

# RM ROADMAP

## 3.2 Overarching Roadmap Plan

This deliverable includes the Overarching Roadmap Plan for the RM Roadmap project.

This report outlines:

- (1) What the objective and the purpose of the *Roadmap* is;
- (2) Which issues and challenges the *Roadmap* seeks to address;
- (3) How the different parts of the project will come together in the *Roadmap*.

**WP3, Roadmap and Advocacy, EARMA**



RM-ROADMAP project has received funding from the European Union's Horizon Europe programme under grant agreement number 101058475.

**Project full title**

**“Creating Framework Conditions for Research Management to Strengthen the European Research Area”**

**Project acronym**

**RM Roadmap**

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**D3.2 Overarching Roadmap Plan**

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## Table of contents

1. EXECUTIVE SUMMARY .....	6
2. INTRODUCTION: RM ROADMAP .....	7
3. BACKGROUND - WHY? OBJECTIVE AND PURPOSE OF THE ROADMAP .....	8
4. WHAT? ADDRESSING THE CURRENT CHALLENGES OF RESEARCH MANAGEMENT IN EUROPE .....	9
4.1. <i>Current fundamental issues</i> .....	10
4.1.1. <i>Summary</i> .....	10
4.1.2. <i>Clarifications on the fundamental issues</i> .....	11
4.2. <i>The Roadmap plan and its pillars</i> .....	13
5. HOW? IMPLEMENTATION OF THE ROADMAP .....	15
5.1 STAKEHOLDER AND SYSTEMS APPROACH .....	15
5.2 CREATING A COMMUNITY-BASED BOTTOM UP CONSENSUS THROUGH CO-CREATION .....	16
5.3 BUILDING THE ROADMAP BASED ON THE PROJECT'S WORK PACKAGES AND TASK OUTCOMES .....	17
5.3.1 <i>Work Package (WP) and tasks populating the Roadmap</i> .....	17
5.3.2 <i>In which form will the Roadmap be delivered</i> .....	19
5.3.3 <i>Examples of potential use of the roadmap</i> .....	19
ANNEX 1 RM ROADMAP WORK PACKAGES .....	22

List of abbreviations

AI	Artificial Intelligence
EC	European Commission
ERA	European Research Area
PDF	Professional Development Framework
RAAAP	Research Administration As A Profession – survey
RFO	Research Funding Organisation
RM	Research Management
RMA	Research Management and Administration
RMS	Research Management and Support
RPO	Research Performing Organisation
RSS	Research Support Services
R&I	Research and Innovation

## 1. Executive Summary

This report outlines the approach to the overarching *Roadmap*, which will be produced as part of the RM Roadmap project. This *Roadmap* is a plan to strengthen the European Research Area (ERA) by improving the quality of the profession of Research Management (RM) in Europe. It is designed to support and inform EU policy and to serve as a tool for national Research & Innovation (R&I) systems to utilise, and to adjust where necessary, for their own purposes.

The *Roadmap* will begin to identify the current context in Europe and outline how it will become a tool to address those issues. The existing European landscape is very fragmented. There is little to no standardisation of the profession and the research management capacity is determined at a local level. There is no standard definition of the role, recognised scope of the associated skills or defined career pathway for those engaged in RM. Moreover, there is insufficient awareness about what research management is and even the existence of research managers.

The *Roadmap* will address these fundamental issues while also defining four pillars that can help R&I systems improve their research management capacity, leading to a number of benefits for the system such as increased efficiency, more quality time for research and better alignment of research with policy objectives. In short, the *Roadmap* seeks to strengthen R&I systems by professionalising research management. The four pillars described are closely linked to the four main objectives in ERA Action 17: Research Management Initiative - Enhance the Strategic Capacity of Europe's Public Research Performing Organisations.<sup>1</sup>

This report describes how the *Roadmap* will be built from the outputs of the project work packages, including an unprecedented co-creation exercise across 40 countries enabled by an already recruited network of approximately 120 RM Roadmap ambassadors. The preliminary outcomes of that co-creation (consensus documents) will become openly available and can be immediately used by national actors including the Member States and other participating countries.

The RM Roadmap timeline can be consulted on the project website [here](#).

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<sup>1</sup> Overview of the ERA actions for the period 2022-2024 is available here: [https://research-and-innovation.ec.europa.eu/system/files/2021-11/ec\\_rtd\\_era-policy-agenda-2021.pdf](https://research-and-innovation.ec.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf)

## 2. Introduction: RM Roadmap

RM Roadmap will chart a course for the future of the profession of Research Management (RM)<sup>2</sup> in Europe and bring together a suitable community to support its delivery. It will be conducted over 36 months and is funded to the amount of €1.5m by the European Commission Horizon Europe funding programme under Grant Agreement N. 101058475.

The overarching objective of RM Roadmap is to identify and adapt the research management capital base of the EU, including the widening countries, and emerging needs of its current and future research management workforce to improve the EU's competitiveness and sustain its economic performance.

RM Roadmap will allow existing European networks to connect on a smart community platform which will enable an unprecedented consultation process in research management. This co-creation process will gather the existing communities and expand upon them to reach two main objectives: to create and inform a bottom-up consensus on the future of RM in a roadmap, and to inform the community about existing training, networking, funding, and career mobility opportunities.

Eight partners are working together on this project: European Association of Research Managers and Administrators (Belgium); HETFA Research Institute (Hungary); Nova University Lisbon (Portugal); Association of European Science & Technology Transfer Professionals (Netherlands); Crowdhelix Limited (Ireland), The Cyprus Institute (Cyprus) and associated partners Janssen Pharmaceuticals (J&J) and Una Europa (Belgium).

