



Outline “Monitoring Electoral Democracy (MEDem)”

March 2019

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1 Summary

Monitoring Electoral Democracy (MEDem) is an emerging European research infrastructure that links many existing comparative as well as national projects to study the functioning of electoral democracy in Europe and brings comparative research on European electoral democracies to a new level.

Understanding voters, parties, and elites (and how they influence policy-making) is crucial to monitoring the functioning of electoral democracy in modern societies. Even though research on electoral democracy is a well-established research area in Europe and elsewhere, further advancements in this field is still restricted due to incompatibility between data sources, projects and countries. The proposed research infrastructure for Monitoring Electoral Democracy (MEDem) is designed to overcome these obstacles and release the underlying potentials in already collected data. The central aim of MEDem is to increase the harmonization, integration and accessibility of data collections regarding various aspects of representative democracy in Europe. With increased coordination and integration, and with improved accessibility of already existing and future data collections, MEDem will provide excellent opportunities for a wider community both within academia and for the broader public to monitor the quality of electoral democracy in Europe.

MEDem is aiming for a status as a distributed European Research infrastructure, linking together existing national infrastructures and international networks. While this is an ongoing initiative, the formal goal of MEDem is to gain a position on the ESFRI roadmap in recognition of its central and strategic scientific importance for European social and political research.

2 The scientific case for MEDem

Well-functioning democracies lie at the foundation of modern Western societies as they provide for citizen representation in the executive and legislative branches of power. To understand in depth how citizens, elites, parliaments, governments and media interact and relate to each other in the democratic process is therefore central for the understanding of modern societies.

2.1 Challenged democracies and the rationale for MEDem

Democracies face a number of very evident challenges, to name a few:

- A wave of populism and nationalism is visible in Europe that challenge established institutions and parties;
- This development is accompanied by growing mistrust of public institutions and politicians in different countries and also, in some instances, by decreasing voter turnout and satisfaction;
- The digitalization of society imposes changes in interpersonal and political communication and can bring about changes to the way elections are being conducted – indeed to the very way electoral systems function;
- Established media systems are under pressure as they experience the erosion of their previous business models. Many people obtain information of political relevance through social media platforms, and this information is often selective and sometimes biased;
- Party systems, having been stable for a long time have recently been shaken in many countries with established parties struggling or disappearing and new parties and politicians appearing on the scene and even achieving government office;
- European societies are transforming due to processes such as migration, urbanization and demographic changes. European societies are also aging. The changing of the societal structure poses challenges in all functions of democracy;

- The future of the EU itself is put into question by popular sentiment as manifested in referendum and election outcomes;
- Fifty years of studying voting behaviour has taught us much about voters' party choices, but recent electoral surprises seem to have been associated especially with new departures in media usage and with unconventional candidacies that affect the context within which elections take place. Furthermore, new political conflict lines and changes in party systems have led to new coalition patterns and even government instabilities. In Europe, the multi-level democracy of the European Union presents a challenge in itself.

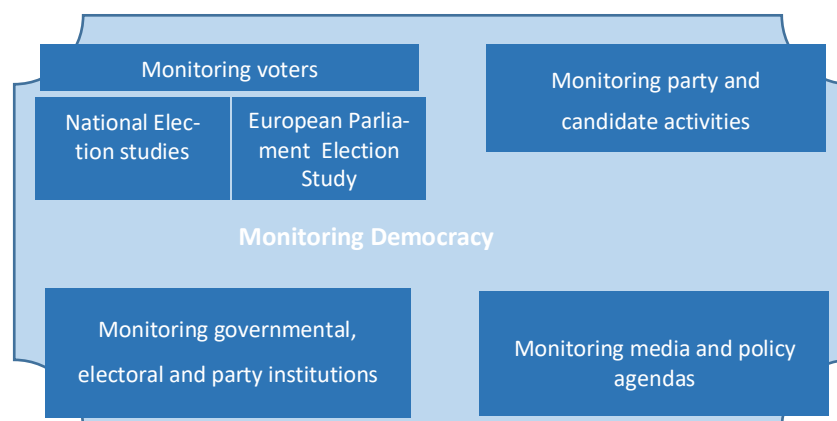
These matters and challenges cannot be studied from within the confines of individual countries — confines that limit the extent to which context can vary. Such matters can also not be studied from a single perspective, be it voters, or media, or candidates. To respond to these challenges policy-makers need to understand the causes and consequences of new political developments. For scientist to answer these questions requires solid data capturing change in democracies over time in many countries. To provide adequate variance in the character of parties and candidates, the functioning of parliaments and governments, and in media coverage of their activities and pronouncements, data manifestly needs to be made available on multiple democracies covering as many countries as possible over as long a time-span as possible. A single country perspective cannot meet this need. Also, European democracies today are interrelated and inter-dependent and must be researched accordingly.

