

## Policy Brief No.2 September 2023

# The Research Management Initiative – The European Research Area Policy Agenda Action No 17

This policy brief explains the Research Management Initiative and provides information about this European Research Area (ERA) Policy Agenda Action. It explains why it is relevant both for Horizon Europe WIDERA applicants and for National Contact Points.

In 2021, the [Council Conclusion on the Future Governance of the European Research Area \(ERA\)](#) outlined the first **ERA Policy Agenda** and its 20 actions, which included the **Research Management Initiative** to “Enhance the strategic capacity of Europe’s public research performing organisations” as action no. 17.

The Research Management Initiative recognizes the importance of proper management as a

backbone of efficient research and innovation systems, and that a strong community of research managers is essential for excellent hubs in knowledge creation and innovation. The ERA Policy Agenda action therefore aims to support networking and to improve the training and skills development of research management staff, to develop better research management capacities, and to pave the way towards a recognition of research management professions. Recognition and career development activities are aligned with ERA Policy Agenda action 4 measures to “promote attractive and sustainable research careers, balanced talent circulation, transdisciplinary and intersectoral mobility across the ERA”.

The **NCP\_WIDERA.NET** is the network of National Contact Points (NCPs) for the Horizon Europe programme parts *Widening participation and spreading excellence* – the WIDENING part – and

*Reforming and enhancing the European research and innovation system* – the ERA part. Both programme parts together are called WIDERA for short.

## Why this is relevant for WIDERA applicants and NCPs?

The ERA programme part is expected to significantly contribute to further enhancing the ERA along the current policy priorities and the ERA Policy Agenda actions. To this end, the ERA Policy Agenda directs the planning and designing of calls particularly in the ERA part, as it provides funding for the efforts to strengthen the ERA.

The Research Management Initiative is widely addressed in the WIDERA programme part. One of the expected impacts of the ERA programme part is to improve knowledge about networking patterns among research support staff and research management for policy making. Research management staff is now widely addressed in several call topics in both the ERA and WIDENING destinations, reflecting that proper science and research management have become a cross-cutting issue. Furthermore, the [ERA Work Programme 2023-2024](#) includes another dedicated call topic for “[Support for the professionalization of research management](#)” ([HORIZON-WIDERA-2024-ERA-01-03](#)), which is expected to contribute to ERA Policy Agenda action 17.

Addressing management staff and tasks is also part of the overall rationale in particular of the WIDENING programme’s destination “Improved access to Excellence”. Capacity building measures encompass the development of managerial and administrative competencies for the benefit of institutions; more often, calls address modern governance and management directly in order to emphasise the European Commission’s support for reforms in the research and innovation landscape. In addition, the need for proper management, for respective training and peer exchange is reflected

and acknowledged in many calls beyond the WIDERA programme part, across all programme parts of Horizon Europe.

- Information about the ERA Policy Agenda is relevant to guide and advise applicants, as the ERA policy agenda provides context and background for the expected outcomes and scope of the dedicated ERA call topic. Applicants are well-advised to gather information on the Research Management Initiative to better understand the policy context and to be well informed about ongoing activities so as to shape their proposals accordingly, adding value to the Initiative. A link to the ERA Policy Agenda context makes it easier for applicants to understand the expected outcomes specified in the topic description, since the ERA Policy Agenda action provides information on policy goals, milestones of joint efforts as well as various further planned activities to link the project with. Keeping this background in mind can facilitate specifying and detailing an ERA project in its planning stage.
- It is also useful to note that enhancing capacities in managing research and innovation and addressing managerial staff has become a cross-cutting issue in WIDERA calls and beyond. Managerial staff is addressed in more and more calls, as proper management is increasingly recognised as a backbone in the pursuit of excellence. NCPs can promote these funding opportunities among this increasingly important target group, too.



# The Research Management Initiative – background and policy development

Research management is of paramount significance for the ERA as it ensures effective planning, coordination, and execution of research and innovation endeavours, contributing to enhanced efficiency, resource optimisation, and the successful realisation of ERA priorities. Furthermore, in today's rapidly changing world, research and innovation actors are faced with numerous urgent challenges, ranging from the need for digital transformation to issues related to international collaboration. Changing priorities in research and innovation require efficient strategic management across the European Union. A well-informed and skilled workforce to execute newly emerging tasks is essential to adapt to ever-changing demands.

