RM
ROADMAP

Consensus Document for Country Community Italy

Co-Creation Session 1: Understanding the landscape: National Networks and Associations

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November 2023

RM ROADMAP

"Creating Framework Conditions for Research Management to Strengthen the European Research Area"

Funded by the European Union's Horizon Europe Programme

Co-Creation Session 1

Understanding the landscape: National Networks and Associations

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1. Introduction

This is an important moment for the research management (RM) community in Europe. The European Commission (EC) and countries across Europe want to better understand the current research management landscape to further strengthen the European Research Area (ERA).

Research management includes a broad range of professionals supporting researchers to achieve excellence in research. For the purpose of this co-creation exercise, Research Managers (RMs) are to be considered as broad as possible including: research policy advisers, research managers, financial support staff, data stewards, research infrastructure operators, knowledge transfer officers, business developers, knowledge brokers, innovation managers, etc. For simplicity, we use the term research management but this exercise covers also other terms such as research support, research management and administration, professionals at the interface of science and other terms which are used as the norm in the national landscapes across Europe.

The RM Roadmap Knowledge and Community Platform (KCP) brings research managers together to shape the future of the profession and support the strengthening of an inclusive research management community in Europe. The KCP is a place where research managers share their views and introduce issues for discussion in a solution-focused endeavor. RM Roadmap Ambassadors lead the discussions for each country on the Knowledge and Community Platform, supported by national and regional RM networks.

This co-creation exercise is the biggest collaboration between RM networks ever to take place in Europe. With a focus on learning insights from RMs, the co-creation exercise seeks to establish a robust framework that can support professional growth and collaboration across the EU and associated countries.

By 2023, 40 country communities have been established within the RM Roadmap Ambassador Network. The RM Roadmap project will use the outcomes from this co-creation exercise to make a roadmap for the future of research management in Europe and to build and exchange solid knowledge on career framework opportunities, upskilling and networking for research managers. RM Roadmap will ultimately build a value proposition for policy makers and institutional leaders who want to strengthen and modernise their research support departments.

This **consensus document for Country Community Italy** contains the outcomes of the **First Co-Creation Session** - **Understanding the landscape: National Networks and Associations.**

A short summary of the main outcomes from the co-creation exercise is included in section 2. More information about the topic of RM National Networks and Associations is detailed in section 3. Recommendations about best practices, challenges and lessons learnt about (formal or informal) national networks, associations, communities are provided in section 4.

For more information about the RM Roadmap initiative, the reader can consult the following website: www.rmroadmap.eu

2. Summary of Co-Creation Session 1

The Italian colleagues who joined the group are 62 and the Session was animated by 21 comments. The Session was accessed 584 times.

This already demonstrates a strong interest of the community towards the topic of research management and, in particular, of the networks and associations of RMAs.

The sample of contributors is quite representative as we have different levels of seniority (at least two contributors are junior) as well as different roles represented: Research Managers, Knowledge/Technology Transfer Officers, 1 Data Manager.

Most of the contributors are affiliated to public Universities, some of them to private Research Institutions, one for a University hospital and two of them to IRCSS (Institutes of Hospitalization and Scientific Care).

Most of the contributions come from colleagues affiliated to entities located in the north of Italy (just two in the center and one in the south). One colleague also works for an Austrian Research Institution.

From each response to the four questions posed, the heterogeneity of the Italian ecosystem strongly emerges.

This circumstance raises a reflection on how to respond to emerging needs, first of all in terms of training and of construction of formally recognized professional paths, as means of recognition, valorization and engagement of the Italian RMAs community.

There is an urgent need for a joint reflection with national policy makers, national research agencies, NCPs about the emerging needs from the Italian community of RMAs.

3. Discussion Outcomes of Co-Creation Session 1

This consensus document for Country Community Italy contains the outcomes of the First Co-Creation Session - Understanding the landscape: National Networks and Associations.

3.1 If you have a national network (formal or informal), how did it help you? If you don't, please say how you have built your (internal) network and are using it.

In Italy there are both formal and informal networks dedicated to RMAs.

From the 21 comments received, it emerges that the informal Italian RMA network is well known. The usefulness of the formal NETVAL network is also clearly recognised.

