detailed perspective of the different thematic areas within the Catalan science and technology system.

\textsuperscript{10} <http://www.iec.cat/reports>.
\textsuperscript{11} <http://www.cat-science.com>.

Table 1

\textit{Reports de la recerca a Catalunya, 2nd edition (1996-2002)}

<table>
<thead>
<tr>
<th>Reports</th>
<th>Coordination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other languages and literatures</td>
<td>Hortènsia Curell i Gotor</td>
</tr>
<tr>
<td>Architecture and town planning</td>
<td>Manuel Ribas i Piera</td>
</tr>
<tr>
<td>Cell and molecular biology and biochemistry</td>
<td>Pere Puigdomènech i Rossell</td>
</tr>
<tr>
<td>Organisms and systems biology</td>
<td>Xavier Llimona i Pagès &amp; Jaume Terradas i Serra</td>
</tr>
<tr>
<td>Social sciences*</td>
<td>Maria Teresa Montagut i Antolí</td>
</tr>
<tr>
<td>Communication</td>
<td>Josep Maria Casasús i Guri</td>
</tr>
<tr>
<td>Law</td>
<td>Encarna Roca i Trias</td>
</tr>
<tr>
<td>Economics</td>
<td>Antoni Serra i Ramoneda</td>
</tr>
<tr>
<td>Agricultural, forestry and food engineering</td>
<td>Albert Ibarz i Ribas</td>
</tr>
<tr>
<td>Civil and construction engineering</td>
<td>Joan Ramon Casas i Rius</td>
</tr>
<tr>
<td>Industrial engineering</td>
<td>Joaquim Agulló i Batlle</td>
</tr>
<tr>
<td>Catalan language</td>
<td>Joan Martí i Castell</td>
</tr>
<tr>
<td>Catalan literature</td>
<td>Eulàlia Duran i Grau</td>
</tr>
<tr>
<td>Philosophy</td>
<td>Jordi Sales i Coderch</td>
</tr>
<tr>
<td>Physics</td>
<td>David Jou i Mirabent</td>
</tr>
<tr>
<td>Geography and demographics</td>
<td>Enric Lluch i Martín &amp; Abel Albet i Mas</td>
</tr>
<tr>
<td>Geology</td>
<td>David Serrat i Congost &amp; Salvador Reguant i Serra</td>
</tr>
<tr>
<td>History</td>
<td>Albert Balcels i González</td>
</tr>
<tr>
<td>History of art and musicology</td>
<td>Francesc Fontbona i de Vallescar &amp; Romà Escalas i Llimona</td>
</tr>
<tr>
<td>Linguistics and linguistic sciences</td>
<td>Joan A. Argenter i Giralt</td>
</tr>
<tr>
<td>Mathematics</td>
<td>Julià Cufí i Sobregrau</td>
</tr>
<tr>
<td>Medicine</td>
<td>Joan Rodés i Teixidor</td>
</tr>
<tr>
<td>Pedagogy</td>
<td>Josep González-Agápito i Granell</td>
</tr>
<tr>
<td>Psychology</td>
<td>Maria Teresa Anguera i Argilaga</td>
</tr>
<tr>
<td>Chemistry</td>
<td>Salvador Alegret i Sanromà</td>
</tr>
<tr>
<td>Information and communications technologies</td>
<td>Lluís Jofre i Roca</td>
</tr>
<tr>
<td>Veterinary</td>
<td>Maria Teresa Paramio i Nieto</td>
</tr>
<tr>
<td><em>(</em>) The social sciences include sociology, political science and anthropology.</td>
<td></td>
</tr>
</tbody>
</table>

Source: Authors.
As to the layout of the *Reports de la recerca a Catalunya*, although each has specific characteristics that differentiate it from the other reports, the analysis of each thematic area is conducted according to a model that covers the following main points:

a) Opportunities. This section covers the definition of the entire set of research frameworks, policies and actions developed and implemented by R&D&I agents.

b) Institutional framework. This section includes an analysis of human and institutional resources—including infrastructure and equipment—and financial data referring to grants awarded, research projects, etc.

c) Results. In this section, the lines of research underway in different groups are analysed and the research activities themselves are assessed in terms of productivity.

d) Conclusions. Weaknesses and strengths are analysed and recommendations are made aimed at obtaining improvements in the development of research activities in specific fields.

