CARDEA

Career Acknowledgement for Research (Managers) Delivering for the European Area
Grant Agreement No. 101058572

Milestone report– 03

Funded by the European Union

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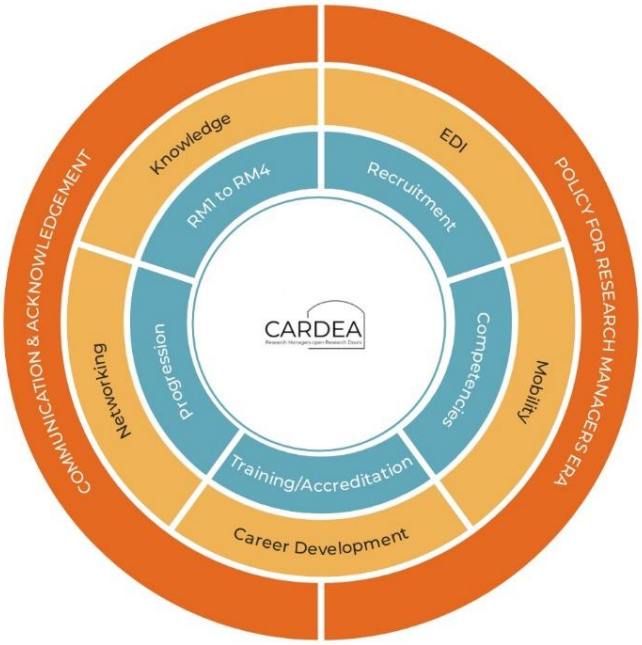
CARDEA
Research Managers open Research Doors

Milestone report– May 2024	
CARDEA - Career Acknowledgement for Research (Managers) Delivering for the European Area	
Project acronym	CARDEA
Grant No	101058572
Call identifier	HORIZON-WIDERA-2021-ERA-01-20
Start of project	1st June 2022
Duration	48 months
Milestone no	3
Work Package	WP 1
Authors	Dr Ivona Peternel and Olivia O'Leary
Work Package/Task leader	Mary Kate O'Regan

CARDEA MATRIX



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Executive Summary

The CARDEA consortium meeting occurred 27-28 May 2024 at Juraji Dobrila University of Pula, Zagrebačka 30, Pula, Croatia. This report includes a copy of the attendees, agenda, minutes, and presentations.

Cardea Consortium Partners

Partners	
Belgium Marilou Ramos Pamplona	1
Croatia Ivona Peternel	1
Croatia Rozana Veselica Celić	1
Greece Achileas Tsiligeridis	1
Greece Dimitrios Sanopoul	1
Greece Fotini Ziogou	1
Italy Barbara Chiucconi	1
Italy Erica Feliziani	1
Poland Justyna Lagan	1
Poland Zaneta Sweiatkowska	1
Romania Mihaela Albu	1
Romania Radu Plamanescu	1
Spain Lluis Rovira Catalonia	1

CARDEA Project Meeting Pula, Croatia-List of Participants

Participant No	Institution	Name	Surname
1	University College Cork, Ireland	Mary Kate	O'Regan
2	National University of Science and Technology POLITEHNICA Bucharest, Romania	Radu	Plamanescu
3	University of Liege, Belgium	Marilou	Ramos Pamplona
4	Institute of nuclear physics, Poland	Justyna	Lagan
5	Institute of nuclear physics, Poland	Kinga	Krupnik
6	Centre for Research and Technology Hellas, Greece	Achilleas	Tsiligeridis
7	Macerata University, Italy	Erica	Feliziani
8	Macerata University, Italy	Barbara	Chiucconi
9	AGAUR, Spain	Lluis	Rovira Pato
10	Juraj Dobrila University of Pula - host, Croatia	Ivona	Peternel
11	Agency for mobility and EU programs representative, RM Roadmap ambassador in Croatia, Croatia	Ana	Ključarić
12	Ministry of Science and Education representative, Croatia	Jelena	Ilić Dreven
13	European Research Executive Agency, Project Officer, Belgium	Rinske	VAN DEN BERG

Pula Attendance Sign-in sheets

CARDEA Project Meeting Pula, Croatia – List of participants

Date: 27. and 28.05.2024.
Location: Juraj Dobrila University of Pula, Zagrebačka 30, Pula

No.	Name and Surname	Institution (Address)	Country	E-mail	*GDPR consent	Signature
1		IFJ PAN	POLAND		☐	
2		IFJ PAN	POLAND		☒	
3		Univ of Liège	Belgium		☐	
4		University College Cork	Ireland		☐	
5		CERTH	GREECE		☒	
6		AGAUR	Catalonia		☐	
7		UPB	Romania		☒	
8		UNIVERSITÀ DI PALERMO	ITALY		☐	
9		UNIMC	ITALY		☐	

Juraj Dobrila University of Pula, Zagrebačka 30, 52100 Pula – Croatia, www.unipu.hr, „CARDEA – Career Acknowledgment for Research (Managers) Delivering for the European Area, project reference number HORIZON-WIDERA-2021-ERA-01

*NOTE: By signing a signature list, you agree that Juraj Dobrila University of Pula will use your information to promote „CARDEA – Career Acknowledgment for Research (Managers) Delivering for the European Area" project within Erasmus+ programme, and treat your information in accordance with the Personal Data Protection Regulation (GDPR). You also agree that the photographs and other recordings made at the event can be used for the dissemination purpose.

10	Alisa Tešić	Unipu	Croatia	atesic@unipu.hr	☒	Alisa Tešić
11	Andrea Bulesić	Unipu, Zagrebačka 30 52100 Pula	Croatia	abulesic@unipu.hr	☒	
12	IVONA PETERNEL	UNIPU	CROATIA	IPETER@UNIPU.HR	☒	
13	ANA KLUČARIĆ	AMPELI	CROATIA	ana.klucaric@ampeli.h	☒	
14	ELISABETH LAZAROU	UPB	ROMANIA		☐	
15	JELENA ILIĆ DREVEN	MINISTRY OF EDUCATION	CROATIA		☐	
16	RINSKE V.D. BERG	European Research Executive Agency (EU)	BELGIUM		☐	
17					☐	
18					☐	
19						
20						

28.5.24. ONLINE
ONLINE
ONLINE

Juraj Dobrila University of Pula, Zagrebačka 30, 52100 Pula – Croatia, www.unipu.hr, „CARDEA – Career Acknowledgment for Research (Managers) Delivering for the European Area, project reference number HORIZON-WIDERA-2021-ERA-01

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Meeting Agenda

Meeting Agenda Day One 27.05.2024

AGENDA 27.05.2024.

DAY 1	Zagrebačka 30, 1st floor
9:30 - 10:00	Registration
10:00 – 10:15	Welcome note by Vice Rector *Valter Boljunčić*
10:15 – 10:45	EC Project Officer *Rinske Van Den Berg (online)*
10:45 – 11:45	Presentation on the overall objectives and goals of CARDEA Overview of the progress made since the last annual meeting Key achievements and milestones reached *Mary Kate O'Regan*
11:45 – 12:00	*Coffee break*
12:00 – 12:30	WP3 Leader - „European Research Manager" Hub Presentation and progress report *Ivona Peternel*
12:30– 13:00	WP7 Leader – „Training and Development" Presentation and progress report *Erica Feliziani/Barbara Chiucconi*
13:00 – 13:15	Discussion

13:15 – 14:15	*Lunch break*
14:15 – 14:45	WP4 Leader – „Mobility and Networking" Presentation and progress report *Lluís Rovira Pato*
14:45 – 15:15	WP 9 Leader – „Communication and Impact Generation" Presentation and progress report *Marilou Ramos Pamplona*
15:15 – 15:45	WP 8 Leader – "Advocacy and Influencing" Presentation and progress report *Achilleas Tsiligeridis*
15:45 – 16:00	*Coffee break*
16:00 - 16:30	WP 6 Leader – "Spreading Excellence and Widening Participation" Presentation and progress report *Radu Plamanescu*
16:30 – 17:00	WP 5 Leader – "Equality, Diversity and Inclusion" Presentation and progress report *Justyna Lagan*
17:00 – 17: 30	WP 1 and 2 Leader – "Project Management and Coordination" "Benchmarking and Research" Presentation and progress report *Mary Kate O'Regan*
19:00	*Dinner and networking "Istrian tradition"*

Meeting Agenda Day Two 28.05.2024

AGENDA 28.05.2024.

DAY 2	Zagrebačka 30, 1st floor
9:30 - 10:00	Registration
10:00 – 10:30	Discussion on DAY 1, open questions, general *ALL*
10:30 – 11:00	Research managers position in Croatia. What can we do to make it better? *Ana Ključarić, Jelena Ilić Dreven (online)*
11:00 – 11:30	RM ambassadors in Croatia, colaboration between CARDEA, RM Roadmap and national authorities. National perspective. *Ana Ključarić*
11:30 – 11:45	*Coffee break*
11:45 – 13:00	Working session: Action plan and preparation for the next set of deliverables with due dates *ALL*
13:00– 14:30	*Lunch break*
14:30 – 15:30	Open questions, potential risks for the following project period, action plan closure, recommendations for the 2024.
15:30 – 16:00	Meeting closure, final remarks

MINUTES OF THE PARTNER MEETING

Minutes of a Partner meeting 27-28 May 2024

- The meeting held as scheduled for two days with participants present from all project partner institutions, one online present from PUB Bucharest .
- Bruxelles Agency representative Rinske Van Den Berg, present online.
- Ministry od Science Education and Youth representative present online, Jelena Ilić Dreven.
- Agency for mobility and EU programs, Ana Ključarić, present in live in Pula.
- All work package leaders presented the work done, progress report and plan for the 2024. calendar year.
- UCC as a project coordinator, Mary Kate, presented the project reports uploaded by May 2024, project update from the management perspective with the reporting deadlines for the next periodic and technical report.
- WP3 project leader presented the online HUB test page with a diiscussion of future development, material creation, registration process, questionnaries for the modules and defined the deadlines for the HUB academy video recording uploads.
- WP 7 leader presented the survey for the trainings and development, conducted in 2023., schedule for the partners for video recordings with example presentation on the recording by UNIMAC.
- WP 4 leader presented the mobility site visits realized by May 2024 and future site visits. Networking plan was presented with explanation of what networking is and how to perform the interviews with public private stakeholders.

- WP 9 leader presented the communication plan. The discussion went mostly arround social networks and sharing the CARDEA news and infos.
- WP 8 leader presented the advocacy and influencing, perspective for widening countries, communication plan methodology. The discussion was arround live and online events held in 2023. and the ones planned by November 2024.
- WP 6 leader communicated the equality, diversity and inclusion actions, questionnarie conducted in Poland with main findings. Fact sheet was presented and agreed among partners. It was agreed to develop simple materials for research managers to follow.
- Ministry and Agency represntatives introduced the plans and actions done on the level of Republic of Croatia showing synergy and a high level of awarennes of the topic of resaerch managers in Croatia.
- The meeting was closed with final conlusions on the future deadlines for recrding the training materials, uploads to HUB and preparation of deliverable reports for November 2024.
- Social part of the visit included joint lunch, campus and city sight visit and networking dinner.

List of participants present as per minutes of the meeting:

Participant No	**Institution**	**Name**	**Surname**
1	University College Cork, Ireland	Mary Kate	O'Regan
2	National University of Science and Technology POLITEHNICA Bucharest, Romania	Radu	Plamanescu
3	University of Liege, Belgium	Marilou	Ramos Pamplona
4	Institute of nuclear physics, Poland	Justyna	Lagan
5	Institute of nuclear physics, Poland	Kinga	Krupnik
6	Centre for Research and Technology Hellas, Greece	Achilleas	Tsiligeridis
7	Macerata University, Italy	Erica	Feliziani
8	Macerata University, Italy	Barbara	Chiucconi
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12	Ministry of Science and Education representative, Croatia	Jelena	Ilić Dreven
13	European Research Executive Agency, Project Officer, Belgium	Rinske	VAN DEN BERG

Cardea Consortium metting Pula May 27th 2024.

Cardea Consortium metting Pula May 27th 2024.

Presentations

Presentation 1: WP1 Project Management and Coordination & WP 2 Benchmarking and Research

Presented by Mary Kate O'Regan
University College Cork
Contact: marykate.oregan@ucc.ie

Slide 1:

Slide 2:

WP1: *Project Management and Coordination*

WP Lead: UCC

WP Leaders: Mary Kate O'Regan and Olivia O'Leary

WP Objective:

The overall goal of this WP is to provide professional project management to the CARDEA project. The delivery of the tasks include initiating, planning, executing, monitoring, controlling and the final closing of the project.

Slide 3:

WP1: *Project Management and Coordination*

WP Description

T1.1: Project Meetings and Networking
T1.2: Develop Detailed Scope, Work Plan, Change Management and Risk Plan (Project Management Plan)
T1.3: Establish working structures (including consortium agreement)
T1.4: Monitor and control project progress
T1.5: Sustainability Planning and development
T1.6: Data Management Plan preparation and reporting

Slide 4:

WP1: *Project Management and Coordination*

T1.3: Establish working structures

- The Project Management Plan (D1.1) reports CARDEA's activities with respect to the establishment of working structures.
- Details of CARDEA's governance structure and members of the advisory board.
- Distribution of WPs and tasks across the whole consortium.

Slide 5:

WP1: *Project Management and Coordination*

T1.4: Monitor and control project progress

- Constant monitoring and control of the project progress ensured via consortium and one-to-one meetings with individual WP leaders.
- Identification of external deadlines with periodical reviews to ensure adequate progress.
- Setting of internal deadlines to provide feedback on each partner's deliverable and coordinate efforts.
- Bespoke training and brainstorming sessions in preparation for the submission of core deliverables.

Slide 6:

WP1: *Project Management and Coordination*

T1.3: Establish working structures

- The Project Management Plan (D1.1) reports CARDEA's activities with respect to the establishment of working structures.
- Details of CARDEA's governance structure and members of the advisory board.
- Distribution of WPs and tasks across the whole consortium.

Slide 7:

WP1: *Project Management and Coordination*

T1.4: Monitor and control project progress

Deviation

- As per the Grant Agreement, the project coordinator appointed a Project Manager.
- Hired Project Manager left in December 2022.
- Temporary slowdown of planning and monitoring activities.
- PI took over, minimised risks of delays.
- New Project Manager hired in April 2023 left in December
- New Research Support Officer hired April 2024
- Timely submission of all deliverables.

Slide 8:

WP1: *Project Management and Coordination*

T1.6: Data management plan preparation and reporting

- Collaboration with UCC Research Data Service team to devise a comprehensive Data Management Plan.
- Correct and safe management of data throughout the project activities.
- The Data Management Plan was designed and submitted in a timely manner (D1.4).

Slide 9:

WP1: *Project Management and Coordination*

The implementation of the following tasks will start in future reporting periods:

T1.5: Sustainability planning and development

Slide 10:

Slide 11:

WP2: *Benchmarking and research*

WP Lead: University College Cork

WP Leaders: Joanne Uí Chrualaoich, Mary Kate O'Regan and Paolo Saporito

WP Objective:

To develop a comprehensive knowledge base, using data-driven metrics and validated methodology to assess RM ecosystems.

Slide 12:

WP2: *Benchmarking and research*

WP Description

This WP aims to develop a comprehensive knowledge base, using data-driven metrics and validated methodology to assess Research Manager ecosystems. The delivery of this WP includes the definition of a methodology; the identification of relevant research questions; collection and analysis of data; and the creation of a range of toolkits to support characterisation and development opportunities for RM careers.

Slide 13:

WP2: *Benchmarking and research*

WP Description

T2.1: Develop methodology: co-creation of research methodology, each partner researching their own country plus two additional countries to ensure full ERA coverage, data analysis and reporting

T2.2: Establish baseline of existing RM capability and activities

T2.3: Develop stakeholder map

T2.4: Develop, validate and pilot Quantitative instrument

T2.5: Quantitative Data Collection (8 partners, 24 countries each, 60 institutions to include HEI, RPO, transnational funders, 500 responses)

Slide 14:

WP1: *Project Management and Coordination*

WP Lead: UCC

WP Leaders: Mary Kate O'Regan and Olivia O'Leary

WP Objective:

The overall goal of this WP is to provide professional project management to the CARDEA project. The delivery of the tasks include initiating, planning, executing, monitoring, controlling and the final closing of the project.

Slide 15:

WP2: *Benchmarking and research*

WP Description

T2.6: Develop Qualitative methodology

T2.7: Qualitative Data collection (focus groups), (8 partners x 2 focus groups made up of RM participants and 8 partners x 2 interviews with HEI senior executive and national funding agency)

T2.8: Data analysis and interpretation. Using validated statistical techniques, Qualtrics

T2.9: Develop RM competency framework based on skills needs, skills gaps and career professionalization

T2.10: Develop futureproof reporting dashboard for research findings

Slide 16:

WP2: *Benchmarking and research*

T2.1: Develop methodology: co-creation of research methodology, each partner researching their own country plus two additional countries to ensure full ERA coverage, data analysis and reporting.

- The Agreed Research Design report (milestone 6).
- Initial Methodology Playbook (D2.1) both provide a detailed account of CARDEA research methodologies in the reporting period.
- These documents focus on the definition of the research questions, fields of enquiry and data collection strategies of the CARDEA Survey (see next tasks for further details).

Slide 17:

WP2: *Benchmarking and research*

T2.2: *Establish baseline of existing RM capability and activities*

- Baseline established upon the collection of quantitative data via the CARDEA Survey.
- The Survey included questions concerning the skills needs, professional aspirations, financing mechanisms, professional satisfaction levels, demographic characteristics, competencies, salary bands, levels, visibility, and specialist categories.

Slide 18:

WP2: *Benchmarking and research*

T2.4: Develop, validate and pilot Quantitative instrument

- Online questionnaire designed to develop an understanding of the role of RM in Europe.
- Literature review, a review of previous instruments and consultation with the Cardea consortium.
- Where possible, published instruments were used to allow comparisons with other findings.
- Ethical approval for the research was provided by the UCC Social Research Ethics Committee (see D1.4).
- The Survey was designed in August 2022 and piloted with CARDEA partners and select collaborators (n = 19) at this time.
- The consortium revised the Survey questions to clarify working and remove redundancies.
- The link to the Survey was then circulated widely, and Data collection commenced for a general Research Manager Audience in September 2023.
- In total, the questionnaire contained 422 response options. The average time to complete the Survey was 30 minutes.

Slide 19:

WP2: *Benchmarking and research*

T2.5: Quantitative Data Collection (8 partners, 24 countries each, 60 institutions to include HEI, RPO, transnational funders, 500 responses)

- The Cardea Survey was presented in English and hosted on the Qualtrics platform.
- The Survey collected 855 responses from Research Managers across 37 countries.
- The Survey results and a report analysing them are available and openly accessible via the CARDEA website.

Slide 20:

WP2: *Benchmarking and research*

T2.8: Data analysis and interpretation. Using validated statistical techniques, Qualtrics.

- In the reporting period, data analysis and interpretation focused on the quantitative component (i.e. CARDEA Survey).
- Please see the Initial Methodology Playbook (D2.1) and the Data Management Plan (D1.4) for more details on data analysis techniques, data types and analytic strategy.

Slide 21:

WP2: *Benchmarking and research*

T2.10: Develop futureproof reporting dashboard for research findings.

- In May 2023, CARDEA UCC partner hired a Research Assistant with expertise in statistic data analysis. The RA worked on the design and delivery of the dashboard in June and July 2023.

Slide 22:

WP2: Benchmarking and research

The implementation of the following tasks will start in future reporting periods:

T2.3: Develop stakeholder map

T2.6: Develop Qualitative methodology

T2.7: Qualitative Data collection (focus groups), (8 partners x 2 focus groups made up of RM participants and 8 partners x 2 interviews with HEI senior executive and national funding agency)

T2.9: Develop RM competency framework based on skills needs, skills gaps and career professionalization

Slide 23:

WP1: *Project Management and Coordination*

T1.2: Develop detailed scope, work plan, change management and risk plan

- Development of the cornerstones of the project with respect to project management, work plan and risk assessment.
- Consortium discussion regarding terms of the project's scope, work plan, change management and risk assessment.
- Core results of this discussion reported in the CARDEA Project Management Plan (see D1.1).

Presentation 2: WP1 Project Management and Coordination

Presented by Mary Kate O'Regan
University College Cork
Contact: marykate.oregan@ucc.ie

Slide 1:

Slide 2:

CARDEA

- Ancient Roman Goddess of the Hinge
- ***Research Managers open Research Doors***

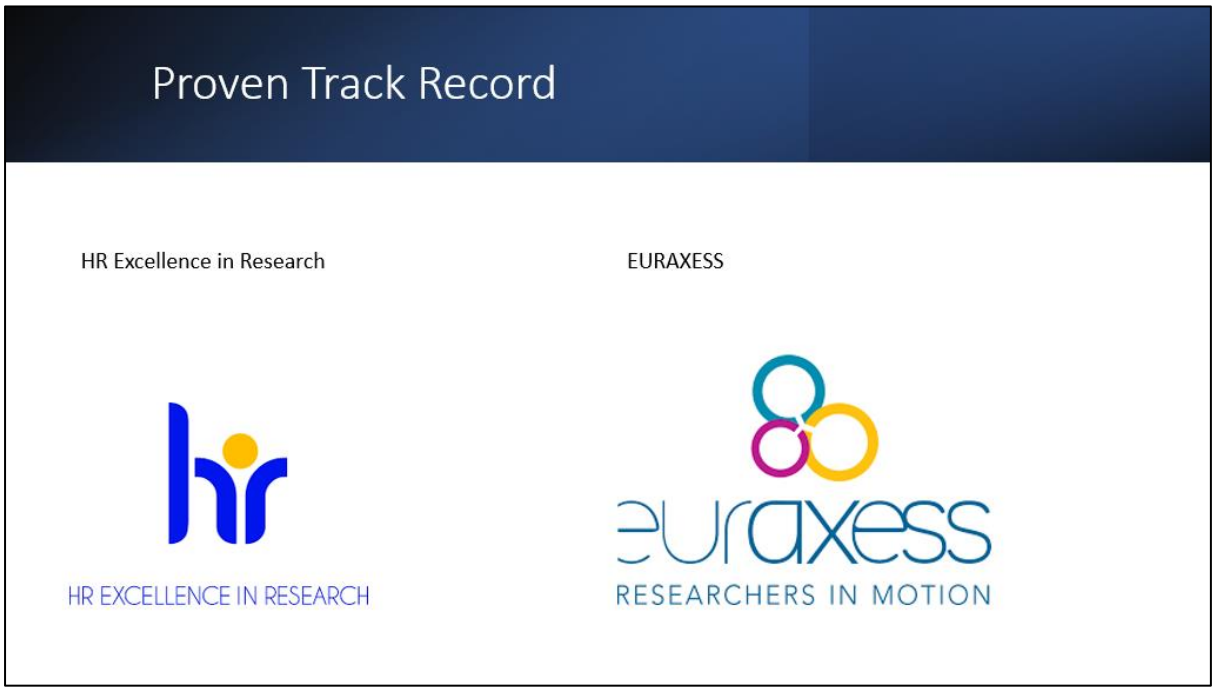
Slide 3:

What it stands for

Career **Acknowledgement** for Research Managers
Delivering for the European Area

Slide 4:

Slide 5:



