

<b>Action 17: RESEARCH MANAGEMENT INITIATIVE – Enhancing the strategic capacity of Europe's public research performing and funding organisations</b>	
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<b>1. Description</b>	<p><b><u>BACKGROUND</u></b></p> <p>The Commission announced in the European Skills Agenda (30 June 2020) to develop science management curricula, in close cooperation with stakeholders and Member States. The Council in its Conclusions on the new ERA (1 Dec. 2020) recognised the need for the professionalization of science management at research performing and funding organisations (further on referred to as research management<sup>1</sup>) and considered the added value of cooperation between training providers to develop research management programmes and guidelines.</p> <p><b>Challenges</b> to Europe's research management capacity are i.a.:</p> <ul style="list-style-type: none"> <li>- Research performing and funding entities, local ecosystems, and regions who are proven strong in knowledge creation and circulation usually rely on a strong community of research managers. An important challenge for the European R&amp;I system in this respect is the <i>uneven distribution of research management communities and expertise across the ERA</i>.</li> <li>- There is a strong need for creating sustained pan-European research management training – both in virtual and in non-virtual curricula and a <i>need for solid networks of early career managers</i> that will last throughout their careers.</li> <li>- Whilst large institutions can hire support staff in discrete and specialised roles, smaller institutions often need support staff to combine roles, requiring readily and democratic access to training and practice exchange platforms and networks. In addition, the <i>need for new skills is constantly evolving</i>.</li> <li>- Overall, there is a <i>lack of recognition of the profession</i> of research managers or research support staff, as compared to other policy sectors. While in some countries specialised staff like (for instance) data stewards and financial officers have an official job profile that contributes to attractive career paths, in other countries supporting frameworks for such careers are absent. Similarly, quality control of training and career development programmes for research managers in the diverse specialisations is lacking.</li> </ul> <p><b><u>OBJECTIVES</u></b></p> <p>Action 17 intends to develop a <b>Research Management Initiative</b> in order to contribute to improve the European R&amp;I system across the entire ERA by particularly <i>enhancing the strategic capacity for research management in Europe's public research performing and funding</i></p>

<sup>1</sup> Research management refers to the operation (research), while science management refers to the result of the operation (science). The initiative we are pursuing in action 17 intends to improve the overall R&I system across the ERA by increasing support capacity for the operation. We therefore refer to research management.

	<p><i>organisations</i>. Research management takes various shapes (see 8A. Additional information), and therefore its <b>scope</b> is multi-dimensional. Following above mentioned challenges, the <b>specific objectives</b> of the European Research Management Initiative are:</p> <ul style="list-style-type: none"> <li>- UPSKILLING: improve training and skills development of research management staff</li> <li>- RECOGNITION: contribute to professionalisation of the continuously evolving, multi-faceted role of the research management profession across the ERA</li> <li>- NETWORKING: support networking of research managers and best practice exchange via cross-border networks in the various dimensions of research management</li> <li>- CAPACITY BUILDING: reinforce research management capacity across the entire ERA, notably supporting organisations in regions of lower R&amp;I intensity.</li> </ul> <p><b><u>ACTIVITIES</u></b></p> <p>We foresee the following <b>activities</b> to be deployed under the Research Management Initiative, in a joint effort from Member States and European Commission, in cooperation with research managers, associations thereof and research performing/funding organisations:</p> <ul style="list-style-type: none"> <li>- UPSKILLING: Through a cooperation of training providers and higher education institutions, training and career development programmes and curricula covering the various dimensions of research management will be established, in response to demand and needs from the communities and market. In particular, the creation or improving accessibility of <i>joint virtual and non-virtual training programmes</i> will be supported; the democratic access for research managers from across the entire ERA will be ensured.