

Policy Brief No.2 September 2023

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

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

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

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

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

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

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

Why this is relevant for WIDERA applicants and NCPs?

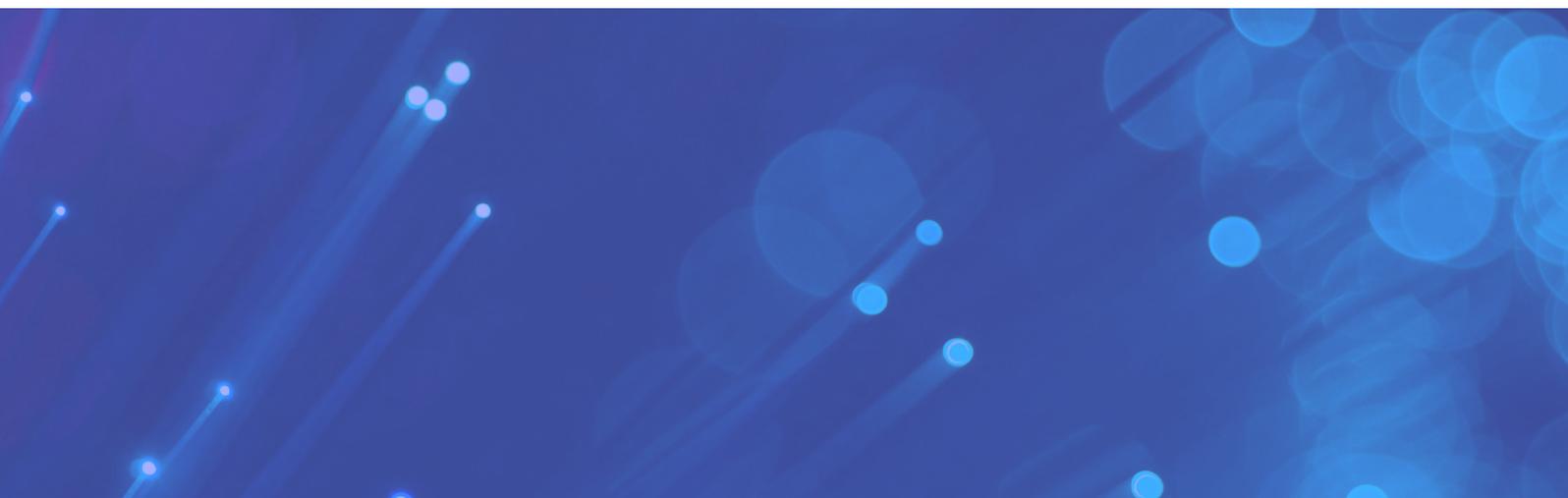
The ERA programme part is expected to significantly contribute to further enhancing the ERA along the current policy priorities and the ERA Policy Agenda actions. To this end, the ERA Policy Agenda directs the planning and designing of calls particularly in the ERA part, as it provides funding for the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

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

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

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

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



The Research Management Initiative – background and policy development

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

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

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

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

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

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

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

Commitments to the Action (as of August 2023)

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

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

Associated Country: Norway

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



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

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

Implementing the Research Management Initiative

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

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

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

What is next?

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

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

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

Extract:

Recommendations to achieve better ‘recognition’ and ‘upskilling’

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

Proposed next steps for ERA Action 17 activities

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

A dedicated Skills and Career Framework for Research Management

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

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

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

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

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

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

Enhancing Training Opportunities

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

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

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

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

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

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

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

Type of Action: Coordination and Support Actions

Expected Outcomes:

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

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

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

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

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

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

among training providers is key to achieving this objective.

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

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

Recommendations for applicants

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

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

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

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

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

Get the support of your National Contact Point

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

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

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

Resources

Documents

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

Brochures

- [The New European Research Area](#)

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

Websites/Platforms

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

NCP Support

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

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



ERA call page in the
Funding & Tenders Portal

Task leader:



Task co-leader:



NCP_WIDERA.NET is the European network of WIDERA National Contact Points. Visit us on www.ncpwideranet.eu, register for our newsletter and follow us on Twitter and LinkedIn to stay up to date on ERA and WIDENING.