Leaving aside groundwork laid in the research plans of different public bodies, other key reports and studies exist, drawn up along similar lines to the *Reports de la Recerca*. As far as Catalonia is concerned, in 2006, the Centre for Business Innovation and Development (CIDEM) published a report on the innovation situation in Catalonia (*La situació de la innovació a Catalunya*) which, taking a European perspective, analysed and evaluated Catalan public policy and the Catalan innovation system in terms of the public sector, universities and the private sector. An annual R&D&I report for 2008 (*Informe anual de l’R&D i la Innovació 2008*) drawn up by ACC1Ó (Centre for Business Innovation and Development (CIDEM)/ Consortium for the Commercial Promotion of Catalonia (COPCA)), provides descriptive and up-to-date information on business innovation. The Interministerial Council for Research and Technological Innovation (CIRIT) has commissioned Profesor Jordi Maluquer de Motes to draw up periodic studies on R&D in Catalonia (*La recerca i la innovació a Catalunya*, with editions available for 2001, 2002 and 2003). Unlike the previous studies, which provide a snapshot of data, this last study relies on consolidated information—which explains the time lag between the year of the study and its date of publication (the 2003 edition was published in June 2008).

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14 BUSOM, 2006.
15 ROMERO, 2008.
17 MALAQUER DE MOTES et al., 2008.
As for Spain, of particular note are the annual reports produced by the CyD Foundation (Knowledge and Development)\(^{18}\) and the COTEC Foundation (for Thecnological Innovation),\(^{19}\) and also the SISE (Integrated Follow-Up and Evaluation System) report produced by the Spanish Foundation for Science and Technology (FECYT).\(^{20}\)

Also worthy of mention are the initiatives undertaken by the Confederation of Spanish Scientific Associations (COSCE) at the instigation of ACCIÓN CRECE (Committees for Reflecting on and Studying Science in Spain),\(^{21}\) which has implemented a project that evaluates science from an impartial perspective. Another state-level study analysing publicly funded research (Radiografía de la investigación pública en España\(^{22}\)) retrospectively examines the activities that have been undertaken in the wake of the Spanish law governing the general promotion and coordination of scientific and technological research passed in 1986.\(^{23}\)

4. The IEC Research Observatory (2003-2008)

In May 2003, to support the tasks involved in preparing the second edition of the Reports de la recerca, the Science Secretariat created a Research Observatory, to be attached to the IEC (OR-IEC) in response to a detected need for a reference framework for the analysis, planning, coordination and communication of R&D&I activities in the Catalan science and technology system.

From the outset, the OR-IEC has had two strategic goals:

a) To evaluate developments in different science and technology areas on an ongoing basis using indicative quantitative data (crucial to assisting decision making by politicians, business people and scientists).

b) To place at the disposal of the scientific community and society in general a system of tools and up-to-date and retrospective information on the state of research in Catalan linguistic and cultural regions (a goal of a more qualitative nature than the first goal).

From the outset, the OR-IEC has had the strategic goal of evaluating developments in different science and technology areas in the Catalan linguistic and cultural regions on an ongoing basis.

At present, the OR-IEC, which hierarchically slots within the IEC’s Research Support Department, has a staff of three documentalists and one biologist. It works closely with the Computer Department and under the academic management of the Science Secretariat. Offering specialist R&D&I information on the Catalan science and technology system, the OR-IEC is present on the Internet through the MERIDÍA web portal. It follows

up and disseminates scientific activities carried out by the IEC (programmes, academic events, publications, etc), provides support to Catalan scientific journals and ensures the continuity of future editions of the Reports de la recerca.

The aim of the OR-IEC is to give both an overview and a detailed perspective on the current state and development of a range of science and technology fields, while avoiding systematic analyses or comparative evaluations of institutions, groups and researchers. It embraces the entire research cycle, from inputs to outputs, and covers the socioeconomic context, research bodies, human, economic and material resources, and results in terms of dissertations, articles and patents. The geographical area of study focuses on all R&D&I activities conducted in Catalan linguistic and cultural regions, with comparisons conducted at the state and international levels.

Before launching the MERIDIÀ project, as a reference that would ensure optimal functioning of the project, a study was first conducted so as to determine which entities offered similar services, analyse and compare these services and assess best practices. The study covered observatories for specific fields (many of which were not related with the subject matter of the OR-IEC) as well as other services that were not observatories as such but which offered research-linked information (see Appendix 1). Several conceptual and technological aspects were analysed, including website design and content, means of accessing information, etc.

All the information on the resources and results of Catalan research available through the OR-IEC is the fruit of key documentation tasks—including the identification, selection and systematic harvesting of data sources for information for subsequent computer processing—implemented in the five years of existence of the observatory. Information is mainly obtained as follows:

- From agreements for the transfer of information between autonomous government bodies, universities and other public and private research organisations (see Table 2). It should be mentioned that the OR-IEC’s mission is to act as a collaborative link that facilitates the integration and sharing of information between agents in the system and makes available detailed data on the scientific and technological environment.