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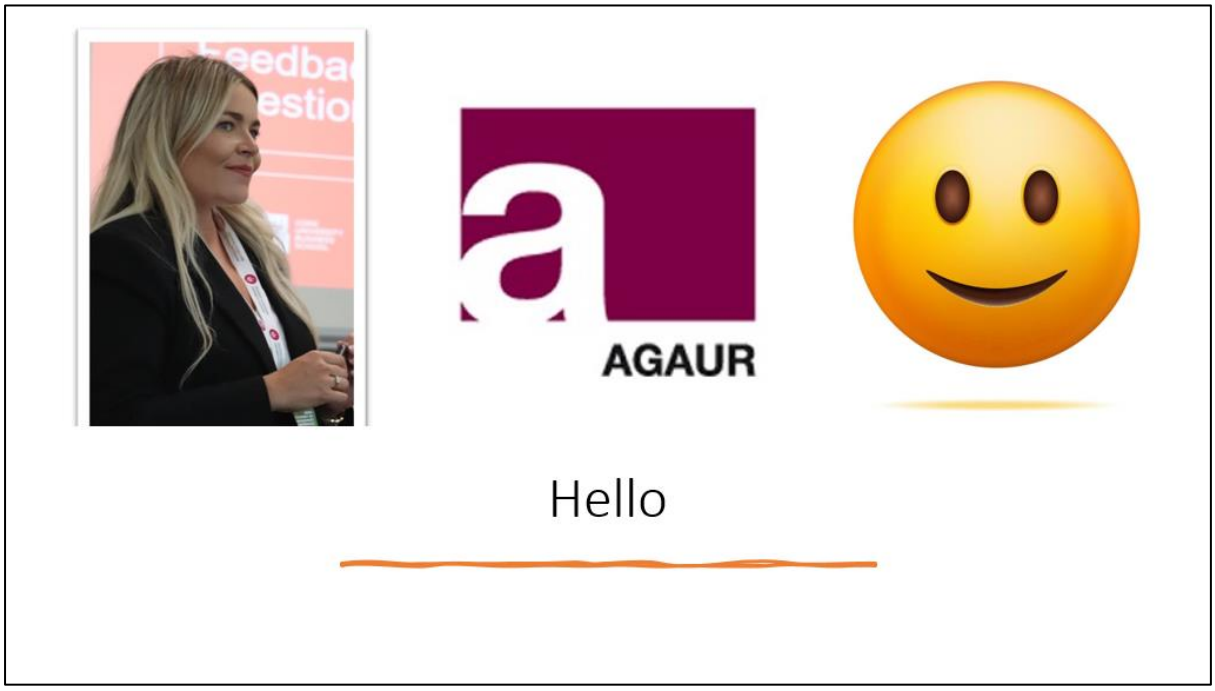

Slide 8:

CARDEA
Research Managers open Research Doors

Horizon Europe

- Research Manager as a valued career choice
- Classification of Research Manager Roles & framework development
- Knowledge, Skills, Competencies required
- Training and Development
- Knowledge Hub/Website
- Policy, lobbying and engagement with stakeholders

Slide 9:

CARDEA
Research Managers open Research Doors

Horizon Europe

- Survey Launched ✓
- Survey Report Written ✓
- Advisory Board in place ✓
- Collaborating with RM Roadmap ✓
- Skills and training identified, and training being provided with free micro credential ✓
- Mobility Patterns being reviewed ✓

Slide 10:

CARDEA
Research Managers open Research Doors

Horizon Europe

- EDI Strategy Plan in preparation ✓
- KPIs for Institutions RM capacity in preparation ✓
- Dissemination and Communication ✓
- CARDEA Academy Events ✓
- RM Comp and tool kit ✓
- Interactions with Industry and Funding Agencies ✓
- Policy feedback report in preparation plus engagement with EU Policy Officers ✓

Slide 11:

Milestones

- Kick-off Meeting UCC 3 June 2022
- CARDEA Summer School and Study Visits
- CARDEA Website and visual identity
- CARDEA Survey
- CARDEA Training modules

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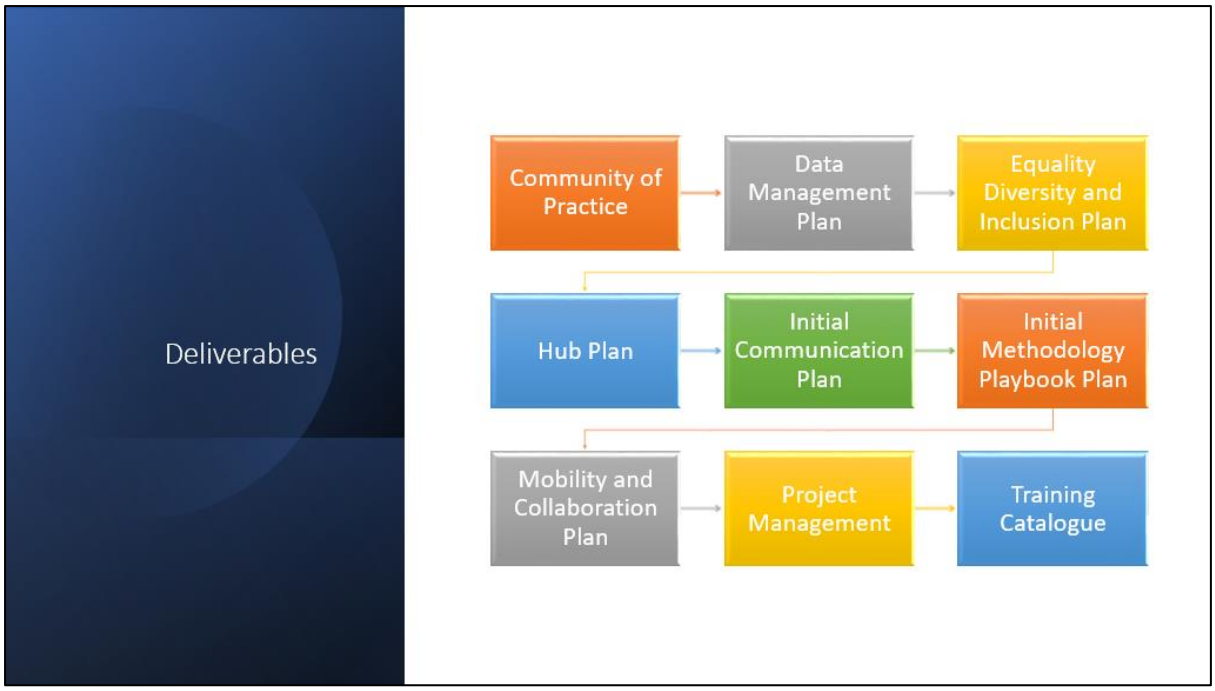

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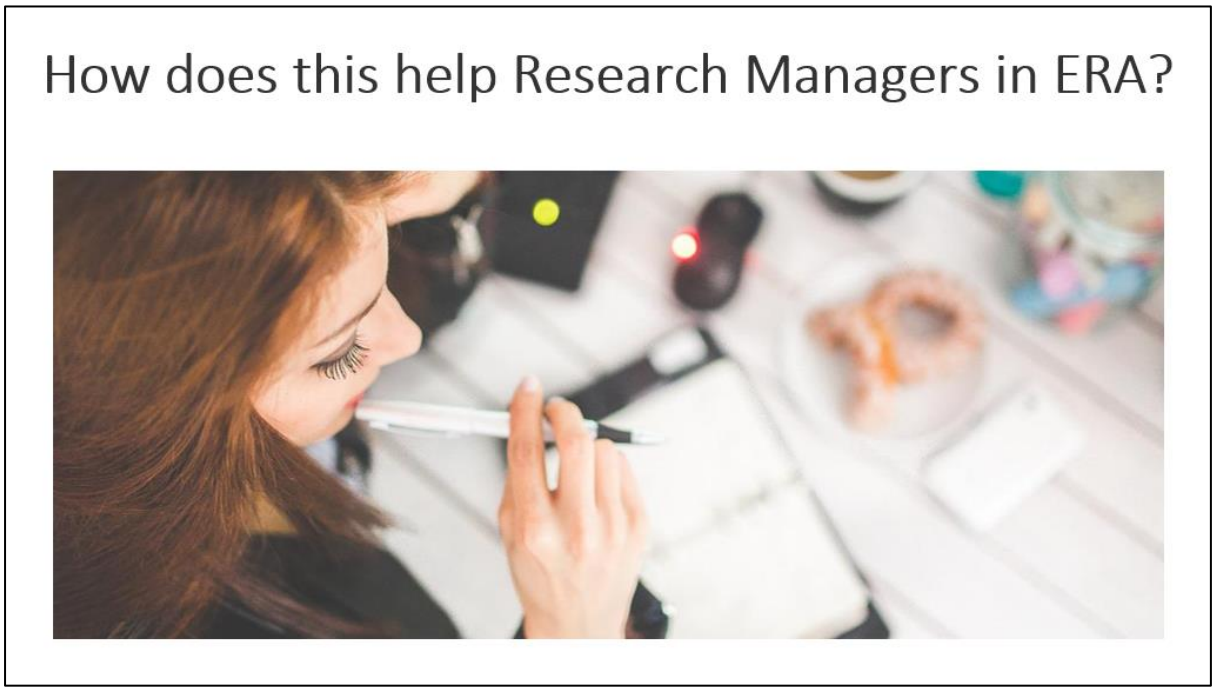


Slide 14:

Slide 15:

Anna…has a PhD…but has never been promoted…

Slide 16:

Career progression is not an option that is available to her within her role

Slide 17:

RM Comp

8 Main Competence Areas

CARDEA CAREER FRAMEWORK AND RM COMP

CARDEA

Cognitive Abilities/ Transversal Skills	Technical Proficiency	Subject Matter Expertise
Research Project Oversight/ Management	Research Manager	Community Engagement
Line Management and Talent Development	Communication	Relationship Management

However, Anna indicated that training in the above competences would benefit her role

Slide 18:

Anna doesn't feel that her organisation values or recognises her contribution to research management

Slide 19:

And her actual profession is not even recognized in her home country or the EU

Slide 20:

Anna wants recognition and a career framework

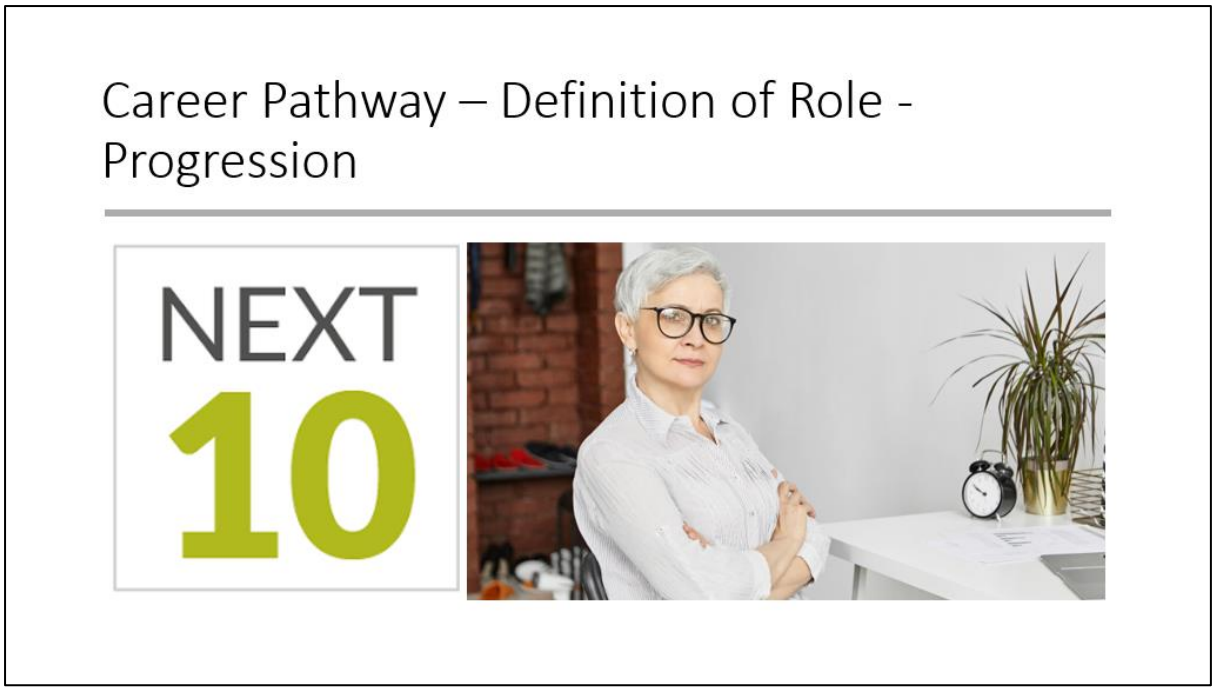
NEXT 10

Slide 21:

Visibility – Appreciation - Promotion

NEXT 10

Slide 22:



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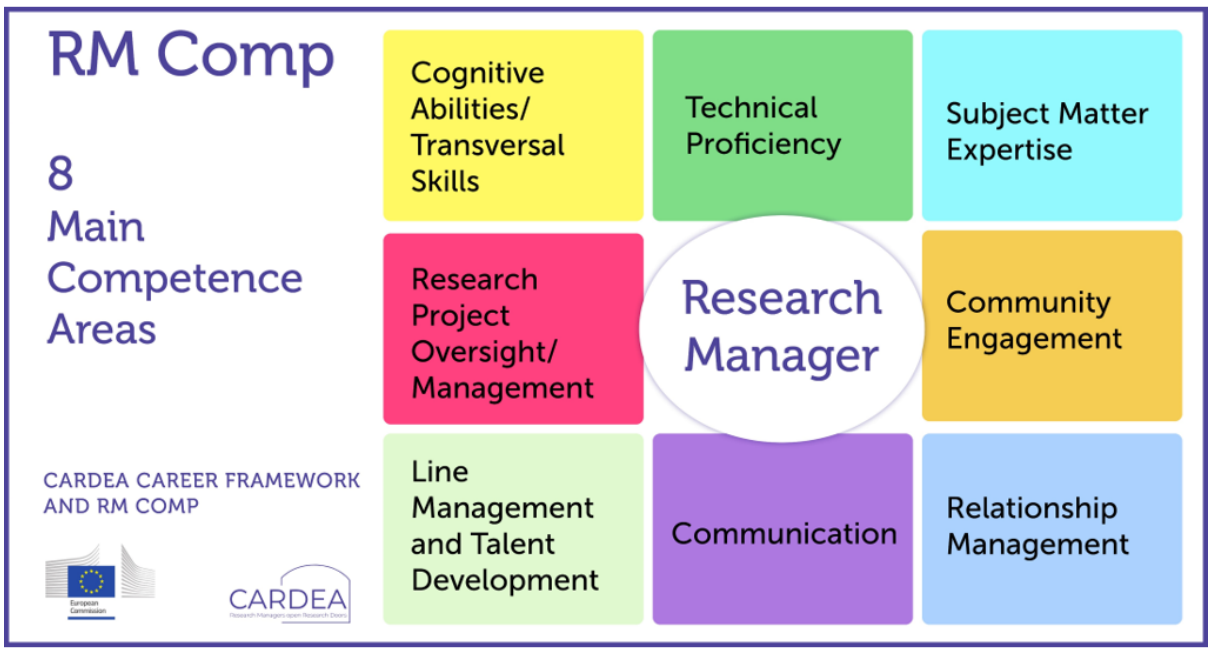

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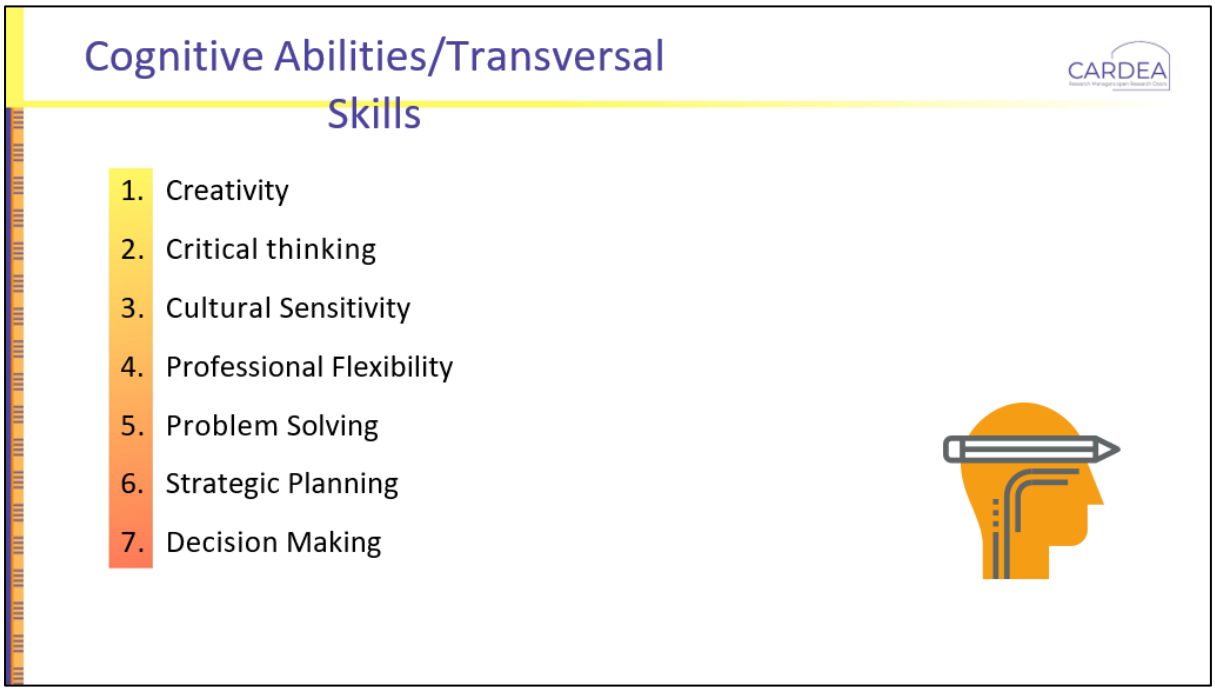
Slide 27:



Slide 28:

Technical Proficiency

1. Research data collection and collation
2. Data and statistical analysis
3. Legal Skills
4. IT skills for research activities

Slide 29:

Subject Matter Expertise/ Specialised Knowledge

1. Pre-Award/Post Award
2. Managing equality, diversity and inclusion *(including gender, disability and racism)*
3. Data Stewardship
4. Technology Transfer
5. HR Research – Employment, training etc.
6. Research Finance
7. Clinical Research Management
8. Research Ethics and Integrity

Slide 30:

Research Project Oversight/ Research Project Management

1. Research Project Management
2. Managing research project deliverables
3. Designing monitoring and evaluation frameworks and indicators
4. Establishing research project plans

Slide 31:

Community Engagement

CARDEA

1. Research Outreach
2. Academic community relationship collaboration
3. Community Engagement with Research
4. Provision of training for outreach engagement
5. Engagement with key stakeholders

Slide 32:

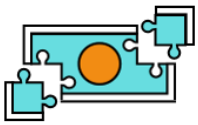
Line Management and Talent Development

1. People Management and managing team performance
2. Team Building
3. Change Management
4. Coaching skills
5. Research talent identification and development

Slide 33:

Communication

1. Building and maintaining relationships with research funders, partners or other stakeholders
2. Designing and implementing research communication plans
3. Media Liaison and associated activities
4. Preparing and writing reports *(including evaluation reports and funder reports)*
5. Social Media engagement



Slide 34:

Relationship Management

1. Building trust within relevant research and strategic partnerships
2. Diplomacy, negotiation, and mediation skills
3. Handling difficult conversations and partnerships
4. Business and commercial liaison management

Slide 35:

Learning Outcomes

672 learning outcomes along ***4*** proficiency levels

(foundational, intermediate, advanced, expert)

Slide 36:

Compentency Levels

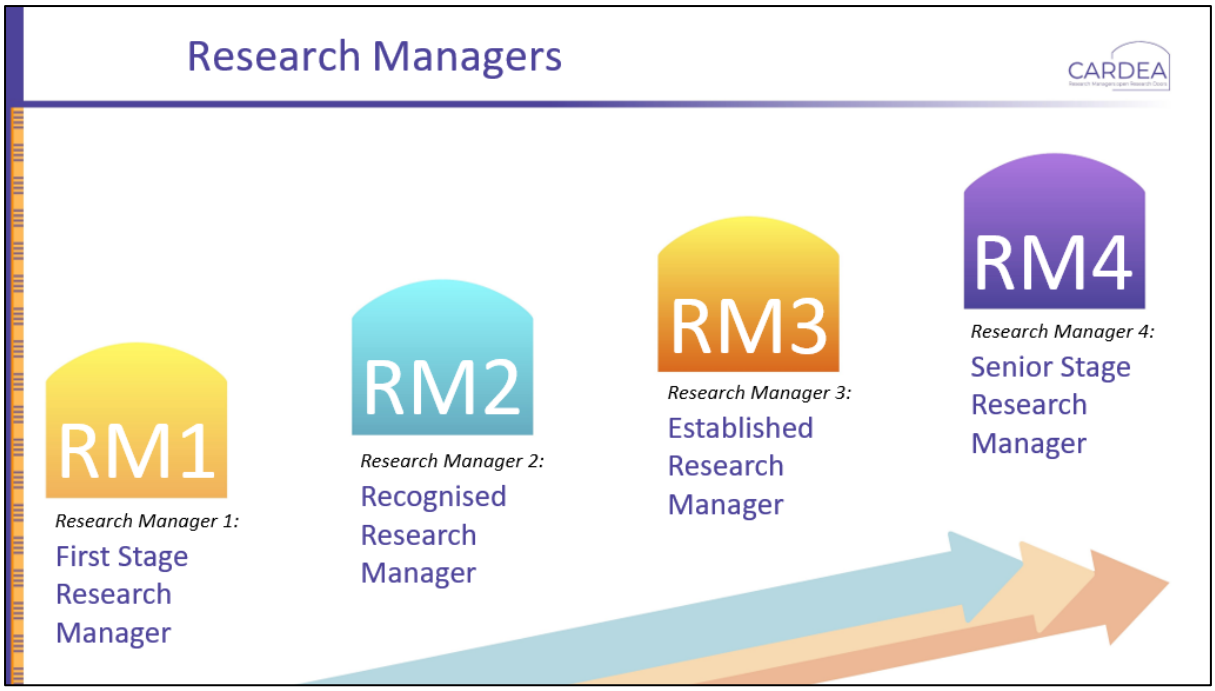
1. Foundational - starting point or the basic level of proficiency
2. Intermediate - moderate level of proficiency
3. Advanced - high level of proficiency and expertise
4. Expert - highest level of proficiency

Slide 37:

Learning Outcomes

COGNITIVE ABILITIES Learning Outcomes			
1. Creativity			
Foster innovative approaches and solutions to aid problem-solving, designing methodologies and/or procedures which encourage a dynamic research environment.			
FOUNDATIONAL	**INTERMEDIATE**	**ADVANCED**	**EXPERT**
Basic understanding of the importance of creativity in research and its critical role in problem solving	Ability to problem solve using methodologies and or procedures to enhance and nuance the solution	Cultivates a culture of solution-oriented thinking by fostering creativity within research teams and/or the organisation	Provides leadership and facilitates creative problem solving at team, organisational and national/international level
Shows promise in ability to generate and express new ideas coherently	Experiments with ideas and collaborates to provide solutions and ascertain risk	Introduces new or improved methodology, policy, or practice to enhance research progress and problem solve	Designs and executes comprehensive processes and strategies in various domains addressing challenging and complex issues creatively
Acknowledges the relationship between creativity and risk	Explores ideas from different discipline and domain perspectives demonstrating genuine curiosity	Uses cross-disciplinary collaborations and combined competence to address and solve organisational or systemic issues	Creates a long-lasting positive footprint in the organisation through the introduction of various policies and practice which create novel and long reaching positive impact
Can analyse information and identify key components to aid creativity	Challenges own personal and cognitive biases that would deter creativity	Considers ethical issues in creative solution decision-making	Consistently demonstrates creativity in evaluating complex problems and generating innovative solutions

Slide 38:



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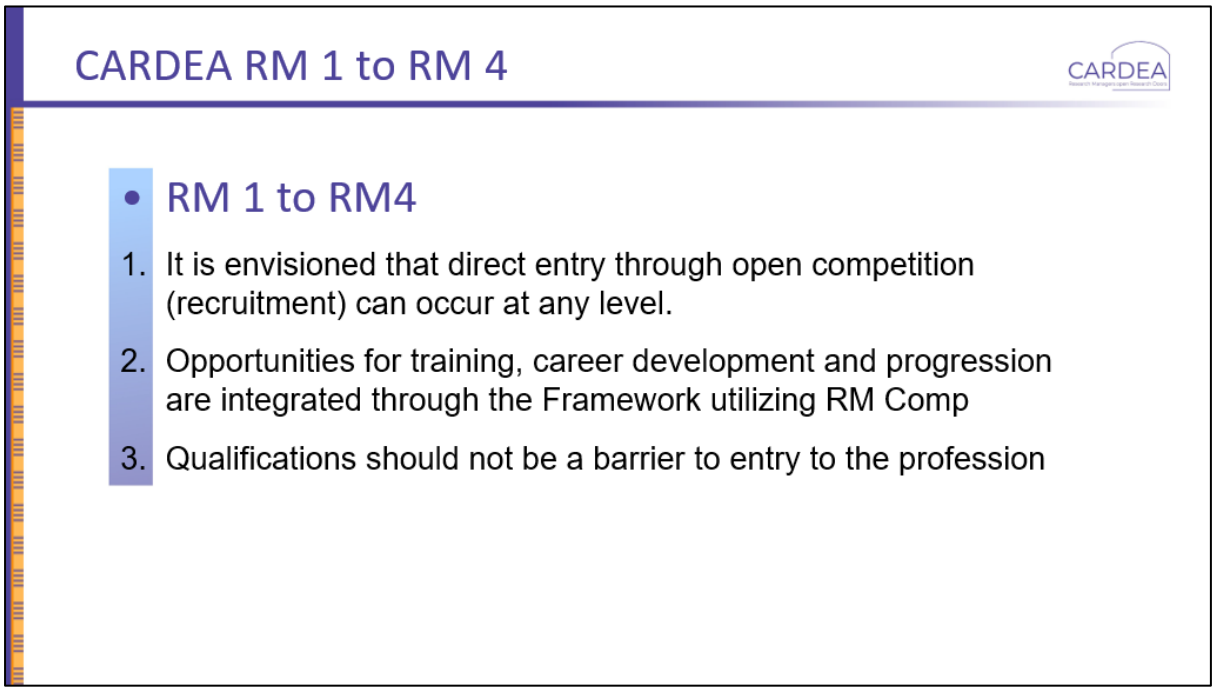

Slide 40:

CARDEA RM 1 to RM 4

- **RM 1 to RM4**
- The links between the four proficiency levels and the various phases in a research management career, (e.g. RM1 to RM4), do exist, but it is not an absolute rule.
- Users have the flexibility to adapt the progression model according to their organisation's policies and practice.
- The descriptors apply to all Research Managers, independent of where they work in the private or public sector
- Regardless of any particular profession or specialisation, one can outline broad profiles that describe the different characteristics Research Managers possess.