The Overarching Roadmap Plan is one of the main deliverables of the RM Roadmap project tying together the other parts of the project. Below is outlined:

- (1) What the objective and the purpose of the *Roadmap* is (section 3)
- (2) Which current challenges of research management in Europe the *Roadmap* seeks to address (section 4)
- (3) How the different parts of the project will come together in the *Roadmap* to help address those challenges, including examples of how the *Roadmap* can be used (section 5)

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<sup>2</sup> The RM Roadmap consortium agreed on using Research Management or Research Manager (RM) as a preliminary working term as a starting point in 2023. This is aligned with the text of the HORIZON-WIDERA-2021-ERA-01 Call and ERA Action 17 working documents. The proposed working term might change depending on the findings of the project and related activities such as ERA Action 17.



### 3. Background - Why? Objective and purpose of the Roadmap

**Objective:** The objective of the RM Roadmap project is to make the R&I system in Europe grow, become more efficient and more impactful in the context of the ERA. The RM Roadmap project will establish a comprehensive *Roadmap*, aiming to elevate the overall quality of research management in synergy with ERA action 17 "Enhance The Strategic Capacity Of Europe's Public Research Performing Organisations".

The *Roadmap* plan aims to achieve this by outlining a path to professionalise research management, with a focus on the following main **benefits for the R&I system**:

- Enhancing efficiency throughout the R&I system
- Enabling researchers to have more quality time for research
- Ensuring better alignment with policy objectives
- Dealing with the expanding complexity in R&I
- Improving the adaptability and resilience of R&I organisations
- Enhancing connectivity among various actors within the R&I system(s)
- Improving trust and accountability within the R&I system
- Contributing to good governance

To achieve these objectives, it is imperative to develop a well-trained, well-networked, and recognised community of professional research managers.

**Approach:** The *Roadmap* will outline the necessary steps to be taken by (national) R&I systems, within their respective contexts and legal frameworks, to enhance the efficiency and effectiveness of research management. While adhering as closely as possible to EU policy and best practices from other countries, it is crucial for each national system to develop research management within the country's specific context. The *Roadmap* will be relevant to organisations, regions and countries regardless of their current development in research management.

**Alignment across the ERA and within Europe:** The *Roadmap* will serve as a tool to help realise the research management potential of individual national systems while promoting alignment across the ERA and with other European countries. Although excellent research management exists across Europe, the quality differs greatly between countries, organisations and even within organisations. The *Roadmap* provides a path towards improved alignment, consistency, and ultimately, a degree of standardisation.

To achieve the main benefits and a better alignment across the ERA, three **basic** requirements must be addressed:

- Defining and understanding the scope of research management including identifying the different roles included in research management (segmentation/classification).
- Raising awareness about the value proposition and evidence base of research management.
- Creating the necessary framework conditions to foster a strong research management community.

The RM Roadmap project will provide an approach and a plan for R&I systems and actors to meet these three requirements.

Next to the three basic requirements, the *Roadmap* identifies four **pillars**<sup>3</sup> that can contribute to building a robust and efficient research management community capable of achieving the objective:

- A. Upskilling
- B. Capacity building
- C. Networking
- D. Awareness creation

The *Roadmap* will outline the steps the various actors<sup>4</sup>, within the national R&I system, can take to enhance their research management practices within each of these four pillars.

The development of this *Roadmap* will be based on the following key methods:

- A co-creation exercise involving research management stakeholders across Europe
- Desk research, Survey(s), Focus groups, Interviews

By gathering existing findings, best practices, and success stories, and incorporating the input of the research management community from across Europe, this synthesis of information will provide a community-based plan to unlock the potential of research management in contributing to more efficient and more impactful R&I.

#### 4. What? Addressing the Current Challenges of Research Management in Europe

The *Roadmap* is being designed to address the key challenges of RM in the ERA and in Europe. It is made to address these challenges in a compatible way with ERA action 17. It looks first towards the most fundamental issues (base) and then how to improve those, for example through training, networking and capacity building to arrive at a professionalised and recognised research management system able to improve the R&I system.

Below is a further elaboration of the main challenges followed by a visual representation of how the work packages and tasks in RM Roadmap will bring in the elements needed to build the *Roadmap*.

The *Roadmap* will be a plan with a vision and framework to be used by (national) R&I systems. This plan will take the form of a report and an online tool while also being driven out by the [Research Management Helix](#) (an international [Open Innovation community of RM practitioners](#), specialists, and other stakeholders, as well as relevant policy makers and citizen interest groups). This will be complimented by the regular dissemination channels such as the project website, social media, publications, press releases, etc.<sup>5</sup> The final way to reach the national actors is ingrained in the project. The project is made up of European networks linked to national networks with a newly created RM Roadmap Ambassador Network across 40 countries<sup>6</sup> to improve connections

<sup>3</sup> The four pillars are a parallel with the four main parts of ERA Action 17 (Research Management Initiative). The difference is that recognition is replaced by awareness creation. This is the case because the *Roadmap* is using the 4 pillars as pathways towards recognition. Recognition is a consequence of getting the four pillar and the basic requirement in place. The combination of elements leads to achieving the objective and the benefits to the system.

<sup>4</sup> Including but not limited to: research performing organisations (RPO's), research funding organisations (RFO's), ministries, research infrastructures, NGO's, foundations, parliaments,... and such groups as researchers, research managers, policy makers and experts, legislators, leaders of RPO's and RFO's,...

<sup>5</sup> For full details please refer to D4.4: Preliminary Dissemination, Communication and Exploitation Report.

<sup>6</sup> The full list of the RM Roadmap Ambassador Network is available here: <https://www.rmroadmap.eu/fags>

between the project and the community. The *Roadmap* is being designed to be useful to the national systems and especially the national community to use it as their own plan to improve their own R&I system.