- By systematically harvesting primary data sources (resolutions published in official bulletins, statistics, administrative records, etc) and secondary data sources (national plans, reports, etc). It should be remembered that there is inevitably a publication time lag for original sources; the average is two to three years, but may be far longer for patents. (See Appendix 2 for a full list of these information sources).

As can be observed, sources are public and/or official, which ensures solid and reliable data in the form of certified and credible information. Once processed and standardised, the information is included in a database for subsequent analysis.
and dissemination (see Section 5.1). The OR-IEC also has its own intranet where documents and resources relevant to research are uploaded and organised (reports, studies, research body memoranda, decisions in regard to calls for applications for funding, websites of interest, etc). This intranet, therefore, functions as a safe and secure warehouse of data that can be consulted by the OR-IEC team.

This information, which is managed and made available through the MERIDIÀ portal, enables the preparation of reports, studies and general and sectoral statistical analyses referring to the Catalan scientific system. The system is flexible enough to respond to very specific requests for information, and the OR-IEC has drawn up a number of made-to-measure reports and studies for bodies such as Agency for the Management of University and Research Grants (AGAUR), the Centre for Mathematics Research (CRM), the Faculty of Sciences of the Autonomous University of Barcelona (UAB), the Spanish Microbiology Society (SEM), the Vice-Chancellor for Research of the University of Girona (UdG), etc. It has also offered support in the form of documentation and technical advice to several IEC research programmes and contributes to the advisory committee for an AGAUR scientific documentation programme. A number of articles and book chapters have been the outcome of the work of the OR-IEC—describing its methods and approaches and providing overall analyses of the R&D&I system (see References).

### 5. The MERIDIÀ portal (2008)

The ongoing task of the OR-IEC in terms of systematic compilation of the information necessary to support the periodic publication of the *Reports de la recerca a Catalunya* has generated, on the one hand, a very high volume of information for use in the third edition and, on the
other hand, requires a team expert in handling scientific information. This situation has naturally led to the idea of shifting from a static system to a specialised, dynamic environment that would make the OR-IEC’s work visible through a portal providing access to basic data in the form of indicators.

Launched to the public in May 2008, MERIDIÀ (Measurement of Research, Development and Innovation) was presented as a tool for specialist users that transforms a large quantity of disperse and heterogeneous data into knowledge.

The data cycle commences with the collection of data, which is then transformed into information when uploaded to the platform, and which terminates with an individual making use of the information to generate knowledge. How this knowledge is used is diverse; for example, it might simply be used to answer concrete questions (similar to those posed in the Introduction) or it might form the basis for strategic reports of all kinds (institutional position reports, master plans, etc).

The MERIDIÀ project commenced with the drafting of a document that outlined requirements, defined master lines for the final product and described specifications for subsequent methodology phases. This document was the work of a mixed team drawn from among OR-IEC documentalists and technical staff in the IEC Computer Department. At a subsequent stage the technology consultancy company ID-EST Consultants was brought in to work on developing a tool that would best implement the project. The tool was designed as a platform that would have different modules, as follows:

a) A research database constructed from an underlying conceptual model that would be flexible enough to respond to issues arising from the multiplicity of information sources.

b) An internal data management environment that would support the information management tasks.

c) An analytical environment that would allow information to be harvested for the generation of results in the form of reports.

d) A website environment that would facilitate the dissemination of results.

The design and implementation of each of these four modules posed specific problems, described in turn below.

5.1. The research database

The original depositary of data compiled and saved by the OR-IEC team since its launch and containing information obtained from the systematic harvesting of data sources (as described in Section 4) was composed of around 250 Microsoft Access tables which had not

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26 <http://meridia.iec.cat>
27 <http://www.idest.es>
undergone any standardisation or data structuring processes. This combination of a large number of heterogeneous sources and vast quantities of historical information configured a framework for the portal while pointing to the main technological challenge facing the project: the design of a data model that would be capable of both migrating historical information and functioning as a layer of data for the internal data management environment (see Section 5.2).

The kernel of this data model was defined in a study of typical indicators reflecting the entire scientific and technological cycle used for analysing R&D&I systems. The OR-IEC and MERIDIÀ use indicators established by the OECD and described in periodically revised methodological documents like the *Frascati Manual*, which is an international reference for obtaining reliable and comparable R&D statistics and indicators from surveys. The indicators are classified as follows:

1) Socioeconomic context  
2) Research bodies  
3) Resources (inputs)  
   3.1) Human  
   3.2) Financial  
   3.3) Material  
4) Results (outputs)  
   4.1) Publications  
   4.2) Patents  
   4.3) Dissertations.