2.2 The MEDem scope

The research infrastructure Monitoring Electoral Democracy (MEDem) releases the potential locked away in data that are already being collected. This potential is currently inaccessible due to the idiosyncrasies of country- and topic-specific data collection and coding conventions.

MEDem brings together scattered European infrastructures, research initiatives, centres, and projects under one umbrella to facilitate data harmonization, to enable linking and integration between various projects and data sources and to stimulate cooperation and collaboration. MEDem will thus contribute to innovation and excellence in the study of electoral democracy. It situates existing and future voting data within broader social and dynamic contexts of elite, party, parliament and government activities as well as those of the media in its broadest sense, over the passage of time. In broad terms, the infrastructure hosts the following main components.

Figure 1 Monitoring Electoral Democracy, the components



In this way MEDem enhances research capacity for monitoring the legitimacy and well-functioning of dynamic electoral processes – topics of interest to scholars well beyond political science, including those in economics, sociology and media studies. Research on electoral democracy is a well-established research field throughout much of Europe. It is represented in journals, standing groups and sections in international organizations, summer schools and training centres and so on. These scholars exist in most EU member countries and beyond, and constitute a well-integrated international community that encompasses political scientists, economists, sociologists, media studies, and more. Beyond academia, the research of this community is widely employed by political party organizations, public opinion research institutes, government departments and the media. It has promoted innovation in electoral campaign techniques and especially in providing policy and procedural advice to political parties, governments and Think Tanks. Monitoring electoral democracy has recently come to the fore because of the strong performance of populist parties promoting illiberal political ideas. Because not all countries have seen similar developments, MEDem data might even permit scholars to devise political and institutional correctives for poor democratic performance. The importance of these questions is widely understood, as is the need for appropriate data in order to address them. In addition to facilitating high quality academic research on European democracy, we expect MEDem to also be widely used beyond of the academic community by those who write reports for media, politicians and the public on election topics, summarizing the empirical data and research findings. To this end we will develop data visualization tools to provide easy access (see below 3.3.2). Furthermore, a vital component of MEDem will build capacity and provide training for the next generation of researchers and experts on European democracy. Given this context, the impact of MEDem will be profound.

The research infrastructure Monitoring Electoral Democracy (MEDem),

- Brings together well functioning national and comparative data collection projects and links and coordinates existing endeavours as well supports innovation in research on electoral democracies;
- Allows for more, better and new comparative research linking a variety of information on electoral democracies in a comprehensive way;
- Assembles existing (and promotes new) long-term time series to study major developments in electoral democracies over time;
- Through a position on the ESFRI roadmap, gains recognition as being of strategic importance for the political science, political sociology, and communication studies research communities in Europe;
- Sets standards and develops instruments for data collection to allow for comparative research;
- Increases accessibility by providing a single data linkage and access point in collaboration with existing data archives;
- Strengthens existing national election studies and allied projects by connecting them to a stable European network of projects and scholars working collaboratively in this field as well as to providing training and building capacity;
- Providing a foundation for new academic research as well as reports and information on the functioning of electoral democracy in Europe to the wider community and public.

It is important to note that MEDem itself is not responsible for data collection. MEDem co-ordinates existing pan-European distributed data-collection centres and projects, encourages new initiatives as necessary to provide nodes in all European countries. Thus it builds on existing projects as far as possible.

MEDem will also use the existing and well established research archive infrastructure CESSDA ERIC and its national service providers to make data FAIR (Findable, Accessible, Interoperable, and Reusable) when it establishes a new and innovative online access facility to the linked data for the research community on electoral democracy. It will coordinate with ESS ERIC and SHARE ERIC to create synergies in methodological standards and in tools to support data collection.