### 4.1. Current fundamental issues

This paragraph explains the main fundamental challenges related to the RM profession in Europe by identifying and clarifying the main key elements (point 1 to 6 below) such as (1) absence of a commonly accepted name and definition for the profession of research managers; (2) no widely recognised segmentation or classification system; (3) lack of standardisation across the ERA and Europe; (4) inadequate information for policymaking purposes; (5) general lack of awareness about the role; (6) and absence of proper framework conditions.

#### 4.1.1. Summary

Here we provide the identified list of current fundamental issues for the RM profession:

- 1) One of the primary challenges in research management is the *absence of a commonly accepted name and definition for research managers*.
- 2) There is *no widely recognised segmentation or classification system* for research management roles, making it difficult to establish standardised practices.
- 3) Another significant issue is the *lack of standardisation across the ERA and Europe*, hindering effective collaboration and cooperation.
- 4) *Inadequate information for policymaking purposes* in RM poses a challenge, as it hampers the formulation of evidence-based policies.
- 5) There is a *general lack of awareness about the role, value, and even existence of research managers*.
- 6) The *absence of proper framework conditions* further complicates matters, making it challenging to establish and maintain high-quality research management practices.

The RM Roadmap is designed to address these issues and establish a solid base for improving research management systematically. It aims to provide an approach to upgrade the research management capacity, know-how and culture within the R&I system, ultimately enhancing the overall strength of the system.

Acting as both a tool and framework, the *Roadmap* is intended for use by (national) R&I systems to unlock the full potential of research management. By adopting a bottom-up vision and establishing a Europe-wide framework, it enables national efforts to be more efficient while fostering better connectivity and complementarity across member states.

The approach of the *Roadmap* is stakeholder-oriented and multi-actor in nature. It considers the needs of various actors within the R&I system, employing end-user design thinking. This means identifying the specific requirements of key actors and analysing how research management can add value to each of them, thereby strengthening the overall R&I system.

### 4.1.2. Clarifications on the fundamental issues

The first question to solve is the *question of definition*. A plan for an undefined group of professionals of which even the naming is unsure will remain vague. Creating framework conditions and solving the above-mentioned fundamental issues requires buy-in from the actors in the R&I system. Buy-in without clarity of which group the buy-in is intended for is problematic in an already niche community.

Second, there is a *need for segmentation or classification of research management*. Research management is an overarching term with a broad range of specific roles or professions which are part of it. There are continuously new roles within research management. A non-exhaustive list<sup>7</sup> of roles to exemplify this is:

- research policy advice, evidence-based policy making, foresight and strategy development,
- research coordination, research development, research project and funding management, financial support;
- evaluation and assessment support;
- research and complementary training programme management;
- data-based research support, such as data stewards and data analysts, exploitation of research data, data protection;
- specialised research infrastructure operation;
- scientific integrity and ethics expertise, legal support;
- science communication support;
- knowledge transfer and innovation support, knowledge brokering, incubator coordination and business development.

Research management can be considered the profession connecting the traditional professions in the research and innovation ecosystem (Figure 2 below). Research Management as a profession is defined by its inextricable relation to research. Unlike established or traditional professions, RM does not exist without research.

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<sup>7</sup> This is a list used as an example and not an outcome or preliminary result of the project. This list comes from the topic description of the call text which led to the funding of the RM Roadmap project. Source : <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-widera-2024-era-01-03>

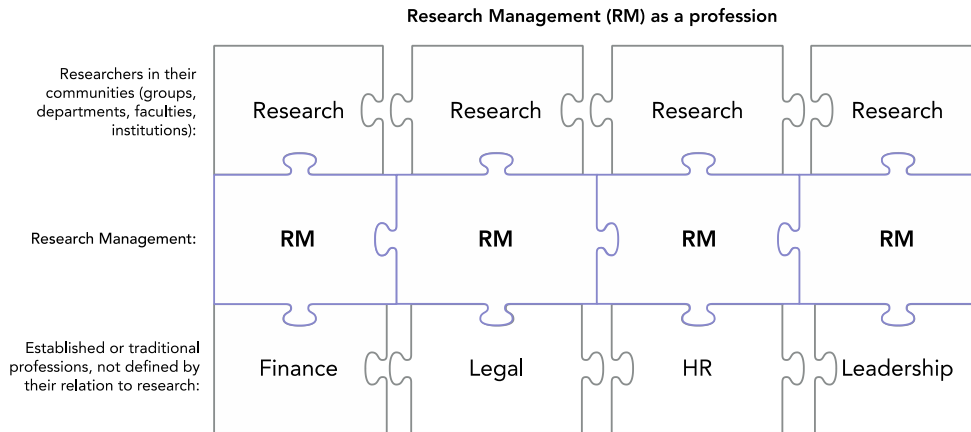


Figure 1. Research Management as a profession is defined by its inextricable relation to research. Unlike the established or traditional professions, RM does not exist without research. Source: Own elaboration.

Third, there is currently *little or no standardisation across the ERA and Europe*. This is explained by the current landscape in Europe as exemplified in the previous two points.

Forth, there is *not enough information for Europe wide policy making purposes*. This is already exemplified by the lack of a clear definition which is part of the basic requirements to roll out targeted policy. RM Roadmap will strongly contribute to improving the current situation by preparing a *Roadmap* plan for national systems to improve their RM community. RM Roadmap has set up an [Ambassador Network](#) across 40 countries which have been recruited in collaboration with national research management networks to gather information about the status of research management in Europe.

Fifth, there is a *lack of awareness among all actors of the R&I system* including research managers and researchers about the role, value and even existence of the profession of research management. At its core, this includes the absence of an accepted definition and professional segmentation, as well as common standards. Systems and organisations will make their own definitions, understanding and standards sometimes at a very local level. There are several examples of local excellence but overall, the system is characterised by significant inefficiency, unclarity and lack of interoperability between institutions, sectors or countries. Since there are blockers at such a fundamental level such as definition of the profession, there is a lot of low hanging fruit. This means that there are concrete opportunities to bring systemic change at organisational level, as well as country level.