Slide 41:

CARDEA Objectives RM COMP

1. Goal - Simple
2. Goal - Interoperable
3. Goal - Consistent
4. Goal - Transparent
5. Goal - For *all* Research Managers

Slide 42:

CARDEA Objectives RM COMP

1. Goal - Simple
2. Goal - Interoperable
3. Goal - Consistent
4. Goal - Transparent
5. Goal - For *all* Research Managers

Presentation 3: WP3 European Research Manger HUB

Presented by Ivona Peternel, PhD
UNIPU
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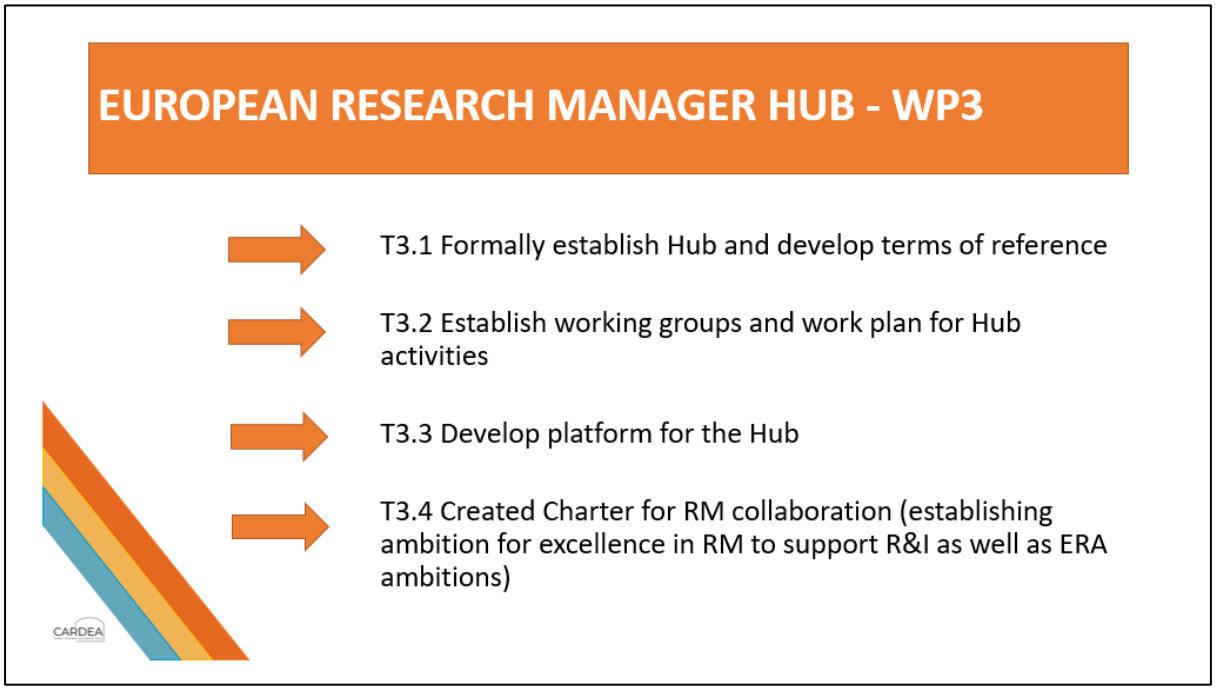
Slide 1:

Slide 2:

Slide 3:



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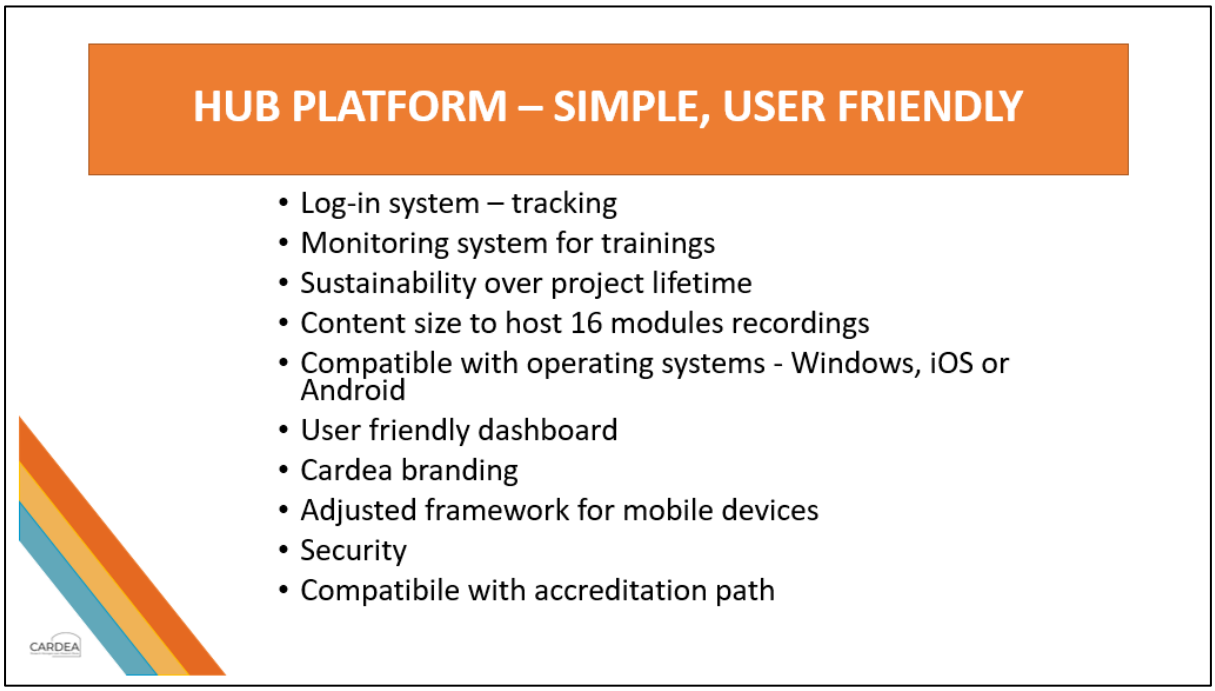

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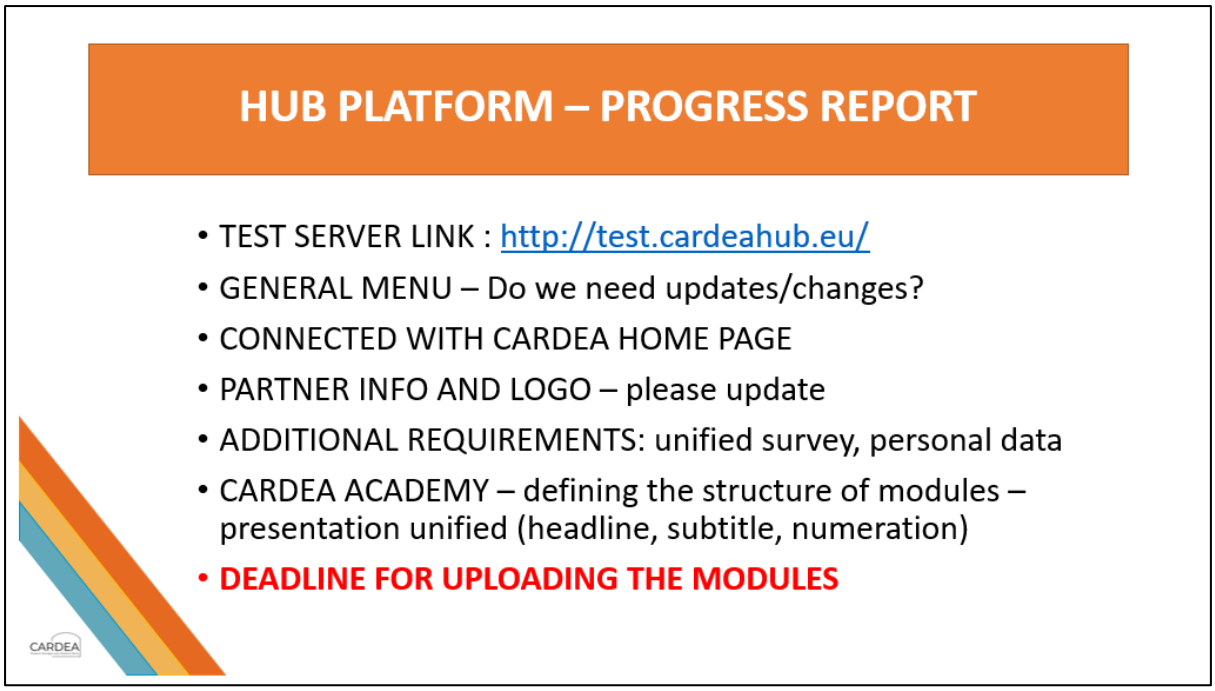

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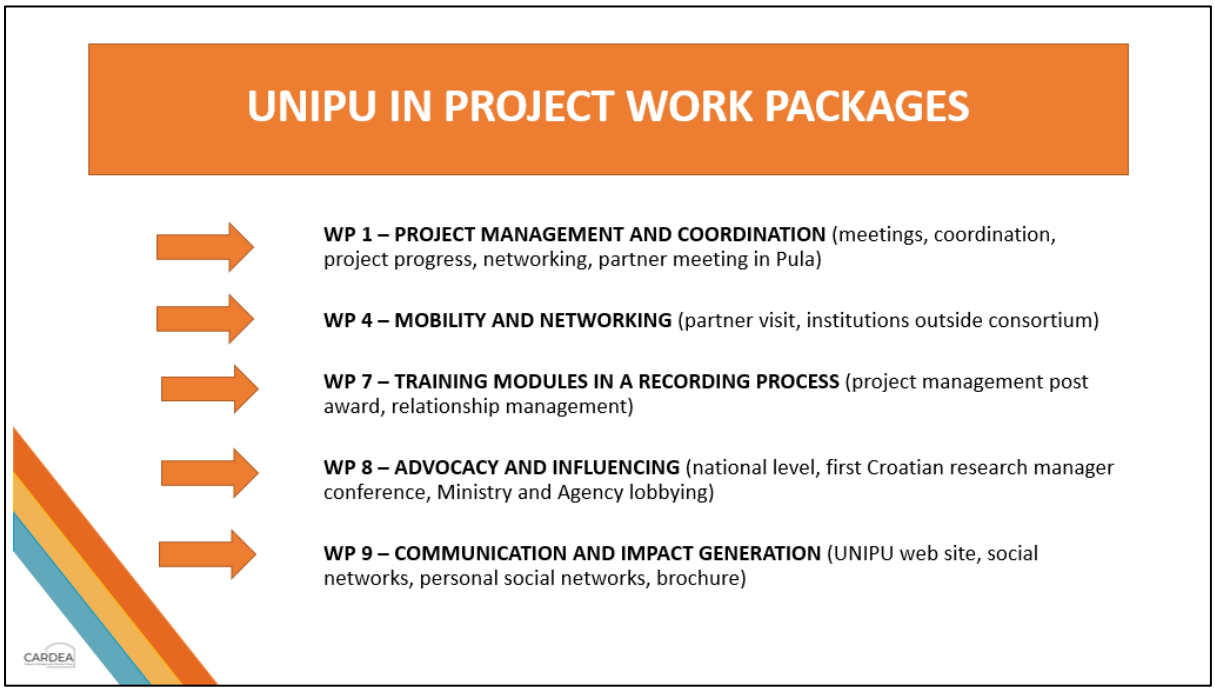


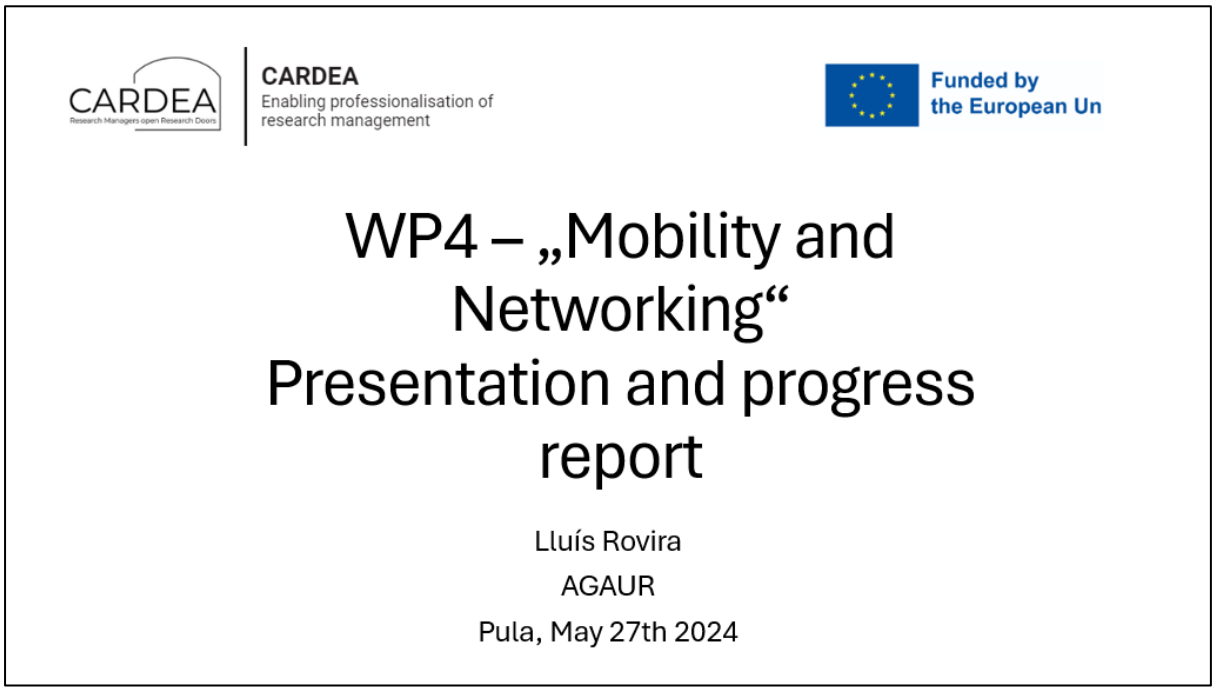
Slide 8:

CURRENT ACTIVTIES, FUTURE WORK
WP 7 – TRAINING MODULES IN A RECORDING PROCESS (project management post award, relationship management)
DISCUSSION WITH UNIVERSITY OF RIJEKA OF JOINT RM EVENT
RESEARCH FOR D3.1 – INITIAL RM MAPPING SUMMARY REPORT
DISCUSSIONS WITH NATIONAL AUTHORITIES
RESEARCH MANAGERS NETWORKING OUTSIDE HIGHER EDUCATION SYSTEM
CARDEA

Presentation 4: WP4 Mobility and Networking

Presented by Lluís Rovira
AGAUR
Contact: llrovirap@gencat.cat

Slide 1:



Slide 2:

CARDEA
Enabling professionalisation of research management

Funded by the European Un

Deliverable No	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month)
D3.5	Cardea Hub Final Report	WP3	4 - UNIPU	R — Document, report	PU - Public	48
D4.1	Research Managers Networking and Mobility - Initial Report	WP4	8 - CERCA	R — Document, report	PU - Public	30
D4.2	Research Managers Networking and Mobility - Final Report	WP4	8 - CERCA	R — Document, report	PU - Public	48
D4.3	Consortium mobility and collaboration report - plan of activities	WP4	8 - CERCA	R — Document, report	PU - Public	12
D4.4	Consortium mobility and collaboration report - interim report	WP4	8 - CERCA	R — Document, report	PU - Public	30
D4.5	Consortium mobility and collaboration report - Final report	WP4	8 - CERCA	R — Document, report	PU - Public	48

Slide 3:

CARDEA
Enabling professionalisation of research management

Funded by the European Un

Deliverable – Research Managers Networking and Mobility - Initial Report

Deliverable Number	D4.1	**Lead Beneficiary**	8. CERCA
Deliverable Name	Research Managers Networking and Mobility - Initial Report		
Type	R — Document, report	**Dissemination Level**	PU - Public
Due Date (month)	30	**Work Package No**	WP4

Description
Initial report on the understanding of the state of play of Research Manager networking and mobility activities (results of mapping exercise) Report systematically detailing the networking and mobility patterns and activities of Research Managers based on data analysis from WP2. To also include report on usage statistics for international, inter-role and inter-sectional matchmaking and discussion forums from Hub activities in WP3.

Slide 4:

Slide 5:

Slide 6:

CARDEA
Enabling professionalisation of research management

Funded by the European Un

Deliverable – Consortium mobility and collaboration report - interim report

Deliverable Number	D4.4	**Lead Beneficiary**	8. CERCA
Deliverable Name	Consortium mobility and collaboration report - interim report		
Type	R — Document, report	**Dissemination Level**	PU - Public
Due Date (month)	30	**Work Package No**	WP4

Description
Report on the intra-Cardea mobility and networking feeding into the advocacy and influencing WP8. This initial report will detail the activities to date within and between the Cardea partners in the space of mobility, networking and collaboration. To include updated plans for and reports on: • 8 study visits (international) • 14 public private fact finding visits • 38 meetings of Science funding • Exploration of opportunities for teaming and twinning with EU projects • Exploration of intra-Cardea collaborative learning through trainings/seminars

Slide 7:

CARDEA
Enabling professionalisation of research management

Funded by the European Un

Study site visits (7/8) **PILOT RM mobility programme**

1. Helsinki (Sept, 2022) CERCA
2. Cork (June 2023) All
3. Barcelona (Nov. 2023) All
4. Pula (May 2024) All
5. Bucharest (Sept. 2024) All
6. Pula to Macherata (2023) Individual
7. Cork to Macherata (2023) Individual

Mobility Committee???

Public Private fact funding visits (2/14)

1. 3M
2. CommScope

Science Funders (3/38)

1. AEI Spain
2. ACCIO Catalonia
3. AGAUR Catalonia
4. IEC Catalonia

Slide 8:

Slide 9:

Slide 10:

Interim Conclusions D4.1 and D4.4

- Universities does not have a clear scheme for RMs mobility
- Some acadèmic institutions have commitment to traint RMs or create community of practice
- Recognition of RMs is in a very low level
- RMs would welcome more training opportunities and mobility schemes
- Job descriptions does not include the right range of tasks and responsibilities for RMs
- Some needed skills are expertise of funding landscapes, strategic thinking, project management, admin. Skills, communication skills, interpersonal skills, empathy with researchers, knowledge of evaluation processes, problema solving
- There is no career development pan for RMs, in general. Only experience counts
- Mentoring is needed
- Some Research grants include funding for RMs (may be limited to 20%)
- In general there is an opinion on the acadèmic level of RMs that should be master degree (Maximum)
- Some institutions evaluate externally their administration and management of Research (RMs)
- Very few RMs calls (PAS, VES-HI)
- Global opinion on the high value of RMs. Good opinion from the scientific community
- No role of RMs in companies but tehre are innovation managers (quite similar)
- RMs and International relations in Brussels (Lobby)

Slide 11:

CARDEA
Research Managers open Research Doors

CARDEA
Enabling professionalisation of research management

Funded by the European Un

Thank-you!