2.3 The current research landscape on electoral democracy and the gaps to fill

Europe is home to many research programs/infrastructures for collecting data directed at better understanding electoral democracies. Historically these developed on a national basis around the collection of data regarding citizen behaviour at the time of elections to national parliaments. These “National election studies” (NESs) are located in almost all European countries. Some of these election studies have a history back to the 1950s and 1960s (such as Sweden, UK, Germany, Norway, Netherlands). Nowadays election studies exist in almost all countries, but there is large variation in their institutionalization. Some have stable long term funding and are included on their national infrastructure roadmaps. But historically there are debilitating gaps in the data. Not all these projects have collected data for every one of their national elections since their founding. Often funding for particular election studies has depended on separate funding applications for each election and not all of these applications have been successful. However, where successful, the funding has virtually always been from national governments or their funding agencies. Thus, national governments in Europe have a long history of providing funds for national election studies in their countries.

Over time these national research infrastructures have widened their focus from studies of citizens to studies that include the candidates and parties these citizens vote for and the media that report on the behaviour and utterances of parties and candidates, though these data collection programs are sometimes also external and supplementary to the NESs of each country. In addition, many additional projects focus on other components of electoral democracies, such as parliaments, governments, political parties, and the media.

As a parallel and complementary process, initiatives to collect and analyse data cross-nationally have intensified over the last 30 years, from projects to harmonize existing election data, for instance through the True European Voter (TEV) Cost-Action, to comparative international projects like the European Election Studies (EES), the Comparative Study of Electoral Systems (CSES), the Comparative Candidate Survey (CCS), the Comparative Agendas Project (CAP), the Manifesto Project (MARPOR), the Chapel Hill Expert Survey (CHES) and the network of Voting Advice Applications (VAAs). In addition, a variety of data collection programs also collect contextual data regarding the economic and political circumstances in which elections are conducted or that result from those elections (most importantly the details of election outcomes per district and of the governments that form on the basis of such election outcomes). This list is far from complete, we do not even count the numerous individual research projects that also collected data at different points in time.

Comparative research on democracies is not limited to elections. While less established in many cases, various comparative research projects also exist that monitor parliaments, government and the media. These projects are important to create the link between what happens at elections and the inter-election period, and facilitates the study of important democratic processes beyond elections in a comparative way.

Because each of these (sets of) data collection enterprises is conducted separately, their data collection instruments are specific to each project and vary in the range of countries they cover. This makes it difficult or impossible to use the data collected within one country or project in conjunction with data collected within other countries and projects. Even within specific countries, using data about candidates in conjunction with data about the parties that field those candidates, along with the media

that report on their activities and pronouncements, is often not straightforward because of different historical traditions in the collection of each type of data.

Much research potential is locked away beyond use because of these data incompatibilities. MEDem seeks to reduce and eventually eliminate these debilitating incompatibilities by introducing procedures for harmonizing the data (*ex-post* in a first step and *ex-ante* in a second step) that flow from different data collection infrastructure/programs in different countries and Europe-wide. Just as importantly it seeks to provide a “viewing window” (more properly a “data portal”) through which the contents of the resulting complex data structure can be viewed and/or engaged by citizens and scholars. MEDem aim to enable cutting-edge European research regarding the functioning of European democracy in its broadest sense.

Comparative social science projects mainly have three tasks:

1. They integrate and document collected data, which is then made available to researchers
2. They define standards for data collection that is used in different countries and /or by different teams
3. They organize communities, projects, institutions and researchers to make sure that data is collected and used and often, beyond that, they define future research agendas.

While the above three key functionalities exist in all existing comparative projects, MEDem is now raising this functionality to a higher level so that research-potential that exists in data already being produced by the different projects is fully realized through the establishment of *cross-project* linkages. This means that the data already being produced in the different projects becomes usable in an easy way across existing projects. In some cases MEDem also facilitates the creation of collaborative projects, like for the National election studies. Beyond CSES – which is already a comparative project – national data needs to be harmonized first in order to be able to use them in a comparative way. And in some fields, such as media studies or parliamentary studies, projects are not yet at the same level of maturity to be integrated into MEDem. In those fields, MEDem will support the creation of strong comparative projects.

MEDem is an umbrella organization that provides these three functionalities across projects: to provide data integration and harmonization and make data usable across projects, to define standards and help integrate and, to some extent, to organize the different sub-communities (where such organization is currently lacking). MEDem proposes to divide these three main tasks into four different centres (see 3.3.2 below). These centres do not themselves take key scientific decisions: such decisions are taken by MEDem's Scientific Board (see 3.3.4 below), representing its member community. The centres, however, are involved in the preparation and documentation of the decisions and they support the Scientific Board with their specialized knowledge on the various aspects of MEDem's activities. Above all they provide organizational continuity and institutional memory essential to an enterprise that depends on the participation of shifting groups of scholars with expertise on and interest in different aspects of the overall enterprise.