In 2020, [Council Conclusions on the new ERA](#)

outlined goals and action priorities for a renewed ERA. In these conclusions, the growing need for skilled research management staff was recognised, calling in particular for ERA-wide collaboration networks and for cooperation between providers of research management training.

In 2021, the [Council Conclusions on the future governance](#) of the ERA outlined the first ERA Policy Agenda which included a Research Management Initiative that was to comprise at least 100 institutions across Europe.

The initial outline of the ERA Policy Agenda action 17 of 2022 is described in the [template](#) designed to facilitate the process of committing to the ERA actions for the Member States and Associated Countries. In this initial outline, ERA action 17 set four specific objectives:

- 1) Upskilling:** improve training and skills development of research management staff;
- 2) Recognition:** contribute to professionalisation of the continuously evolving, multi-faceted role of the research management profession across the ERA;
- 3) Networking:** support networking of research managers and best practice exchange via cross-border networks in the various dimensions of research management;
- 4) Capacity Building:** reinforce research management capacity across the entire ERA, notably supporting organisations in regions of lower research and innovation intensity.

By March 2023, 15 Member States and Norway as Associated Country had expressed their commitment to implementing the action. The support of stakeholder organisations is worth highlighting.

## Commitments to the Action (as of August 2023)

Implementation of the different actions of the ERA Policy Agenda relies on the commitment from MS as they describe voluntary ERA actions.

**Member States:** Austria, Belgium, Bulgaria, Czechia, Denmark, Estonia, Finland, France, Germany, Hungary, Latvia, Malta, Netherlands, Portugal, Slovakia

**Associated Country:** Norway

**Stakeholder groups:** [AURORA](#), [European University Association](#) (EUA), The Guild, [Young European Research Universities Network](#) (YERUN), [EU-LIFE](#)

Part of this first ERA Policy Agenda also was to “Promote attractive and sustainable research careers, balanced talent circulation and international, transdisciplinary and inter-sectoral mobility across the ERA”. To improve career prospects and working conditions for managerial staff is in line with and also part of current Europe-wide efforts to attract, retain and skill talents in Europe’s research and innovation system. Therefore, the [Proposal for a Council Recommendation on a European framework to attract and retain research, innovation and](#)

[entrepreneurial talents in Europe](#) recognises the support received through research management, undertaken by researchers or management professionals. Regarding the latter the proposal states: “These highly valuable professions deserve proper recognition, including by way of further analysis and alignment at the level of the Union, with a view to strengthening their capacity, developing relevant training, fostering comparability, and allowing them to effectively manage and support research and innovation”.

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## Implementing the Research Management Initiative

Upon reaching the specified threshold, implementation of the ERA Policy Agenda action 17 started in early 2023 under coordination of the European Commission together with three so-called “sponsors” – Germany, Hungary, and the Universities Stakeholder Group in the [ERA Forum](#), represented by AURORA. This core group engages with Member States and stakeholders via workshops on key issues of the action.

Two projects, launched in 2022 with funding from the ERA programme part, already support the Initiative: [CARDEA](#) and [RM ROADMAP](#). Both

projects map the research management landscape, inter alia with regard to existing training schemes and qualification backgrounds of research managers. [RM ROADMAP](#) has established a network of Research Management Ambassadors, comprising over 60 highly experienced research managers from 43 countries on the European continent. As ambassadors they will help to establish links among the regional and national research manager communities, thereby contributing to the networking objective of the action.

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## What is next?

A first report on the state of play and the findings so far was presented to the ERA Forum in September 2023. The report also included a set of recommendations on how to support the

recognition of research management professions and how to enhance upskilling in managerial tasks. It furthermore outlined the next steps of the Research Management Initiative.