</li> <li>- RECOGNITION: In coordination with Action 4 (notably the competence framework for researchers), the Commission together with national experts, the community of practitioners, and existing networks will engage in <i>defining skills and competences of research managers</i> in the various dimensions of research management. Both core ‘disciplinary’ aspects (e.g. open science, ethics, infrastructure) and transversal skills and competencies (e.g. communication, management, autonomy) will be addressed, feeding back to the ‘Upskilling’ activities, contributing to recognition of new career pathways and paving the way for career diversification of PhDs. Mechanisms for quality control of training programmes and curricula for research managers will be developed, and (non-obligatory) certification of programmes will be explored.</li> <li>- NETWORKING: Support for <i>networks of research managers</i> from public research performing and funding organisations, both at national level (see 8B. Additional information below) and at European level, which target the different dimensions of research management for practice exchange, focussing in particular on early career stage research managers.</li> </ul>
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	<ul style="list-style-type: none"> <li>- CAPACITY BUILDING: Support for <i>cross-border staff exchange</i> for research managers, complementing national initiatives and national funding to support networking, training, and exchange of practices. Focus could be put on exchanges that help build capacity in organisations from low R&amp;I intense regions (for instance through the ERA Talents action under widening).</li> </ul> <p>The Research Management Initiative will build on <b>existing support</b> for some of the research management dimensions, such as initiatives for open science, data management, ethics, infrastructures, research funding (see section 8B. Additional information). The Commission intends to <b>coordinate</b> the existing EU research management project portfolio, where feasible and providing added value.</p>
<p><b>2. Actors</b> (<i>envisaged role of MS is underlined</i>)</p>	<ul style="list-style-type: none"> <li>- The <b>target groups</b> of the Research Management Initiative are public research performing and research funding organisations and their research managers, including associations thereof.</li> <li>- UPSKILLING: Initiatives jointly taken by training providers and higher education institutions, with <u>support from Member States</u> (where feasible) and European Commission</li> <li>- RECOGNITION: Task Force of <u>Member States experts</u> and research management practitioners, with logistics support from the European Commission</li> <li>- NETWORKING: Practitioners and networks of research managers from research performing and research funding organisations, with <u>support from Member States</u> (and Associated Countries) for networks at national level and support from the European Commission for networks at European level</li> <li>- CAPACITY BUILDING: Research managers from countries and regions with low R&amp;I intensity, together with experienced research managers and research performing and research funding organisations, supported by the European level, and (where feasible) <u>complemented by regional or national support</u>.</li> </ul>
<p><b>3. Timing and milestones</b></p>	<p><b>Q2 2022</b></p> <ul style="list-style-type: none"> <li>- Launch of EU level pilot projects for networking and training programmes (through Horizon Europe WIDERA 2021) – UPSKILLING &amp; NETWORKING</li> </ul> <p><b>Q3 2022</b></p> <ul style="list-style-type: none"> <li>- Establish task force to define the needs for research management careers and training curricula, and to develop a strategy to contribute to recognition of the profession – RECOGNITION</li> <li>- Open call for staff exchange, including targeting research managers (Horizon Europe WIDERA 2022 and 2023-2024, ERA Talents) – CAPACITY BUILDING</li> </ul> <p><b>Q3 2023</b></p> <ul style="list-style-type: none"> <li>- Report from task force on needs for research management careers</li> </ul>

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	<p>and career profiles, training curricula, quality assurance methodology, as well as facilitation of mutual sharing – RECOGNITION</p> <ul style="list-style-type: none"> <li>- Open call for open network of research managers and training (Horizon Europe WIDERA 2024) – NETWORKING &amp; UPSKILLING</li> </ul> <p><b>2024</b></p> <ul style="list-style-type: none"> <li>- Development of a non-obligatory certification and accreditation methodology for curricula of research managers, depending on the results of the analysis by the task force – RECOGNITION</li> <li>- Launch of open networks of research managers and training programmes, including complementary support from Member States for national networks of research managers – NETWORKING</li> </ul>