The database contains two types of information: basic data and aggregated data. Aggregated data is all information in the form of calculations, statistics and indicators supplied by the different sources to which the OR-IEC has access and which, in a theoretically ideal situation, can be calculated from basic data. However, it is necessary to store both aggregated data and original data, firstly because the same kind of information is not always available from the different information sources and, secondly, because information is not always updated for the same periods of time.

A main technological challenge of the MERIDIÀ project was the design of a data model capable of migrating all the available historical information.

Once the initial migration was implemented, the work subsequently carried out by the system administrators resulted in the basic data currently contained in the database, as classified in Table 3.

<table>
<thead>
<tr>
<th>Table 3</th>
<th>MERIDIÀ volumes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator groups</td>
<td>Items</td>
</tr>
<tr>
<td>Research bodies</td>
<td>11,208</td>
</tr>
<tr>
<td>Financial resources</td>
<td>65,274</td>
</tr>
<tr>
<td>Results (publications)²⁹</td>
<td>1,022</td>
</tr>
<tr>
<td>Results (patents)</td>
<td>5,804</td>
</tr>
<tr>
<td>Results (dissertations)</td>
<td>9,755</td>
</tr>
</tbody>
</table>

Source: Authors.

²⁹ Scientific, cultural and humanities journals currently published in Catalan cultural and linguistic regions.
To endow the model with expressiveness, systems of classification were used that provide a standard frame of reference for analysing and comparing information from several perspectives. These classifications introduce a semantic element into the data and enable it to be prepared for analytical processing and advanced searches. Four basic classification groups are used, as follows: scientific and technological disciplines; scientific and technological production; socioeconomic classifications; and finally, geographical classifications. Table 4 shows the full diversity of the current classifications in use.

The values for these classifications serve as thematic labels associated with elements in the database, thereby ensuring that each data item is labelled suitably. This labelling system is referred to as characterisation.

Table 4
MERIDIÀ classification

<table>
<thead>
<tr>
<th>Science and Technology Disciplines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Areas covered by the National Science and Technology Council (CONACYT)</td>
</tr>
<tr>
<td>Areas covered by the Interministerial Council for Research and Technological Innovation (CIRIT)</td>
</tr>
<tr>
<td>Areas covered by the Reports de la Recerca a Catalunya (IEC)</td>
</tr>
<tr>
<td>Science and technology areas covered by the Advanced Scientific Research Council (CSIC)</td>
</tr>
<tr>
<td>Knowledge areas covered by the Spanish Ministry of Science and Innovation (MICINN)</td>
</tr>
<tr>
<td>Doctoral study areas covered by the National Statistics Institute (INE)</td>
</tr>
<tr>
<td>Thematic areas covered by the National Agency for Scientific and Technological Evaluation and Prospective Analysis (ANEP)</td>
</tr>
<tr>
<td>Scientific disciplines covered by the National Statistics Institute (INE)</td>
</tr>
<tr>
<td>Subjects covered by the Community Research and Development Information Service (CORDIS)</td>
</tr>
<tr>
<td>UNESCO international nomenclature</td>
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</table>

<table>
<thead>
<tr>
<th>Science and Technology Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Areas covered by the social science and humanities journals list (CARHUS)</td>
</tr>
<tr>
<td>Categories - Essential Science Indicators (ESI, Thomson)</td>
</tr>
<tr>
<td>Categories - Journal Citation Reports (JCR, Thomson)</td>
</tr>
<tr>
<td>Categories - National Citation Reports (NCR, Thomson)</td>
</tr>
<tr>
<td>Categories - National Science Indicators (NSI, Thomson)</td>
</tr>
<tr>
<td>International Patent Classification (IPC)</td>
</tr>
<tr>
<td>Disciplines - Current Contents Connect (CCC, Thomson)</td>
</tr>
<tr>
<td>Disciplines - Science Bibliometrics and Evaluation (BAC)</td>
</tr>
<tr>
<td>Patents in the European Classification System (ECLA)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Socioeconomic Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalan Classification of Economic Activities (CCAE)</td>
</tr>
<tr>
<td>Catalan Classification of Education (CCED)</td>
</tr>
<tr>
<td>Nomenclature for the Analysis and Comparison of Scientific Programmes and Budgets (NABS)</td>
</tr>
<tr>
<td>Statistical Classification of Economic Activities in the European Community (NACE)</td>
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<tr>
<td>Activity Branches of the National Statistics Institute (INE)</td>
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<tr>
<td>High and Medium-to-High Technology Sectors (AYMAT) of the National Statistics Institute (INE)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Geographic Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nomenclature of Territorial Units for Statistics (NUTS)</td>
</tr>
</tbody>
</table>

Source: Authors.
To ensure the future coherence of reports while making them independent of any possible taxonomical changes, we apply the concept of version, understood as a list of codes for a classification that is valid at a given moment in time. As for linking up the different versions of a classification, this is done by using a concept called equivalence, which reflects the relationships between values in the tables of codes for different classifications or between tables of codes for two versions of the same classification. Combined use of versions and equivalences (see Figure 1) equips the model with sufficient flexibility to be able to both incorporate classification changes without needing to alter previously classified reports and represent different views of the same information.

