

RM ROADMAP

Deliverable 6.1 Sustainability Plan

This deliverable provides summary of lessons learned towards preparing a sustainability roadmap for the RM Roadmap Knowledge and Community Platform (KCP). This report is prepared in month 12 of the project (August 2023) and is a forward look summarizing the plan moving forward to enable generation of the detailed Sustainability Report due as Deliverable 6.2.

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Project full
title

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

Project
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D6.1: Sustainability Plan

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Authors:	Laura MacDonald
Reviewer(s):	Nik Claesen Borana Taraj
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1. Project

RM Roadmap will chart a course for the future of research management (RM) in Europe and a 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 program.

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 ability to sustain its economic performance and growth.

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).

2. Summary

Since the RM Roadmap project has a finite lifespan, one of the key deliverables under WP6 *Sustainability and Exploitation* is to develop a strategy to ensure sustainability of the vision and outputs of the project. Not only the vision but its tangible outputs should have the possibility to continue under a variety of different routes and planning for this longevity needs to be a process embedded through the life of the whole project.

Therefore, WP6 provides for both a Sustainability Plan due after 12 months, as well as a full Sustainability Report due at the end of the project. The latter document will contain the specific tangible actions, processes and recommendations based on the actual deliverables and wider outputs achieved during the project. However, at this stage after the first 12 months it is already possible to identify key areas where specific measures can be designed.

To define the process for the Sustainability Plan, we first look to the RM Roadmap project and its overall objective to make the research and innovation (R&I) system in Europe become more efficient and more

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impactful in the context of the ERA, by delivering a Roadmap for the future of research management (RM) in the European Research Area (ERA) and the larger European area¹ by ensuring strategic strengthening of the RM community.

In addition to setting the scene for future activities by stakeholders, the project will also develop specific tangible results in the nature of new platforms, tools and ways of connecting newly created and existing communities of research managers, as defined in the ERA. Therefore, the Sustainability Report in the final Roadmap will contain detailed proposals and recommendations as to how all of the relevant project outputs.

3. Background for the Sustainability Plan

Since the key nature of the results of this project will be enshrined in a series of recommendations, tools and communities, a Sustainability Report is required to help not only the Consortium but all stakeholders in the RM community move the project outputs to a post-project phase where the continuity of the project goals can deliver outcomes beyond the project lifecycle.

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The elaboration of this Sustainability Plan is crucial to detect - already at an early stage – the key areas of focus for the content of the Sustainability Report so that it will provide inspiration for how the individual project partners, the consortium and the wider RM community will use the research results after the end of the project. A key element of developing the Sustainability Report will involve working closely with all partners to monitor the results of different elements of the Project under different work packages.

This Sustainability Plan prepared after the initial 12 months of the project sets out the process of how the Sustainability Report is to be drawn up. The Plan aims to identify those outputs of the RM Roadmap which will need to be supported to ensure an ongoing momentum towards realization of the overall RM Roadmap goal - a mature, efficient, well-supported RM landscape for Europe. Implementation of the Sustainability Plan will lead to the Sustainability Report to be incorporated into the final RM Roadmap. The document outlines potential routes to capture, support, and sustain over time the results and ideas that will emerge during project activities.

Initial discussions among partners around the scope of the Sustainability Report have identified several

¹ ERA is the priority within the RM ROADMAP project. However, we will also take into account the wider European area whenever possible. When ERA is mentioned, it should be understood that the wider European area is also being considered. For the ease of reading, it is not made explicit at each referral. This wider area includes for example all associated territories and members of the EEA.

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areas of key focus for the legacy of the RM Roadmap project. These are identified below in points 4 through to 10 and for each focus area a brief description of the planned role in the final Sustainability is set out.

4. Clear Goals of Sustainability Planning

Given the clear goals of RM Roadmap, it has become clear that future sustainability of the results of this project cannot be planned for along the lines of most other EU-funded projects where future activities will look to commercial income generation models to sustain the existence and effective running of new tools or platforms. Since the RM landscape in Europe already comprises many useful networks, tools and processes, the ultimate Sustainability Report will provide recommendations on how these existing networks and platforms can better become available to all relevant stakeholders and professionals as well as providing recommendations as to how new tools will also become embedded within the RM landscape.