Slide 12:

Community of Practice Report 1 – D3.2	
CARDEA - Career Acknowledgement for Research (Managers) Delivering for the European Area	
Project acronym	CARDEA
Grant No	101058572
Call identifier	HORIZON-WIDERA-2021-ERA-01-20
Start of project	1st June 2022
Duration	48 months
Deliverable no	D4.1
Work Package	WP4
Authors	Lluís Rovira
Work Package/Task leader	Lluís Rovira

Presentation 5: WP5 *Equality, Diversity and Inclusion - Raport*

Presented by Justyna Lagan
IFJ
Contact: justyna.lagan@ifj.edu.pl

Slide 1:

Slide 2:

WP5: *Equality, Diversity and Inclusion*

Equality, Diversity and Inclusion

2

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Slide 3:

WP5: *Equality, Diversity and Inclusion*

Actions for implementation

T5.1 Data Driven RM EDI profiles (national, institutional)

T5.2 Policy Recomandation

T5.3 FactSheets

T5.4 Checklist to support local EDI development activities

T5.5 Transition Support programme

T5.6 EDI awarness training modules

T5.7 Pilot coaching and mentoring programme

3

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Slide 4:

WP5: *Equality, Diversity and Inclusion*

T5.1 Data Driven RM EDI profiles (national, institutional)

- Results and conclusions analysis
- The three main problem areas of EDI values
- Lack of sufficient data on the values of EDI in different employment sectors
- New Survey / Study Case – Poland
- Analysis of the results of the new survey and follow-up

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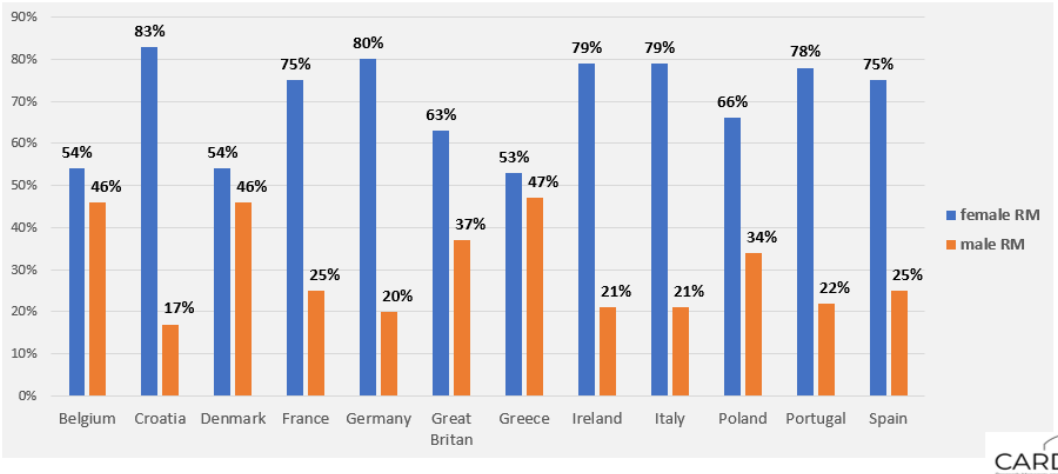
Slide 5:

WP5: *Equality, Diversity and Inclusion*

T5.1 First problem – Gender balance in RM role



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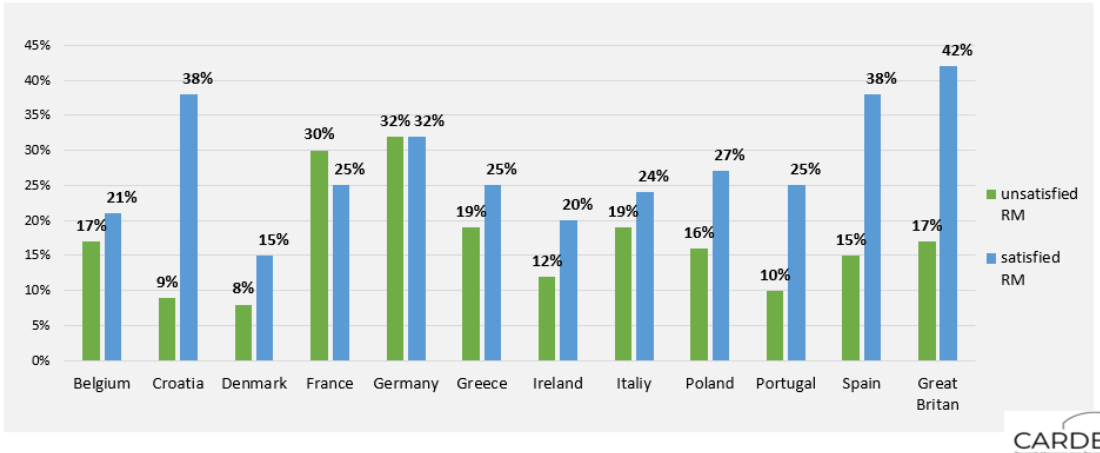
Slide 6:

WP5: *Equality, Diversity and Inclusion*

T5.1 First problem – Gender balance in leadership and decision – making in RM role



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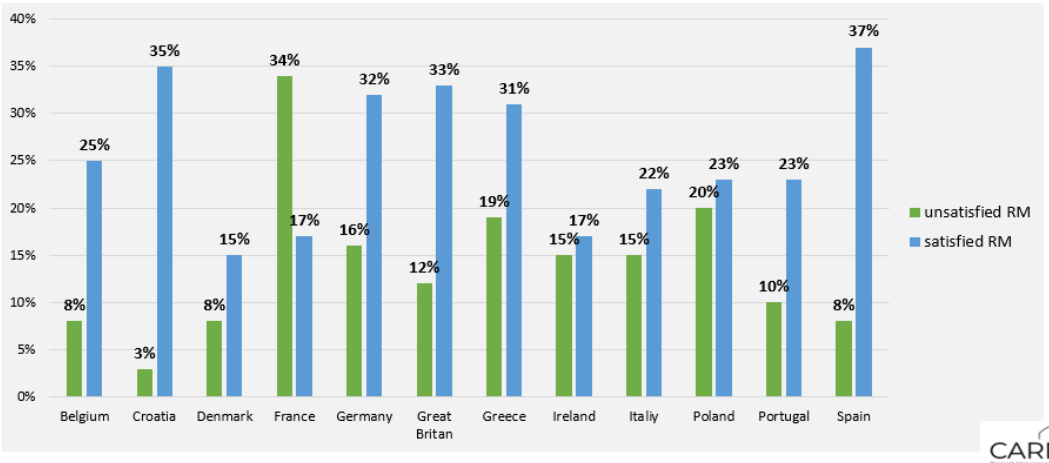
Slide 7:

WP5: *Equality, Diversity and Inclusion*

T5.1 First problem - Gender balance in gender equality in research careers



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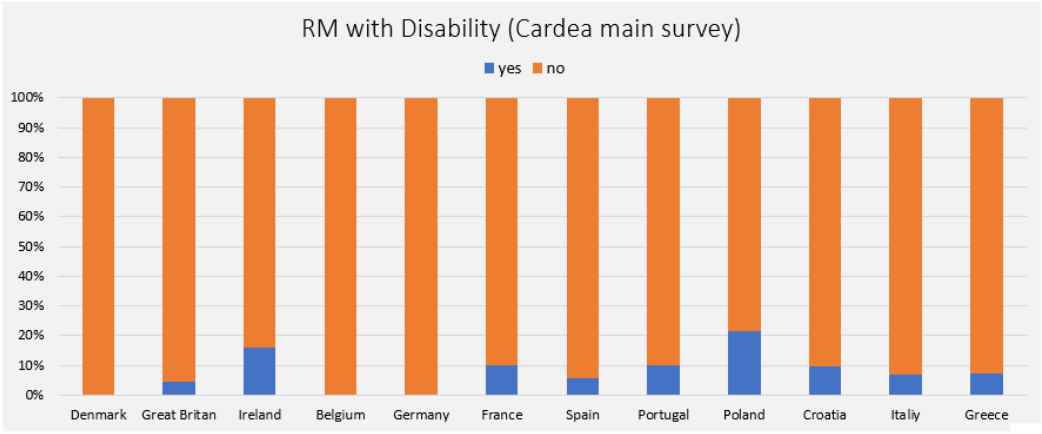
Slide 8:

WP5: *Equality, Diversity and Inclusion*

T5.1 Second problem – Diversity and Inclusion in RM role



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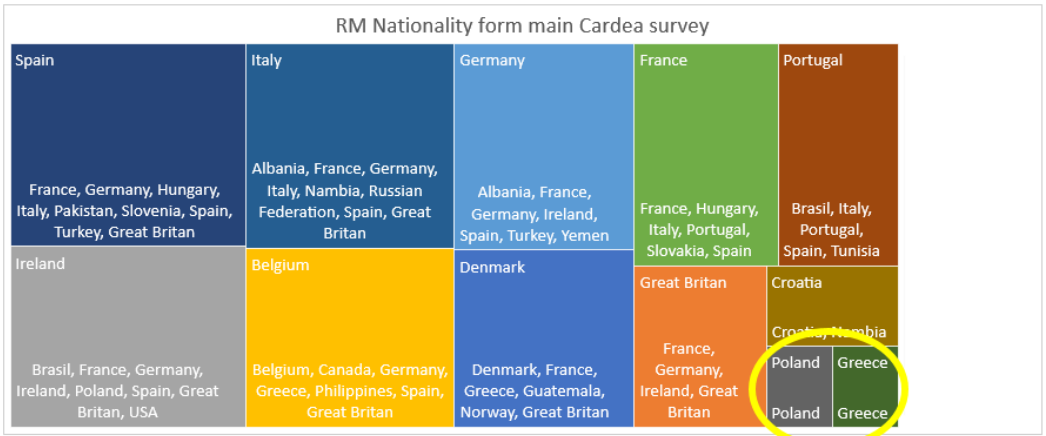
Slide 9:

WP5: *Equality, Diversity and Inclusion*

T5.1 Third problem – National Diveristy in RM role



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Slide 10:

WP5: *Equality, Diversity and Inclusion*

T5.1 Data Driven RM EDI profiles (national, institutional)

Employment sectors of research managers divided into 3 categories

- Commercial
- Scientific and educational
- Scientific excluding universities

Study Case POLAND – new Survey

- Surprising research results
- Decision on the distribution of the survey to our consortium partners

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Slide 11:

WP5: *Equality, Diversity and Inclusion*

Age, gender and disability among RM's

	Commercial	Scientific and educational	Scientific excluding universities
female	50%	56%	27%
male	50%	44%	73%
medium age	38 years	41 years	43 years
disability	49%	22%	18%

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Slide 12:

WP5: *Equality, Diversity and Inclusion*

Age, gender and disability among RM's

	Commercial	Scientific and educational	Scientific excluding universities
female	50%	56%	27%
male	50%	44%	73%
medium age	38 years	41 years	43 years
disability	49%	22%	18%

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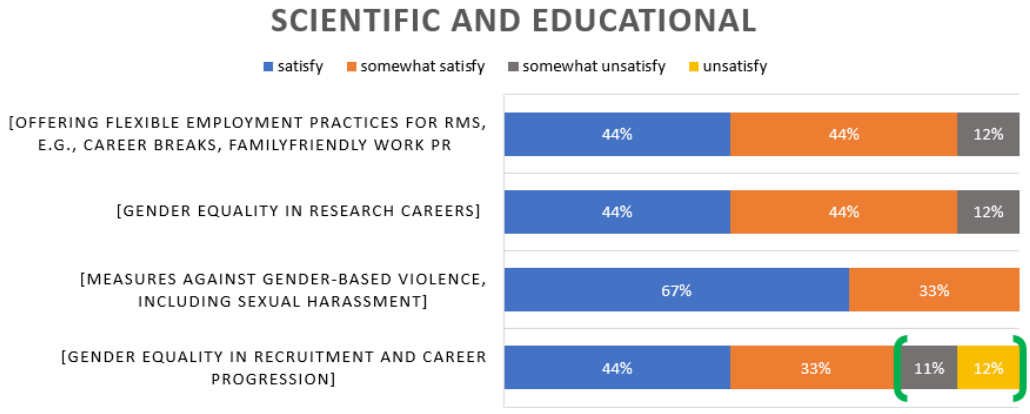
Slide 13:

WP5: *Equality, Diversity and Inclusion*

Satisfaction with thematic areas in organisation



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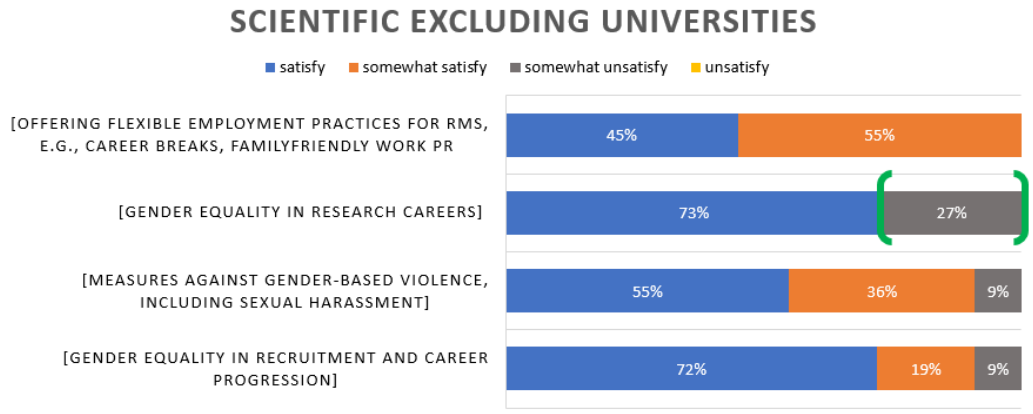
Slide 14:

WP5: *Equality, Diversity and Inclusion*

Satisfaction with thematic areas in organisation



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Slide 15:

WP5: *Equality, Diversity and Inclusion*

T5.2 Policy Recomandation

- Based on the issues identified after analysing the current results of the main survey
- Flexible recommended solutions for institutions and EU countries
- Accepted by constortium partners
- It will be placed on CardeaHUB working version
- It will be updated in the event of future changes or additional requirements

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Slide 16:

WP5: *Equality, Diversity and Inclusion*

Meetings with experts in the EDI field from private institutions and organisations

Meetings in networking and mobility:

- Three different EDI experts representing three different international companies.
- Conversations that led to discussions about the appropriate approach to setting up training and a policy recommendation.

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Slide 17:

WP5: *Equality, Diversity and Inclusion*

T5.3 Fact Sheets

- Covers the core values of EDI
- Graphic and clear to the user
- Subdivided by advancement breakdown RM1- RM4
- The downloadable tool will be available on CardeaHUB

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Slide 18:

WP5: *Equality, Diversity and Inclusion*

T5.3 Fact Sheets

❖ The following EDI values are suggested for RM at level RM1 – RM2:

- Unconscious Bias
- Inclusive Language
- Accessible Communication
- Creating Inclusive Environment

❖ The following EDI values are suggested for RM at level RM3 – RM4:

- All from RM1 – RM2
- Conscious Inclusive Lidership

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Slide 19:

WP5: *Equality, Diversity and Inclusion*

T5.4 Cheeklist

- Updated new content with questions:
  „Does our organisation have employee groups in support of EDI activities? (Minority groups, parent's groups, women's groups, etc.)"

  „Does our organization encourage participation in activities to promote values of EDI policy"
- Full version will be available on CardeaHUB as one of the tools for Research Managers.
- It will continue to be modified as and when the need arises.

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Slide 20:

WP5: *Equality, Diversity and Inclusion*

T5.5 Transition Support programme

The idea of ZERO group:

- Composed of Reserach Managers proposed by each of the consortium partners
- Made up of Reserach Managers of different levels of expertise and experience
- Composed of Reserach Managers from different countries and therefore different institutions
- They will form the first group of mentors for future Reserach Managers joining Cardea Academy and CardeaHUB

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Slide 21:

WP5: *Equality, Diversity and Inclusion*

T5.6 EDI awarness training modules

- In English
- Module split into 20 min short webinars
- Additional material such as links to articles
- Divided into thematic modules with 2h training content
- Tailored to meet the needs of RM according to survey research

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Slide 22:

WP5: *Equality, Diversity and Inclusion*

T5.7 Pilot coaching and mentoring programme

- Created mentor base from ZERO Group volunteers
- Mentors will receive support and additional training
- Mentors will be provided with tools for training
- The quality of the programme will be developed and evaluated based on their feedback

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Slide 23:

WP5: *Equality, Diversity and Inclusion*

Summary

Done:

- ✓ producing a thorough analysis of the EDI values issues that should be highlighted – Three main areas
- ✓ recognising the need for a deeper extension of the analysis – new survey
- ✓ policy recommendation – based on the conclusions of the main survey
- ✓ pictorial factsheet on EDI values in relation to RM levels
- ✓ updating the checklist for organisations

In the progress:

- ➢ setting up trainings
- ➢ a transision programme
- ➢ a pilot and mentoring programme
- ➢ a database of useful links and articles

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Slide 24:

WP5: *Equality, Diversity and Inclusion*

"Whatever you do you have to keep moving forward."

Martin Luther King

Thank you!
Dziękuję bardzo.

CARDEA

Presentation 6: WP 7 Training and Development

Presented by Barbara Chiucconi and Erica Feliziani
University of Macerata
Contact: barbara.chiucconi@unimc.it erica.feliziani@unimc.it

Slide 1:

Slide 2:

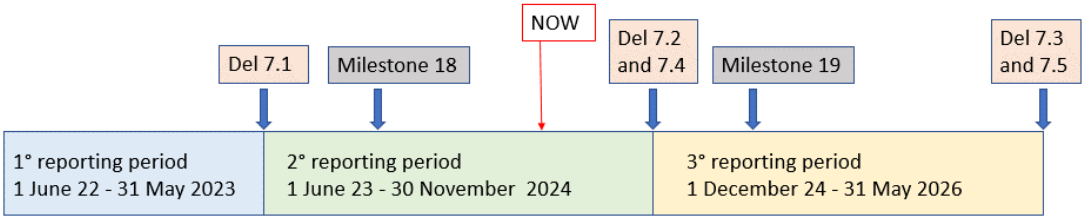
CARDEA project: WP7 "Training and Development"

WP Lead: UNIMC (University of Macerata)
WP team: Barbara Chiucconi, Erica Feliziani, Francesca Spigarelli

WP Objective:
WP 7 aims to:

1. **describe the existing training ecosystem** for research managers (DONE!)
2. **develop a comprehensive training programme** designed by and for research managers (IN PROGRESS!).

6 tasks, 5 deliverables, 2 milestones



Slide 3:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"

3. **TRAINING MODULES**

Slide 4:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers
2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"
3. **TRAINING MODULES**

Slide 5:

CARDEA project: WP7 "Training and Development"

mapping training opportunities available for Research managers

WP7 mapped:

- **Certified training** for Research Managers offered by RM organizations across the world
- Training programs for RMs, in some cases differentiated by the level of experience of the participants, albeit not linked to professional qualifications or certifications **offered by RM professional associations and networks**
- **Training projects and initiatives** for Research Managers developed within EU and international projects
- **Main academic training** for Research Managers (mainly in the Anglo-Saxon world)

Results available in deliverable 7.1 in OA on Zenodo: https://doi.org/10.5281/zenodo.1073153

A "dashboard" will soon be created on the CARDEA website to collect training opportunities for RMs (in collaboration with the EU project, RM ROADMAP)

Slide 6:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers
2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"
3. **TRAINING MODULES**

Slide 7:

CARDEA project: WP7 "Training and Development"

analysis of surveys targeting Research Managers

Analized SURVEYS:

1. **CARDEA**
2. **RAAAP 2016** (Research Administration As A Profession)
3. **RAAAP 2019** (Research Administration As A Profession)
4. **HETFA** (Hungarian Research Institute and Center for economic and social analysis)
5. **EARMA PDRC** (Professional Development and Recognition Committee)

WP7
Deliv 7.1

Main findings:

1. RMs need wide range of skills
2. Importance recognized to soft skills
3. Lack of training opportunities for RMs
4. Preference toward a training relevant to daily work tasks and with a problem-oriented and hands-on approach
5. coaching and mentoring from a more experienced colleague is extremely useful
6. flexibility is a "must-have" for training

Slide 8:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"

3. **TRAINING MODULES**

Slide 9:

CARDEA project: WP7 "Training and Development"

analysis of policy documents

Main findings:

- Investigating the national documents of the CARDEA partners' countries, in the majority of cases, research manager **is not recognized as a profession** by the national legislation **nor funded explicitly** by research funders.

- However, the analysis of recent policy documents initiated by WP7 reveals that RMs **are not so "invisible" as they used to be:**

  - e.g. in the WIDERA work programme, it is **explicitly recognized** that entities who are strong in research performance rely on a **strong community of RMs**, while lower R&I intense countries, regions, institutions often lack such communities
  - e.g. in Italy into the National Research Strategy, RMs are described as the ones who **connect the dots of the worlds of science and of business**, promote and support the **twin transitions**, accompany the transition to an **open science and open innovation** approach

- The input to start the analysis of policy documents mentioning the professional figure of RM **came from WP7** (albeit not foreseen in Annex 1), now RM ROADMAP is going on with this analysis with its community of ambassadors.

Slide 10:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"

3. **TRAINING MODULES**

Slide 11:

CARDEA project: WP7 "Training and Development"

interviews to "opinion leaders"

- 1 hour interview with each of the **7 selected OPINION LEADERS** working in EU RPOs:
  - experts of the ERA principles and the research process
  - members of the ERAC Standing Working Group on Human Resources and Mobility (SWG HRM)
  - experts that are participating in the review of C&C

- **Aim:** deepen what the real expected skills for RMs are, with the ultimate goal of shaping training modules for RMs based on researchers' needs

Slide 12:

CARDEA project: WP7 "Training and Development"

interviews to "opinion leaders"

Main findings:

RM IDENTITY/ROLE/SKILLS

- It is challenging to have a definition since there are so **many varieties of roles and tasks**
- People that **enable – not support (ancillary connotation)** - the entire (pre-award, post award, techtrasf) cycle of research.
- Definition of RM using words from the semantics of the **"relation"** i.e. "connectors, mediators, facilitators, coordinators, intermediaries, communicators, problem solvers, "stakeholder's managers", "gaps fillers", "knowledge brokers";

HOW TO ACKOWLEDGE THE PROFESSIONAL FIGURE OF RM?

- It is **not good to link the profession of RM to the one's of researcher**: RMs need their own framework and career path
- Need to **increases awareness** of this new profession
- Need to **build evidence** to proof the value of RMs es % and amount of grants obtained

Slide 13:

CARDEA project: WP7 "Training and Development"

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on "others' perspectives"**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to "opinion leaders"
   - survey targeting "RM's employers"

3. **TRAINING MODULES**

Slide 14:

WP7 "Training and Development"
survey targeting RMs' employers

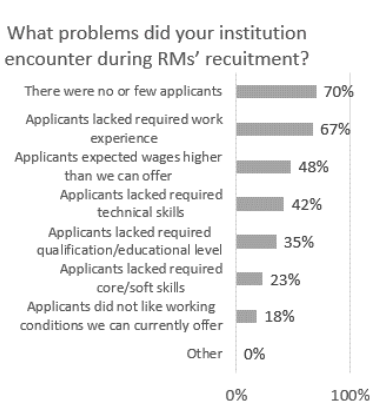
METHODOLOGY:

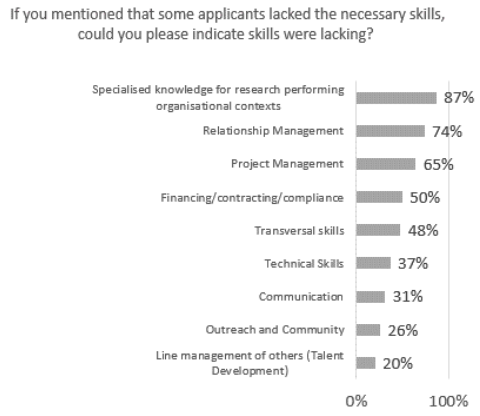
- **TARGET GROUPS:**
  - not mass mailings to all RMs, but only to those involved in the RMs selection processes (including HR office staff)
  - have EU geographical coverage with all MSs represented
- **QUESTIONS OF THE SURVEY:**
  - according to CEDEFOP guidelines (a EU Center that monitors the emerging needs of the labor market and provides guidance for those who develop training courses for new workforce)
  - Developed to have comparable results with other surveys (e.g. the same questions asked in other surveys were repeated to different target groups in order to have different perspectives)
  - Few questions to have a short questionnaire (max 30 questions, 5 minutes)
  - 3 sections:
    - info on the organization and who responded,
    - questions about the selection process
    - questions about «workforce development»

Slide 15:

WP7 "Training and Development"
survey targeting RMs' employers

125 answers from all EU Member States





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Slide 16:

CARDEA project: WP7 “Training and Development”

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on “others’ perspectives”**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to “opinion leaders”
   - survey targeting “RM’s employers”

3. **TRAINING MODULES**

Slide 17:

CARDEA TRAINING MODULES

GENERAL PROJECT REVIEW CONSOLIDATED REPORT (HE)

COVER PAGE

PROJECT	
Project number:	101058572
Project acronym:	Cardea
Project name:	CARDEA - Career Acknowledgement for Research (Managers) Delivering for the European Area
Call:	HORIZON-WIDERA-2021-ERA-01
Topic:	HORIZON-WIDERA-2021-ERA-01-20
Type of action:	HORIZON-AG
Service:	REA/C/04
Project starting date:	1/6/2022
Project duration:	48 months

PROJECT REVIEW	
Period covered:	from 1/6/2022 to 31/5/2023
Reporting period number:	1
Date of the latest version of DoA against which the assessment is performed:	21/4/2022
Date of meeting with consortium (if applicable):	6/9/2023 – 6/9/2023
Name of project officer:	Ruske VAN DEN BERG
Name(s) of monitors:	Not applicable

We have taken into account the following RECOMMENDATION from the Project Officer:

Pertinent LEARNING content that aligns with the developed COMPETENCES FRAMEWORK

Slide 18:

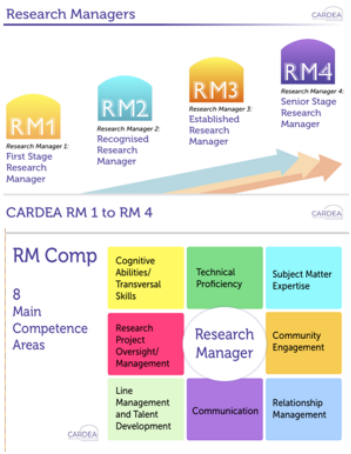
WP7 "Training and Development"
CARDEA training modules

Main features:

- **Content:** the training modules will be a comprehensive training covering the main topics of RM profession; link with the **CARDEA RM COMPETENCES FRAMEWORK**
- **Targets:** only RMs, mainly (not only) **new comers;** a RM could attend the whole package of training or select only the content of interest
- **Trainers:** CARDEA partners (2 modules per each CARDEA partner)
- **Format:**
  - 16 free recorded lessons, lasting approx. 2 hours each lesson divided in mini videos of 20-30 minutes;
  - created specifically for the CARDEA training purpose; it must be labelled as a "CARDEA Academy" initiative;
  - will have a link to the subgroups of the CARDEA community of practices, that will act as a sort of mentorship programme
- **Certification:** micro-credentials and open badge

Slide 19:

CARDEA Research Managers FRAMEWORKS



Career Stage: RM1-RM4

1. First Stage Research Manager
2. Recognised Research Manager
3. Established Research Manager
4. Senior Research Manager

Includes **8 main competence areas**:

1. Cognitive Abilities/Transversal Skills
2. Technical Proficiency
3. subject Matter Expertise/Specialised Knowledge
4. Research Project Oversight
5. Community Engagement
6. Line Management and Talent Development
7. Communication
8. Relationship Management

672 learning outcomes along **4 proficiency levels:**

1. foundational,
2. intermediate,
3. advanced,
4. expert

In the CARDEA Competences Framework, it is <u>not envisaged that Research Managers acquire the highest level of proficiency</u> or have the same proficiency across all the 8 competency areas. However, Researcher Managers should develop their skills <u>in all 8 competency</u> areas where possible.