Oracle Database 10g was chosen to implement the research database.30

5.2. The research data management application

In a project of these characteristics, quality is fundamental to the value of the results that are produced by the platform; consequently, maintenance and keeping up-to-date the information that represents the kernel of the platform is crucial.

To facilitate the administration task, a management application was created that allows platform users to incorporate information harvested from original sources in the database. This is the point at which

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**Figure 1**
Mathematics Department: characterisation and classification equivalences

Source: IEC Computer Department.

(‘) Ministry of Education and Science.

(‘) National Science and Technology Council.

(‘) Thematic areas are those referred to in the Reports de la Recerca de Catalunya.

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Solutions are included to minimise the considerable manual effort required for the maintenance of the information—mainly a component that allows massive uploading.

We previously mentioned the challenge implied by the processing of information from multiple sources prior to incorporation of the information in the system. This first-level issue of data integration has traditionally been solved through the definition of data exchange interfaces. Once these interfaces acquire weight in a community with common interests, such interfaces become standards.

Interfaces and standards

The first electronic data interchange (EDI) system arose among manufacturers and suppliers (primarily in the automotive and commercial distribution sectors) desiring to save costs and improve supply chain processes. Published standards were adopted by United Nations working parties (EDIFACT) and other sectoral associations (ODETTE and AECOC) that made it necessary to develop tools for translating customer software formats and for developing collaborative outsourcing platforms. The technological advances of the last fifteen years have reduced the high financial cost of using added-value networks that allow electronic interlocutors to be massively incorporated in a communications network through Internet-based technological solutions. Likewise, standards have gradually evolved towards the use of XML as the definition language (as e-business XML).

In the case of MERIDIÀ, internal interfaces for automated uploads by research bodies—whether of research, financial resources, publications, patents and dissertations—were defined in order to make the database independent from the source of the information (see Figure 2).

The generation of these interfaces continues to be one of the points requiring most manual work in the entire process, for two main reasons:

- A low level of standardisation in the original data. In many cases the data is uncoded so coding has to be implemented from the description, with all the problems implied by typographical errors, variability in the use of...
particles like prepositions and conjunctions, translations, etc.

- A lack of a sufficiently consolidated community for the exchange of this type of data. This means that no standards or translation tools exist as yet that would substantially improve the process.

As commented earlier, a substantial amount of work is required to resolve the problem of data integration. Cooperation with other institutions committed to resolving similar problems is likely to lead to improvements that should allow progress from this data integration level to a more powerful level in which applications would be integrated through the development of connectors, web services and other technological devices. The evolution of platforms towards service-oriented architectures (SOAs) is likely to facilitate this step in the coming years.

The research data management application and the web portal have been implemented in Java using the Struts Framework\(^3\) and deployed in an Apache Tomcat 5.5 applications server.\(^4\) The data layer is based on the Oracle database and XML files hold unstructured portal content (news, links, static-information files, etc).

5.3. The analytical environment

The analytical environment is the basic tool from which the most important content—namely, the MERIDIÀ reports—is generated. It was clear from the outset that a high-technology data

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\(^3\) Apache Struts is a free open-source framework for creating Java web applications. <http://struts.apache.org>.
A data warehouse is a database specially designed for the analytical mining of data that contains all information on corporative applications (which, for MERIDIÀ, is the research database), restructured and optimised so as to enable mining.

Customer Relationship Management (CRM) automates relationships between organisations and their customers in commercial transaction phases such as supply, sales, post-sales, marketing, etc.

At this point it is appropriate to comment on the progressive expansion in applications of business intelligence (BI) tools, traditionally conceived as tools aimed at the mining of information generated in corporative applications so as to support decision making and complement customer relationship management systems in banks, insurance companies and services companies (communications, energy, etc). Illustrative examples of these new uses are science information initiatives such as the UNeix universities and research portal and the data warehouse environments implemented by a range of institutions—including, for example, the Foundation for Science and Technology (FECYT) and universities such as the Autonomous University of Barcelona (UAB), Rovira and Virgili University (URV), the Technical University of Valencia (UPV), the University of Alacant (UA), etc.