The Sustainability Plan recognizes that there are many different stakeholders involved in the RM Roadmap project whose downturn engagement needs to be encouraged and planned for if the sustainability of the emerging enhanced RM landscape is to become a reality. Therefore, this Sustainability Plan recognizes these different stakeholders and the different critical roles they will play in moving the project outputs to a post-project phase where the continuity of the project goals can continue to deliver outcomes beyond the project lifecycle.

There are two key areas where sustainability planning can take place: strong RM landscape evolution and secondly around the new platforms which emerge from this project. Specific target aspects of each area are listed here (including their connection to the and under section 11 below, we will see more details of how these targeted actions will be developed during the life of the project).

a) RM Landscape evolution

- Terminology Framework (Recognition)
- Mature RM landscape (Recognition, Upskilling, Networking)
- Connectivity of Networks: sustainable vision (Networking, Upskilling)
- Empowering National and regional communities to support and grow strong RM
- Utilization of the Value proposition for RM and its Impact

b) Platform utilization

The KCP of RM Roadmap is constituted of two different systems. One for the cocreation (EARMA cocreation platform) and another for dissemination and impact acceleration (CrowdHelix RM Helix).

- The EARMA cocreation platform is an upgrade of the existing EARMA community platform.
- The RM Helix is existing and proven technology.

This will involve partners EARMA and CrowdHelix in particular as the developer and hosts of the relevant

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platforms. There are multiple aspects to the platforms developed and hosted by Crowdhelix, including the co-creation platform dedicated initially for the ambassador Network but this has scope to act as an ongoing networking tool to drive thought leadership across multiple sectors of the RM ecosystem. The Sustainability Report will set out recommendations around how these platforms can continue to be accessible and utilized by stakeholders.

5. RM Landscape Evolution: Terminology Framework

As noted by partners HETFFA and EARMA in Work Packages 1 and 3 (*WP1 - Intelligence & WP3 - Roadmap and Advocacy*), much still needs to be resolved around an agreed and useful terminology for matters relating to roles, competencies and functions associated with Research management. The Sustainability Plan recognizes how essential such a Framework will be and an action remains under WP6 *Sustainability and Exploitation* to monitor this topic to see how best to incorporate the results in the Sustainability Report. Recognition, upskilling, networking, and capacity building all require investment. To make investment attractive, policy makers must know the value and the contribution of the community to the R&I system. A value proposition can only be established in a solid way where agreed definitions exist.

6. RM Landscape Evolution: Harnessing a Mature RM Landscape

The key features of a mature RM landscape as foreseen in the deliverable WP3.4 *Drafting of the Roadmap to Improve the RM System in Europe* will be included in the Sustainability Report. These aspects included harnessing the ingredients of successful professional ecosystems such as recognition and training for professionals, ongoing engagement with access to training and upskilling tools as well as ongoing recognition of the value proposition of strong RM. Thought leadership from both practitioners as well as leaders, including policy developers, will also be explored to best identify how to share best practices and inspire regional and national commitment to their respective RM ecosystems.

7. Connectivity of Networks

New and enhanced networks are being created under the RM Roadmap project and their future sustainability and adoption by the different stakeholders will be addressed in the Sustainability Report. Anticipated networks included the following:

- a) Ambassador Network
- b) RM Community via Crowdhelix Platform
- c) Regional networks such as in widening areas
- d) Cardea Mobility and Funding Platform (CARDEA Project)

However, one of the key strengths of this project is the opportunity to identify and harness existing networks across the RM landscape. This will enable both a widening of access to chance to such networks to further expand and develop their activities, geographically as well as in scope. The content of the

landscaping work done under Work Packages 1 and 2 (*WP1 - Intelligence & WP2g -Training and Development*) will demonstrate that much thought leadership already is available and can be further stimulated while access to existing activities, professional development and networking can be promoted to embed and strengthen cross-connectivity of the RM community with all stakeholders.

8. Platforms for the RM Communities

a) Commercial Exploitation Framework for the RM Roadmap platform

Given the development by Crowdhelix of an enhanced platform for the RM ecosystem within this project, the Sustainability Report will seek to include recommendations by Crowdhelix of their identification of the market structure, functionality of the new platform and accessibility conditions possibilities for after the end of the RM Roadmap project. As part of new network(s) sustainability it is anticipated that exploration of how such a platform can be supported on a user-access basis as well as other commercial opportunities will be explored.

b) Cardea Mobility and Funding Platform

The functionality and nature of the Cardea platform as well as accessibility and user profiles will be shared by CARDEA. Planned access and future use will be described in the Sustainability Report.