Since the contributions coming from the different roles are closely linked to the main reference networks, the results of the contributors are synthesized and divided according to the network in which the individuals identify themselves:

- **Italian Research Managers Network**:
  - such a network is firstly helpful for its **dissemination and promotion** of events related to the RMA figure (recognition, professionalization, upskilling etc.) both at national and European level.
  - this national network is (and will always be more) helpful in:
    - giving RMAs the needed visibility to be heard (both at the institutional and national levels).
    - giving the opportunity to have a deeper understanding of the **profession worldwide**, create a large national and international **network**, strengthen **relationship** with colleagues who in many cases became friends and co-create new actions for RMAs in each institution and at national level, act as **mentor** for early stage career RMAs;
    - **promoting awareness** of the **complexity of the role and profile** of the Research Manager and Administrator; **increasing awareness of professionalism** within the RMA community of universities, research institutions and companies; **promoting the formal recognition** of the profession in Italy; defining, planning and implementing **innovative** ad hoc **training** for RMAs aimed at entering the professional world and career progression at national and international level;
    - providing numerous **opportunities to connect and share good practices** with like-minded individuals, mentors, leaders, and other RMAs who share the same passion.
  - the RMAs Italian Community offers a room for **propositions and suggestions to cooperatively work** toward the recognition of the RMA figure through **regular professional development webinars or programs** on current topics, technology, and resources that can help improve day-to-day work and advance career development.
  - it allows RMAs to stay updated with EU programme standards, current topics, and emerging issues within our profession.
  - attending a professional association networking or development event also provides an **opportunity to relax, unwind, and reflect**.
  - it offers periodic online meetings that provide useful insights into the national scenario and specific issues related to the RMAs role, with the activities of working groups on specific topics.
  - **explore the various roles** within RMAs to ensure that each figure is adequately **recognized and valued**.

- **NETVAL**:
  - a crucial role in **fostering collaboration and knowledge exchange and sharing among member institutions.**
  - **access to Funding**: Netval has been instrumental in helping access national and regional funding opportunities for technology transfer initiatives.

- **policy Influence**: As a collective, Netval member universities have a stronger voice in advocating for policies that support technology transfer and innovation at the national level. This has enabled us to contribute to shaping policies that benefit our institution and the broader higher education sector.
- **capacity Building**: Netval often organizes workshops, seminars, and training programs that help developing stronger and more capable teams.
- **visibility and outreach**: increasing visibility and credibility in the technology transfer space.

Other informal networks are named by the contributors such as:
- the Regional informal RMA network in Trentino-Alto Adige (TAA) "**Exchange Experience**" (since 2018 with 1-2-times-a-year regular meetings; the aim is exchanging best practices and experiences in the implementation of third-party funded research projects (for both, pre- and post-award phase);
- **CODAU** with its specific focus group on research and innovation;
- **APRE** (Agency for the Promotion of European Research) supports and facilitates Italian participation in the Programs for the financing of research and innovation (R&I) of the European Union, through information, training and assistance services, services to support the innovation, international cooperation activities, data analysis, advocacy and public engagement;
- **European Alliances:** collaborations with Italian RMAs involved in the Alliances informal networks offers the opportunity to share best practices and challenges encountered in their respective European Alliance. Such particular perspective and context allow to address the issue of the recognition of the RMA figure at multiple levels (institutional, national, Alliance-level, European).

What written by the RMAs of a Research Institution may summarize the answers of the others:
"The added value of participating in those networks (...) are:
- to get to know your peers and to have some contact points for quick **exchanges** on specific questions.
- to **stay up-to-date** on new developments in research policy/programme requirements (e.g., gender equality plan, data management, impact, activities for ERA 17),
- to learn about **best practices** which helps to understand how to implement research policies within your home institution (what is necessary, might work, avoiding errors).
- to find arguments for the better **positioning of our profession/work in our institution** (e.g., growing importance of RMAs on national and European level, defining institutional functions, roles and responsibilities).
- to **understand better whether you are "on the right path"** or whether you need to adapt your support services, workflows and skills in your organisation.
- to better **train young RMAs in our institution** (participation in networks' training events)".

3.2 *What challenges do RM networks and associations encounter in contributing to national and European R&I systems? If there are no networks, please elaborate if there have been networking initiatives and if not, please state why you think that is the case.*

Research Managers networks and associations play a critical role in advancing national and European Research and Innovation (R&I) systems. However, they encounter several challenges in their efforts to contribute effectively to these systems.