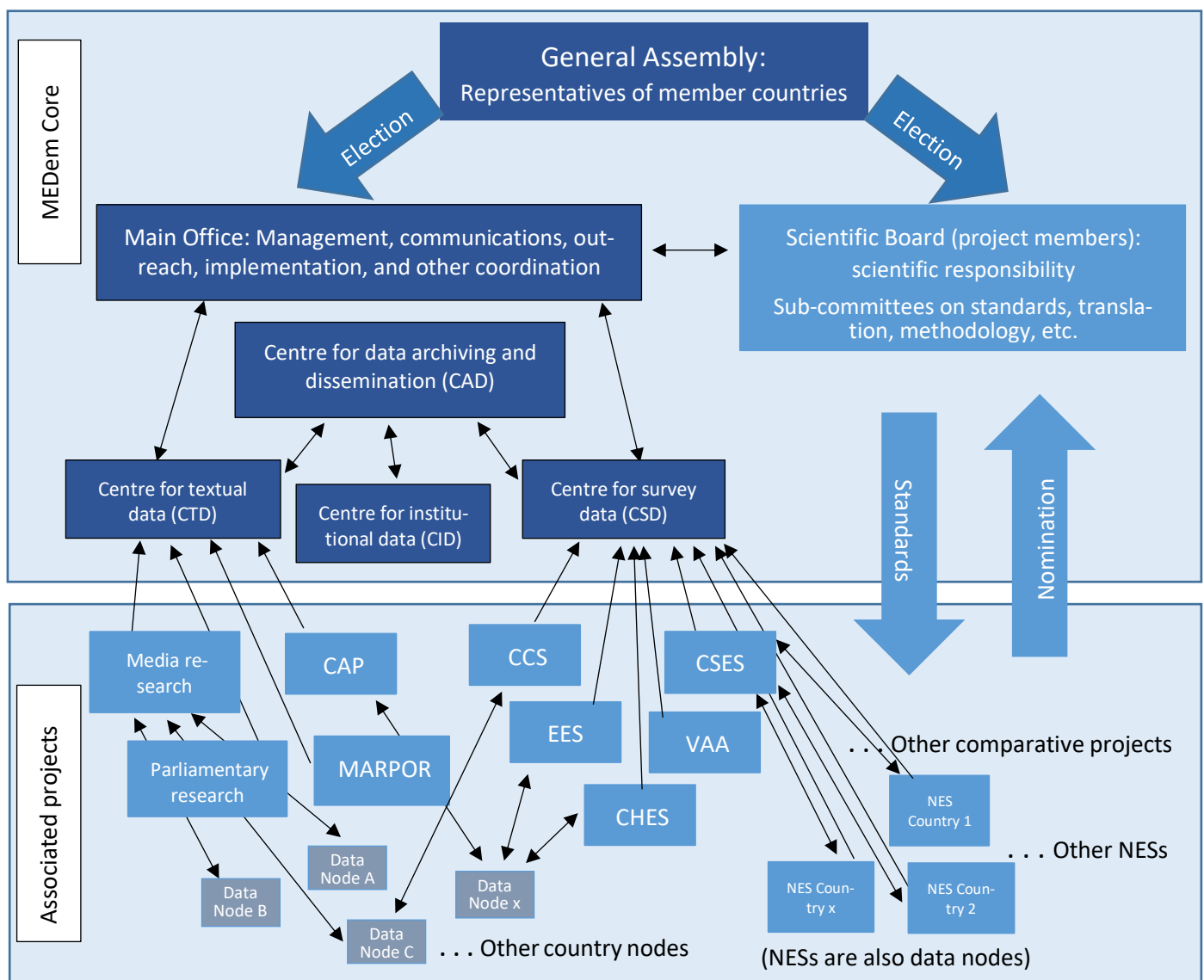
3 The future MEDem organisation

MEDem will bring together existing national and comparative projects. While existing projects will continue to retain their independence, they will coordinate through MEDem in efforts to make data inter-

linkable by agreeing on common standards of data collection with the ultimate goal of making redundant the current need for (expensive and inadequate) *ex-post* data integration of different data sources. MEDem will support the establishment and integration of comparative projects within the scope of MEDem, providing a single point of entry for data access and provide a platform for future comparative European research on electoral democracy.

The following section proposes a model of how MEDem may be organized in bringing together existing projects that all share ownership of MEDem.