<p><b>4. Funding</b></p>	<ul style="list-style-type: none"> <li>- UPSKILLING: <ul style="list-style-type: none"> <li>o <u>Support from Member States, potentially through ESF+, for national training initiatives</u></li> <li>o Support from European Commission for pan-European training programmes, and for ensuring accessibility (through Horizon Europe WIDERA 2023 dedicated action, coordinated with Erasmus+ where relevant)</li> </ul> </li> <li>- RECOGNITION: <ul style="list-style-type: none"> <li>o Logistics support from European Commission for the task force (through Horizon Europe WIDERA support for experts and/or public procurement)</li> </ul> </li> <li>- NETWORKING: <ul style="list-style-type: none"> <li>o <u>Support from Member States for national networks of research managers</u></li> <li>o Support from European Commission for pan-European networks of research managers, and access to these networks (through Horizon Europe WIDERA dedicated support actions)</li> </ul> </li> <li>- CAPACITY BUILDING: <ul style="list-style-type: none"> <li>o Support for staff exchange from European Commission (through Horizon Europe WIDERA ERA Talents action as of 2022), <u>where possible complemented by national or regional initiatives</u> for staff exchange</li> </ul> </li> </ul>
<p><b>5. Expected impact</b></p>	<p>By end of 2024, <u>involvement of at least 100 public research performing and research funding organisations</u> and their research management staff in the training and networking programmes.</p> <ul style="list-style-type: none"> <li>- Improved training, skills and career development of research management staff in the participating organisations.</li> <li>- Contribution to professionalisation, including through quality control, and possible certification of training programmes.</li> <li>- Increased recognition of the research management profession in Member States and the important role of research managers for the across the ERA.</li> <li>- Increased networking and practice exchange at national and at</li> </ul>

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	<p>pan-European level.</p> <ul style="list-style-type: none"> <li>- Strengthened research management capacity across the entire ERA, including in regions with lower R&amp;I intensity.</li> </ul>
<b>6. Monitoring</b>	<ul style="list-style-type: none"> <li>- Availability of networks of research managers for the dimensions requested by the market.</li> <li>- Availability of curricula aimed at preparing research managers for distinct or various research management roles, for the acquisition of specialised and complementary skills.</li> <li>- Number of early career research managers participating in training programmes, staff exchanges, networks.</li> <li>- Number of more experienced research managers participating in training, in order to lead out on the research management teams.</li> <li>- Existence of dedicated job profiles in national frameworks and in European context.</li> </ul>
<b>7. Communication</b>	<ul style="list-style-type: none"> <li>- Awareness creation via research management initiative conference and workshops and European R&amp;I Days</li> <li>- Support for projects through NCPs, Horizon Europe national shadow programme committees</li> <li>- Presentations at umbrella organisations of research performing organisations, associations of research managers and administrators, and research funding organisations</li> <li>- EOSC Association is expected to become an important multiplier of actions and policies on research management. It's member base includes research funders, research performing organisations, libraries, etc.</li> </ul>
<b>8. Additional information</b>	<p><b>A. Multidimensional scope of research management</b></p> <p>Research management takes various shapes across the ERA (and beyond), and therefore its <b>scope is multi-dimensional</b>:</p> <ul style="list-style-type: none"> <li>- research policy advice, evidence-based policy making, foresight and strategy development</li> <li>- research coordination, research development, research project and funding management, financial support</li> <li>- evaluation and assessment support</li> <li>- research and complementary training programme management</li> <li>- data-based research support, such as data stewards and data analysts, exploitation of research data, data protection</li> <li>- specialised research infrastructure operation</li> <li>- scientific integrity and ethics expertise, legal support</li> <li>- science communication support</li> <li>- knowledge transfer and innovation support, knowledge brokering, incubator coordination and business development</li> </ul> <p><b>B. Overview of existing networks or initiatives of research managers</b></p> <p><i>National initiatives</i></p> <ul style="list-style-type: none"> <li>- Formal associations at national level: BE-ARMA (BE), CZARMA (CZ), DARMA (DK), Finn-ARMA (FI), FORTRAMA (DE), Icearma (IC),</li> </ul>