Slide 20:

CARDEA TRAINING MODULES
overview

LEARNING OBJECTIVE:
provide training for RMs **covering all competence areas** of the profession

CONTENT:
CARDEA training modules will be a **core learning common to all categories of RMs** (i.e. Data Manager, Research Project Manager, Research Integrity Manager and Outreach Manager), a comprehensive training covering the main aspects of research management profession

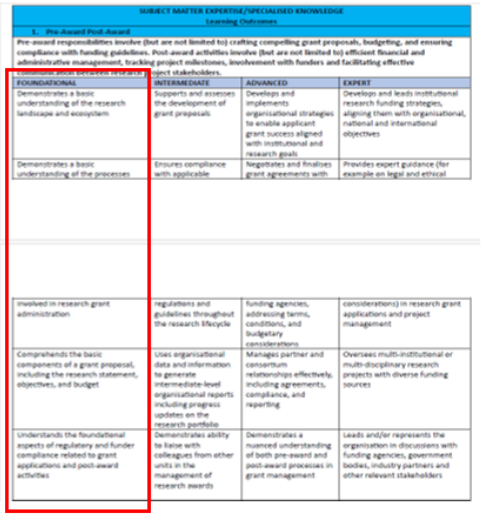
- **COVER ALL 8 COMPETENCES AREAS** of RM COMP with a **FOCUS ON SUBJECT MATTER EXPERTISE** (Specialised knowledge for research performing organisational contexts)

TARGET:
mainly people new in the profession (RM1 newcomers), but training will be also **useful to more expert staff (RM2, RM3 and RM4)** that could choose some topics according to their own needs

- **FOCUS ON FOUNDATIONAL LEVEL COMPETENCES** OF RM COMP

Slide 21:

CARDEA TRAINING MODULES
1ST AND 2ND modules (out of 16)



PRE-AWARD POST-AWARD
Pre-award responsibilities involve (but are not limited to) crafting compelling grant proposals, budgeting, and ensuring compliance with funding guidelines. Post-award activities involve (but are not limited to) efficient financial and administrative management, tracking project milestones, involvement with funders and facilitating effective communication between research project stakeholders.

Slide 22:

CARDEA TRAINING MODULES
3/16 (16 modules)

2. Managing equality, diversity and inclusion (including gender, disability and racism)			
Promote diversity in research teams, value varied perspectives, and ensure equal opportunities for all members. Champion EDI principles and contribute to a more inclusive research culture.			
FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Understands foundational concepts related to equality, diversity, and inclusion (EDI), including key terms and definitions	Enhances cultural competence, understanding and appreciating differences in backgrounds, experiences, and perspectives	Develops inclusive leadership skills, actively promoting diversity and inclusion within teams and the organisation	Leads and drives organisational change initiatives to embed diversity, equality, and inclusion in the culture and practices of research within the organisation
Recognises and acknowledges personal biases and stereotypes and understands their potential impact on workplace dynamics	Able to apply comprehensive practices to foster a more inclusive and respectful workplace environment	Implements diverse and advanced strategies to mitigate biases in decision-making processes	Contributes to the development and implementation of comprehensive diversity and inclusion policies and practices
Gains awareness of relevant laws and policies related to equality, diversity, and inclusion in the workplace	Works exclusively in teams and collaboration partnerships that respect inclusiveness and diversity[2]	Assists with the delivery and organisation of training programs on diversity and inclusion for employees at various levels of the organisation	Engages with external communities and all research stakeholders to promote diversity, equality, and inclusion at national and international level
Develops basic communication skills that promote inclusivity and avoid unintentional biases	Exhibits the ability to analyze and assess diversity-related	Advises less experienced colleagues	Contributes to thought leadership in the field of diversity and

MANAGING EQUALITY, DIVERSITY AND INCLUSION (INCLUDING GENDER, DISABILITY AND RACISM)

Promote diversity in research teams, value varied perspectives, and ensure equal opportunities for all members. Champion EDI principles and contribute to a more inclusive research culture.

Slide 23:

CARDEA TRAINING MODULES
4/16 (16 modules)

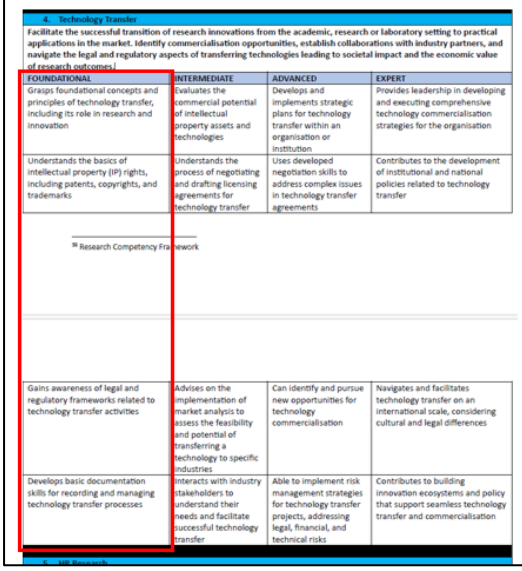
3. Data Stewardship			
Responsible and ethical handling of research data throughout its lifecycle. Robust data management practices, data security, compliance with privacy regulations, and transparent documentation.			
FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Understands the importance of research data as an organisational asset and its role in decision-making	Conducts data profiling to assess data quality and identifies areas for improvement	Implements data management strategies for critical data elements	Provides leadership in establishing and leading organisational data governance initiatives
Recognises basic principles of data quality and the impact of poor data quality on outcomes	Able to apply metadata management practices to enhance data discoverability and traceability	Demonstrates advanced understanding of data privacy and security principles and implements measures to protect sensitive data	Introduces innovative approaches to data management, including the integration of emerging technologies
Grasps foundational concepts of data governance, including roles and responsibilities	Ability to classify data based on sensitivity and usage requirements to ensure proper handling	Collaborates with stakeholders across the organisation to align data stewardship practices with research objectives	Possesses expertise in navigating and ensuring compliance with evolving data regulations and standards
Understands basic data compliance requirements and their implications for stewardship	Participates in the implementation of data governance frameworks and policies (i.e. GDPR, FOI)	Develops and implements data lifecycle management strategies, including archiving and purging	Contributes to the development of an overarching data strategy aligned with organisational, national and international research goals

DATA STEWARDSHIP

Responsible and ethical handling of research data throughout its lifecycle. Robust data management practices, data security, compliance with privacy regulations, and transparent documentation.

Slide 24:

CARDEA TRAINING MODULES
5/16 (16 modules)



4. Technology Transfer

Facilitate the successful transition of research innovations from the academic, research or laboratory setting to practical applications in the market. Identify commercialisation opportunities, establish collaborations with industry partners, and navigate the legal and regulatory aspects of transferring technologies leading to societal impact and the economic value of research outcomes.[36]

FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Grasps foundational concepts and principles of technology transfer, including its role in research and innovation	Evaluates the commercial potential of intellectual property assets and technologies	Develops and implements strategic plans for technology transfer within an organisation or institution	Provides leadership in developing and executing comprehensive technology commercialisation strategies for the organisation
Understands the basics of intellectual property (IP) rights, including patents, copyrights, and trademarks	Understands the process of negotiating and drafting licensing agreements for technology transfer	Uses developed negotiation skills to address complex issues in technology transfer agreements	Contributes to the development of institutional and national policies related to technology transfer
Gains awareness of legal and regulatory frameworks related to technology transfer activities	Advises on the implementation of market analysis to assess the feasibility and potential of transferring a technology to specific industries	Can identify and pursue new opportunities for technology commercialisation	Navigates and facilitates technology transfer on an international scale, considering cultural and legal differences
Develops basic documentation skills for recording and managing technology transfer processes	Interacts with industry stakeholders to understand their needs and facilitate successful technology transfer	Able to implement risk management strategies for technology transfer projects, addressing legal, financial, and technical risks	Contributes to building innovation ecosystems and policy that support seamless technology transfer and commercialisation

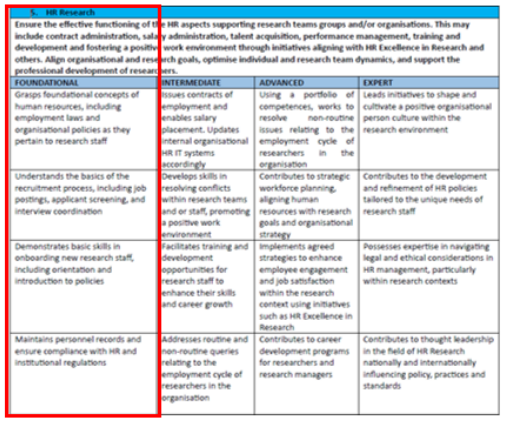
[36] Research Competency Framework

TECHNOLOGY TRANSFER

Facilitate the successful transition of research innovations from the academic, research or laboratory setting to practical applications in the market. Identify commercialisation opportunities, establish collaborations with industry partners, and navigate the legal and regulatory aspects of transferring technologies leading to societal impact and the economic value of research outcomes.

Slide 25:

CARDEA TRAINING MODULES
6/16 (16 modules)



5. HR Research

Ensure the effective functioning of the HR aspects supporting research teams groups and/or organisations. This may include contract administration, salary administration, talent acquisition, performance management, training and development and fostering a positive work environment through initiatives aligning with HR Excellence in Research and others. Align organisational and research goals, optimise individual and research team dynamics, and support the professional development of researchers.

FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Grasps foundational concepts of human resources, including employment laws and organisational policies as they pertain to research staff	Issues contracts of employment and enables salary placement. Updates internal organisational HR IT systems accordingly	Using a portfolio of competences, works to resolve non-routine issues relating to the employment cycle of researchers in the organisation	Leads initiatives to shape and cultivate a positive organisational person culture within the research environment
Understands the basics of the recruitment process, including job postings, applicant screening, and interview coordination	Develops skills in resolving conflicts within research teams and or staff, promoting a positive work environment	Contributes to strategic workforce planning, aligning human resources with research goals and organisational strategy	Contributes to the development and refinement of HR policies tailored to the unique needs of research staff
Demonstrates basic skills in onboarding new research staff, including orientation and introduction to policies	Facilitates training and development opportunities for research staff to enhance their skills and career growth	Implements agreed strategies to enhance employee engagement and job satisfaction within the research context using initiatives such as HR Excellence in Research	Possesses expertise in navigating legal and ethical considerations in HR management, particularly within research contexts
Maintains personnel records and ensure compliance with HR and institutional regulations	Addresses routine and non-routine queries relating to the employment cycle of researchers in the organisation	Contributes to career development programs for researchers and research managers	Contributes to thought leadership in the field of HR Research nationally and internationally influencing policy, practices and standards

HR RESEARCH

Ensure the effective functioning of the HR aspects supporting research teams groups and/or organisations. This may include contract administration, salary administration, talent acquisition, performance management, training and development and fostering a positive work environment through initiatives aligning with HR Excellence in Research and others. Align organisational and research goals, optimise individual and research team dynamics, and support the professional development of researchers.

Slide 26:

CARDEA TRAINING MODULES

7/16 (16 modules)

6. Research Finance Oversee budgetary aspects, financial planning, and compliance within research projects and or at organisational level. Effective allocation of funds, monitor expenditure, and adhere to financial regulations, funding guidelines, having overall fiscal responsibility within research projects at local and or organisational level.			
FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Grasps foundational concepts in finance, including budgeting, financial statements, and cost accounting	Manages research project budgets, considering both direct and indirect costs	Develops advanced financial forecasting models for research projects, considering long-term financial implications	Develops advanced financial forecasting models for the organisation, considering long-term financial implications
Understands basic types of research funding sources and their implications for financial management	Generates and interprets financial reports for research projects, ensuring accuracy and compliance	Implements advanced cost accounting methodologies to allocate costs accurately across research projects	Contributes to the development of financial policies tailored to the unique needs of research finance
Comprehends foundational financial compliance requirements related to research grants and projects	Contributes to budget development for grant proposals, aligning financial plans with project goals	Prepares for and participates in audits, ensuring compliance with financial regulations and funder requirements	Contributes to the finalising of complex financial agreements, including terms and conditions of research funders and collaborating partners and organisations
Develops basic skills in financial documentation and record-keeping for research projects	Understands the financial aspects of partners and collaborations within research projects	Assesses and advises on mitigation for financial risks associated with research projects	Provides organisational leadership in research finance, including mentoring and guiding junior research finance professionals

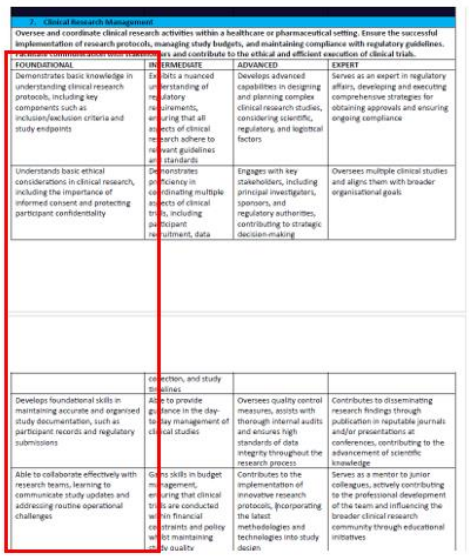
RESEARCH FINANCE

Oversee budgetary aspects, financial planning, and compliance within research projects and or at organisational level. Effective allocation of funds, monitor expenditure, and adhere to financial regulations, funding guidelines, having overall fiscal responsibility within research projects at local and or organisational level.

Slide 27:

CARDEA TRAINING MODULES

8/16 (16 modules)

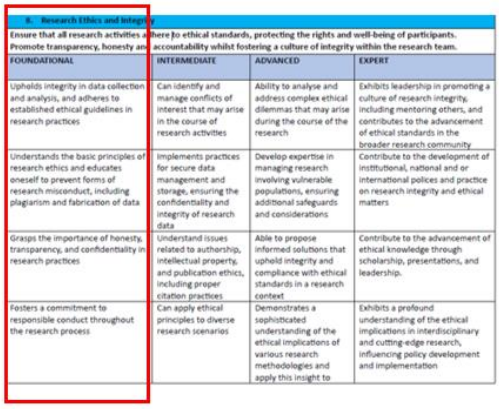


CLINICAL RESEARCH MANAGEMENT

Oversee and coordinate clinical research activities within a healthcare or pharmaceutical setting. Ensure the successful implementation of research protocols, managing study budgets, and maintaining compliance with regulatory guidelines. Facilitate communication with stakeholders and contribute to the ethical and efficient execution of clinical trials.

Slide 28:

CARDEA TRAINING MODULES
9/16 (16 modules)



8. Research Ethics and Integrity			
Ensure that all research activities adhere to ethical standards, protecting the rights and well-being of participants. Promote transparency, honesty and accountability whilst fostering a culture of integrity within the research team.			
FOUNDATIONAL	INTERMEDIATE	ADVANCED	EXPERT
Upholds integrity in data collection and analysis, and adheres to established ethical guidelines in research practices	Can identify and manage conflicts of interest that may arise in the course of research activities	Ability to analyse and address complex ethical dilemmas that may arise during the course of the research	Exhibits leadership in promoting a culture of research integrity, including mentoring others, and contributes to the advancement of ethical standards in the broader research community
Understands the basic principles of research ethics and educates oneself to prevent forms of research misconduct, including plagiarism and fabrication of data	Implements practices for secure data management and storage, ensuring the confidentiality and integrity of research data	Develop expertise in managing research involving vulnerable populations, ensuring additional safeguards and considerations	Contribute to the development of institutional, national and or international polices and practice on research integrity and ethical matters
Grasps the importance of honesty, transparency, and confidentiality in research practices	Understand issues related to authorship, intellectual property, and publication ethics, including proper citation practices	Able to propose informed solutions that uphold integrity and compliance with ethical standards in a research context	Contribute to the advancement of ethical knowledge through scholarship, presentations, and leadership.
Fosters a commitment to responsible conduct throughout the research process	Can apply ethical principles to diverse research scenarios	Demonstrates a sophisticated understanding of the ethical implications of various research methodologies and apply this insight to	Exhibits a profound understanding of the ethical implications in interdisciplinary and cutting-edge research, influencing policy development and implementation

RESEARCH ETHICS AND INTEGRITY

Ensure that all research activities adhere to ethical standards, protecting the rights and well-being of participants. Promote transparency, honesty and accountability whilst fostering a culture of integrity within the research team.

Slide 29:

CARDEA TRAINING MODULES
10/16 (16 modules)

COGNITIVE ABILITIES/TRANSVERSAL SKILLS

- Creativity
- Critical thinking
- Cultural Sensitivity
- Professional Flexibility
- Problem Solving
- Strategic Planning
- Decision Making

REFER TO RM COMP LEARNING OUTCOMES AT **FOUNDATIONAL LEVEL**

Slide 30:

CARDEA TRAINING MODULES
11/16 (16 modules)

RESEARCH PROJECT OVERSIGHT/MANAGEMENT

- Research Project Management
- Managing research project deliverables
- Designing monitoring and evaluation frameworks and indicators
- Establishing research project plans

REFER TO RM COMP LEARNING OUTCOMES AT **FOUNDATIONAL LEVEL**

Slide 31:

CARDEA TRAINING MODULES
12/16 (16 modules)

LINE MANAGEMENT AND TALENT DEVELOPMENT

- People Management and managing team performance
- Team Building
- Change Management
- Coaching skills
- Research talent identification and development
- Inclusive leadership

REFER TO RM COMP LEARNING OUTCOMES AT **FOUNDATIONAL LEVEL**

Slide 32:

CARDEA TRAINING MODULES
13/16 (16 modules)

COMMUNICATION

- Building and maintaining relationships with research funders, partners or other stakeholders
- Designing and implementing research communication plans
- Media Liaison and associated activities
- Preparing and writing reports (including evaluation reports and funder reports)
- Social Media engagement

REFER TO RM COMP LEARNING OUTCOMES AT
FOUNDATIONAL LEVEL

Slide 33:

CARDEA TRAINING MODULES
14/16 (16 modules)

RELATIONSHIP MANAGEMENT

- Building trust within relevant research and strategic partnerships
- Diplomacy, negotiation, and mediation skills
- Handling difficult conversations and partnerships
- Business and commercial liaison management

REFER TO RM COMP LEARNING OUTCOMES AT
FOUNDATIONAL LEVEL

Slide 34:

CARDEA TRAINING MODULES
15/16 (16 modules)

COMMUNITY ENGAGEMENT

- Research Outreach
- Academic community relationship collaboration
- Community Engagement with Research
- Provision of training for outreach engagement
- Engagement with key stakeholders

REFER TO RM COMP LEARNING OUTCOMES AT
FOUNDATIONAL LEVEL

Slide 35:

CARDEA TRAINING MODULES
16/16 (16 modules)

HR EXCELLENCE IN RESEARCH

The 16th module:
HOW TO EMBED THE HUMAN RESOURCES STRATEGY FOR RESEARCHERS **(HRS4R)** IN THE OVERALL RESEARCH MANAGEMENT

An innovative module as the cherry on the cake:
- Added value from the CARDEA project, not in other projects
- Reflects the CARDEA partners' expertise

This module will teach:

- on how to leverage on the **HRS4R initiative** to create synergies among the different departments dealing with research management and maximize its impact
- how to make a research organization more friendly for RMs and attract the best talented research managers, by endorsing the **CARDEA RM Charter and Concordat** that will provide a set of principles and requirements for RMs' (both public and private) employers

Slide 36:

CARDEA TRAINING MODULES
Matching partner/topic

	Topics	Partner
1	PRE-AWARD	CERTH
2	POST-AWARD	UNIMC
3	MANAGING EQUALITY, DIVERSITY AND INCLUSION (INCLUDING GENDER, DISABILITY AND RACISM)	IFJ PAN
4	DATA STEWARDSHIP	AGAUR
5	TECHNOLOGY TRANSFER	UNIMC
6	HR RESEARCH	UCC
7	RESEARCH FINANCE	AGAUR
8	CLINICAL RESEARCH MANAGEMENT	UCC
9	RESEARCH ETHICS AND INTEGRITY	UPB
10	COGNITIVE ABILITIES/TRANSVERSAL SKILLS	ULIEGE
11	RESEARCH PROJECT OVERSIGHT/MANAGEMENT	UNIPU
12	LINE MANAGEMENT AND TALENT DEVELOPMENT	IFJ PAN
13	COMMUNICATION	ULIEGE
14	RELATIONSHIP MANAGEMENT	UNIPU
15	COMMUNITY ENGAGEMENT	UPB
16	HOW TO EMBED THE HUMAN RESOURCES STRATEGY FOR RESEARCHERS (HRS4R) IN THE OVERALL RESEARCH MANAGEMENT	CERTH

Slide 37:

CARDEA TRAINING MODULES
Open badge and micro-credentials

CARDEA will release micro-credential and open badge for free to who will attend entirely the CARDEA training modules

CARDEA HUB will:

- **host** the recorded lessons and other related **training materials**
- **has a monitoring system to assess who attends all modules entirely**
- send **satisfaction questionnaire** to the students by the end of each module
- be **GDPR** compliant

Slide 38:

CARDEA TRAINING MODULES

Next steps

- **Beginning of June**: first draft of training modules (already recorded)
- **Summer 2024:** Quality assessment: internal (by CARDEA partners and Advisory board members) and external (by asking colleagues).
- **September/October 2024:** final version of training modules ready (incorporating advices from the quality assessment). This means in practice that in case of modules which have modified based on the assessment received, a new and final version of the modules must be recorded again by the partners and then shared with the project coordinator and UNIMC for upload to the CARDEA Hub.
- **November 2024**: promotion of the modules

Slide 39:

Presentation 7: WP 8 Advocacy and Influencing

Presented by Tsiligeridis Achilleas
Centre for Research and Technology Hellas (CERTH)
Contact: tsiligeridis@certh.gr

Slide 1:

Slide 2:

WP8: *Advocacy and Influencing*

WP Lead: Centre for Research and Technology Hellas (CERTH)

Beneficiaries: All partners

WP Objectives:

The main objective of this WP is to **enhance the attractiveness of research careers**, **by creating attractive and safe working and employment conditions.**

To involve, network and engage the research managers in each partner's organizations and if possible at regional level in order to identify and discuss the real needs in order to facilitate the establishment of the European Hub for Research Managers.

