RM
ROADMAP

Consensus Document for Country Community Portugal

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

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RM ROADMAP

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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 modernize their research support departments.

This consensus document for Country Community Portugal 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 first co-creation session took place between the 2ⁿᵈ and 13ᵗʰ October 2023.

The project and the co-creation platform were officially launched and presented to the Portuguese RMA community at the PIC (Plataforma de Interface à Ciência) annual event on 25ⁿᵈ September 2023, a meeting attended by more than 100 Portuguese RMs.

Since the launch of the platform on 25ⁿᵈ September and its opening, the Portuguese Ambassadors have tried to mobilize the different communities of Portuguese RMs through different channels and points of action. he ambassadors have sent emails via the PIC mailing list, which includes more than 800 RMs, via targeted emails, Linkedin, Facebook, etc., in order to inform, involve the Portuguese community and promote the participation of national RMs.

From these efforts, 67 members joined the Portuguese ROADMAP community and 10 made individual contributions. These participants had different profiles, ranging from pre-award to innovation managers. The results of these contributions are summarized and consolidated in this document.

3. Discussion Outcomes of Co-Creation Session 1

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

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.*

    ● All contributors **have identified PIC - *Plataforma de Interface à Ciência as the portuguese (informal) national network,*** *which is thought to be working quite well and active.*
    ● *from the **benefits and help** that this network brings to the portuguese community it can be highlighted that PIC:*
        ○ acts as a source of information regarding research management initiatives and other (job opportunities, training offers, and doubts)
        ○ promotes interaction and networking with other RMs/ community building
        ○ is very relevant for professional/career development
        ○ encourages exchange of experiences and sharing
        ○ contributes for the portuguese community/RMs to participate and engage in other initiatives and networks (eg. BESTPRAC, EARMA)
        ○ is inspirational (eg. development of different initiatives for researchers at RMs institution)
        ○ is instrumental in enhancing understanding of the RMs role
        ○ helps build a nation-wide RM identity.

    PIC uses mainly a **mailing list, social networks** (Linkedin® and Facebook®) and organizes **regular online events and talks** (e.g. "*Café com Ciência - an information session covering a specific topic where invited research managers share best practices and hot topics, such as funding calls"*), F2F meetings, etc.

    On the less positive side is a feeling that PIC **tends to focus on pre-award** (excluding the other profiles) or see it as a network to discuss the definition of Research Management.

It is worthwhile to mention also the existence of **other previous informal networks** with regional/institutional scope, such as "*Finca-pé*" or Instituto Superior Técnico Pre-Award network, that promoted meetings, working groups and a WhatsApp® group, that are thought to be helpful in terms of learning, sharing knowledge and work experiences and some individual attempts to create other institutional internal networks *informal network which included exclusively science managers (pre-award and post-award, knowledge transfer; did not include administrative and financial staff). This initiative was thought to be great as it worked as a more official way to be connected with people with the same difficulties/questions, exchange ideas and best practices, know about opportunities/webinars/etc. At the institutional level, it was also a positive experience because of the information flow.*

With regards to **internal network building** the Portuguese community highlighted the use of LinkedIn® to strengthen the network of contacts of research managers, as well as initiative sharing and the previously mentioned attempts to create smaller networks/groups at institutional level.

From the collected contributions (and its lack) it is interesting to note that there seems to be a **cleavage between RMs/identities** (RMs/ technology transfer officers (TTOs) & RMs/Science Communicators) and even maturity and a set of different networks and initiatives devoted to **technology transfer, entrepreneurship & science communication were identified**:

○ *informal network established by MetaREDX - Santander , devoted to knowledge transfer and entrepreneurship activities. It has been relevant to share best practices and insightful activities that are being organized in the Portuguese research performing organizations (RPOs), it has allowed knowing the community evolution and to have direct contacts between RPOs which greatly facilitates when there are collaborative projects, independently if they are public-funded or not. It provides the network that knowledge transfer officers (KTO) and TTOs need to chat whenever they encounter a negotiation block, a situation that is new, allowing for the sharing of experiences.*

○ *A formal network of KTOs and TTOs has been tried before in Portugal, and it has resulted in a document that was sent to the National Agency of Innovation, which quickly understood the need to steer this community and to empower it. However, although having*

this policy body support, it did not come with the much-needed funded national activities to mature technologies, working in an organized national network of facilities and knowledge, in order to increase the number of technologies that are transformed into products needed in the market. RPOs in Portugal tend to work independently from each other.