As was mentioned earlier, the use of classification-based data labels opens up a number of possibilities when it comes to choosing the analysis dimensions or perspectives for inclusion in reports. Furthermore, the execution of pre-planned daily processes that synchronise information in the research database with the warehouse database ensure that the information in the reports is up-to-date.

The analytical environment was developed using MicroStrategy 8.0 and using IEPortal for report display.
5.4. The web portal

Once the information has been processed by the research data management application and results in the form of reports have been generated in the analytical environment, the next stage is dissemination through the web portal. The portal was initially viewed as a vehicle for communication and dissemination that operated simply as a reports depository. However, this notion developed further in terms of the development of a more generic portal that would function as a tool for communicating OR-IEC activities to society. Thus, the concept of a portal for displaying reports grew into the concept of a portal of contents.

The following consultations can currently be made through the MERIDIÀ portal:

1) Reports. Generated from the analytical environment (see Table 5), each report is structured according to one or more indicators and according to suitable dimensions (for example, modalities, national R&D&I plans, different autonomous communities, etc). Additional information includes source, scope and date of last update. The display portal includes a cross-tabulation mechanism that enables users to view reports from different perspectives in rows or columns and to export data to an office environment.

2) Relevant documentation. Additional information includes size, type, publisher and publication year.

3) Search. An additional option offered by the Lucene open-source search engine[^41] enables searches in the database and in relevant documentation. Not only does this permit indexing and more complex searches (providing a more basic level of information than that provided in aggregated form in the reports), it also enables reports to be contextualised.

4) News. Up-to-date news on the OR-IEC is provided to users.

5) Links. Selected website links are offered to users.

Initially viewed as a vehicle for communicating and disseminating reports, the portal was eventually developed as a more generic portal that would function as a tool for communicating OR-IEC activities to society.

The system developed for managing content includes a security layer that restricts access by users and also ensures a capacity to grow on the basis of new types of content that may appear in the future. Additional features of note include the fact that each report provides a detailed explanation of methodology, content, information sources, etc, the possibility of making consultations in Catalan, English and Spanish, and the fact that MERIDIÀ users can address a consultation or comment directly to the system administrator through the “contact” option.[^42]

It is necessary to be registered to access most of the information in MERIDIÀ. Two kinds of user are envisaged: institutional users (an access code is provided by the OR-IEC) and other users (who must request access by e-mail). The system is flexible enough to be able to establish specific profiles for each group of potential users, as follows:

[^41]: <http://lucene.apache.org>
[^42]: http://www.or@iec.cat
Table 5
MERIDIÀ: most significant reports

<table>
<thead>
<tr>
<th>Socioeconomic context</th>
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<tbody>
<tr>
<td>Total internal expenditure on R&amp;D activities as a % of GDP</td>
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<tr>
<td>Autonomous Community expenditure on innovation (in euros and as a % of state expenditure and of GDP)</td>
</tr>
<tr>
<td>Employment in R&amp;D activities (full-time equivalents)</td>
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<tr>
<td>Number of researchers (full-time equivalents)</td>
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<table>
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<tr>
<th>Resources</th>
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<tbody>
<tr>
<td>Academic-researcher staff, by grade and knowledge area</td>
</tr>
<tr>
<td>Ramón y Cajal Programme (RyC), by research body, thematic area* and ANEP** area</td>
</tr>
<tr>
<td>University Teacher Training (FPU) grants and funding, by research body and thematic area</td>
</tr>
<tr>
<td>Research Staff Training (FPI) grants and funding, by research body and thematic area</td>
</tr>
<tr>
<td>Catalan Research and Advanced Studies Institute (ICREA) researchers, by research body and thematic area</td>
</tr>
<tr>
<td>Centre for Industrial Technological Development (CDTI) projects, by company and CCAE*** code</td>
</tr>
<tr>
<td>Health Research Fund (FIS) research projects, by research body</td>
</tr>
<tr>
<td>National R&amp;D&amp;I Plan research projects and complementary actions, by research body and programme</td>
</tr>
<tr>
<td>European Union Framework Programme (FP) research projects, by company, plan-programme, modality and CCAE code</td>
</tr>
<tr>
<td>European Union Framework Programme (FP) research projects, by non-business research body, plan-programme, modality and thematic area</td>
</tr>
<tr>
<td>Agency for the Evaluation of Medical Technology and Research (AATRM) research projects, by research body</td>
</tr>
<tr>
<td>TV3 Marathon Foundation research projects, by research body and by thematic area</td>
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<table>
<thead>
<tr>
<th>Results</th>
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</thead>
<tbody>
<tr>
<td>Scientific, cultural and humanities journals, by publisher and thematic area</td>
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<tr>
<td>Scientific production according to Thomson Scientific ISI</td>
</tr>
<tr>
<td>Doctoral dissertations, by university, scientific area and study</td>
</tr>
<tr>
<td>Patent applications lodged with the Spanish Patent Office (OEPM), by research body, CCAE code and International Patent Classification (IPC) code</td>
</tr>
<tr>
<td>Patent applications lodged with the European Patent Office (EPO), by research body, CCAE code and International Patent Classification (IPC) code</td>
</tr>
</tbody>
</table>

Source: Authors.