Finally, there is a *lack of framework conditions*. Research managers often do not have suitable recognition or a recognised place in national legislation nor any solid career paths. This can lead to lack of good job descriptions, career opportunities and frameworks and insufficient training and development opportunities. Training the community "on the job" is even more crucial in research management because there is no academic degree linked to professional rights as a research manager. The combination in many countries of no formal recognition in policies or legislation and the lack of sufficient professional development opportunities with unclear job descriptions constitute poor framework conditions. The job of a research manager is however often high paced and needs continuous learning and adjustment. As stated above, research management exists inextricably in relation to research and therefore the job of research managers is to meet the needs of research and research

organisations in the rapidly changing R&I system. This requires highly trained and motivated professionals who can adapt quickly. This need to adapt quickly and to connect researchers with niche expertise in an efficient way is the reason why research managers need a strong network. Research management and the needs of research are so broad that one individual or office cannot have all the required expertise. A network is needed to be up to speed. Poor framework conditions coupled with the need for highly educated, flexible and networked staff is a mismatch. Finding, training and especially maintaining such personnel is becoming increasingly challenging in the 2023 context of the war for talent in many countries in Europe.

## 4.2 The Roadmap plan and its pillars

The RM Roadmap is planned to have four pillars<sup>8</sup>, representing pathways to impact R&I through research management, leading to the professionalisation<sup>9</sup> and recognition of the profession. These pillars coincide with addressing the current challenges of improving the quality in RM in Europe (Figure 1).

### **Upskilling:**

The *Roadmap* will provide:

- An overview of existing upskilling opportunities across Europe, including training and professional development.
- Recommendations to address gaps in the upskilling offerings.
- Foster the creation of communities of practice among trainers to exchange best practices and promote the internationalisation of existing training
- Benchmarking with the upskilling options available to recognised professions

### **Capacity Building:**

The *Roadmap* will offer an overview of the value of building capacity in research management from the perspective of various actors within the R&I system. It will also elaborate how to start or continue building.

Within the frame of the project, there will be a Research Management incubator in WP2 to help (national) networks startup or develop.

### **Networking:**

The *Roadmap* will provide guidance on networking for research managers in their daily work and highlight its role in enhancing connectivity within the ERA and in Europe.

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<sup>8</sup> The four pillars are a parallel with the four main parts of ERA Action 17 (Research Management Initiative). The difference is that recognition is replaced by awareness creation. This is the case because the roadmap is using the 4 pillars as pathways towards recognition. Recognition is a consequence of getting the four pillar and the basic requirement in place. The combination of elements leads to achieving the objective and the benefits to the system (there was a very similar footnote already)

<sup>9</sup> Called for by the Council of the EU on 1 December 2020, 13567/20 <https://data.consilium.europa.eu/doc/document/ST-13567-2020-INIT/en/pdf>

Within the frame of the project, there will be networking opportunities created already during project implementation:

- RM Roadmap Ambassador network
- Research Management Helix
- Co-Creation through the RM Roadmap Knowledge and Community Platform<sup>10</sup>
- National network meetings and ad hoc meetings with RM Roadmap topics

**Awareness Creation:**

The *Roadmap* will provide guidelines on how to raise awareness among the actors in the R&I system regarding the role and value of research management.

These pillars are most effective when supported by a foundation consisting of a clear definition, a value proposition, and suitable framework conditions. However, they can also individually drive improvements in research management practices.

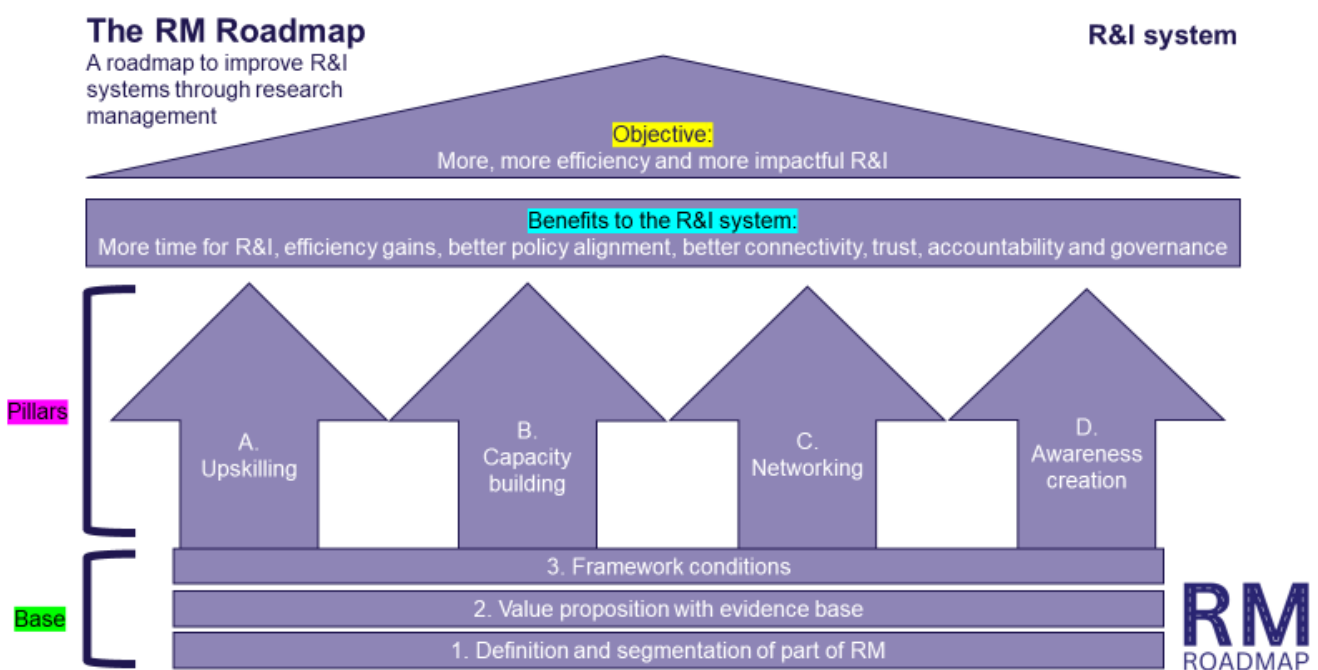


Figure 2: Graphic representation of the RM Roadmap.