Figure 2: Proposal for MEDem's structure



Abbreviations: European Election Studies (EES); Comparative Study of Electoral Systems (CSES); Comparative Candidate Survey (CCS); Comparative Agenda Project (CAP); Manifesto Research on Political Representation (MARPOR); Chapel Hill Expert Survey (CHES); network of Voting Advice Applications (VAAs); National Election Studies (NES).

MEDem members shall eventually be countries.¹ Members;

- Fund the national data collections for those parts of MEDem that exist within their countries;
- Commit to developing the data collection parts that do not yet exist in their country;
- Contribute to the overall MEDem operation costs of the main office and centres;
- Appoint a representative to the General Assembly.

3.1 MEDem Services

MEDem will provide the following key services to the scientific community:

1. Integration of existing data

- a. **Post-harmonization:** Integration of different existing data sets by making them comparable and linkable. In some cases (for example CSES, CCS, CAP, MARPOR etc.) comparative data already exists, in other cases (such as NES data, media data, parliamentary data etc.) comparative data files still needs to be produced and established;
- b. **Access:** Providing a single entry point for data users. The data may be stored at different places, mainly existing national data archives, but MEDem will provide a single access point and assure that existing data follows a common documentation standard so that data can be used across projects.

2. Standardization of future data

- a. **Pre-harmonization:** Development of a “conceptual map” that specifies how data for increasing numbers of concepts should be coded for eventual integration, using instruments suited to different data types, thus eventually making post-harmonization redundant for new data produced under the auspices of MEDem. These instruments should facilitate comparative research in two main domains:
- b. **Coding schemes** on parties, constituencies, candidates etc. that allow for comparability and matching of existing data within the MEDem framework. Although some coordination activities have already been conducted (e.g. the TEV Cost Action) coordination has so far only been sought within specific projects (e.g. National Election Studies);
- c. **Methodological standards** on data collection for different parts of MEDem. MEDem, in collaboration with the existing projects will develop rules and quality standards of data collection.

3. **Innovation:** At a later stage, MEDem will provide a platform and procedures to develop and implement joint collaborative research topics in one or several sub-fields associated within MEDem across different data collections.

In addition, MEDem supports:

- **Community integration and development:** the MEDem framework will bring together scholars from the different subfields in a comprehensive and permanent fashion that ensures inclusivity.
- **Integration for new comparative projects:** MEDem will support new research teams in their attempt to organize a sub-community related to MEDem and to organize the future data collections.

¹ Should MEDem become an ERIC, MEDem will grant observer status to countries that cannot be full members, as is the case for other European infrastructures.

- **Competence building:** providing training and guidance for using MEDem data.
- **Knowledge Dissemination:** communicating results to a scientific and non-scientific audience.

MEDem will be organized around the cycle of elections in European countries with some change in data collection instruments (**Modules**) from cycle to cycle in order to address evolving research questions. Since different countries hold elections at different frequencies (and some countries occasionally experience early elections), for some countries more than one election will fall within the period of currency of a particular Module.

3.2 Existing nodes and projects

3.2.1 National nodes

National nodes are the lowest organizational component of MEDem. They are research teams located at national research institutions who are in charge of parts of the actual data collection within the MEDem framework according to the standards set by the comparative projects and MEDem. Often national nodes are responsible for more than one part of the MEDem data collection. National nodes:

- Commit to conduct data collections for one or several different MEDem components within the MEDem framework, following jointly agreed overall MEDem scientific and methodological standards, building on existing relevant standards of the comparative projects (where these already exist);
- Find funding for their national data collection component;
- Commit to working through the relevant comparative project in coordinating data collected at the national level, so as to be able to contribute the data to the comparative data collection;
- Commit to deliver data free of charge and without any embargo.

3.2.2 Existing projects linked to MEDem

Existing national and comparative projects continue to be independent projects and they remain the main building blocks of MEDem. They will have rights and obligations. They shall,

- Ensure the appropriate functioning and funding for their own endeavour;
- Contribute to the development of joint standards and jointly supervised coordination of their existing data collections through MEDem, with their existing national data collection nodes, following jointly decided coding and methodological standards to allow for comparative (cross-national and cross-project) research;
- Commit to making resulting data available free of charge and without any embargo,
- Nominate members to the Scientific Board;
- Commit to open and transparent procedures for the definition of future data collections and to ensure that the ownership of the data collections rests with the scientific community,
- Sign an agreement between MEDem and the project that defines rights and duties of both partners;
- May receive funding for parts of their operations from MEDem.