# Report to the ERA Forum on the state of play and first set of recommendations on ERA Action 17 “Research Management Initiative”, prepared by the ERA Action 17 delegates, experts and sponsors – 18-08-2023

## Extract:

### Recommendations to achieve better ‘recognition’ and ‘upskilling’

- 1) EC to **improve awareness** about the added value of RM [Research Management] for the European R&I system. To this end, map success stories, develop a concept for qualitative/quantitative impact of RM in its various roles, collect qualitative/quantitative data and develop an information campaign showcasing role models (short-term goal: 2024-2025).
- 2) EC to develop a generic **Career & Competence Framework for Research Management** based on existing RM frameworks (e.g. CARDEA, ARMA, SARIMA) considering specific features detailed in Annex II and III, and complementing the European Research Careers Framework (short-term goal: 2024-2025).
- 3) EC to **expand the use of EURAXESS (and the future ERA Talent Platform) to the RM community** by establishing a platform structure including RM, adding job opportunities in RM, and by providing information on RM training and mobility opportunities (e.g. with link to one-stop-shop portal being developed by the RM-ROADMAP/CARDEA projects). (short-term goal: 2024-2025).
- 4) EC to **revise the Human Resources Strategy for Researchers (HRS4R)** to include Research Managers or their roles and render it a tool applicable to all types of human capital within the R&I system (medium-to-long-term goal: 2026-post 2027).
- 5) EC to propose **support to policy implementation for MS/AC** enabling exchange of practices and the development of tailored national policies and funding mechanisms for capacity building in RM across the ERA (medium- and long-term goal: 2025-2027 and post-2027).
- 6) MS/AC to **adapt the Career & Competence Framework** to national specificities and national RM job categories, and to **implement it** for HR development, career path design, training, mobility and other upskilling activities (medium-term goal: 2024-2027).
- 7) MS/AC to promote the establishment of national RM associations and networks, to **incentivise and facilitate networking** of its RM community/association at national level, notably focusing on learning and mentoring of early career Research Managers (short-term goal: 2024-2025).
- 8) MS/AC to **encourage organisations’ governance level to engage** in peer-to-peer learning, consulting or mentoring regarding the added value of RM (medium-term goal 2024-2027).
- 9) MS/AC to **invest in upgrading the R&I system** at national and organisational level with targeted support for RM capacities and RM training and career development. (medium-term goal:2024-2027).
- 10) EU and MS/AC to **create and coordinate training**, mentoring, mobility, and career development tools for individual Research Managers, such as fellowships, staff exchanges, targeted training tools for emerging skills needs, and a voucher system to ensure financial accessibility of training for Research Managers from the entire ERA territory (medium-term goal: 2026-2027).
- 11) EU and MS/AC to explore **targeted additional budget for RM capacity** in its research funding instruments, and to incentivise applicants making the role of research managers in project implementation plans more explicit (medium-/long-term goal: 2026-post-2027).



## Proposed next steps for ERA Action 17 activities

- a. Continuing to work on a 2nd set of recommendations regarding the ‘capacity building’ objective.
- b. Establishing a team of experts to collect data on the added value and impact of RM, complementing ongoing work, and developing a methodology for monitoring progress at EU and at MS/AC level.
- c. Establishing an action plan for awareness raising on the added value and impact of RM.
- d. Preparing a proposal for the next phase of the Research Management Initiative under the ERA Policy Agenda 2025-2027, exploiting synergies with other actions.

## A dedicated Skills and Career Framework for Research Management

The recommendations regarding recognition focus on developing and implementing a Career & Competence Framework for Research Management. As set out in the [Proposal for a Council Recommendation on a European framework to attract and retain research, innovation and entrepreneurial talents in Europe](#) already, professions in research organisations and higher education institutions encompass various careers, including in research management. Researchers and other professionals take over managerial tasks to oversee and support research and innovation activities:

- (a) streamlining or facilitating the planning, the development, management, administration, communication and valorisation of research and innovation;
- (b) ensuring compliance with policy objectives, funding programme requirements, financial rules and legal regulations;
- (c) improving the efficiency and effectiveness of R&I projects/system;
- (d) enhancing the impact of R&I on the society.

Using this non-exhaustive list as a starting point, the Research Management Initiative aims to further specify and differentiate research

management roles, linking them to required skills, competences and knowledge within a dedicated Career & Competence Framework for Research Management. One main objective is to aid in the transition towards more adaptable career paths, promoting diverse career options for research and innovation talents, and paving credible career pathways into research management, in alignment with ERA Policy Agenda action 4.