<sup>10</sup> The RM Roadmap Knowledge and Community Platform is a place where research managers can share their views, and information on available training, and funding and introduce issues for discussion in a solution-focused endeavour that will seek to build recognition for the profession by understanding the needs of the community. Not just another forum, it is a combination of EARMA's website and the Crowdhelix platform. This co-creation platform will be all about research management and the issues faced by the professionals who provide excellent research support. <https://www.rmroadmap.eu/community-connect>

## 5. How? Implementation of the Roadmap

The *Roadmap* will be built by having most of the Work Package (WP) tasks feed into the relevant topic of the *Roadmap*. The *Roadmap* takes a systems approach and seeks to be relevant to most of the stakeholders in the R&I system. It does not seek to target only a specific type of organisation but rather create a dialogue about RM between the players within an R&I system. A game changer in research management can happen when there is sufficient awareness and support from key actors, such as RPO's, RFO's and ministries. The *Roadmap* seeks to show how these actors can benefit from good research management.

### 5.1 Stakeholder and systems approach

The *Roadmap* will be designed to start a **dialogue** about RM in the (national) R&I system between the relevant stakeholders:

- Ministries
- RPO's
- RFO's
- Researchers
- Research Managers
- Networks and associations
- ....

A game changer in research management is possible when enough actors in the system are aware of the role of research managers and the available potential and low hanging fruit. It will take the form of a report and will also be an online tool with templates. National actors and in first instance national RM networks can use the *Roadmap* to engage in the dialogue with the other actors and use it as a plan on how to improve research management.

This **dialogue** will be triggered both top-down and bottom-up.

1. Top-down: RM Roadmap is looking to underpin ERA action 17 leading to potential EU and member state policy about research management. RM Roadmap will make its outputs fully available for such purposes (fully open access and data). RM Roadmap will also inform member states through the ambassadors, Helix and networks around Roadmap and ERA Action 17.
2. Bottom-up: RM Roadmap will provide the *Roadmap* as a template to national associations, networks and communities through existing and new contacts with networks. RM Roadmap beneficiaries are mainly networks and networks of networks (e.g. EARMA, BESTPRAC, ASTP) AND further through the RM Roadmap ambassador network covering 40 countries in Europe.
3. Connection top-down and bottom-up: RM Roadmap seeks to connect the EU, member state representatives and their ministries or agencies, RM Roadmap ambassadors and national networks. We have seen the existence of Action 17 and RM Roadmap already organically form new connections in many countries and increase awareness. RM Roadmap does this by creating a networking context and by its multi-stakeholder approach. It doesn't seek to start or mediate those interactions directly.

RM Roadmap will also directly help trigger this dialogue via the communication and dissemination activities described in the communication and dissemination plan and report (D4.4).



## 5.2 Creating a community-based bottom-up consensus through co-creation

The *Roadmap* will be based on desk research, interviews, focus groups and one or more surveys. Please consult the deliverables of WP1 and WP2 for more details about the specifics<sup>11</sup>. Section 5.3 below shows how the different part of the project will feed into the *Roadmap* using these methods.

RM Roadmap is complementing these methods with an unprecedented co-creation exercise (WP3). The aim is that research managers from across Europe will come together on a newly created co-creation platform and will discuss RM in five co-creation sessions of two weeks on the RM Roadmap Knowledge and Community Platform. To make this possible we are building connections on national and regional networks and a moderated self-service online environment. The link between the individual contributors, the networks and the projects are the RM Roadmap Ambassadors (more information about the programme [here](#)). We have recruited about 120 ambassadors from 40 countries in collaboration with existing (national) networks. Please find full detail about the ambassador network on the Ambassador section of the RM Roadmap website. <https://www.rmroadmap.eu/faqs>.

The 5 co-creation sessions and their topics are included below:



Figure 3: The short topics and timing of the 5 co-creation sessions of RM Roadmap

This approach was chosen to enable and present a *Roadmap* for the future of RM which is co-created and supported throughout Europe and moreover to deliver significant preliminary data and outcomes through the Knowledge and Community Platform.

<sup>11</sup> D1.1 Preliminary report on ERA-wide landscape and D2.1 Preliminary report on professional development opportunities.

The co-creation exercise will lead to a discussion on the online platform (KCP: Knowledge and Community Platform) and will be concluded by a consensus document. The consensus document will be drafted by the ambassadors of the relevant country based on the community discussion on the platform (see RM Roadmap deliverable 4.3 on the KCP). Afterwards, the participants to the discussion can vote to support the consensus document. This will create an output of up to 40 consensus documents after each co-creation session from 40 different countries (see deliverable D4.3).

The project is currently assessing if Artificial Intelligence (AI) could be used to help analyse the results. If this proves possible, it could be of high added value to make analysis across different parts of the co-creation possible which otherwise might not be possible due to the large volume (e.g. up to 40 online discussions, potentially in different languages etc.).

The outputs will be available through the Research Management Helix as part of the KCP, so all those interested can have easy access to this information. This can already provide information to (member) states regarding research management in their country and help identify the relevant actors in their national frameworks. In October 2023, the first co-creation session about "Understanding the landscape: National frameworks and associations" will start. By the end of 2023, we will generate up to 40 country-specific consensus documents about the situation of national networks and associations effectively making a country and European map of the available networks.