The following comparative projects have been involved in the discussion to establish MEDem and may become part of MEDem in the future:

- Comparative Study of Electoral Systems (CSES)
- Comparative Agendas Project (CAP)
- Manifesto project (MARPOR)
- Comparative Candidate Survey (CCS)
- VAA Research Network - Data on Party Positioning
- Chapel Hill Expert Survey (CHES)
- European Election study (EES)
- Media Research Network
- Parliamentary Research Network

National Election Studies (for other projects see below)

National election studies exist in many countries, in some for a very long time by now, however, with varying degrees of institutionalization. Because of their importance in the national academic environment and their long tradition, national election studies are a central pillar of the MEDem data collection. National election studies,

- Commit to conducting a national election study in their country for the national elections according to defined joint standards,
- Find funding for their national data collection,
- Provide their data for post-harmonization of election data to the Center on Survey Data as well as implement standards of data collection for future election studies in order to make data comparable.

3.3 MEDem Core Structure

3.3.1 The MEDem Main office

The main office is located in the leading country under the leadership of the MEDem Director. The main office:

- Is in charge for the overall coordination and operation of MEDem;
- Prepares the agenda and documentation of the General Assembly and implements its decisions;
- Prepares the agenda and relevant documentation of the Scientific Board;
- Coordinates with the units and centres and the management all work related to MEDem;
- Ensures, together with the management, the functioning of the centres;
- Is responsible for promoting MEDem and for reaching out to the academic community as well to the wider public;
- Is responsible for documenting and supporting the MEDem membership of projects and nodes.

The management consists of the MEDem Director as well as the directors of the centres. The role of the management is to plan, execute and coordinate the MEDem workplan at the main office and the centres.

The MEDem main office is responsible for providing all services described above. It may be divided up into different units. Those units may or may not be in the same physical location. A possible functional division could be along the following lines.

Methods and standards unit (MSU)

The *Method and standards unit (MSU)* suggests the standards to be agreed by the Scientific Board, in close collaboration with the Centre for data archiving and dissemination (see below), and implements the agreed standards to be used in future data collection in order to facilitate the later data integration and usage across projects. These include:

- Coding standards to link data (e.g. countries, parties, policy domains, socio-demographics etc.) to be used, and metadata standards;
- Standards of measurement: the development and harmonization of measurement instruments for making the different studies comparable (e.g. in elite and voter surveys, or CHES with voter surveys etc.) and the creation of scales and indices;
- Expertise on various modes of data collection and tests on new modes of data collection;
- Analysis of complex and heterogeneous datasets, defining data imputation and weighting of heterogeneous data sets;
- Develop techniques to cope with new types of data that MEDem aims at creating;

The MSU's role is to reflect upon and prepare standards, so that the *decisions can be made by the Scientific Board*.

At a later stage, MEDem shall also be used as an innovation platform for new research. This can include new types of data or modules of data collection to be integrated in the different sub-parts of MEDem. MEDem shall in the future, and in close collaboration with the existing projects, design and establish procedures (such as calls for modules, as well as review- and decision-making procedures) that allow for innovation and make sure that new scientific topics can be studied by using different MEDem components.

The MSU may organize its work in creating different units along the type of data, or the type of tasks. This needs to be defined at a later stage.

Outreach unit (OU)

The Outreach unit (OU) is in charge of supporting existing projects in:

- Reaching out to new countries and building new nodes for their data collection;
- Developing and strengthening the governance and organizational and operational capacity of projects;
- Finding sustainable funding for the comparative projects and their nodes where this does not yet exist.

The unit also organizes events for scholars interested in MEDem, such as summer/winter schools, scientific workshops and conferences.

3.3.2 Competence Centres

Centre for data archiving and dissemination (CAD)

The CAD will most likely be hosted by one or several established national social science data archive(s). While all of the MEDem data may not be physically stored at a single location, the MEDem CAD will provide a single data access point for MEDem-related data. The main tasks of the CAD are to:

- Make data usable across projects, and datasets collected in the different projects, in collaboration with the other competence centres;

- Provide tools and instruments to link the data sources from different projects;
- Map the existing projects and data sources, and make data findable;
- Ensure that all the data is well documented and updated following a joint metadata and documentation standard and archived in established data archives, if not archived at the competence centre itself;
- Archive a substantial part of the data collection and provide links to data archived elsewhere;
- Contribute to developing post- and pre-harmonization procedures and standards for previous and future data collections;
- Advise the other centres in their data harmonization and in the development of standards for data collection, data integration and data documentation;
- Support and train researchers in the use of MEDem data.