9. Synergies with other Initiatives

Under development of the Sustainability Report, close links to other ERA actions and their outputs will be maintained, where these relate to professionalisation of the RM community such that they can be included within the RM Roadmap Sustainability Report (for example additional training tools such as Soft Skills for Knowledge Transfer Professionals)

Specifically, ongoing close connectivity to the CARDEA project to monitor outputs such as its mobility and funding platform will be included in the Sustainability Report.

10. Key Tasks in Creating in Sustainability Report

a) Partner Engagement

A critical element of the Sustainability Report preparation will be to ensure active engagement with partners in the RM Roadmap project during the project to ensure that not only the content of the final deliverables is considered when preparing the Sustainability Report, but also to ensure that wider considerations gained through the synergy of working together can be harnessed. The Project Co-ordinator included effective quality control measures for each deliverable in this project. The Sustainability Report will be prepared utilising all the quality control measures recommended by the Project Co-ordinator.

Regular meetings with each of the other partners will be set up by ASTP, to discuss the Sustainability Plan an development of the Sustainability Report.

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b) Monitor Project Outputs to identify Sustainability recommendations

Review the deliverables from WP2 *Training and Development* working with all partners to identify sustainability recommendations to maintain the increased awareness amongst research management staff about existing training, networking and mobility opportunities at EU, national, and regional level all. This process will involve looking closely at the following deliverables in accordance with the timelines linked to their production:

- D1.1. Preliminary Report on ERA-wide landscape (M12)
- D1.2. Report on ERA-wide landscape (M34)
- D2.1. Preliminary Report on professional development opportunities (M12)
- D2.2. Online tool for professional development opportunities (M24)
- D2.3. Report on the professional development opportunities (M34)

Review deliverables from WP4 *Communication* to ensure that identification of relevant stakeholder and their engagement experiences throughout the life of the RM Roadmap project:

- D4.2. Online Knowledge and Community Platform (KCP) M6
- D4.4 Preliminary Dissemination, Communication and Exploitation report M12
- D4.5. Activity Report on Knowledge and Community Platform M34
- D4.6. Dissemination, Communication and Exploitation report M34

Review the evolution of the final Roadmap deliverables from WP3 *Advocacy* RM Roadmap to identify the key focus of the scope of sustainability routes to be proposed. These will reflect the ERA calls for support and practical measures around recognition, upskilling, networking and capacity-building for research management. This will involve collaborating closely with partner EARMA.

- D3.1. Short policy brief 1 (M12)
- D3.3 Short policy brief 2 (M36)
- D3.4. Overarching Roadmap (M36)

c) Identification of roles for Different Stakeholders (policy/ commercial/ RM community)

Sustainability will depend upon ongoing engagement and commitment of all the RM stakeholders thus the Sustainability Report will highlight ways in which those deliverables and other outputs of the RM Roadmap project around which sustainable activities could be driven by the different stakeholders. Reinforcing the potential roles that can be continued or taken up by different stakeholders will be a critical part of the Sustainability Report.

d) Connectivity and Cross-fertilisation of Activities

The Sustainability Report will take account of the identified synergies with other projects and initiatives that not only were identified in the project application but all those subsequently gathered, in particular as part of the Ambassador Network activities.

Connectivity with the wide community of stakeholders as planned for (and implemented) in the Dissemination Strategy for RM Roadmap will be reviewed in preparing the Sustainability Report to ensure

that wherever possible, project outcomes will continue to be widely 'disseminated' beyond the partners' original audiences to further drive utility of the results after the project ends.

11. Conclusion

It can be seen already after one year of the RM Roadmap project that concrete achievements are being produced. The role of the Sustainability Report will focus on describing actions and opportunities for the RM landscape comprising frontline practitioners, their institutional, national and EU-level policy-makers and the wider European society to continue to drive towards an efficient research management landscape with all the economic, societal and financial benefits that brings. Returning to the four drivers for the ERA, the Sustainability Report will remain focussed on the following goals.

Recognition - measures that continue to promote the recognition of RMA as a profession that is a necessary component of a well-functioning of research and innovation system.

Upskilling - measures that continue to contribute to developing more and better training opportunities for RMA in Europe.

Networking - providing ongoing evidence and opportunities around networking being an agreed necessary component of career development for RMA staff.

Capacity-building - promoting the dissemination and use of all aspects of a structured value proposition description for research management to enable policy-makers and organizations to dedicate ongoing investment in well-trained RM resources.



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