These challenges often stem from the complexity and diversity of the R&I landscape, as well as resource limitations, evolving regulations, and the need for effective coordination and communication among various stakeholders (research managers, researchers, employers, funding agencies and policy makers).

The main challenges arising from the contributions of the members of the group are listed above.

- RECOGNITION AND VALORIZATION OF RMA. All stakeholders are important to overcome this challenge. This also implies fair salary recognition.
- COMMON FRAMEWORK: Providing a unique and representative message towards the European R&I system. Indeed, the Italian R&I scenario is fragmented and competitive. Coordination and consistency in the approaches and strategies across these institutions is fundamental.
- This fragmentation makes complex ADVOCACY AND POLICY INFLUENCE processes aimed at gaining favorable policies and funding allocations at the national and European level.
- COORDINATION AMONG STAKEHOLDERS: coordination in approaches and strategies for RMAs and communication among diverse stakeholders (RMAs in a wide definition, researchers, policy makers, employers, industry,…).
- TRAINING AND PROFESSIONAL PATHS (both for junior and for senior levels). Training has to be appropriate, up to date and innovative, and recognised. Training is crucial especially for developing soft skills (communication, networking, …).
- CONTRACTUAL SCHEME AND SALARY: lack of a strong and structured contractual scheme and salaries that are not adequate to the skills and professional levels achieved.
- Creating AWARENESS: there is a general lack of awareness about RMA as a profession in the whole country, especially in Southern Italy.
- COMMUNITY ENGAGEMENT AND RETENTION: activities are now carried out on a voluntary basis.
- IMPACT ASSESSMENT: and develop common metrics and indicators to assess impact and project success.
- FORMALIZATION OF INFORMAL NETWORKS: The informal nature of some of the above-mentioned RMA national and regional networks makes it difficult to promote initiatives/ideas or contribute to the national and European R&I systems.
- FOCUS ON RMAs: It is necessary to define topics that can improve the situation/role/working conditions of RMAs and not the organizations' interests as such.
- To overtake FUNDING RESOURCE CONSTRAINTS (for example for associations constitution and activities).
- FACING THE RAPID EVOLUTION OF THE ECOSYSTEM, that is widely influenced by global financial crisis; technology advancement; and knowledge-based economy: ethical aspects, Open Science vs Intellectual Property, Data security, Responsible Research, Technology Transfer regulations, Technology and Tools.
- CLEAR DEFINITION OF RMA, that is currently heterogeneous, and too broad.
- PRACTICES HARMONIZATION, across multiple countries and regions (reporting standard, data collection, …).

3.3 Please list all of the formal and informal networks and associations of research managers in your country and link to their websites or online groups. Skip if there are no networks of your knowledge.

Only a few formal networks dedicated to RMs exist in Italy. Several formal networks are dedicated to TT officers. Here a list of major networks reported by the respondents:

- *RM networks (mainly **pre-award and post-award** grant office staff):*
  - *Italian Research Manager Network: the first Italian network specifically dedicated to RMs - https://www.italianresearchmanagers.eu/*
  - *Italian RMAs involved in European Alliances (e.g. UNIMI is member of the 4EU+ Alliance)*
  - *Research managers in charge of National Recovery and Resilience Plan project management (mandatory to recruit one project manager per each project);*
  - Regional: *1) RMA network of Trentino-South Tyrol "Exchange Experience" based on a mailing list*; 2) *Ricerca Pisana: informal group from Scuola Normale Superiore, Scuola Sant'Anna and Università di Pisa. It shares ideas, discusses common issues, organizes training sessions for researchers and administrative staff.*

- *Research **Data Managers**: ongoing attempt to start with an Open Science competence centre and an Italian network of Data Stewards, connected with the EOSC platform. Both initiatives are coordinated by ICDI in collaboration with the Skills4EOSC European research project (https://www.skills4eosc.eu/).*