## 5.3 Building the roadmap based on the project's work packages and task outcomes

### 5.3.1 Work Package (WP) and tasks populating the Roadmap

The *Roadmap* is part of task 3.4 (Work Package 3) and below (Figure 4) is a visual representation of which tasks will provide the basis for the relevant part of the *Roadmap*. Annex 1 provides a summary of Work Package (WP) distribution in RM Roadmap project.

In short, we are including the main objectives and expected outcomes of each WP:

- **WP1 "Intelligence"** will produce a comprehensive assessment of the RM community, potential for a more standardised profession and terminology as well as propose recommendations and guidelines.
- **WP2 "Training and Development"** will recommend training to synergise with a future Europe-wide training and networking scheme and foster the creation of communities of practice between trainers to exchange best practice and promote internationalisation of existing training.
- **WP3 "Roadmap and Advocacy"** will create a Roadmap to improve the RM system in Europe, as well as a value proposition and a business case to raise awareness of the role of research management. WP3 also establishes the RM ROADMAP Ambassador Network.
- **WP4 "Community, Communication and Dissemination"** aims to ensure that project activities are effectively communicated and disseminated to the wider community of stakeholders and that project results, outputs, and resources are broadly disseminated. WP4 will also create and implement the RM Roadmap Knowledge and Community Platform.
- **WP5 "Project Management"** works closely with the consortium, puts in place project management

structures and procedures and ensures regular communication with the European Commission.

- **WP6 "Sustainability and Exploitation"** main objective is the *exploitation of the project results and the long-term exploitation*. It will develop a long-term action plan for the sustainable use and long-term operation of the project outcomes.

The Roadmap base will be created mainly in the following way:

1. WP1 will put forward the definition and segmentation/classification.
2. WP 3 will mainly be responsible for the value proposition and business case with support from WP 1
3. WP1 will mainly be responsible for the framework conditions including a professional development framework

The pillars will be a more complex interplay:

- A. Upskilling elements are mainly populated by outcomes of WP2 supported by WP1
- B. Capacity building is WP2 with WP3 and a sustainability element added by WP6.
- C. Networking is delivered to the roadmap by WP2 with support of WP4, 3 and 2.
- D. Awareness creation will mainly come from the work of WP3 and 4

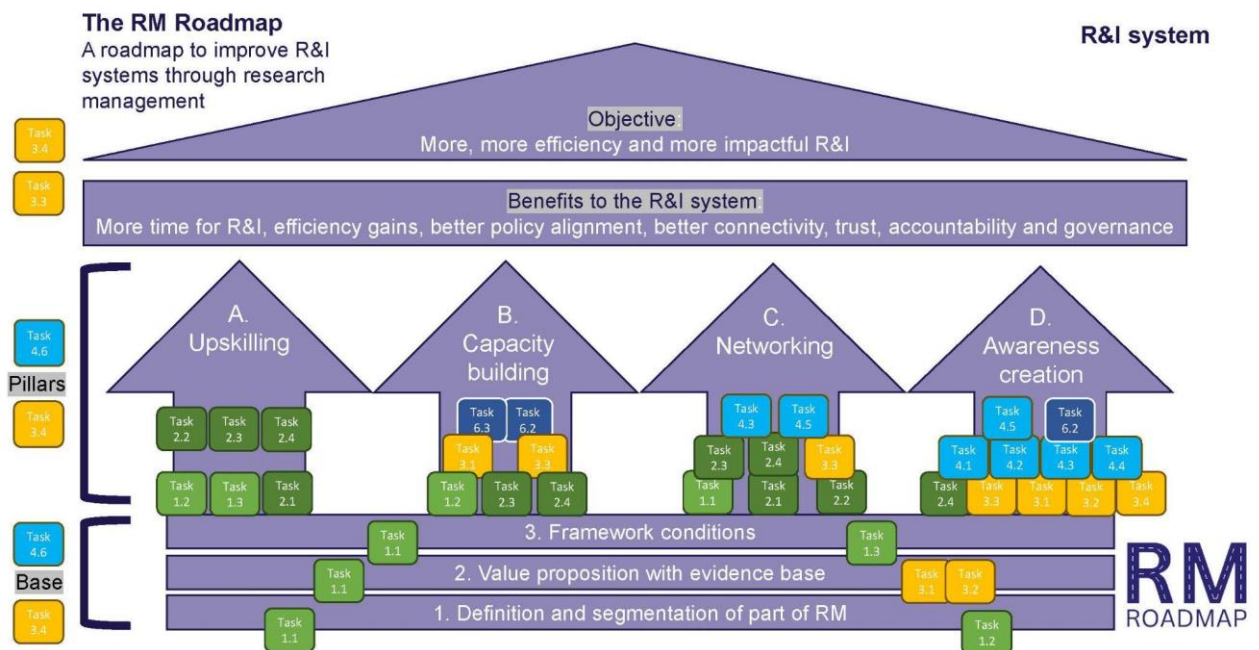


Figure 4. Graphic representation of how the work package tasks outputs will populate the RM Roadmap. List of tasks below in Annex 1.

### 5.3.2 In which form will the Roadmap be delivered

The *Roadmap* is planned to be delivered in the form of a:

- A. Report with a vision, strategy and action plan on RM in R&I systems (2025)
- B. Practical online tool to improve (national) R&I systems
- C. Target group specific messaging and guidance on how to use the roadmap

The *Roadmap* is meant to be used as a tool including a framework and vision to be adjusted to the context of the specific system. The *Roadmap* will not be country specific but a tool for countries to use to develop their country specific plan or roadmap.