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Policy Brief

No.1 November 2022

The European Research Area Policy Agenda

This policy brief explains what the European Research Area (ERA) Policy Agenda is and provides information about the actions specified in the first ERA Policy Agenda (2022-2024). It explains why it is relevant for Horizon Europe WIDERA applicants as well as for National Contact Points.

In 2020, the European Commission and the Member States agreed on a new governance of the ERA. The ERA Policy Agenda forms an important pillar of the new ERA governance. It is a strategic

instrument that allows the Member States and the European Commission to join forces and align their efforts to achieve the ERA goals and ambitions, and Horizon Europe as the EU's most power- and impactful funding programme for research and innovation plays a key role in this. The ERA programme part in particular is expected to significantly contribute to further enhancing the ERA along the current policy priorities and the ERA Policy Agenda actions.

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

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

Why this is relevant for WIDERA applicants and NCPs

The ERA policy priorities determine the goals and scope of the WIDERA call topics, and the ERA Policy Agenda defines the specific fields of action and the concrete objectives to realise this overarching ambition. The ERA Policy Agenda therefore directs the planning and designing of calls in this programme part, in particular the ERA part, which supports the various efforts to strengthen the ERA with its funding. The WIDENING part also contributes to achieving ERA ambitions in particular but not exclusively with regard to improving access to excellence as an ERA priority and as an action of the first ERA Policy Agenda.

The first [WIDERA work programme](#) to fully reflect the new ERA governance is the Work Programme 2023-2024.

Almost all topics are linked to one or several concrete ERA Policy Agenda actions, i.e. the results of projects funded under the WIDERA programme are expected to contribute to one or several ERA Policy Agenda actions. The ERA Policy Agenda will guide the actions over the next years, especially in the ERA part.

- Information about the concrete ERA Policy Agenda actions is relevant to guide and advise applicants as the ERA policy agenda provides context and background for expected outcomes and scopes of call topics.
- Applicants are well-advised to gather information on relevant ERA Policy Agenda actions to better understand the policy context of the call topic of interest.

The ERA Policy Agenda – background and development

Politics on regional, national and European level are striving to shape the ERA into a single borderless market for research, innovation and technology across the EU. From its launch in the year 2000, the central aim for the ERA was

the free movement of researchers, knowledge and innovation, to enable better cross-border cooperation, to build critical mass, and to enhance international competitiveness.

ERA priorities

The new ERA will

- prioritise investments and reforms in research and innovation,
- boost market uptake,
- strengthen the mobility of researchers and the free flow of knowledge and technology,
- improve access to excellence.

In the WIDERA work programme, the call topics of the ERA part are assigned to one of the four priorities of the new ERA.

A number of recent policy developments underline and renew these ambitions for the ERA, setting out new ERA goals and priorities. In 2020, the

European Commission adopted a [Communication on A New ERA for Research and Innovation](#) which outlined a new vision for the ERA, followed by

[Council Conclusions on the new ERA](#) in December 2020. By the end of 2021, the Council had adopted Recommendations on the [Pact for Research and Innovation in Europe](#), which calls on the Commission and the Member States to develop an ERA policy agenda and a multi-level governance model capable of delivering on the new ERA.

The Pact for Research and Innovation in Europe (2021) – a non-binding initiative – set out commonly agreed values and principles and

identified the areas where Member States jointly develop priority actions – from open science to knowledge valorisation. A common ERA policy agenda was proposed as a new coordination instrument in support of the common principles and ERA priorities set out in the Pact. The joint ERA Policy Agenda was meant to be clear and actionable, defining and describing each action with a view to its implementation.

The ERA Policy Agenda actions

The first [ERA Policy Agenda \(2022-2024\)](#) comprises 20 specific actions. The actions are implemented jointly by the Member States and the European Commission in cooperation with stakeholder organisations and with countries associated to Horizon Europe, where applicable.