- ***TT** networks:*
  - *Netval (Italian Network for Research Valorization): open to academic and non-academic organizations as well. Focuses on TT and provides support mainly through the organization of networking events, webinars and training - https://netval.it/*
  - *PNC Life Science TTO Network (no web site available): network funded by Ministry of Health through funds complementary to Recovery and Resilience Plan funds;*
  - *JoTTO: the Joint Technology Transfer Office of School IMT Advanced Studies Lucca, Scuola Normale Superiore, Scuola Superiore Sant'Anna, School for Advanced Studies IUSS Pavia, School for Advanced Studies SISSA and Gran Sasso Science Institute. It provides a common service of exploitation of research through training activities and consultancy.*

- *NICo – Italian Network **Core Facilities** - https://corefacilitiesital.wixsite.com/website*

- ***Wider networks** with thematic groups dedicated to Research Management;*
  - *Apenet (Italian Network of Universities and Research Centers for Public Engagement): http://www.apenetwork.it/it*
  - *APRE (Italian Agency for the Promotion of European Research): National Contact Point for Horizon Europe. It supports and promotes Italian participation in the European Union research and innovation (R&I) programs, by providing information, education and assistance services. APRE also provides a tailored support and consultancy service (pre-award phase, award phase and post award phase) - https://apre.it/*
  - *CRUI (Conference of Italian Universities' Rectors): https://www.crui.it/*
  - *"Comitato promotore per l'istituzione del ruolo dei Tecnologi nelle università italiane": technologists are recruited on projects as project managers in academic institutions; they usually have both scientific as well as research management competences;*
  - *GIURI (more on institutional level): Informal Group of Italian Research & Innovation EU Liaison Offices in Brussels GIURI: Übersicht | LinkedIn*
  - *Promis: https://promisalute.it/*
  - *Codau (Conference of Italian Universities' General Directors) Research Groups: it organizes networking events and training, coordinates thematic working groups where to share documents and information on research management and valorization: https://www.codau.it/ricerca-e-valutazione-della-ricerca https://www.codau.it/attivita/gruppo-di-lavoro.html*
  - *TOUR4EU: association promoting Tuscany research within the EU. Provides support by lobbying with EU institutions, organizing webinars, info days, trainings and networking events.*
  - *EELISA innoCORE (European University EELISA - European Engineering Learning Innovation and Science Alliance). It delves into the institutional transformation initiated by the Alliance, by focusing on its R&I. It works on codefining a common open science strategy and a gender equality plan and analyzing barriers hampering cooperation. It pays special attention to the role of RMs fostering networking and sharing of experiences within the Alliance.*
  - *AIB (Associazione italiana biblioteche): Italian library associations – www.aib.it*

- o *SWIM - Science Writers in Italy association: promotes cooperation and debate within the professional community and with the scientific community and supports multidisciplinary research on science and science writing. It is composed mostly of science reporters, editors, popularizers, but is open to all involved in the communication of science (https://www.linkedin.com/company/swim---science-writers-in-italy/?originalSubdomain=it)*

3.4 Please list and link to any policy documents and funding which mentions research management or the equivalent national name(s) for research management.

The RM activities and professional framework has not been identified precisely in Italy. Although it is a well in-demand professional role, the RM is not yet recognized. Sometimes the RM is confused with the Project Manager role.

There are only very recent articles mentioning RMA as a role. It is much more common to find publications where roles similar to ours, are associated with those of Project Manager, Research Support.

For example, Italian national calls for empowerment and capacity building of technology transfer offices 2022. The call foresees a new professional figure, named **Innovation Promoter**, *which will have to play a linking role between the world of academic research and the world of industry*. The Innovation Promoter has to act *as an enhancer of patent titles towards companies potentially interested in developing and marketing innovations.*

The "development of a **new generation of research managers**" is stated as a priority in 2021-2027 Italian National Programme for Research (PNR).

The role of high-skilled research managers is also mentioned in the National Recovery and Resilience Plan documents - Home - Italia Domani - NRRP Portal.

Last but not least recently an Italian law which mentions the Italian professional figure of "Tecnologo" described as the staff whose role is to carry out professional and managerial activities to support and coordinate research, promote the technology transfer process, design and manage infrastructure, as well as protect industrial property (L. 240/2010 "Tecnologi a tempo indeterminato", D.L. 36/2022, L. 79/2022).