○ *There is also a project steered by a portuguese renowned research institute (I3S) that besides being an accelerator program also aims to strengthen the sharing of best practices, examples, and advice, as well as to create a matchmaking platform - Resolve Health.*

○ *INPI also has steered the formal GAPI network - that provides training and continuous support to the offices that provide support in IP (Intellectual Property) registry and management. It constitutes a good example of how citizens can reach these offices, providing support not only to researchers but also to individual inventors and small companies that do not yet have the knowledge to navigate the world of IP management and knowledge transfer. The GAPI network also allows the Portuguese TTO community to have direct access to the international network PATLIB and indirectly to ASTP.*

○ *Several Facebook groups and initiatives related to science communication such as:*

■ *Scientific illustration group: https://www.facebook.com/groups/558770177483443*

■ *Network of Science Managers and Communicators (PT): https://www.facebook.com/groups/1683238242004890*

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.*

- It is **very difficult for the RM community to contribute to national policies when the research manager career is not officially recognised in Portugal, either by research funding organizations or research performing organizations**. PIC has allowed RMs to bring together several colleagues from the varied Portuguese institutions, giving an overview that is often very important in the profession, and allowing the sharing of cases and good practices contributing to knowledge on application of public science policies which can be a very useful tool in designing these policies, both at national and European level. However, for the RM group to be considered a valuable contributor to these policies, it becomes extremely **necessary to draw the attention of both national and European decision-makers to the professionalization of the research manager's career as part of the scientific community**.

- Still, **RM does not have a consensual definition (position, career, or otherwise) in Portugal (and Europe)**: the same roles in different institutions can be considered completely different positions, and likewise, the same official position (e.g. "*Técnico Superior*" - public servant) can be representative of careers either related or completely unrelated to research management. This discrepancy is seen between institutions and could be also a reality within the same institution, and poses a challenge in creating bridges and networks among RMs, especially when sometimes RMs do not consider themselves to be Research Managers or Administrators while performing functions as such. This hinders the perception that Research Management is important or relevant by itself, and it is not a "complementary" function. A further factor that contributes to this confusion is the **complexification of science management roles** that has taken place recently and has led many professionals who are part of University staff to become "research managers" without realizing it. On the other hand, most RM professionals are still regarded much like other non-faculty employees, without taking into account the level of graduation, experience, responsibility, and value that they can bring to the research projects. **As such, one of the biggest challenges for any RM association is also the difficulty in acting as an "umbrella" association for such a widely diverse professional group** that, in spite of the catch-all term of "Research Managers", is still made up of individuals that can have different priorities/areas of

interest/professional needs and backgrounds, depending if they are focusing on: pre-award, post-award (or both!), science communication, IP or Impact and Knowledge Transfer. While all these can be "research managers" the ways/tools/methods by which they are managing research can be surprisingly different.

- It is considered that not only concrete actions of valorization and career progression for RMs are needed, but also **funding schemes that allow RM offices to maintain and continuously capacitate their HR without being dependent of public-funded projects or reduced budgets** at their institutions, that allow to maintain these offices but not to consolidate them, professionalize them, grow in terms of people, capacity and, most importantly, strategy.

- In order to ascertain RMs position, **it is essential for the Portuguese network of RMs - maybe originating from the informal PIC - to become a formal network**. At least in Portugal, if it is not a formal network the participants' engagement is not 100%, as participants do not feel the responsibility to participate and engage, and, as a consequence, any efforts will have limited impact both within the national and the European R&I system. It is thus believed that PIC's **most significant challenge is to professionalize / formalize and underscore the importance of representing Research Managers in R&I decision-making processes in Portugal**. The main challenge for RMs is to get their voice heard, to get noticed by policy-makers and employers, that is, to "be taken seriously" by other stakeholders. The formalization of PIC as an official RM Association would definitely help in this regard, allowing its contributions to have a real impact on national policy for R&I. Furthermore, it would empower PIC as a reliable representative and official network on which national and European systems can rely.

- **Links with other national associations are also important**: in its 3rd national meeting PIC joined forces with a well-established national researchers association (Associação Nacional de Investigadores de Ciência e Tecnologia (ANICT)) to discuss the future of research management in Portugal, giving them more visibility. ANICT also advocates for the creation of a new career for RMs, but as a researchers association focuses only on careers for PhD holders, which represents only a subset of the RMs.