To best coordinate the various efforts to achieve the shared ERA ambitions, a co-creation process on the agenda and the implementation planning was set up involving the European Commission and the

ERA Forum and also the Horizon Europe Programme Committee configuration on *Widening participation and strengthening the European Research Area*.

For all these 20 actions, outcomes and milestones have been defined to allow for the best possible coordination. Sub-groups under the ERA Forum as well as a ‘sponsorship’ approach with Member States shall help to ensure shared responsibility and ownership.

The ERA Forum

The group is tasked with supporting the implementation and monitoring of the ERA Policy Agenda and the further development of the agenda and its actions. The ERA Forum is an informal expert group of the European Commission that provides expertise and advice in the preparation, implementation, monitoring and further development of the ERA Policy Agenda.

The group is co-chaired by the European Commission and the Member States and comprises representatives from Member States’ authorities responsible for research and innovation. Representatives from countries associated to Horizon Europe, from the Committee of the Regions and the European Economic and Social Committee as well as from European Stakeholder Organisations are involved as observers, ensuring close coordination and cooperation between all actors.

In 2021, the preceding ERA Forum for Transition helped to bring the new ERA governance to life and kick-started the work on the ERA Policy Agenda.

Member States as well as stakeholders and associated countries have expressed their commitment to the actions of the first ERA Policy Agenda.

Planned activities related to all 20 ERA Policy Agenda actions will be implemented, among others, through ERA Calls.

The ERA Policy Online Platform, scheduled to launch in 2023, will provide information on the design and implementation of the concrete actions as well as on relevant activities of the Member States, the Commission, and the stakeholders, thereby tracking the progress towards achieving the new ERA goals and ambitions.

The 20 ERA Policy Agenda actions 2022-2024 and their expected outcomes:

1. Enable the open sharing of knowledge and the re-use of research outputs, including through the development of the European Open Science Cloud

- Deploy Open Science principles in synergy with other relevant ERA actions and identify Open Science best practices by the various communities to progressively make Open Science 'the new normal'
- Deploy the core components and services of EOSC, federate existing data infrastructures in Europe and develop community frameworks for interoperability of research data and quality control of EOSC resources
- Establish a mechanism to collect data and investments, policies, digital research outputs, open science skills and infrastructure capacities related to EOSC and link it to the ERA Monitoring Mechanism

2. Propose a EU copyright and data legislative and regulatory framework fit for research, with two main outcomes

- Identify barriers and challenges to access and reuse of publicly funded R&I results and publications and data for scientific purposes, and identify potential impacts on research, through an analysis of relevant provisions under EU copyright and data legislation and related regulatory frameworks, and of relevant institutional and national initiatives
- Propose legislative and non-legislative measures to improve the current EU copyright and data legislative and regulatory frameworks

3. Advance towards the reform of the Assessment System for research, researchers and institutions to improve their quality, performance and impact, with following expected outcomes

- The creation of a coalition of European research funders and research performers who agree on a new approach for research assessment, following wide and inclusive

consultations at European and international level

- An implementation plan of the coalition to roll-out the new approach, including pilots in different domains
- An analysis of legal and administrative barriers at national and trans-national level for a modern research assessment system

4. Promote attractive and sustainable research careers, balanced talent circulation and international, transdisciplinary and inter-sectoral mobility across the ERA, with three main sets of activities

- Development of a comprehensive European framework for research careers
- Exchange of best practices and mutual learning on the use of the European Competence Framework for Researchers, on inter-sectoral mobility as well as on balanced circulation of talents in Member States
- Support measures to improve attractiveness of research careers in academia and beyond, including an observatory on research careers, an ERA Talent Platform (reinforcing EURAXESS)

5. Promote gender equality and foster inclusiveness, with four interlinked outcomes

- Develop a policy coordination mechanism to support all aspects of gender equality through inclusive Gender Equality Plans and policies, and a dedicated EU network on their implementation
- Strategy to counteract gender-based violence including sexual harassment in the European R&I system and to assure gender equality in working environments through institutional change in any research funding or performing organisation
- A policy approach to strengthen gender equality, that addresses gender mainstreaming to advance the new ERA