(*) Thematic areas are those referred to in the *Reports de la recerca a Catalunya*.

(**) National Agency for Scientific and Technological Evaluation and Prospective Analysis.

(***) Catalan Classification of Economic Activities.

- Public administration personnel holding political posts.
- Chancellors and vice-chancellors of public and private universities.
- Directors and senior managers in research bodies, research centres and institutions.
- Science and technology policy planners (management and technical staff) in public administrations, universities, research bodies, companies, etc.
- Members, staff and affiliates of IEC subsidiary bodies.
- Research staff specialising in the description and analysis of R&D&I activities (including scientific production, patents, etc).
- General and specialist press.
- The scientific community and society in general.

Already underway is the second phase of the MERIDIÀ project, in which access to content will be enhanced and an integrated search service for all MERIDIÀ content will be implemented.
6. Conclusions and perspectives

Through its MERIDIÀ portal, the OR-IEC makes research data available to users, along with means for consultation and analysis of the data; users can thus locate relevant information rapidly and accurately in response to their queries and searches. Any quantitative approach must, of course, be complemented by the application of qualitative and standardised criteria by experts on general scientific policy or on the R&D&I activities in a specific field.

The purpose of MERIDIÀ is to publicise and foster Catalan science by providing detailed information on research agents, resource investment and results. The portal has a number of strong points, as follows:

- It has territorial scope, meaning that it covers all the Catalan cultural and linguistic regions and also provides state-level and international comparisons.
- It embraces the complete R&D&I cycle, from the socioeconomic context to industrial application of new scientific and technological knowledge.
- It offers full sectoral coverage (universities, companies, public administrations, non-profit private institutions, etc) and subject matter coverage (the hard sciences, life and health sciences, engineering, architecture, the social sciences, the arts, etc).
- It guarantees data reliability and quality by only relying on certified and credible information sources.
- It makes intensive use of the information and communications technologies (ICT).

Nonetheless, it is also necessary to be aware of the challenges entailed by a project of this nature, for example:

- Huge quantities of data and a vast range of information sources have to be handled.
- There is a lack of referents and clear models for conceptual and technological development of the system.
- There is an urgent need to make the portal known and to ensure a natural symbiosis between MERIDIÀ and the R&D&I system that guarantees added value.

There is an urgent need to make the portal known and to ensure a natural symbiosis between MERIDIÀ and the R&D&I system that guarantees added value.

The combined work of the OR-IEC and research managers and scientists meets a demand for qualitative studies on aspects as central to Catalan scientific research as international impact, interdisciplinary cooperation, other networks, etc. Planned for the future is the development of new indicators from the consultation of electronic serial publications, patent citations, bibliometric studies applied to the arts and social sciences, etc. Another area that requires further development is the systematic harvesting and organisation of data on all available material R&D&I resources. Finally, technological transfer mechanisms between universities and the private sector need to be studied, and also the role played by the private sector in scientific and technological research.

In conclusion, the MERIDIÀ portal is an ambitious initiative of the IEC that aims to provide an umbrella, for all research undertaken in the
The combined work of the OR-IEC and research managers and scientists meets a demand for qualitative studies on aspects as central to Catalan scientific research as international impact, interdisciplinary cooperation or other networks. Catalan cultural and linguistic regions, that goes beyond one-to-one exchanges and individual interdisciplinary cooperation undertakings by universities and research centres.\textsuperscript{43} It is anticipated that the MERIDIÀ portal will become a reference node for the analysis, promotion and widespread dissemination of all scientific knowledge developed in the Catalan cultural and linguistic regions in the broader context of a networked society.

\textsuperscript{43} CAMARASA & ROCA ROSELL, 2008.

Acknowledgements

The authors wish to thank the members of the IEC’s Computer Department, Research Support Department and Science Secretariat, and also the staff of ID-EST Consultants for their assistance.

References


### APPENDIX I:
Institutions included in the study

#### General
- Fundació Observatori per a la Societat de la Informació de Catalunya [http://www.fobsic.net](http://www.fobsic.net).