- Furthermore, it would be valuable for the Portuguese RM community for the national network to act as an **aggregator of information and establish links to other professional associations (EARMA, among others)**, as some RMs complain about lack of knowledge on how to interact and who to target to initiate communication with other international RM associations.

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 in your knowledge.**

PIC - Plataforma de Interface à Ciência (informal network of science managers at national Portuguese level).

● Website - https://sites.google.com/view/PIC-pt
● Facebook® - https://www.facebook.com/groups/plataformainterfaceciencia/
● Linkedin® - https://www.linkedin.com/company/plataforma-de-interface-a-ciencia/about/

SciComPt - an association of heterogeneous, multidisciplinary science communication profiles that aims to serve the science communication community. SciComPt aims to map and highlight the work of science communicators in Portugal, promoting partnerships, knowledge sharing and new opportunities that allow for symbiotic growth among all its players to make the community, the professional field and science itself thrive.

● Website: http://scicom.pt/
● Facebook:https://www.facebook.com/RedeSciComPt/

Other Science Communication Facebook groups:

● Scientific illustration group: https://www.facebook.com/groups/558770177483443
● Network of Science Managers and Communicators: https://www.facebook.com/groups/1683238242004890

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

Decreto-lei 57/2016, de 29 de Agosto https://dre.tretas.org/dre/2709637/decreto-lei-57-2016-de-29-de-agosto

- Portuguese law to formally establish the research career for PhD holders, transitioning from scholarships to employment contracts associated with career progression.
- Although it specifically mentions RM roles (research management and science communication), it considers a possible national regulation of this specific career separately from research & development and has been mostly used by RPOs for hiring researchers.
- It gives a very specific emphasis on PhD hiring towards RM positions and careers, which seems a rather narrow view for the sector and does not take into account the knowledge, skills and experience that can still be found in many RMs that do not have a PhD diploma. It is considered thus to favor PhDs for RM positions in detriment of other professionals with experience.
- While it can correctly be argued that a PhD provides experience in transversal skills relevant to RM, a professional whose career focused on RM will always be more relevant than one whose actual focus was another thematic.

Regulamento n.º 744/2020, de 4 de setembro (Gestor de Ciência e Tecnologia)
https://diariodarepublica.pt/dr/detalhe/regulamento/744-2020-141963750

- At the University of Aveiro, RMs are recognized to have a special career, different from the other technicians / administrative staff members. Purely administrative and financial staff is not included in this career.

Ciência e Inovação em Portugal 2020-2030 - Propostas para promover a qualidade científica, emprego e carreiras para doutorados na próxima década.
https://anict.files.wordpress.com/2021/03/propostas-anict-para-politicas-cientificas-a-medio-prazo-2020-2030vf_apos-consulta-publica.pdf
- ANICT (the national researchers' association) suggests the promotion of a new career of "Técnico Superior de Ciência" (different from the generic "Técnico Superior"), focusing on supporting PhD holders with roles of science communication, science management, and specialized technical support for research. The aim is to promote new RMs style roles for PhD holders, rather than support the creation of an inclusive career.

4. Recommendations

It seems clear that the role of PIC is now widely recognized by the Portuguese RM community and that there is willingness to promote it to a formal network as well as the need for the creation of a real RM career in portugal.

The creation and success of these networks, either formal or informal, is pretty much dependent on the engagement of the community / its members as the activities depend mainly on volunteer work.

The formalization of the network, and the hiring of a dedicated staff (even if, initially, on a part-time level) could be fundamental to further launch the network and efficiently promote its activities.

Networking and knowledge sharing with colleagues in other countries is also crucial for setting up these networks/associations and despite each country's specificities, benchmarking exercises, do's and don'ts analysis as well as coaching and mentoring can be of major interest and have major impact on the first years of these networks.

It can also be relevant to check on other professional networks/groups that may already exist and to promote synergies or more inclusive/wider scope groups or joint events (after all these groups are acting in the same ecosystem).

Online events, such as the "*Café com Ciência"*, have gained traction in the last couple of years (specially after the aftermath of COVID-19) and have proven to be a type of initiative that can be both beneficial and sustainable in the long run and that can involve different actors of the research ecosystem.

5. References

6. Acknowledgements

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