ERA Policy Agenda actions 4 and 17 both centre on aiding the transition towards more adaptable career paths, and to promote diversity in the career options available for research and innovation talents. Action 17 specifically focuses on paving credible career pathways into the broad field of research management. Together with the Researchers Competence Framework, the dedicated Career & Competence Framework for Research Management will enhance interoperability and comparability among careers across countries. It will provide orientation for recruitment and facilitate transnational career progression. The Framework encourages and facilitates recognition for management professionals, inter alia by helping to equip professionals with the skills and competences required for their roles.

The [CARDEA](#) project in particular supports the development of a Career & Competence Framework for Research Management, e.g. through stakeholder dialogues.

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## Enhancing Training Opportunities

Competence frameworks also further the development of targeted training opportunities, thus significantly supporting the upskilling and reskilling of professionals in the research and innovation sector with a lifelong perspective. They provide valuable guidance, e.g. as regards institutional capacity and skills development, and support the validation of formal and informal training opportunities.

With a dedicated work stream, the Research Management Initiative strives to enhance opportunities for a broad target group to develop their management skills. Activities in the training pillar will be based on the findings made in the build-up of the Career and Competence Framework. The upskilling objectives will be achieved by gathering information on existing training opportunities – as started with the two ERA projects [CARDEA](#) and [RM Roadmap](#) – and making them available via the new ERA Talent Platform eventually, to facilitate the accessibility of trainings and upskilling. The upskilling pillar is to enhance training opportunities by initiating

more collaboration among training providers. The Competence Framework will guide and inform the further development of training opportunities across all Member States. Further dialogue and coordination among training providers shall be established.

Whereas the framework under development will focus on management professionals only, the upskilling pillar has a broad target audience that includes researchers preparing to take on managerial responsibilities, among others. With its training pillar, the Research Management Initiative embraces a holistic approach, targeting management professionals as well as academic staff taking over managerial tasks, since high-level research and innovation rely on diverse roles and tasks performed by both groups. This is important to note, as a special focus of the Research Management Initiative will be on emerging tasks and coordinated upskilling efforts regarding urgent needs. The Initiative is meant to be an enabler to deliver on most of the current ERA Policy Agenda actions and all ERA priorities.

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## The ERA Programme Part's Call Topic – how it helps to implement the ERA Policy Agenda action

### [HORIZON-WIDERA-2024-ERA-01-03: Support for the professionalisation of research management](#)

Indicative budget: The total indicative budget for the topic is EUR 1.00 million; 1 project to be funded

Type of Action: Coordination and Support Actions

#### **Expected Outcomes:**

This action aims to contribute to improve the European R&I system across the entire ERA by particularly strengthening the capacity for research management in the European Union's public research performing and funding organisations. Actions are expected to:

- Involve a large number of public research performing and research funding organisations and their research management staff in the training and networking programmes, including by improving accessibility for staff from regions of lower R&I intensity;
- Improve training, skills and career development of research management staff in the participating organisations;
- Contribute to professionalisation, including through certification of training programmes;

- Increase recognition of the research management profession in Member States and the important role of research managers across the ERA.

**Scope (see the call description for the comprehensive definition of the scope):**

- Address management in its multidimensional roles
- further develop and implement a methodology to identify, train and ‘professionalise’ individuals who are essential support for the ‘research enterprise’
- create sustainable pan-European research management training – both in virtual and in non-virtual curricula
- tackle the uneven distribution of research management communities and expertise across the ERA
- provide access to training and practice exchange platforms
- support recognition of research management as a profession

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The topic is directly linked to one of the main objectives of the ERA Policy Agenda, i.e. to establish an initiative with at least 100 participating countries. The project is expected to deliver on a key milestone of the ERA Policy Agenda action itself. The expected outcome of the project is to improve training, skills and career development of research management staff, thereby supporting the ‘research enterprise’. As there is a pressing need to better coordinate efforts, the development of curricula as a tool to inform and guide training providers across the ERA is mentioned explicitly. Developing curricula and other resources will support training providers across the ERA. Initiating exchange and collaboration

among training providers is key to achieving this objective.