#### Specific
- Sistema Integral de Seguimiento y Evaluación (SISE) [http://sise.fecyt.es](http://sise.fecyt.es).
- UNEIX-Comissionat per a Universitats i Recerca [http://uneix.gencat.cat](http://uneix.gencat.cat).
## APPENDIX 2:
### Information sources

### Socioeconomic context
- Institut d’Estadística de Catalunya (IDESCAT) <http://www.idescat.cat>
- Instituto Nacional de Estadística (INE) <http://www.ine.es>
- Sistema Integral de Seguimiento y Evaluación (SISE) <http://sise.fecyt.es>
- Statistical Office of the European Communities (EUROSTAT) <http://ec.europa.eu/eurostat>

### Bodies
- Balears Innova <http://www.balearsinnova.net>
- CAMERDATA (list of Spanish businesses) <http://www.camerdata.es>
- Tecnocerca <http://www6.gencat.net/cidem/tecnocerca/index.asp>
- Xarxa de Parcs Científics i Tecnològics de Catalunya (XPCAT) <http://www.xpcat.net>

### Resources
- Agència d’Avaluació de Tecnologia i Recerca Mèdiques (AATRM) <http://www.aatrm.net>
- Agència de Gestió d’Ajuts Universitaris i de Recerca (AGAUR) <http://www.gencat.cat/agaur>
- Associación de Parques Científicos y Tecnológicos de España (APTE) <http://www.apte.org>
- Centre d’Innovació i Desenvolupament Empresarial (CIDEM) <http://www.cidem.com>
- Centro para el Desarrollo Tecnológico Industrial (CDTI) <http://www.cdti.es>
- Community Research and Development Information Service (CORDIS) <http://cordis.europa.eu>
- Confederación de Rectores de las Universidades Españolas (CRUE) <http://www.crue.org>
- Confederación de Sociedades Científicas de España (COSCE) <http://www.cosce.org>
- Consejo Superior de Investigaciones Científicas (CSIC) <http://www.csic.es>
- Consell Interdepartamental de Recerca i Innovació Tecnològica (CIRIT) <http://www.gencat.cat/diue/departament/estructura/organismes/comissionat/cirit/index.html>
- Consorci de Biblioteques Universitàries de Catalunya (CBUC) <http://www.cbuc.es>
- Fundació Catalana per a la Recerca i la Innovació (FCRI) <http://www.fcri.es>
Fundació la Marató de TV3 <http://www.fundaciomaratotv3.cat>.
Fundación Banco Bilbao Vizcaya Argentaria (BBVA) <http://www.fbbva.es>.
Fundación COTEC para la Innovación Tecnológica <http://www.cotec.es>.
Fundación Conocimiento y Desarrollo (Fundación CyD) <http://www.fundacioncyd.org>.
Fundación Española para la Ciencia y la Tecnología (FECYT) <http://www.fecyt.es>.
Institució Catalana de Recerca i Estudis Avançats (ICREA) <http://www.icrea.es>.
Institut de Recerca i Tecnologia Agroalimentàries (IRTA) <http://www.irta.cat>.
Instituto de Salud Carlos III (ISCIII) <http://www.isciii.es>.
Ministeri de Ciencia i Innovació (MICINN) <http://www.micinn.es>.
Obra Social Fundació la Caixa <http://www.fundacio.lacaixa.es>.
Red de Oficinas de Transferencia de Resultados de Investigación (RedOTRI) <http://www.redotriuniversidades.net>.
Sociedad Española de Neumonología y Cirugía Torácica (SEPAR) <http://www.separ.es>.

Scientific journals and articles

Dialnet <http://dialnet.unirioja.es>.
e-Revist@s: Plataforma Open Access de Revistas Científicas Electrónicas Españolas y Latinoamericanas <http://www.erevistas.csic.es>.
Grup de Bibliometria i Avaluació en Ciència (BAC) <http://www.prbb.org/bac>.
Plataforma de Integración de Estudios Métricos y Estadísticos de Información (EmEi) <http://bidoc.ub.es/pub/emei>.
Revistes Catalanes amb Accés Obert (RACO) <http://www.raco.cat>.
### Patents
- Oficina Española de Patentes y Marcas (OEPM) <http://www.oepm.es>.
- Trilateral Cooperation <http://www.trilateral.net>.

### Doctoral dissertations
- TESEO: Bases de datos de tesis doctorales <http://www.micinn.es/teseo>.
- Tesis Doctorals en Xarxa (TDX) <http://www.tdx.cesca.es>.

### Other
- RECERCAT: Dipòsit de la Recerca a Catalunya <http://www.recercat.net>.
- RECOLECTA: Recol·lector de ciència oberta <http://www.recolecta.net>.