- Develop principles for the integration and evaluation of the gender perspective in research and innovation content in cooperation with national Research Funding Organisations

6. Deepening the ERA through protecting academic freedom in Europe, with two main strands:

- Facilitate the development of a policy approach to safeguard academic freedom in Europe
- Support for recognising and tackling R&I foreign interference

7. Upgrade the EU guidance for a better knowledge valorisation

- Develop and endorse Guiding Principles for knowledge valorisation
- Development of a Code of Practice for smart use of IP together with stakeholders
- Development of a Code of Practice for researchers on standardisation

8. Strengthen sustainability, accessibility and resilience of research infrastructures in the ERA

- Strategic analysis of the European Research Infrastructure landscape
- Broader and more sustainable access for all countries to European research infrastructures and their services and revision of the European Charter of Access to Research Infrastructures
- Update of the ESFRI Roadmap and implementation of the research infrastructures performance monitoring framework
- Report on the ERIC Framework
- Increased cooperation between research infrastructures, e-infrastructures and stakeholders, including through European Open Science Cloud

9. Promote a positive environment and level playing field for international cooperation based on reciprocity, with a focus on four aspects

- Further develop the values and principles for

international cooperation to be promoted in multilateral dialogues with partner countries and international fora

- Launch pilot initiatives on the Team Europe approach for a specific world region
- Develop a European Science Diplomacy Agenda
- Promote a coordinated joint approach for engagement in multilateral initiatives with national Research Funding Organisations

10. Make EU Missions and partnerships key contributors to ERA

- Share information, create awareness and build ownership of EU R&I missions at national level, regional and community level
- Monitor the performance of partnerships and how they contribute to the new ERA and its set of values and principles

11. An ERA for Green Transformation

- Development of a green hydrogen R&I ERA pilot action
- Policy approach for a cooperation framework on R&I driven safe and sustainable low-carbon energy technologies
- ERA4FutureWork: a policy approach to address research and development funding for the Future of Work

12. Accelerate the green/digital transition of Europe's key industrial ecosystems

- Consultation process on R&I-related needs of industries, including skilling/upskilling needs, digitalisation, R&I driven standardisation, common technology roadmaps, and research and technology infrastructures
- Development of a policy approach to link industrial and R&I policies, notably on how to accelerate the industrial take-up of R&I results, and launch pilots in transport and energy industrial ecosystems

- Development of industrial technology roadmaps on low carbon technologies for energy-intensive industries and on circular industrial technologies
- Development of a coordination mechanism to provide industry with the technology infrastructures needed to test, validate and upscale innovations
- Develop a robust policy framework to better support industrial R&I from fundamental/low TRLs research at national and European levels to generate breakthrough knowledge and innovation for greener future industries
- Address the social adaptation of the green (and digital) transitions.

13. Empowering higher education institutions to develop in line with the ERA, and in synergy with the European Education Area, which lays out following objectives:

- Supporting more inclusive and deeper cooperation between higher education institutions across Europe to accelerate institutional reform
- Better aligning Member States' efforts to strengthen global competitiveness of their higher education sector

14. Bring Science closer to citizens

- Scale-up of the Plastic Pirates – Go Europe! Initiative
- Launch the European City for Science
- Feasibility analysis for a federated “EU Science Media Network” to ensure more factual journalistic reporting on science
- Propose a policy coordination mechanism on public engagement practices, including citizen involvement in scientific processes

15. Build-up research and innovation ecosystems to improve excellence and competitiveness

- Define and pilot ERA Hubs to enable the emergence of competitive R&I ecosystems across the EU, to fill territorial gaps and to ensure easier flow of talents and investments
- Consultation process on future bilateral R&I cooperation activities to strengthen and connect R&I excellence in the ERA

16. Improve EU-wide access to excellence, with the following key objectives:

- Establish a dedicated work stream in the ERA Forum to improve access to excellence
- Design and implementation of tailor-made support to individual Member States
- Policy approach on the potential of COST to improve access to excellence across the EU

17. Enhance public research institutions' strategic capacity

- Implementation of a Science Management Initiative, with at least 100 participating institutions across Europe