The call also underlines that ensuring equal opportunities for access to training programmes for staff across the entire ERA, including regions with lower research and innovation intensity, is of paramount importance. Special focus should therefore be placed on targeting these regions.

As the Coordination and Support actions [RM Roadmap](#) and [CARDEA](#) have already started to map training opportunities and to build communities, seeking synergies with these projects is highly recommended.

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## Recommendations for applicants

When drafting a proposal for the call topic “Support for the professionalization of research management” (HORIZON-WIDERA-2024-ERA-01-03), the link to the ERA Policy Agenda action should be seen as an invitation to gather further information on the overarching goals of the call topic and related activities in the context of the ERA Policy Agenda action no 17. Applicants should be aware that there is much movement regarding the ERA Policy Agenda action since its implementation has already begun.

An initial description of the action can be found in the European Commission’s [brochure on the ERA Policy Agenda](#). The further discussions within the ERA Forum can be a useful source for information.

The minutes of the meetings are available in the [Register of Commission expert groups](#). The ERA Policy Agenda was discussed during the ERA Forum Meeting in September 2023. Be aware that the Research Management initiative will further progress and develop. It is therefore highly recommended to gather up-to-date information.

Applicants should bear in mind that two projects of relevance in this regard are already running: [CARDEA](#), coordinated by the University College Cork, Ireland, and [RM Roadmap](#), coordinated by EARMA. New projects should build on their work and seek collaboration. Both are Coordination and Support Actions, funded through the ERA programme part of Horizon Europe. Of particular relevance is to consider



the development of the Skills and Career Framework, since it is meant to guide and support further enhancement in the training landscape. In general, it is important that applicants stick to the expected outcomes and the specified scope of the topic and refer to them in their proposal. The scope and the expected outcomes describe the expectations for the project design.

### Get the support of your National Contact Point

The WIDERA National Contact Points provide advice on all questions related to the WIDERA programme parts and the application process. Furthermore, the transnational [network of the WIDERA National](#)

[Contact Points](#) offers a broad range of support services. Potential applicants have the opportunity to participate in Info Days and accompanying Brokerage Events, organised in cooperation with the European Commission. These events provide information and opportunities to meet partners for future projects. The events are announced on the [network's website](#). In addition, the network also publishes factsheets and other [publications](#) which provide further information and background on the ERA part and the respective calls.

To receive immediate and up-to-date information on both the WIDENING and the ERA parts of Horizon Europe, please subscribe to the [network's newsletter](#).

## Resources

### Documents

- Commission's Communication on [A new ERA for Research and Innovation](#), September 2020
- [Council Conclusions on the new ERA](#), December 2020
- [Council Recommendation on "A Pact for Research and Innovation in Europe"](#), July 2021
- [Proposal for a Council Recommendation on a European framework to attract and retain research, innovation and entrepreneurial talents in Europe](#), July 2023
- [Council Conclusions Deepening the European Research Area: Providing researchers with attractive and sustainable careers and working conditions and making brain circulation a reality](#)

### Brochures

- [The New European Research Area](#)

- [European Research Area Policy Agenda. Overview of actions for the period 2022 – 2024](#)

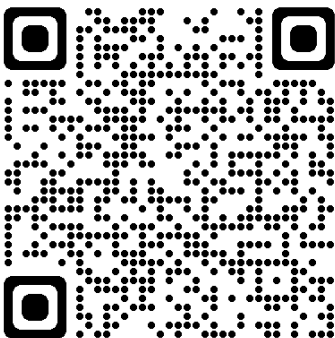
### Websites/Platforms

- [CARDEA project](#): Career Acknowledgement for Research Managers Delivering for the European Area, coordinated by the University College Cork, Ireland
- [RM Roadmap project](#), Research Management Roadmap, coordinated by EARMA
- [ERA Portal Austria – ERA Actions - Templates](#)
- Coming soon: ERA Policy Online Platform

### NCP Support

- [NCP WIDERA.NET](#)
- [Policy Brief on the EPA](#)

The **WIDERA National Contact Points** provide free and confidential advice on all questions related to the ERA part and the application process. They also offer proposal checks. Early contact is recommended. Find the WIDERA NCP of your country in the [NCP database](#).



ERA call page in the  
Funding & Tenders Portal

Task leader:



Task co-leader:



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