Centre on Survey Data (CSD)

The Centre on Survey Data (CSD) will coordinate and integrate all survey related data, mainly on voters and citizens, but also on candidates and MPs. More specifically, the centre will:

- Provide coordination between different comparative projects conducting surveys, such as CSES, CCS, CHES, VAA and provide tools to link the different data sources;
- Coordinate and link national election studies and harmonize national election study data. For this part the centre will closely collaborate with CSES. There have been previous attempts to integrate national election study data from various countries and over several decades, most recently through the True European Voter Cost-Action project. The CSD will build on this, and on national election study data, to establish a set of time series that will be extended into the future as new editions of the data are collected;
- Promote the usability of survey data, also in cooperation with other competence centres, across datasets collected within the different projects;
- Contribute to the development of post- and pre-harmonization procedures and standards for previous and future survey data collections;
- Advise projects in the development of standards for data collection, data integration and data documentation that will facilitate data harmonization in the future;
- The CSD may also be involved in supporting the preparation of the European Election Study (EES), but it will not fund it.

Centre on textual Data (CTD)

The use of textual data for empirical research is rapidly growing. Because of this, MEDem plans to establish a Centre for textual data (CTD) that will:

- Provide coordination between different comparative projects involved in the collection of textual data, such as the MARPOR and CAP, as well as comparative media and parliamentary research projects that are under development;
- Promote the usability of textual data across datasets collected in the different projects;
- Document methodological and technical approaches for collecting, scraping and analysing digital textual data from a variety of sources, with a special focus on the multilingual nature of such raw data;

- Ensure that all the textual data is well documented and updated following a joint metadata and documentation standard, and archived in established data archives if not archived at the competence centre itself;
- Contribute to the development of post- and pre-harmonization procedures and standards for previous and future textual data collections;
- Advise projects in the development of standards for data collection, data integration and data documentation that will facilitate data harmonization in the future.

Centre on Institutional (contextual) Data (CID)

The CID is responsible for providing contextual data for the different data sets that may be used for scientific research. It will be central to the aim of linking different types of election studies to actual electoral outcomes.

This is a component currently contributed to separately by many of the individual projects, although the contributions of different projects differ in terms of standards and coverage.

MEDem will attempt to simplify and standardize the collection and distribution of institutional and contextual data to its various projects. It will also link to existing projects by gathering more fine-grained comparative data on matters such as campaign conduct, electoral systems and districting principles, or media regulations. Providing a separate Competence Centre to undertake this task will relieve other projects of the need to do so while ensuring the standardization of data used in virtually all of the research undertaken with MEDem data. The centre will:

- Consult with comparative projects involved in the collection of survey and textual data, as set out above;
- Promote the usability of contextual data across datasets collected in the different projects, especially for data that exist in different languages;
- Document the methodological and technical approaches for collecting contextual data from a variety of sources;
- Ensure that all the contextual data is well documented and updated following a joint metadata and documentation standard, and archived in established data archives if not archived at the competence centre itself;
- Contribute to the development of post- and pre-harmonization procedures and standards for previous and future contextual data collections;
- The CID may also be involved in the preparation of the European Election Study (EES).

3.3.3 The General Assembly

The General Assembly consists of representatives from member countries who shall have overall responsibility for ensuring the financial and operative viability and sustainability of MEDem. Its responsibilities shall also include, without being limited to:

- Appointing, replacing or removing the MEDem Director, and the directors of centres in collaboration with the host institution;
- Appointing, replacing or removing the Main Office and centres;
- Receiving periodic reports from the Director on the exercise of his/her duties;
- Reviewing and approving accounts and rolling work programs;
- Appointing, replacing or removing the members of the MEDem Scientific Board and its sub-committees;

- Monitoring and ensuring that members fulfil their obligations towards MEDem;
- Approve the overall strategic planning of MEDem.

3.3.4 *The Scientific Board (SB)*²

The Scientific Board has the ultimate scientific responsibility and decides on all scientific issues related to MEDem. It is important that existing national and comparative projects retain ownership of MEDem and that they are represented in the SB. This is assured through their right to nominate members to the SB. The members are expected to include well-known scholars in the fields covered by MEDem.

The Scientific Board,

- Ensures the overall scientific quality of all MEDem operations at large and decides on the future scientific direction of MEDem;
- Decides on standards of data integration, data collection and data comparability (methodological standards, measurement and coding standards);
- Defines in the future on procedures for innovation and the inclusion of new instruments across different sub-fields of MEDem, which are to be included in one or several MEDem components.