18. Support the development of EU countries' national processes for the ERA implementation

- Provide coordination between EU and Member States on the definition and implementation of national policy approaches supporting ERA

19. Establish an efficient and effective ERA Monitoring Mechanism, consisting of an ERA scoreboard at EU level, an ERA dashboard at national level and a policy platform

20. Support to the prioritisation, coordination and direction of R&I investments and reforms

- Develop and promote the adoption of a policy and investment approach, through bilateral and multilateral policy dialogues in order to support interested Member States in prioritising R&I investment, including synergies between EU and national programmes and apply structural reforms

The European Commission's view and advice

How would you describe the role and the expected overall impact of the ERA programme part with regard to the ERA Policy Agenda?

The “Reforming and Enhancing the European Union R&I System” part of the WIDERA programme plays an important role in implementing the revamped ERA. First, it continues to reflect the four strands of the Commission’s ERA Communication of September 2020, i.e. improving access to excellence, attracting and mobilising best talents, reforming and enhancing the European Union R&I system and transforming research results into the economy. Second, it underpins the ERA Policy Agenda, which sets out 20 concrete ERA actions for the period 2022-2024, with substantial funding, thereby contributing to the priority areas defined in the Pact for R&I in Europe of November 2021. In sum, we expect a major impact of the WIDERA programme on successfully driving the new ERA.

What would be your advice for applicants how to best plan a project given this ambitious and complex political context?

Implementation of the different actions of the ERA Policy Agenda relies on the strong commitment and contribution from Member States and stakeholders. Applicants are encouraged to ensure actions are designed in a way that allows broad involvement and participation, and use of results by their communities.

Indeed, there is a specific topic, “HORIZON-WIDERA-2023-ERA-01-05: Exploitation and valorisation of results relevant for the ERA Policy Agenda” for establishing a Coordination and Support Action (CSA). Such a CSA would boost the uptake of results stemming from the different ERA Policy Agenda actions, support mutual learning between different actors (both Member States and stakeholders), and build an ERA community, which would focus on setting recommendations for policy-makers and stakeholders on how to best implement institutional changes related to ERA policies.

Directorate-General for Research and Innovation of the European Commission.

The Horizon Europe ERA Programme Part – how it helps to implement the ERA Policy Agenda

Over the coming years, the ERA Policy Agenda will guide the Horizon Europe actions, in particular in the ERA part. The scope and expected outcomes of the different call topics are negotiated and designed in such a way as to best correspond to the jointly planned ERA Policy Agenda actions. Consequently, the ERA Policy Agenda is meant to guide the efforts of the consortia engaged in implementing the projects.

The links to the ERA Policy Agenda context makes it easier to understand the expected outcomes specified in the topic descriptions, as the ERA Policy Agenda provides information on policy goals, milestones of joint efforts as well as various further

planned activities to link the project with. Keeping this background in mind will facilitate specifying and detailing an ERA project in its planning stage.

The topic descriptions indicate to which concrete ERA Policy Agenda action the projects are expected to contribute. In the WIDERA work programme 2023-2024, there are topics that clearly refer to a single ERA Policy Agenda action. Depending on the scope of the respective ERA Policy Agenda action, project outcomes will deliver important milestones for achieving the ambitions of that action.

In some cases, call topics provide relevant links to further ERA Policy Agenda actions.

For example, the call topic *Support to reforms of*

research assessment in the European Research Area (HORIZON-WIDERA-2023-ERA-01-07) is planned and designed to support the ERA Policy Agenda action 3 *Reform the Assessment System for research, researchers and institutions* but also refers to the ERA Policy Agenda action 1 *Enable Open Science* as the reform of research assessment will also contribute to achieving the open science goals for the ERA.

There are also call topics with a cross-cutting approach that contribute to several ERA Policy Agenda actions. The expected outcome of the topic

on *Exploitation and valorisation of results relevant for the ERA Policy Agenda* (HORIZON-WIDERA-2023-ERA-01-05), for example, is to implement a dissemination and valorisation facility, which relates to a number of ERA Policy Agenda actions.