To involve research policy makers, funding organizations, and the high-level managers of the RPO's, representatives from the EC in order to increase their awareness on the Hub and to explore potential ideas for improvement of the operation of the Hub.

Slide 3:

WPs Descriptions

- **Task 8.1:** Identification of RMs at regional and national level in widening countries and regions with strong and excellent hubs in knowledge creation and innovation.
- **Task 8.2:** Involvement and networking of relevant actors
- **Task 8.3:** Pilot operation of the services
- **Task 8.4:** Policy recommendations

Slide 4:

Task 8.1: Identification of RMs at regional and national level in widening countries and regions with strong and excellent hubs in knowledge creation and innovation

This task aims in the **identification of Research Managers at regional and national level in widening countries and regions** that have strong experience in hubs related to knowledge creation and innovation.

- **The identification and engagement methodology** was developed in collaboration with Task 9.3, responsible for the preparation of the Communication Plan

- **The activities of the methodology** are:
  - 2 Focus Groups
  - 4 Info days (Task 8.2)
  - Pilot operation of the services offered by the Hub (Task 8.3)

Slide 6:

Task 8.1: Identification of RMs at regional and national level in widening countries and regions with strong and excellent hubs in knowledge creation and innovation

Deliverables

- **D 8.1:** Initial Engagement Report – CERTH – M 30 **(Almost completed)**
- **D 8.3:** Institutional KPIs interim report – CERTH – M 30 **(In progress)**

Slide 7:

Task 8.2: Involvement and networking of relevant actors

This task aims in the **involvement and networking of relevant actors**. It will be achieved via Events foreseen to be held within WP 9 (info days/workshops). **These events aim in the exchange of experience on research management staff** about existing training, networking and mobility opportunities at national, regional and EU level.

- **Two of the info days are already organized**
  - ✓ **CARDEA ACADEMY - Career Framework for Research Managers** which was organized on 25th September 2023. The objective was the official presentation of the Career Framework for Research Managers and the collection of feedback from relevant stakeholders via focus groups.
  - ✓ **Potential of Research Managers and Administrators (RMAs) within the ERA Challenges** which was organized on 14th December 2023. The objective was the increase of the awareness of researchers for the research management profession, as a valued career choice, with identified competencies, progression pathways, and access to appropriate skills development. In addition, research manager could be informed for the efforts related to the recognition of their profession.
- **Two will be organized the period M 30 – M 48**

Slide 8:

Task 8.2: Involvement and networking of relevant actors

Deliverables

- **D 8.2:** Final Engagement Report – CERTH – M 48

Slide 9:

Task 8.3: Pilot operation of the services

The aim of this task is the implementation of the **pilot operation of the services offered by the Hub** developed within **WP 3.** The aim is to **test the services in terms of the skills in EU research management** in the partners involved by inviting the stakeholders

- The pilot operation will be done in two phases:
  - ✓ **Internal pilot operation – project beneficiaries and the Advisory Board** (next Advisory Board meeting 26/07/2024)
  - ✓ **A virtual round table discussion will be organized** with the identified stakeholders (already identified in Task 8.2). This roundtable will be organized after M30

Slide 10:

Task 8.3: Pilot operation of the services

Deliverables

- **D 8.4:** Initial policy feedback report – CERTH – M 30 **(In progress)**

Slide 11:

Task 8.4: Policy recommendations

The aim of this task is the preparation of recommendations that will focus on the **training and networking patterns of research support staff** and **research management and funding schemes,** to improve the research management in the ERA

- **Development of new training paths** dedicated to research support/management staff, or **optimize the integration of existing** recognized institutional training and certification programmes for research managers.
- Both solutions **will strengthen the existing schemes at EU level.**

Slide 12:

Task 8.4: Policy recommendations

The aim of this task is the preparation of recommendations that will focus on the **training and networking patterns of research support staff** and **research management and funding schemes,** to improve the research management in the ERA

- **Development of new training paths** dedicated to research support/management staff, or **optimize the integration of existing** recognized institutional training and certification programmes for research managers.
- Both solutions **will strengthen the existing schemes at EU level.**

Slide 13:

Deliverables summary

Next reporting period (M30)

- **D 8.1:** Initial Engagement Report – CERTH – M 30 **(Almost completed)**
- **D 8.3:** Institutional KPIs interim report – CERTH – M 30 **(In progress)**
- **D 8.4:** Initial policy feedback report – CERTH – M 30 **(In progress)**
- **D 8.5:** Recommendations policy feedback report – CERTH – M 30 **(In progress)**

Final reporting period (M 48)

- **D 8.2:** Final Engagement Report – CERTH – M 48
- **D 8.6:** Final policy feedback report – CERTH – M 48

Slide 14:

Thank you for your attention

Presentation 8: Agency For Mobility Presentation

Presented by Ana Ključarić
Head of Department for Horizontal Areas of the EU Framework Programmes and Mobility of Researchers
Contact: ana.kljucaric@ampeu.hr

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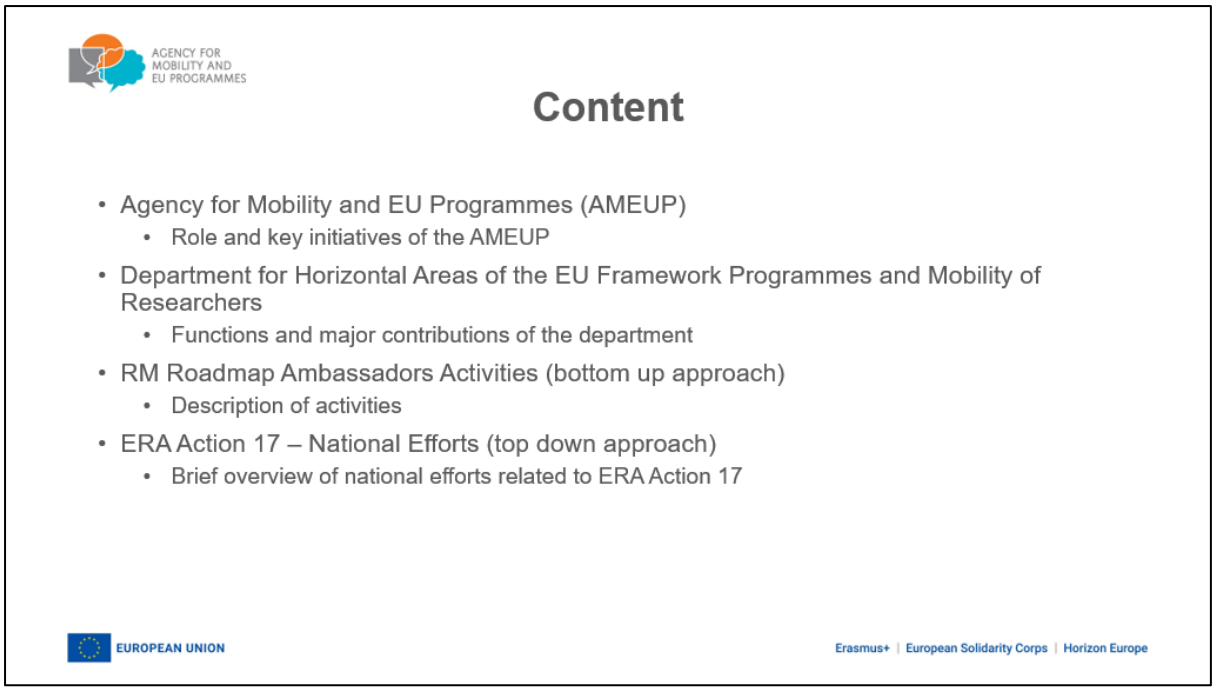

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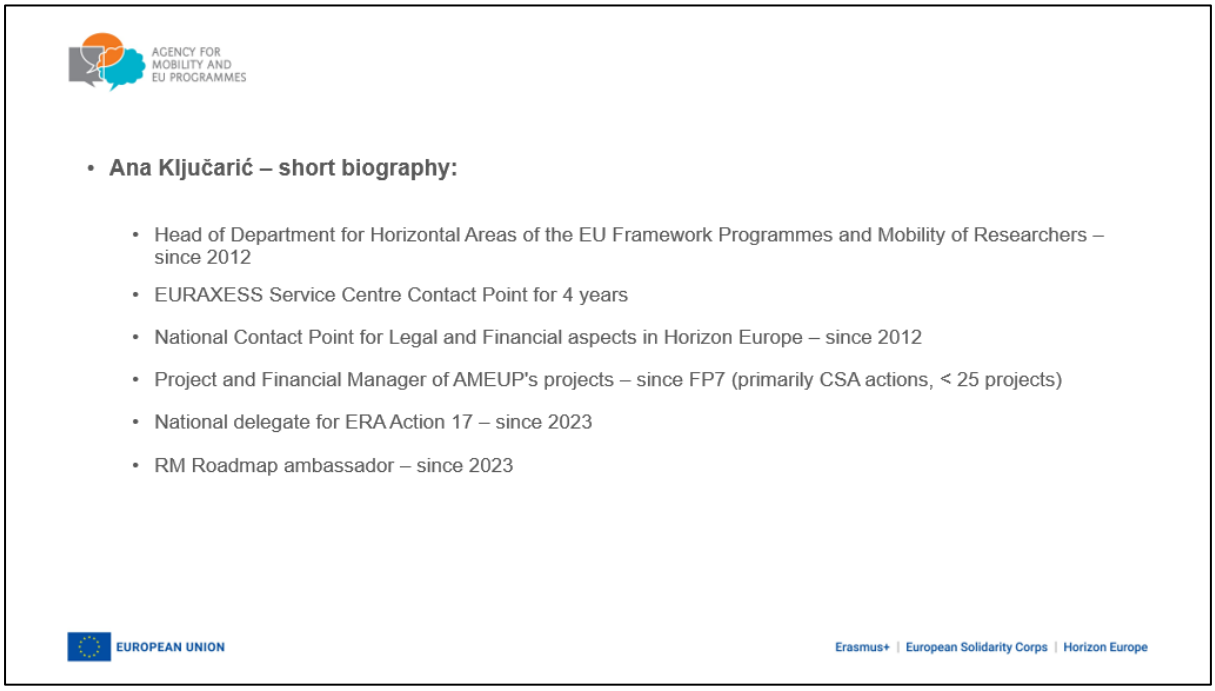

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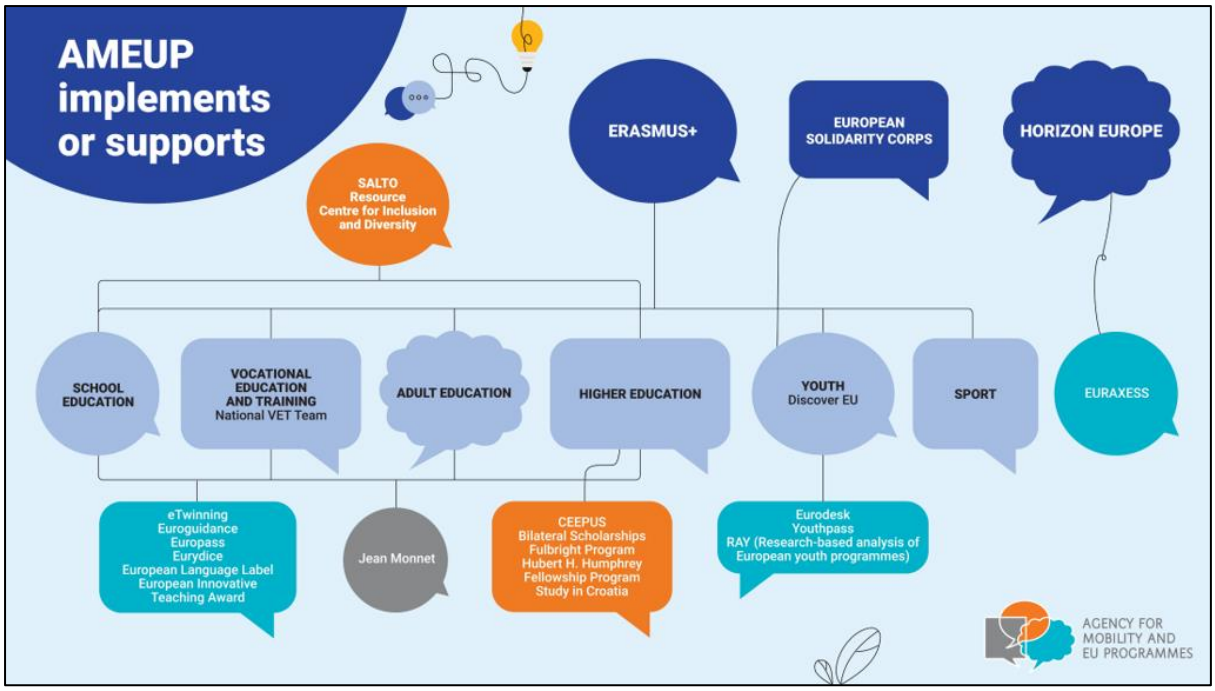

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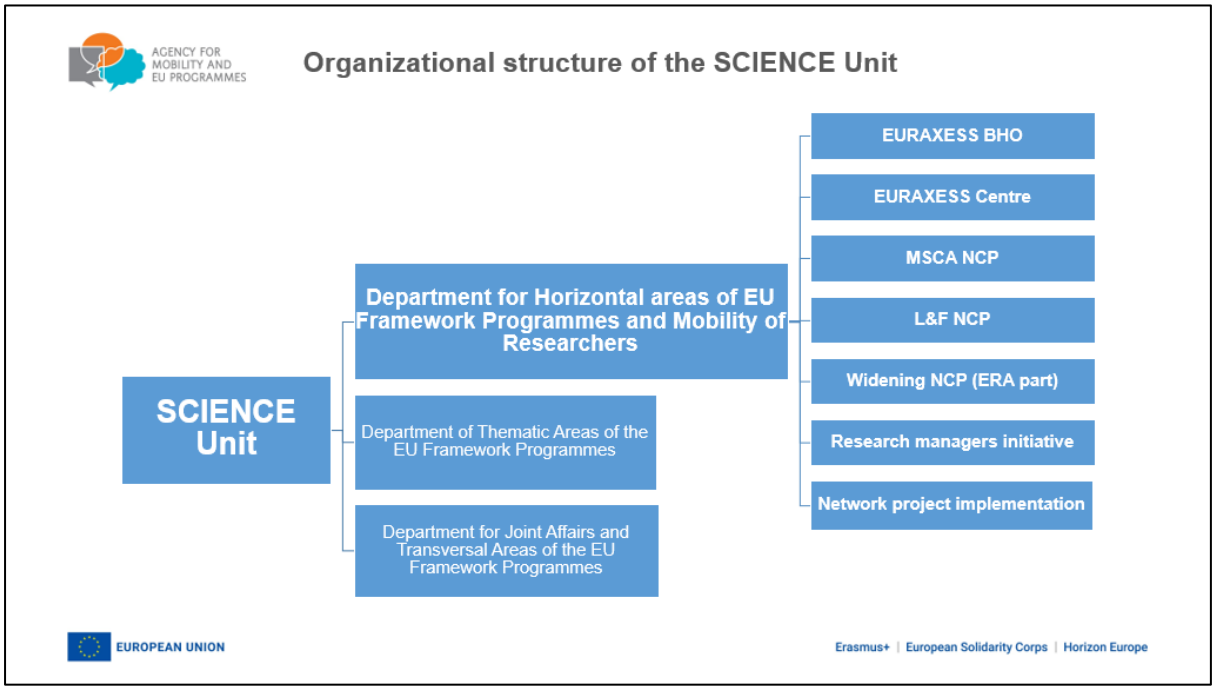

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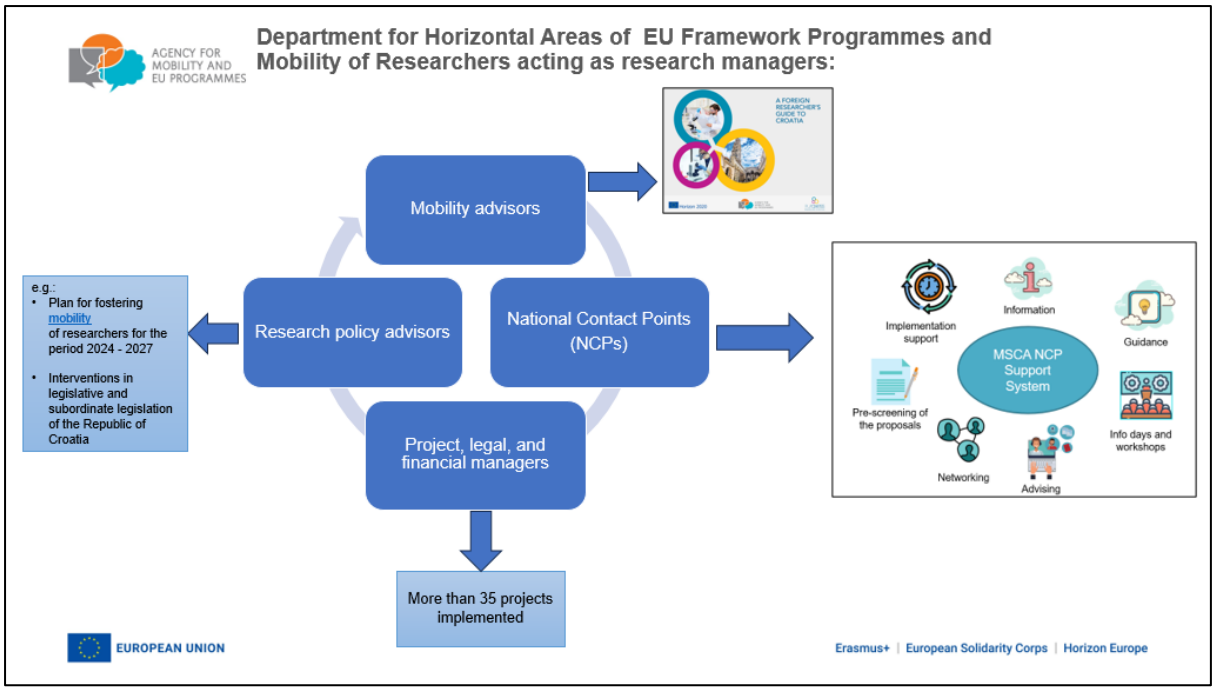

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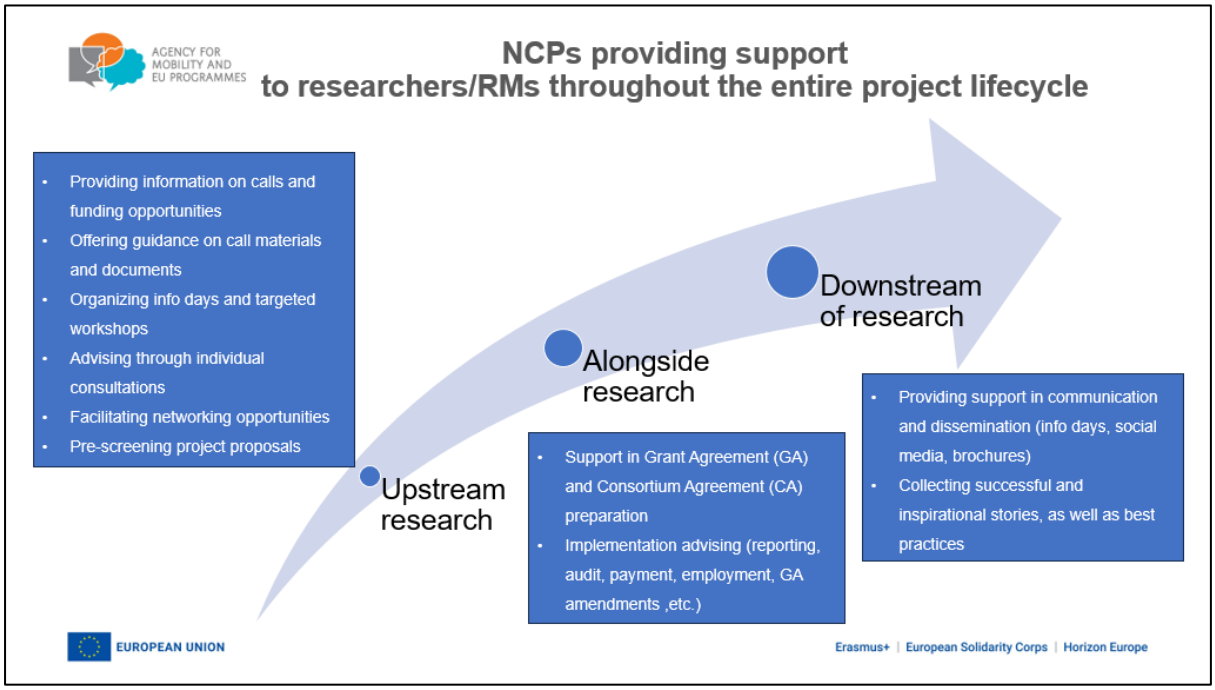

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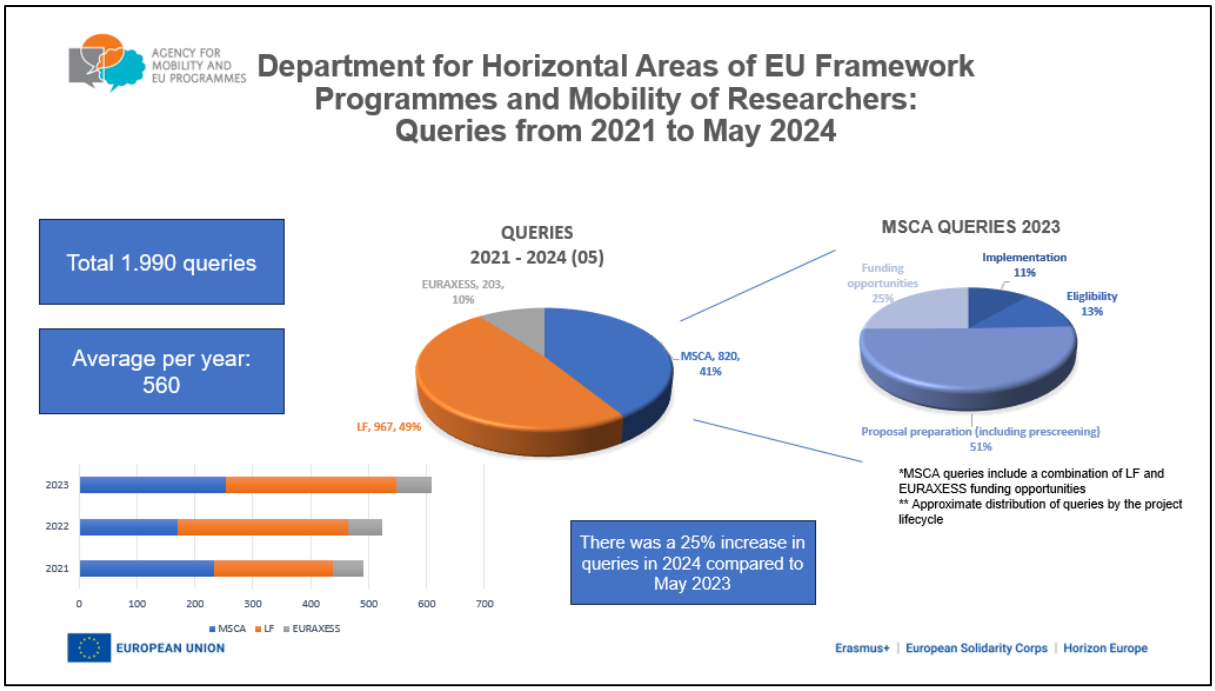