### 5.3.3 Examples of potential use of the roadmap

Three concrete examples of how the roadmap can be used is:

1. A ministry wants to learn more about the role of research management and potentially develop national policy. It will be able to:
  - a. Find a Europe wide vision supporting the ERA to optimise national policy, as well as synergise with other (member) states and the EU to increase connectivity and facilitate collaborations.
  - b. Identify the national networks and roadmap ambassadors of the relevant country to make connections and set up a dialogue.
  - c. Find out if there is a national definition and segmentation and benchmark it with the RM Roadmap definition and segmentation AND hopefully with a commonly accepted European definition in the future (through the work of action 17).
  - d. Understand the value and role of research managers better and how they can benefit national policies.
  - e. Find (best practice) examples from countries across Europe about policy and legislation regarding RM and look at the RM Roadmap consensus reports about the 5 co-creation session topics of up to 40 countries
  - f. Access to Research Management Helix and RM Roadmap website and find all the information about the roadmap.
  - g. Find the networking, training, funding and mobility opportunities in an online repository or hub in collaboration with sister project CARDEA<sup>12</sup>.
  - h. Have a template, benchmark and best practice examples on how to create a mature and recognised profession through working on 4 pillars nationally:
    - i. Upskilling
    - ii. Capacity building
    - iii. Networking
    - iv. Awareness creation

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<sup>12</sup> Further to RM Roadmap (Creating Framework Conditions for Research Management to Strengthen the European Research Area) the other EU project funded towards the Europe-wide scheme for research managers is CARDEA - Career Acknowledgement for Research (Managers) Delivering for the European Area. Collaboration between the two projects will maximise impact. More information: <https://www.rmroadmap.eu/sisterprojects>

2. An informal research management network wants to improve the quality of research management in a country and will be able to:
  - a. Make use of the information in the previous example.
  - b. Find guidance on how to organise a research management network.
  - c. Get in touch with other networks in the country and Europe wide.
  - d. Find templates and messaging to collaborate with the other actors of that R&I system
  
3. The leadership of a university want to assess the internal research management capacity and will be able to:
  - a. Use the definition and segmentation of RM Roadmap and the relevant national definition and segmentation to:
    - i. Determine who is in fact a research manager at that university
    - ii. Find gaps in the RM expertise present
    - iii. Asses if there are gaps in the type of RM profiles are working at the university
    - iv. Asses the (lack of) consistency in job titles and job descriptions
  - b. Find national and international experts to help the assessment
  - c. Find best practices and benchmark
  - d. Find the internal and national framework(s) conditions for RM
  - e. Use the roadmap to assess the national context in relation to the local condition of the universities' research managers

## 6. Timing

During the first 12 months of the project, the scene has been set to be able to carry out the project in the way it was designed. There is a reliance on voluntary collaboration by actors across Europe, especially for the co-creation. A great deal of effort has been put into ensuring the necessary connections are present with the community, (national) RM networks and the ambassador network. In month 14, we will launch the co-creation on the newly created co-creation space and the research management Helix will start to be populated with outputs. At that time, we will be able to assess the results of the community engagement efforts. The degree of engagement will be crucial to the success of the mass co-creation.

The visual representation of the RM Roadmap timeline can be found [here on the RM Roadmap website](#).

## 7. Conclusion

The creation of the *Roadmap* is an open invitation and tool for actors from across Europe to unlock the potential of the RM community for their own benefit and the benefit of their (national) R&I systems.

Considering the current landscape of the profession of research management in Europe, it is important to avoid fragmentation, inconsistency and the lack of interoperability between organisations and countries in the ERA and Europe. This improvement could be drastic and game changing in the longer term in comparison to the current siloed approach, where many systems and organisations create their own models.

The *Roadmap* will not be a quick fix but a tool for different (national) actors to establish a dialogue and create their own plan or roadmap. Such a (national) plan will be specific to the relevant context but through using the guidance, standards and best practice examples of the *Roadmap*, consistency and interoperability will improve.

The project is on schedule to deliver the *Roadmap*. The plan is clear and the first wave of outputs from the WP's will start to provide input to the *Roadmap*. The co-creation process and main survey will launch during the coming months (October 2023). This will allow us to clarify the value proposition of research management and to prepare its business case (Task 3.1). This will lead to the final *Roadmap* being released in 2025 (task 3.4). Meanwhile, we will be able to share preliminary results and data from the co-creation sessions (in the form of consensus documents) through the RM Roadmap Knowledge and Community. The RM Roadmap project objectives and overall timeline can be found on the website here: <https://www.rmroadmap.eu/>.

The RM Roadmap consortium looks forward to continuing this process in consultation with the relevant stakeholders, related projects and ERA Action 17 representatives and the Member States.

## Annex 1 RM Roadmap Work packages

### WP1 Intelligence

- Task 1.1 Mapping RM Value Chain M1-M12
- Task 1.2 Characterisation and Categorisation of Current Available RM roles in the ERA M1-M24
- Task 1.3. Reviewing Current Regulatory Frameworks and Roadmap for RM Career Path and Professional Recognition M1-M36.
- Task 1.4 Review of Existing RM Resource Platforms M1-M36

### WP2 Training and Development

- Task 2.1 Analysis of existing training, networking and funding per segment of the RM community & creation of an open smart database M1-M30.
- Task 2.2 Survey, gap analysis and recommendations about training and networking needs M1-M24
- Task 2.3 Fostering the creation of communities of practice among trainers M6-M36.
- Task 2.4 RM Community incubator: Fostering national and thematic communities (in Widening Countries) including research infrastructure M12-M36.