Only a few call topics are not assigned to a specific ERA Policy Agenda action. One such example is the topic *Development of new approaches to the macroeconomic modelling of research and innovation* (HORIZON-WIDERA-2023-ERA-01-04) with its goal to improve the integration of Research and Innovation within macro-economic modelling.

Recommendations for applicants

– The ERA Policy Agenda as guidance

Applicants should take a link to a specific ERA Policy Agenda action as an invitation to gather further information on the broader political context and the overarching goals of the call topic. They should be aware that there is much movement regarding the Policy Agenda actions since work on implementing the actions has already begun.

As a result, the call descriptions do not necessarily reflect the state of the art in terms of implementation of the ERA Policy Agenda actions. It is therefore highly recommended to gather up-to-date information. From 2023 onwards, the ERA Policy Online Platform will provide a comprehensive overview of the goals and the implementation process as well as information on the ongoing activities of the Member States and stakeholders.

It is of utmost importance that applicants prepare their project in strict keeping with the expected outcomes and the specified scope of the topic. The scope and the expected outcomes precisely describe the expectations for the project design, with a view to adding the most value to the jointly planned ERA Policy Agenda actions. Proposals should therefore address the scope and all listed expected outcomes accordingly.

Applicants should bear in mind that the scope and the expected outcomes are most often the result of

extensive discussions and negotiations on political level and with stakeholders from across the EU.

Most call topic descriptions provide further information and links related to the specific policy area of the ERA Policy Agenda action. These links need to be taken into consideration when planning a project. The *Policy support to facilitate the implementation of a zero-tolerance approach towards gender-based violence in the ERA* (HORIZON-WIDERA-2023-ERA-01-09), for example, links an outcome to the [Ljubljana Declaration on gender equality in research and innovation](#) as a guiding policy document.

In this context, applicants should bear in mind that predecessor projects mentioned are meant to provide further background and guidance for new projects.

Should stakeholder organisations be mentioned in the topic description, approaching them should be part of proposal preparation. There are even call topics prescribing the involvement of key stakeholders in the field.

The discussions within the ERA Forum can be a useful source for information as well. The minutes of the meetings are available in the [Register of Commission expert groups](#). To summarise, gathering information on the relevant ERA Policy Agenda action should serve as guidance in project planning.

Get the support of your National Contact Point

The WIDERA National Contact Points provide advice on all questions related to the WIDERA programme parts and the application process. They can also help facilitating further support, if needed.

Furthermore, the transnational network of the WIDERA National Contact Points provides a broad range of support services.

Potential applicants will have the opportunity to participate in Knowledge Days and accompanying

Brokerage Events, organised in cooperation with the European Commission. These events will provide information and opportunities to meet partners for future projects. The events will be announced on the network's website.

In addition, the network also publishes factsheets and other publications which provide further information and background on the ERA part and the respective call topics.

Resources

Documents

- Commission's Communication on [A new ERA for Research and Innovation](#), September 2020
- [Council Conclusions on the new ERA](#), December 2020
- [Council Recommendation on "A Pact for Research and Innovation in Europe"](#), July 2021

Brochures

- [The New European Research Area](#)
- [Pact for Research and Innovation in Europe](#) (brief factsheet)

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

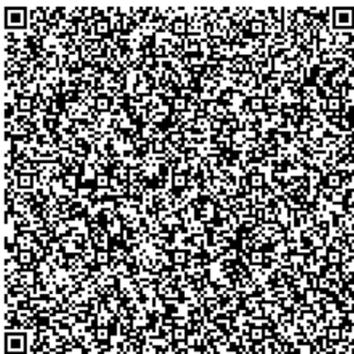
Websites/Platforms

- [European research area \(europa.eu\)](#)
- [ERA Portal Austria](#)
- [ERA Forum in the Register of Commission expert groups with ERA Forum meeting minutes](#)

WIDERA Work Programme

- [Work Programme 2023-2024](#)

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



ERA call page in the
Funding & Tenders Portal

Task leader:



Task co-leader:



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