The Scientific Board can create or delegate to sub-committees for permanent or specific tasks. Already envisaged are sub-committees on methodology, on translation and on harmonization.

3.4 Funding

A draft budget will need to be established in the coming months, following some key principles:

- The main office and the competence centres, including the Centre for data archiving and dissemination, are funded by contributions from the member and observer countries as well as by substantial funds from the host countries of the main office and the respective centres;
- Actual data collection is funded through existing projects and/or national nodes, thus its collection costs are usually not part of the MEDem budget;
- Special funds will be required for the implementation and development of MEDem. Some of these financial needs may be covered through the funds especially provided for research infrastructures in the Horizon 2020 program, while additional funds will very likely also be needed to establish MEDem.

Note that the largest costs associated with MEDem are those of collecting survey data from mass publics – costs that in many countries have already been covered from national sources, in some cases for decades already. The major purpose of MEDem is to get greater returns from these expenditures by releasing added value inherent in the data already being collected (and already being paid for) through linking with additional data that, for the most part, is much less costly to acquire.

² MEDem may consider putting also an international scientific advisory board with highly experienced scholars in place.

4 Annex: MEDem Preparation and Implementation Phase Working Principles (Adopted at Gothenburg MEDem meeting, June 2018)

Purpose, Scope, and General

1. MEDem (for „Monitoring Electoral Democracy“) is an initiative of scholars and institutions involved in research on modern democracies. Its purpose is to establish a permanent organisation that serves as an infrastructure supporting comparative research of the highest possible quality, by enabling connections between, and providing access to, data of the types most relevant for understanding the functioning of contemporary democracies in Europe and beyond.
2. The present MEDem initiative was established in April 2017 at a Special Meeting of the Consortium for European Research with Election Studies (CERES) in Vienna, Austria, with the objective of making a trial application for ESFRI roadmap status in the then current round of applications. This trial was unsuccessful in overcoming bureaucratic hurdles in the way of a new organization, and our revised goal is to make MEDem formally part of the ESFRI roadmap 2020. An initial Steering Committee was elected at a follow-up meeting in Mannheim, Germany, in November 2017 and was tasked with developing these Working Principles and to further develop the infrastructure initiative.
3. The present Working Principles regulate the cooperation among members of the MEDem initiative until that permanent organisation has been installed. They come into force immediately after having been initially confirmed by supporters of the initiative at a meeting held in Gothenburg in June 2018. They can be modified by a normal vote of the MEDem plenary.
4. The MEDem initiative will cease to exist once the permanent organisation has been formally installed, and these Working Principles will be fully replaced by the regulations of that future organisation.

Membership

5. Membership to the MEDem initiative is by invitation and can be acquired by individuals representing national data collections, by relevant institutions, and by existing comparative data collection initiatives.
6. Members commit to fostering the objectives of MEDem.
7. Membership rights include participation and voting at MEDem plenary meetings, and using the name and logo of MEDem when working for its stated objectives.

The MEDem Plenary

8. The Plenary is the ultimate decision-making body of the MEDem initiative and is constituted by all members of MEDem.
9. Plenary meetings can be called by the Steering Committee, or by a quorum of at least 25% of the membership. Outside meetings, members can demand a vote on a particular issue with a quorum of 25%.
10. Decisions in the Plenary are made by simple majority of all valid votes cast. Decision-making outside of plenary meetings can be conducted by electronic communication.
11. The Plenary elects the Steering Committee and assigns one of its members to be its speaker.
12. The Plenary decides about these Working Principles by simple majority.

13. The speaker of the Steering Committee chairs the meetings of the Plenary.

The Steering Committee

14. The Steering Committee can have between 3 and 7 members. Members do not have a fixed term of office.

15. The Steering Committee conducts the day to day business of MEDem. Specifically, this includes:

- a. Organisational and administrative work to run the MEDem initiative, including the organisation of plenary assemblies and voting processes.
- b. Designing roadmaps for establishing the permanent infrastructure, in interaction with the wider community and the MEDem membership.
- c. Initiating the development of applications for relevant grants.
- d. Supporting members in their national efforts to obtain the required funding for participation in the permanent organization.
- e. Reaching out to existing and potential members in order to collect information about their current status and to encourage their membership in MEDem.

16. The Steering Committee is obliged to inform the membership in an at least semi-annual schedule about its activities and current developments. The plenary will be consulted outside this schedule on issues of foundational importance to MEDem.