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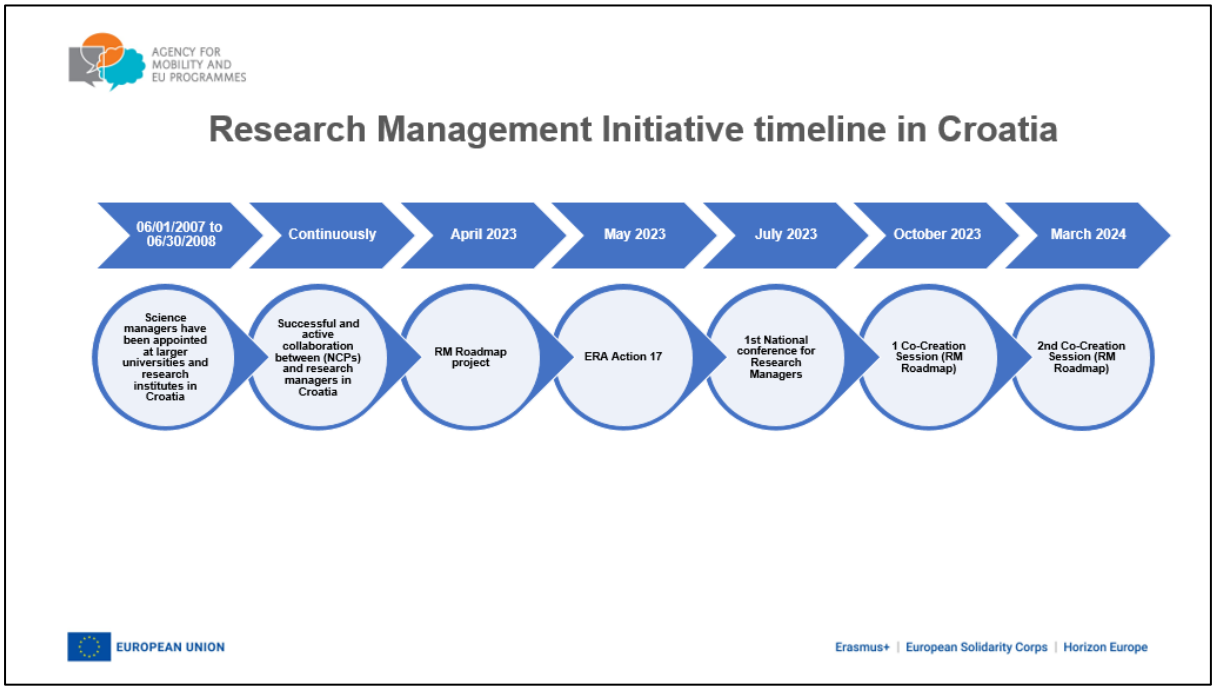

Slide 10:

First national conference for research managers in Zagreb

- **First national conference for research managers in Zagreb on 15 June 2023**
- **More than 150 participants**
- **Supported by Ministry of Science and Education**
- **During the conference, several topics were presented, including:**
  - ❑ The RM Roadmap project
  - ❑ Co-creation sessions (topics and the timeline)
  - ❑ ERA Action 17
  - ❑ CARDEA project

There was a very strong research management momentum, not only in Europe, but also in Croatia!

Slide 11:

AGENCY FOR MOBILITY AND EU PROGRAMMES

Bottom-up approach: RM Roadmap ambassadors

- **In relation to RM Roadmap activities:**
  - Ana Ključarić and Ivana Vuka were officially **nominated as ambassadors** in April 2023.
  - **The first Co-Creation process**, focusing on understanding the landscape of RM national networks and the needs of the national RM community, was conducted from October 2nd to October 13th, 2023.
  - **The second co-creation session**, focused on defining terminology and professionals working in research management, as well as discussing the skills and competencies relevant to different job categories/RM fields, started on March 18th, 2024
  - More than 100 RMs registerd on the platform

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Co-Creation sessions

- **Close collaboration of Ambassadors and Associate Ambassadors**
- **The promotional campaign started early; first Co-Creation session** was announced already at the **first national conference for research managers in Zagreb on 15 June 2023:**
- **Croatian ambassadors have created two reports**
- **Co-Creation Results: https://www.rmroadmap.eu/co-creation-results**

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Next steps:

❑ **As RM Roadmap Ambassador:**

- ~~Session 3 on the Knowledge and Community Platform:~~
  - ~~Topic: Training, Networking, and Professional Development Opportunities~~
  - ~~Duration: June 3 – July 8, 2024~~
- ~~Session 4 on the Knowledge and Community Platform Development Framework:~~
  - ~~Date: November 2024~~
- ~~Session 5 on the Knowledge and Community Platform Value Proposition:~~
  - ~~Date: May 2025~~

- **New:** there will be only one more co-creation session starting in November 2024, which will be therefore the 3rd and last co-creation session on the Career Development Framework. The RM Roadmap co-creation session on Value Proposition (March 2025) will be in the form of a workshop.

❑ **As NCPs (National Contact Points):**

- ❑ Contribution to the implementation of measures outlined in the Plan for fostering mobility of researchers for the period 2024 – 2027.
- ❑ Organizing events for Research Managers as part of NCP activities.
- ❑ Newsletters, web pages, social media…

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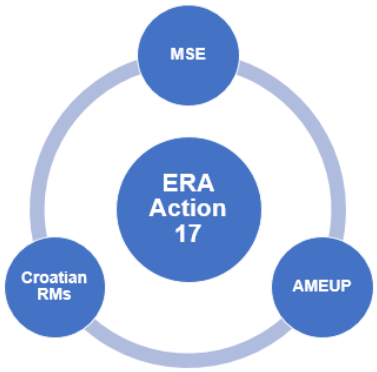
AGENCY FOR MOBILITY AND EU PROGRAMMES

Top-down approach: ERA Action 17

In relation to ERA Action 17:

- **Support on a national level:**
  - The Agency for Mobility and EU Programmes **has been emphasized several times as an institution that provides quality and timely support to RMs**, as well as the institution that connects RMs even without an established formal network.
  - as a result of excellent collaboration between Research Managers (RMs), the Ministry of Science and Education (MSE), and National Contact Points (NCPs) Croatia **has officially supported ERA Action 17 in May 2023**
- **Recognition:**
  - Croatia R&I managers are still **not recognised as a profession** (or a set of professions) with specific knowledge, skills and competencies in Croatia.
  - However, some specific functions such as **experts for proposal writing, financial reporting and procurement experts and knowledge/technology transfer officers are gradually (and mostly informally) gaining prominence**, as R&I project development and management knowledge and experience are accumulated in the Croatian R&I organisations in public and private sectors.



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AGENCY FOR MOBILITY AND EU PROGRAMMES

Top-down approach: ERA Action 17

- **Regulation on Programme Funding for Public Higher Education Institutions and Public Scientific Institutes in the Republic of Croatia**: in July 2023, as part of the reform of the higher education financing system this Regulation entered into force and contributed to the **recognition of RM profession on the national level.**
  - Specifically, the Agency for Mobility and EU Programmes **proposed that the Regulation explicitly mentions the strengthening of the human resources of research support staff (research managers)** as one of the specific objectives that a public higher education institution or public research institute achieves within the agreed funding period.
  - This suggestion was adopted by the MSE which shows a high level of understanding of the importance of strengthening the role of RMs.
- **Catalogue of objectives and indicators**: specific objectives that public research organisations may choose are laid down in the Regulation and described in more detail in the Catalogue of objectives and indicators, which also contains general KPIs for specific objectives.
  - **The specific objective referring to RMs is strengthening the human resources of research support staff.**

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AGENCY FOR MOBILITY AND EU PROGRAMMES

Top-down approach: ERA Action 17

Implementation of the measures outlined in the Plan for fostering mobility of researchers for the period 2024 – 2027.

- The Croatian Ministry of Science and Education has adopted a Plan for fostering mobility of researchers for the period 2024 - 2027 which aims to **increase international, cross-sectoral and balanced mobility of researchers**.
- Accordingly, the Plan **provides for the implementation of the following activities:**
  - further development of the EURAXESS umbrella organisation
  - further development of EURAXESS centres
  - **encouraging capacity building of institutions in the higher education system**
  - ensuring the stability and continuity of national calls for competitive funding of young researchers
  - further encouragement of participation of Croatian beneficiaries in activities of Horizon Europe Programme
  - implementation of ERA activities aimed at the mobility of researchers
  - encouraging participation in national and European mobility programmes for researchers.
- The Plan for fostering mobility of researchers is foreseen as a measure that will contribute to the **development of human resources in the system of science and higher education**, increase incoming and outgoing mobility of scientists and strengthen international cooperation, **strengthen human capacities**, international visibility of scientific results, as well as potential for cooperation with the economy and ultimately lead to increased investment in research and development.

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AGENCY FOR MOBILITY AND EU PROGRAMMES

Top-down approach: ERA Action 17

Plan for fostering mobility of researchers for the period 2024 – 2027

Measure: Implementation of the activity *encouraging capacity building of institutions in the higher education system*

- Continuing to encourage the **preparation and implementation of activities and initiatives to address identified obstacles** in human resources, necessary knowledge, skills, and experience, which are often perceived as obstacles in project preparation and implementation by the project office employees at higher education institutions and scientific organizations.
  - With the aim to increase the quality and quantity of project preparation and implementation (including increase in EU and other international funding) it is **necessary to encourage development of models dedicated to project office employees at higher education institutions and scientific organizations**.
- **Supporting the regular exchange of project office employees** responsible for implementing international projects and related expert services for financial-accounting, legal, and HR aspects at universities, including their faculties, and scientific institutes.
  - include individuals from institutions preparing and/or implementing framework program projects for research and innovation or those who have capacity of participating in such a program.
  - allow the **dissemination of good practices** across Croatia and facilitate the process of **adaptation and implementation of the best European practices and principles** to the specificities of Croatian research landscape.

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AGENCY FOR MOBILITY AND EU PROGRAMMES

Key documents that contribute to the recognition of the Research Management (RM) profession

1. **COUNCIL RECOMMENDATION of 18 December 2023 on a European framework to attract and retain research, innovation and entrepreneurial talents in Europe**

   *17. (…) Performing high-level research and innovation requires the support of other professionals. Amongst them, **research management and research technician careers deserve proper recognition**, including by way of further analysis and alignment at the level of the Union. Research management capacity should be strengthened by defining required skills and competences, developing relevant training, fostering comparability, and allowing their holders to effectively manage and support research and innovation.*

2. **COUNCIL CONCLUSIONS ON THE EX-POST EVALUATION OF HORIZON 2020 AND FUTURE OUTLOOK (approved on 23 May 2024):**

   *24. (…) **ACKNOWLEDGES the vital role of the National Contact Points to guide and support applicants and INVITES the Member States and the Commission to further strengthen their roles and practices and to additionally support organisational research management and capacity.“***

Incorporating Research Management (RM) into both documents reflects the increasing recognition of RM's importance among decision-makers!

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Slide 20:

Thank you!

Ana Ključarić
ana.kljucaric@ampeu.hr

Head of Department for Horizontal Areas of the EU Framework Programmes
and Mobility of Researchers
National Contact Point for Legal and Financial aspects in Horizon Europe

Agency for Mobility and EU Programmes

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Presentation 10: WP9 Communication and Impact Generation

Presented by Marilou Ramos-Pamplona
ULIEGE-RISE
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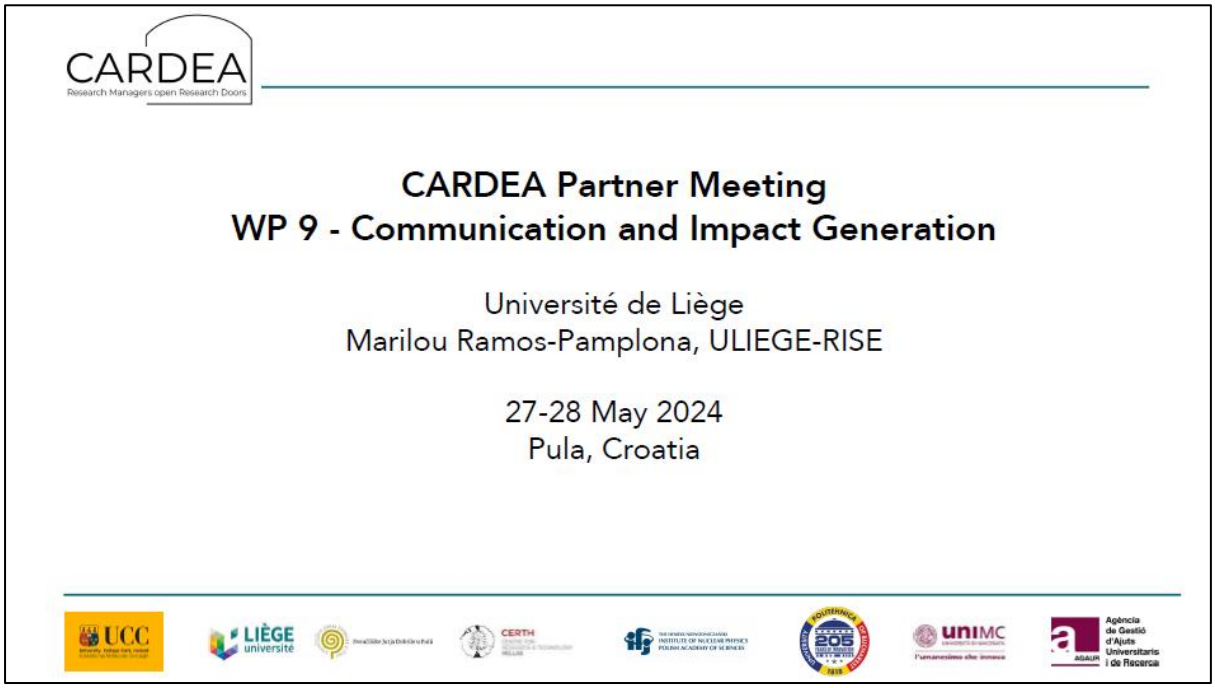

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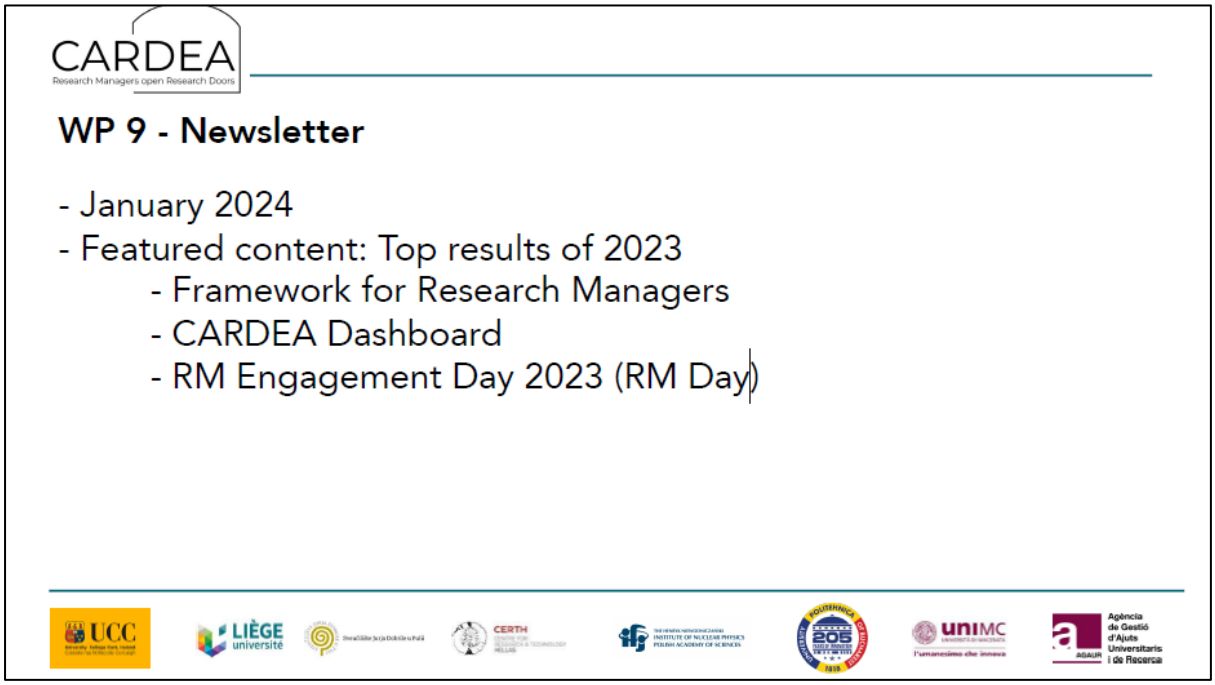

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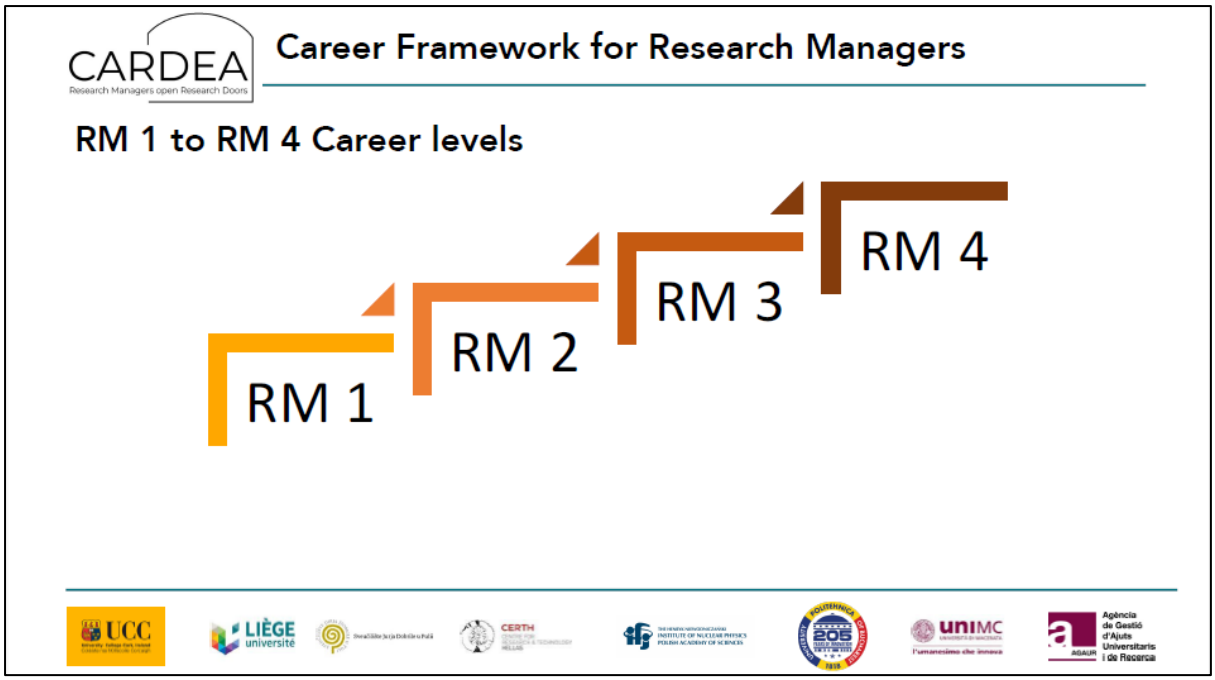

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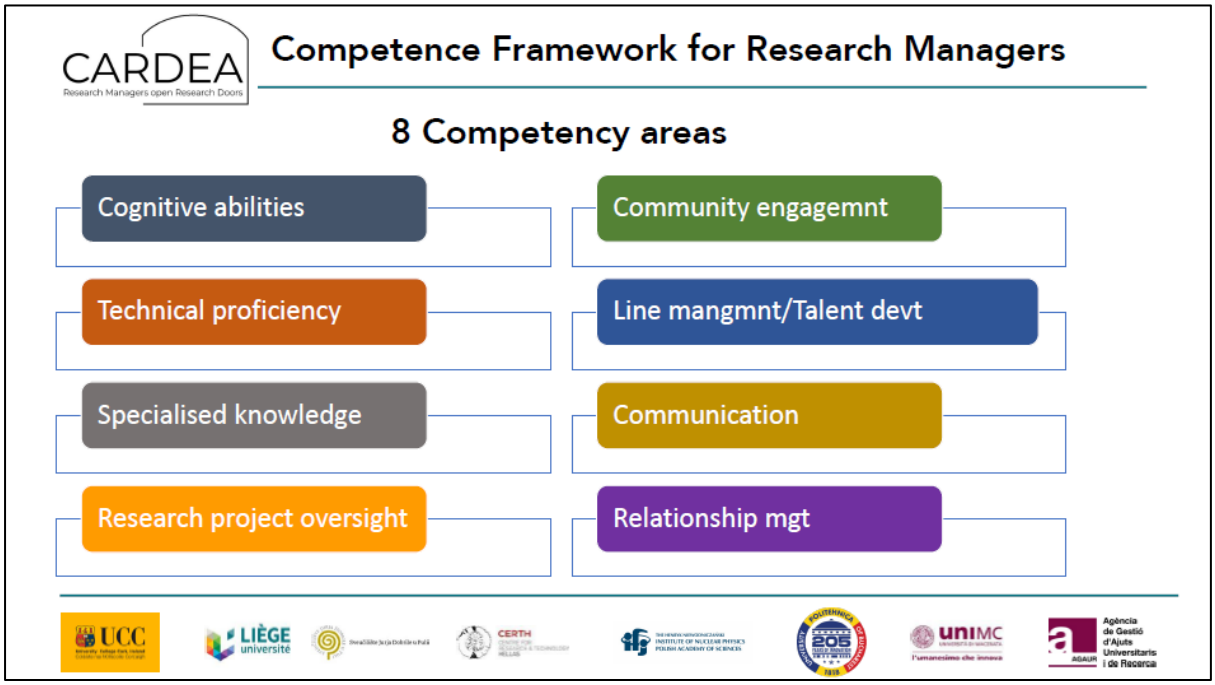

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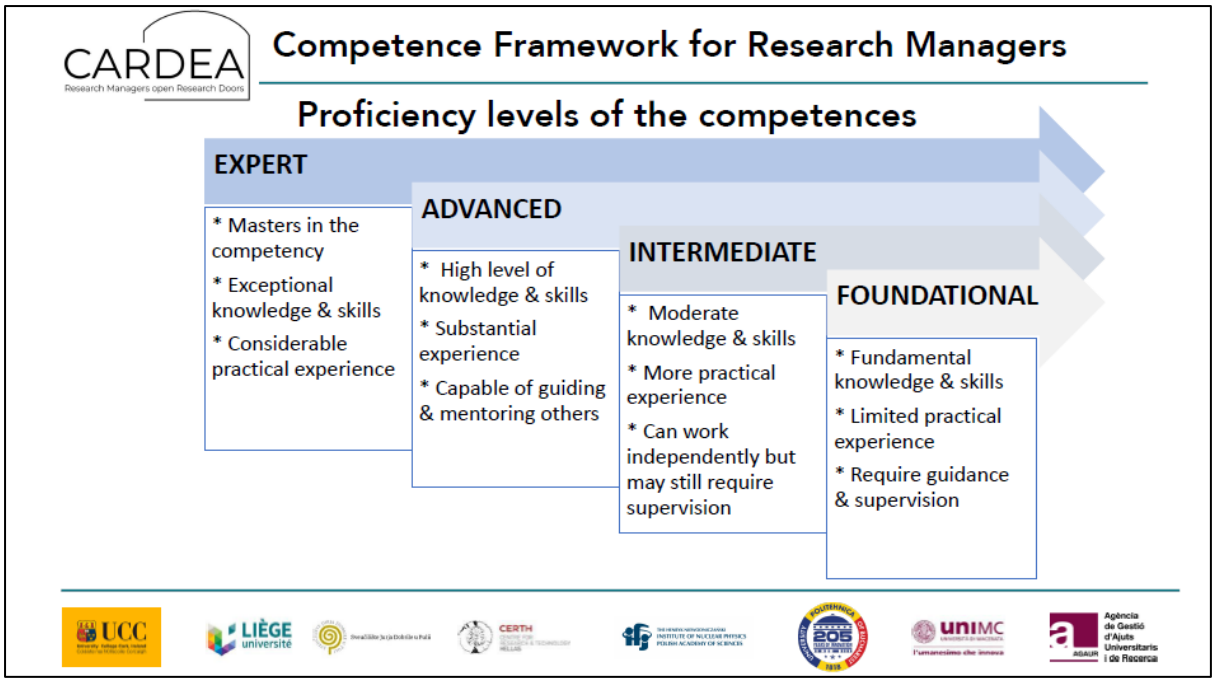