Main policy documents and funding with specific mentions to the Research Manager role:

- *Piano Nazionale di Ripresa e Resilienza M4, C2 (National Recovery and Resilience Plan):* The calls foresee the possibility to hire RMs for research projects, and the obligation to hire an infrastructures Research Manager in the case of calls funding research infrastructures.

- *Programma Nazionale per la Ricerca 2021-27 (National Research Programme 2021-27 Italian Ministry of University and Research - MUR):* the Programme shapes research policy in Italy and aims at providing a pluriannual strategic plan in line with the priorities of the European Commission and the objectives of Cohesion Policy 2021-27, UN Agenda 2030 and Next Generation EU. Within the priorities identified for our Country (Investing in young people, strengthening fundamental research, encouraging interdisciplinary research, promoting higher education and research at the international level, exchanging knowledge between the research and productive system, the key role of Research Manager is extremely important.

   Concerning the new emerging professional figure of RM, the documents reports the following statements:

- *"Research Managers" will have to be the glue between the training systems at all levels, research, businesses and of the institutions, to promote and accompany the twin transitions, digital and green…*(Page 29)

- *The new generation of Research Managers will also have to accompany the transition to an open science and open innovation approach…*(Page 30)

- *Highly qualified Research Managers, who understand the languages of both worlds, that of science and that of business…*(Page 30)
- *The training and recruitment of new professional figures to support research, for example, staff scientists, data managers, data analysts, facility managers and knowledge exchange managers…*(Page 42)

● **Open Science Italian National Plan:** the main objective is to lay the foundations for the full implementation of open science in Italy, encouraging the transition towards an open, transparent, fair, inclusive system, in which the scientific community takes over the communication of research results, with benefits for the whole society.
The National Plan for Open Science is an essential element of the National Research Programme (NRP) and is a complement to the National Plan for Research Infrastructures.
The plan aims to create the conditions for the full participation of Italy within the European and international processes of open science. The development of university curricula and training for "data scientist", "data steward" and "tecnologi" is forseen.
Italian Universities documents (Università di Trento, Università di Milano Statale, Università di Milano Bicocca, Università di Bologna) including policies on Research Data Management are listed in the references.

4. Recommendations

4.1 If associations or networks do exist in your country, what recommendations would you share to support colleagues in setting one up in countries without associations or networks?

● Recognition, adoption of common frameworks in a fragmented context, training and community engagement seem to be the most challenging topics. We recommend policy initiatives focused on these aspects, involving not only formal/informal national networks but also local authorities such as Ministries, National Agencies, NCPs.

● Given the high level of heterogeneity, we also recommend policy initiatives that are as inclusive as possible: research managers have different seniorities and backgrounds, work at different levels (pre-award, post-award, facility management, TTOs, Communication, Legal Departments, etc.), in different entities (academic, hospitals, research centers, public and private). Do not leave anyone behind.

● Internal recognition is sometimes an issue: policy, lobbying and promoting our role as RMAs is often considered by the governance as a side activity that should not interfere with other priorities. Getting our work environment more efficient through the exchange of best practices is not considered part of the job.

4.2 If your country does not have any informal/formal network or association, what kind of support would you need?

● In Italy we do have informal/formal networks or associations, but we need support to convince internal governance and regulatory bodies about the importance of our role and its dignity compared to any other research job.

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6. Acknowledgements

Danilo Aceto, University of Tor Vergata

Adriana Agrimi, University of Bari Aldo Moro

Valeria Baruzzi, University of Bologna

Elena Boni, University of Parma

Giuseppe Caputo, University of Trento

Lorena Cebolla, University of Trento

Cristina Chiriac, University of Trento

Carlafederica Costanzo, University of Trento

Erica Feliziani, University of Macerata

Andrea Galeotti, University of Milan

Carlotta Gamberini, IRCCS Fondazione Don Carlo Gnocchi

Michele Gasparoli, University of Trento

Chiara Gilli, IRCCS Fondazione Don Carlo Gnocchi

Vincenzo Maltese, University of Trento

Serena Mancini, Padua University Hospital and St.Anna Children´s Cancer Research Institute (Wien, Austria)

Eva Maria Moar, EURAC

Manuela Martorana, University of Milan

Riccarda Moser, EURAC

Barbara Pucci, Scuola Normale Superiore di Pisa

Valentina Romano, Politecnico di Torino

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