### WP3 Roadmap and Advocacy

- Task 3.1 'Business Case' development M1-M36
- Task 3.2. Advocacy and Mobilisation of stakeholders strategy M1-M36
- Task 3.3 Create Ambassador Network Outreach M1-M36
- Task 3.4. Drafting of the Roadmap to Improve the RM System in Europe M1 – M36

### WP4 – Community, Communication and Dissemination

- Task 4.1 Communication M1-M36
- Task 4.2 Dissemination M1-M36
- Task 4.3 Collaborative Virtual Ecosystem: Research Managers Helix development and management M1-M36
- Task 4.4 Outreach activities M12-M36
- Task 4.5 Clustering with sister and other EU projects M1-M36
- Task 4.6 Knowledge and Community Platform (KCP) M1-M36

### WP5 – Project Management

- Task 5.1 Project Management of the Project Resources M1-M36
- Task 5.2 Networking activities M1-M36
- Task 5.3 Coordination with and reporting to the EC M1-M36
- Task 5.4 Data Management and Ethics M1-M36

### WP6 Sustainability

- Task 6.1 Critical Review of the Project Strategy and Lessons Learned M3-M36
- Task 6.2 Development of a Sustainability Roadmap M6-M36
- Task 6.3 Commitment and Sustainability Strategy/Action Plan M12-M36



## RM Roadmap\_EARMA\_WP3\_D3.2\_Overarching Roadmap Plan

### Overview of RM Roadmap WPs

<https://padlet.com/EARMA/oct54tclwi09som2>

**WP1 Intelligence**

WP1 is a groundwork/starting point on which subsequent tasks and activities can be based.

WP1 analyses the career paths and working context of research managers including best training, networking conditions and future skills needs for RMs.

WP1 will identify success and failure factors in institutional RM practice mainly through case studies and create recommendations for:

- o RM definition and terminology,
- o RM professional categories,
- o RM career development framework,
- o RM skill and competence table.

**WP2 Training and development**

WP2 will:

- increase the accessibility for the RM community of information on existing funding and training.
- recommend training that could create synergies with a future Europe-wide training and networking scheme
- foster the creation of communities of practice among trainers to exchange best practices and to promote the internationalisation of existing training.

**WP3 Roadmap & Advocacy**

WP3 ties together the results from primarily WP1 and WP2 by using cocreation processes to produce the roadmap for the future of RMA in Europe. The tools for achieving this goal are a business case for raising awareness of the role of RMA, a strategy for advocacy and stakeholder engagement, and establishing an Ambassador network for managing dialogue and communities of practice that are expected to outlast the project and contribute to its impact.

**WP4 Community, Communication and Dissemination**

WP4's aims to ensure that project activities are effectively communicated to the wider community of stakeholders and that project results, outputs, and resources are broadly disseminated.

It will develop the necessary support, visibility and identity to promote project outcomes and will sustain the expected achievements of the project.

**WP5 Project Management**

EARMA will lead the consortium in coordination of the bodies involved in the project management structure and ensuring project management procedures are implemented.

**WP6 Sustainability and exploitation**

WP6 main objective is the exploitation of the project results and the long-term exploitation:

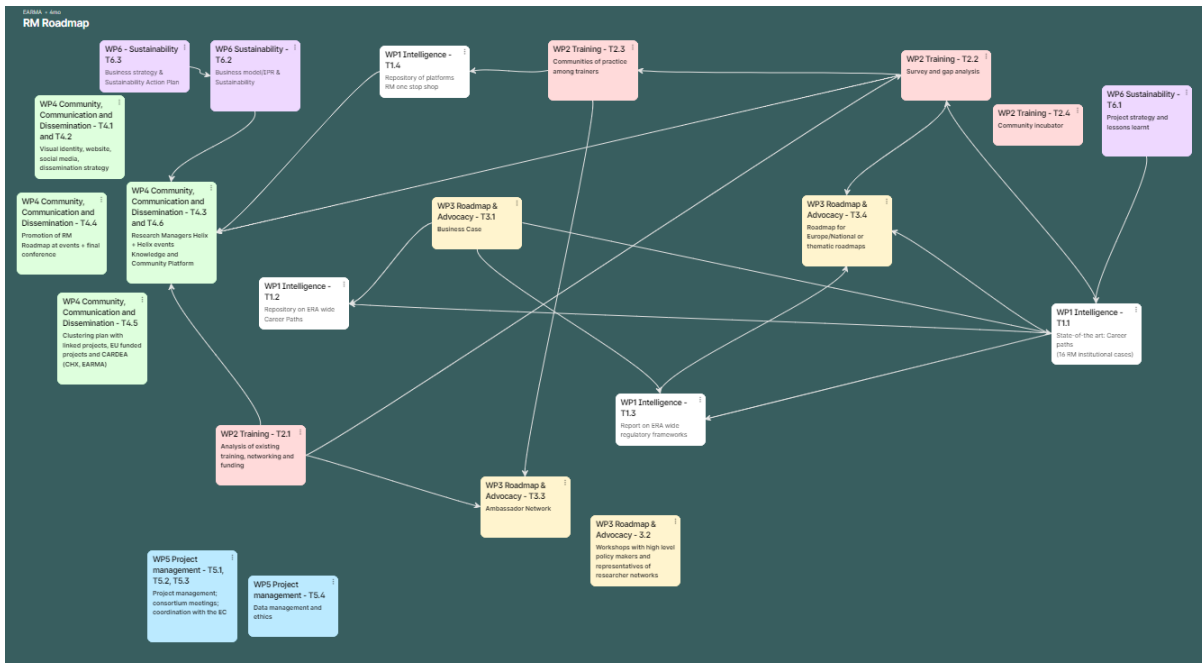
- sustainability roadmap and long-term action plan for the sustainable use and long-term operation of the project outcomes.
- sustainability measures for the RM ROADMAP project including the sustainability of the project ambassadors.
- long-term sustainable business model for RM ROADMAP.



## RM Roadmap\_EARMA\_WP3\_D3.2\_Overarching Roadmap Plan

### Interconnection between RM Roadmap WPs and tasks

<https://padlet.com/EARMA/oct54tclwi09som2>





# RM ROADMAP

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