	<p>ARMA-NL (NL), SWARMA (SE)</p> <ul style="list-style-type: none"> <li>- Informal national/regional networks, linked to research councils, university networks, or research funding organisations: AURAM (AT), AGUAR (ES, Catalunya), CLORA (FR), CODAU (IT), PARMA (PL), PIC (PT), KosRis (SI)</li> <li>- Grassroots initiatives exist in EE, EL, and LT</li> </ul> <p><i>Associations with secretariat and employees</i></p> <ul style="list-style-type: none"> <li>- Formal association at European level: EARMA</li> <li>- Formal associations at national level: ARMA (UK), NARMA (NO), EURResearch (CH)</li> </ul> <p><i>Projects supported with public funding</i></p> <ul style="list-style-type: none"> <li>- V4 + WB Network of Research Managers and Administrators: Visegrad 4 (PL, CZ, SK, HU) and Western Balkan Countries, <a href="https://hetfa.eu/international-projects/v4wb-rmas">https://hetfa.eu/international-projects/v4wb-rmas</a></li> <li>- DE initiative for research management staff exchange and training: <a href="https://www.era-fellowships.de/en/index.php">https://www.era-fellowships.de/en/index.php</a></li> <li>- BESTPRAC (COST TN1302): all countries, but with specific focus on capacity building in widening countries, <a href="https://bestprac.eu/home">https://bestprac.eu/home</a>; BESTPRAC recently joined EARMA as targeted working group</li> <li>- FoRMAtion (Erasmus+): foRMAtion aims to support students in higher education as potential Research Managers and Administrators (RMAs) by reinforcing the high-level and transversal skills needed for developing and managing excellent European research, innovation and educational projects, <a href="https://www.formation-rma.eu">https://www.formation-rma.eu</a></li> </ul> <p><i>Projects supported through Horizon 2020 / Horizon Europe</i></p> <ul style="list-style-type: none"> <li>- RITrainPlus (Research Infrastructures): RItrain project (2015-2020) identified a comprehensive set of skills and competences needed by research infrastructure managers and developed a two-year European Masters in Management of Research Infrastructures (EMMRI) programme implemented at University of Milano Bicocca. Three editions of the programme trained to date over 150 RI managers. Currently, the RItrainPlus project (2020-2024) aims at designing and delivering short-cycle Continuous Professional Development courses (CPDs) for current and potential leaders in RIs and to establish a permanent European School for Management of Research Infrastructures.</li> <li>- EOSC (HORIZON-INFRA-2021-EOSC-01-01): Supporting an EOSC-ready digitally skilled workforce”, aims at upskilling and training through the development of new curricula, including to foster the “development of a distributed pan-European user support network, supporting the collaboration of existing networks of competence and data curation centres, in order to provide expertise on storing, sharing and re-using digital outputs”; skills and training in the digital context of EOSC (which includes training more data stewards, and increasing advanced digital skills) is derived from the Strategic Research and Innovation Agenda for the EOSC Partnership.</li> </ul>
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	<ul style="list-style-type: none"><li>- EOSC Future (Horizon 2020 project) Tasked with delivering a federated training catalogue where training materials are FAIR, building on previous efforts such as FOSTER and FOSTER Plus projects.</li><li>- EIT's HEI Initiative: Provides support higher education institutions with expertise and coaching, access to the EIT innovation ecosystem and funding, enabling them to develop innovation action plans complementing the needs of individual higher education institutions.</li><li>- In general, through Horizon Europe SwafS (Science with and for Society) and Research Infrastructures, expertise was built regarding i.a. open science, data protection, gender equality, interdisciplinarity, ethics and integrity, science communication, infrastructures.</li></ul> <p><i>Pilot initiative</i></p> <ul style="list-style-type: none"><li>- Following the Council's call to launch a pilot (see December 2020 Conclusions on the new ERA), the Commission issued a call in 2021 "HORIZON-WIDERA-2021-ERA-01-20: Towards a Europe-wide training and networking scheme for research managers". Two CSA projects are anticipated to start in Q2/Q3 2022: CARDEA (coordinated by University College Cork) and RM ROADMAP (coordinated by EARMA).</li></ul>
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