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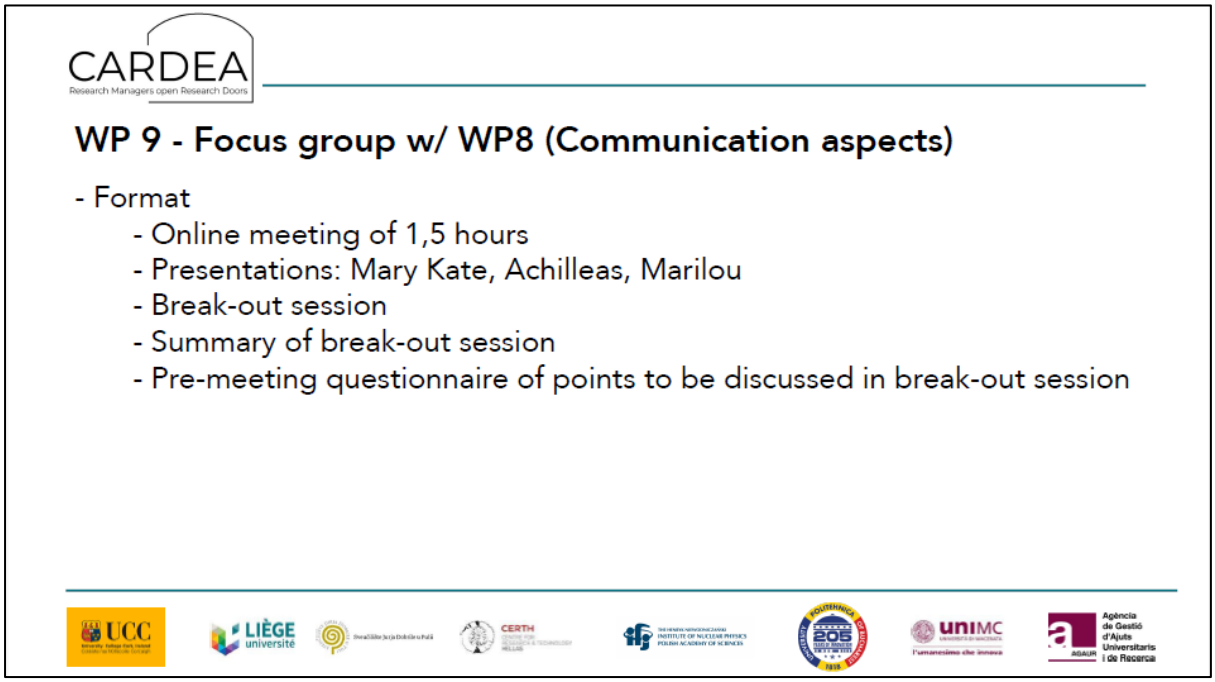

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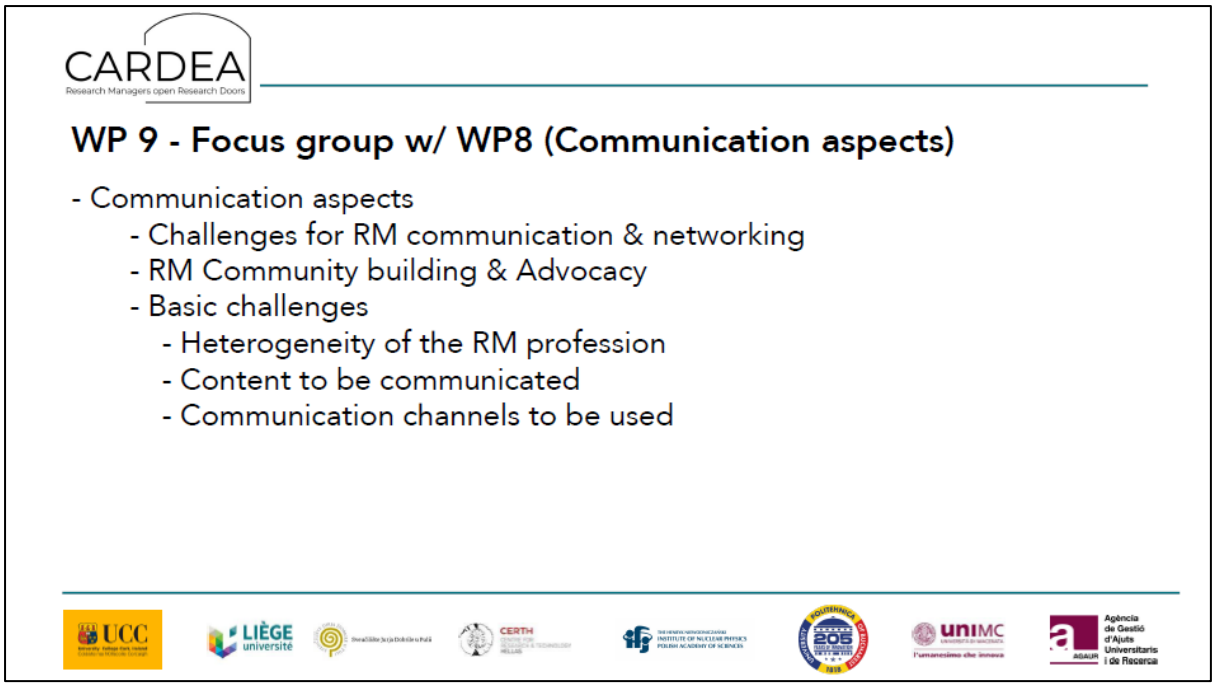

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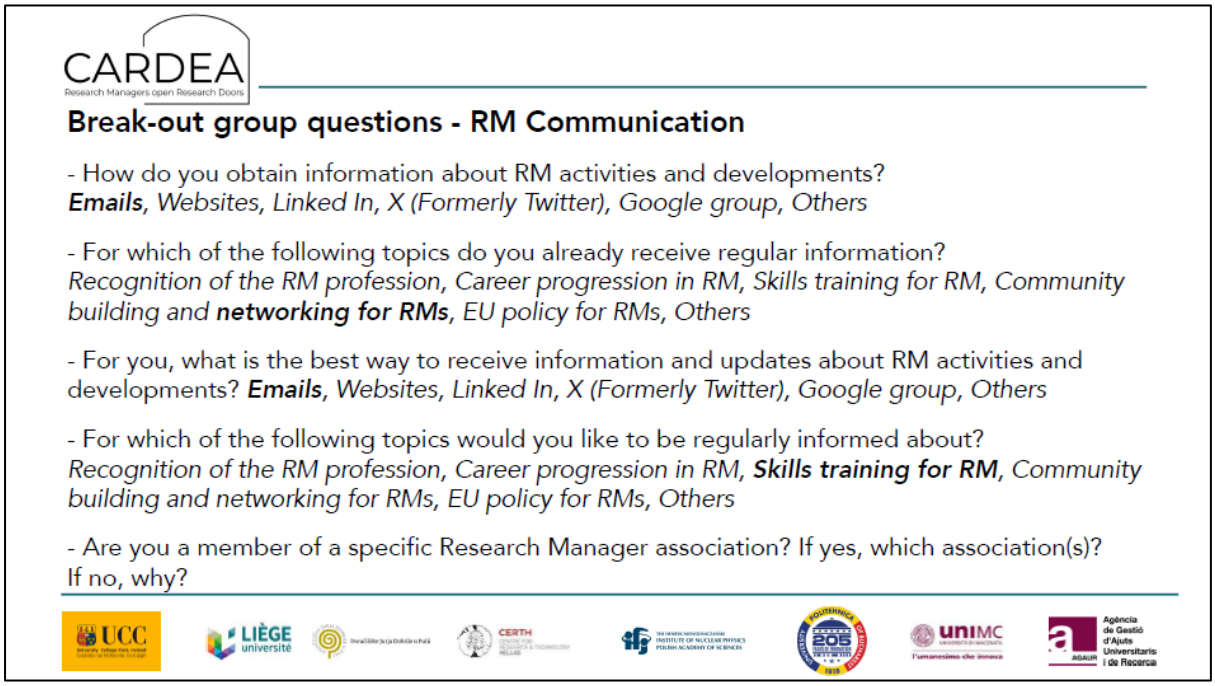

Slide 14:

Presentation 11: CROATIA RESEARCH MANAGERS Policy Overview

Presented by Jelena Ilić-Dreven
THE MINISTRY OF SCIENCE, EDUCATION AND YOUTH
Contact: Jelena.IlicDreven@mzo.hr

Slide 1:

Slide 2:

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Croatia's science policy overview

- New legislative framework.
- With the aim of strengthening Croatian science and raising our research and innovation capacity.
- One of key factors is the encouragement of our scientists to participate in competitive European calls.
- Key role of scientific managers that are the main support to scientists in their projects.

1) Act on Higher Education and Scientific Activity
2) Act on Quality Assurance in Higher Education and Science
3) Act on the Croatian Science Foundation

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Research managers in Croatia - overview

- The Croatian RM community is relatively small.
- Not recognised at the institutional or national level.
- They have many tasks that help to boost R&I activities.
- There is no formal education.
- Working on better support in the last couple of years.

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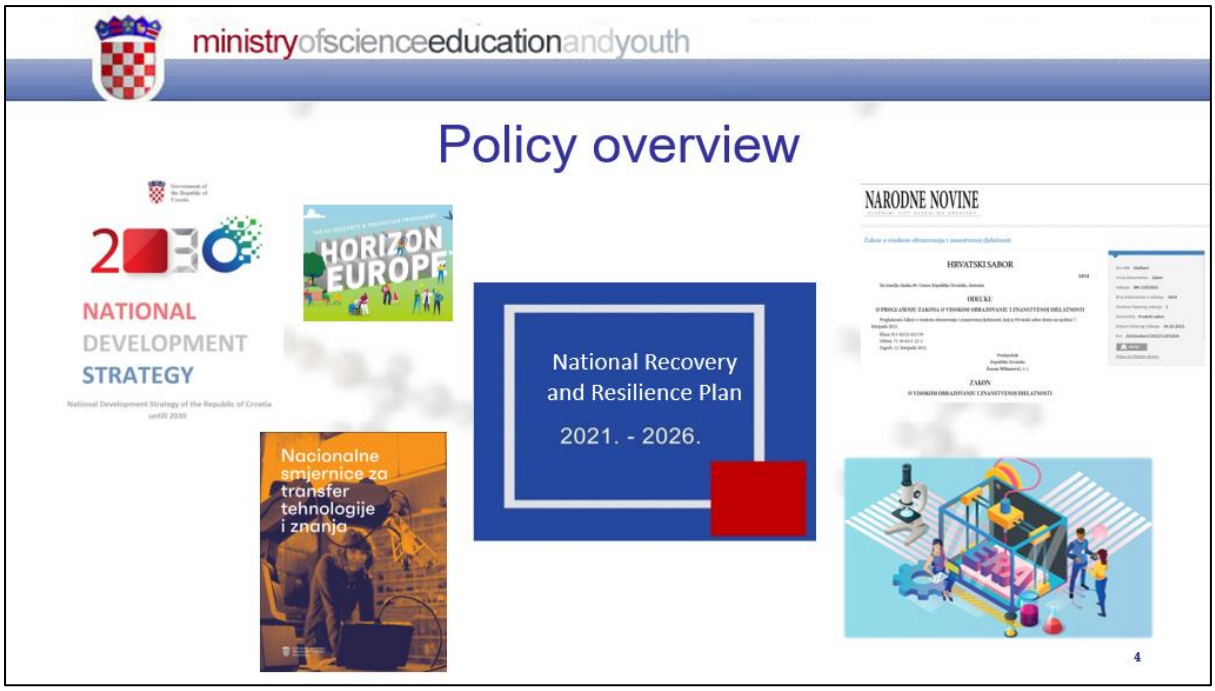

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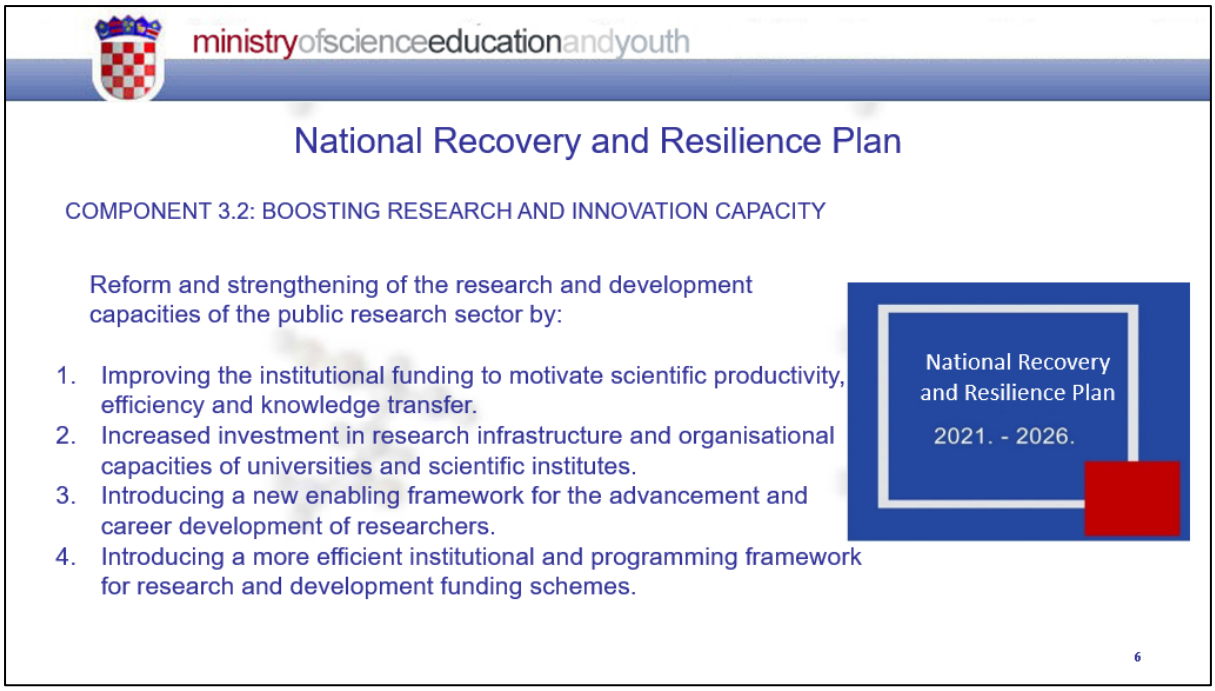

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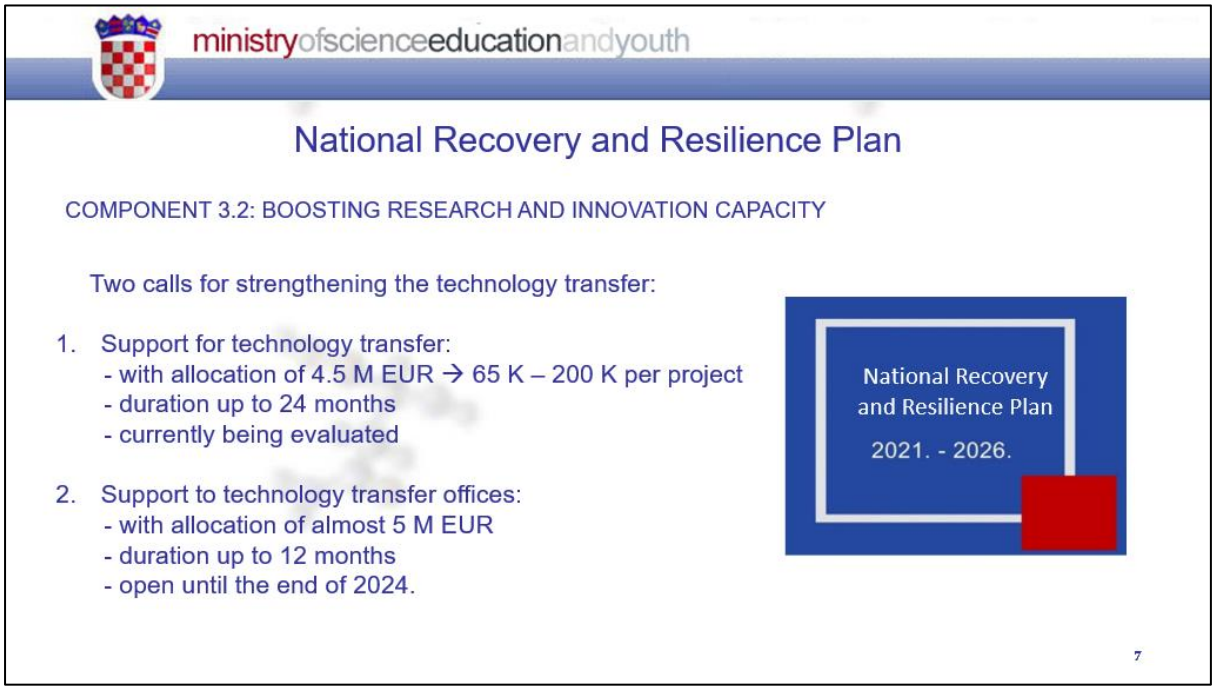

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Act on Scientific Activity and Higher Education

- One of basic principles for scientific activity is achieving the competitiveness of scientific projects.
- Scientific research based on:
  - research to innovate and develop technologies in the European Research Area
  - international quality standards
  - protection of intellectual property

NARODNE NOVINE

Zakon o visokom obrazovanju i znanstvenoj djelatnosti

HRVATSKI SABOR

1834

ODLUKU

O PROGLAŠENJU ZAKONA O VISOKOM OBRAZOVANJU I ZNANSTVENOJ DJELATNOSTI

ZAKON

O VISOKOM OBRAZOVANJU I ZNANSTVENOJ DJELATNOSTI

8

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Programme funding agreements

- They determine the total multi-annual financing of public research institutes and public higher education institutions from state budget funds.
- They enable institutions to independently manage their scientific activity in accordance with national strategic objectives and on the basis of results.
- 25 public research institutes signed the agreements in December 2023.
- The components of funding are:
  I. Basic
  II. Development
  III. Performance

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Programme funding agreements

I. Basic - the institution's needs arising from performing its core activities are financed (salaries, material operating costs, means for publishing…)

II. Development - institutions independently select ten or more specific goals and corresponding activities to achieve those goals over a four-year period.

Under the strategic objective 1, Enhancing Scientific Excellence, there is a specific objective "**Strengthening the human resources of research support staff**" → 10/25 institutes chose that objective.

It entails strengthening competences and recognising the role of research support staff for carrying out projects through continuous education, networking and establishing internal procedures in the preparation of project applications.

III. Performance – on the basis of the achievement of the objectives and indicators set out.

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Smart Specialization Strategy until 2029 (S3)

- The main purpose is to transform the Croatian economy in order to increase its competitiveness by concentrating knowledge resources and linking them to a limited number of priorities.
- Specific objective 1 is "Improving scientific excellence".
- Recognised that the transfer of technology and knowledge has not received sufficient support over the past years.

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National guidelines for knowledge and technology transfer

- The basis for the Guidelines has been prepared by an international expert team taking into account national regulations for technology and knowledge transfer and international best practices.
- They represent an important step towards defining and strengthening the position of technology transfer offices in the innovation system.
- They provide:
  - ✓ Recommendations and practical advice to technology transfer offices (TTOs).
  - ✓ A framework for the efficient use of the results of publicly funded research.

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Horizon Europe

- The Ministry is the mandated coordinating body for activities of all stakeholders of the national support system.
- NCPs are providing information and guidance on tenders, advice on procedures, rules and methods for project preparation, organising info days and workshops, pre-screening project proposals etc.
- National support system consists of:

AGENCIJA ZA MOBILNOST I PROGRAME EU HAMAG BICRO srce Sveučilište u Zagrebu Sveučilišni računski centar REPUBLIKA HRVATSKA Ministarstvo unutarnjih poslova HRZZ Hrvatska zaklada za znanost

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Measures for supporting national participation in EU programmes - research, innovation and space

- Since 2018 providing financial support.
- users of the support: ► researchers and
  ► administrative personnel

- Objectives: ► increase the number and the quality of project applications
  ► boost excellence
  ► strengthen human and operational capacities

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Measures for supporting national participation in EU programmes - research, innovation and space

Who can apply?

- Research organisations
- Foundations
- Civil society organisations
- SMEs
- Public organizations

What is Funded?

- Measure 1: Support for project submission
  – max financial support: **2.500,00** EUR for each activity
- Measure 2: Support for re-submission of project proposals which are deemed excellent, but not funded
  – max financial support 3.000,00 EUR (partner) to 6.000,00 EUR (coordinator) for each activity

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Annual Horizon Europe Conference
Development of a network of scientific managers

- First national conference for RM, held in 2023.
- For RM primarily from HE and scientific institutes, but open for everyone interested in the topic.
- Very well attended.

- The aim was to provide an overview of opportunities for strengthening the capacities of RM at national level and in Horizon Europe as well as sharing of experiences and good practices.

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Plan for fostering mobility of researchers 2024 - 2027

- Adopted in April.
- Aims to systematically encourage active mobility of researchers and to increase international, cross-sectoral and balanced mobility of researchers.
- Plan foresees the implementation of measures aimed at further developing support systems for the mobility of researchers and further fostering the development of researchers' careers.
- Support is also envisaged for the regular exchange of project office employees in charge of the implementation of international projects and related expert services.
  - ► This would enable the dissemination of good practices and facilitate the process of adopting best European practices and principles while adapting them to Croatian specificities.

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European Research Area Policy Agenda

ERA ACTION 17: Enhance the strategic capacity of Europe's public research performing organisations.

- Aims to improve training and skills development of science management staff.

Science management can take many shapes: research policy advisers, research managers, financial support staff, data stewards, data analysts, specialised research infrastructure operators, knowledge transfer officers or knowledge brokers, business developers, innovation managers, etc.

- Expected outcome is: Implementation of a Science management Initiative, with at least 100 participating institutions across Europe.

✓ The action intends to pilot a European network for research and innovation managers through Horizon Europe, explore European training and certification programmes, and provide policy support for Member States through mutual learning platforms.

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European Research Area Policy Agenda

ERA ACTION 17: Enhance the strategic capacity of Europe's public research performing organisations.

- R&I managers are still not recognised as a profession.
- Some specific functions such as experts for proposal writing, financial reporting and procurement experts and knowledge/technology transfer officers are gradually (and mostly informally) gaining prominence.
- Research infrastructure projects financed through ESI Funds are obliged to include organisational reform of the host organisation.
- the Research Infrastructures Roadmap of the Republic of Croatia 2023-2027 involves a long-term plan to improve the quality and build capacity of RI in Croatia.

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Thank you!
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