

## Project Deliverable Information Sheet

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## Document Control Sheet

<b>Document</b>	<b>Title: Report on RI managerial trainings</b>
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	Approved: ACCELERATE Steering Committee

## Rationale and Background

Research Infrastructures are considered one of the success stories of the European Research Area (ERA), and have transformed the way science is done as they facilitate access to large-scale facilities to perform excellent and ground-breaking research. Moreover, Research Infrastructures support in building bridges and linking communities across different regions, in Europe as well as globally, through scientific research and collaborations.

With the adoption of the ERIC (European Research Infrastructure Consortium) regulation in 2009, a new type of Research Infrastructures (RI) Consortia started being established and implemented in the European Research Area (ERA). The novelty of this type of consortia, the ERICs', posed new challenges for the managers leading them. Many implementation aspects of the ERICs have not been completely sorted out so far, thus hindering a smooth operation. For these reasons, CERIC-ERIC proposed to address, with the support of ACCELERATE partners, some of the main obstacles that need to be tackled to guarantee the success and allow an effective operation of ERICs.

Just to mention an example, the VAT and Excise duty exemption is a strong advantage for an ERIC but the implementation on a daily basis is fairly hard, not completely clear and time consuming. The level of complexity grows when different cases of the ERICs are taken into account like distributed or single site ERICs, newly build or ERICs implemented based on already existing facilities.

In-kind contributions (IKC) are a very efficient tool to pool national resources, representing in some ERICs by large the main contribution, orders of magnitude higher than the cash contributions. This is the case of some ACCELERATE partners such as CERIC, ELI or the European Spallation Source ERIC (ESS ERIC), while other ERICs mainly rely on financial contributions. Also in this case, several aspects need to be better defined and best practices shared, on VAT exemption on IKC, evaluation, reporting and auditing.

Another important managerial aspect to consider in ERICs are the HR policies and international mobility. The ERIC regulation does not include any provision for Human Resources, that are then subject to the national laws. Since many ERICs have a European dimension, in many cases the personnel is working in different countries, not only where the seat is located, raising a series of issues related to social security, taxation, benefits and others.

The relevance of a potential ERIC is assessed by the EC through the ERIC committee, when granting the ERIC status to a research infrastructure. However, ERICs have a broad range of impacts that risk on being overlooked. The evaluation of ERICs and their impact assessment need to be tuned to be fully representative of the benefits of these consortia for all stakeholders.

Finally, ERIC managers need to meet the various expectations of stakeholders, ensuring the facility can remain operative, effective and competitive over its expected lifetime. The approach towards sustainability planning varies according to the objectives, domain and development stages of a Research Infrastructure.

To fully profit from the possibilities that this legal form provides to the RIs that have decided to adopt it, within ACCELERATE we organised a series of five managerial training workshops, usually

in collaboration with other ERICs, to tackle open issues sharing experiences, best practices and increasing awareness of the European Commission and national authorities about their possible contribution. The programme of the events is enclosed as Annex 1.

## 1. Workshop on Human Resources issues in ERICs

### 1.1. General information about the workshop

The first workshop organised in the framework of task 1.4, **RI Human Capital Development** was the one on Human Resources issues in ERICs. It took place in Graz, Austria in November 17, 2017. It was co-organised with ELI DC and their H2O2O project ELI TRANS.

The training was initially expected to involve 12-15 participants, but the interest turned to be much wider than expected. Therefore, the training was organised as a satellite event of an ERIC Network meeting. As a result, there were 32 participants from 20 different organisations, out of which 13 were ERICs.

Website: <https://www.accelerate2020.eu/workshop-on-human-resources-in-erics-2/>

### 1.2. Content and objectives

The HR workshop was organized with the objective of bringing together ERICs' managers and administrative personnel in order to discuss common challenges and difficulties related to HR practices and processes, and therefore find the necessary solutions with the support of HR experts.

Looking at the number of participants in our first workshop, the number of questions and vivid discussions, it is obvious that the topic of HR issues in the context of ERICs need to be addressed by policy makers and RI managers. ERICs are investing a considerable amount of resources to sort out issues related to the international mobility of staff, social security, taxation, etc. The training focused on some good practices, however it raised awareness on the need for further discussions between RI managers and policy makers.

The workshop was divided into 6 different sessions covering various topics, ranging from HR Management practices in some of the biggest ERICs (BBMRI and ESS), to mobility of personnel, international aspects of taxes, social security and labour law, pension schemes, the RESAVER pension fund, training of RI personnel with special focus on RIttrain, ERA policies for researchers, in addition to the different necessary skills and attractiveness of careers in ERICs.

The lectures from managers from the ERICs that presented their experience so far and best practices in HR management in this specific environment, were complemented by those of experienced consultants and external experts who gave their insights in the topic.

### 1.3. Post workshop feedback

After the workshop, a feedback questionnaire was delivered where participants have expressed their level of satisfaction with the choice of topics as well as the structure of the workshop.

Participants had a different level of experience in the topic, considering that the institutions they represented were at different levels of maturity or had a different depth of knowledge of ERICs.



While some of them had some years of experience operating as an ERIC, others had just started to operate as an ERIC, and some were still at the stage of applying for the ERIC status.

The workshop opened an excellent opportunity to learn from the more experienced ERICs and to discuss with the experts the solutions adopted and potentially feasible, but also to focus on the open issues that could serve as potential topics of similar future workshops.

Altogether, the workshop fulfilled the expectations of the organisers as well as of participants.

## 2. ERIC's implementation and VAT issues

### 2.1. General information



The 2<sup>nd</sup> managerial training workshop within task 1.4 was co-organised by CERIC, with the ACCELERATE partners ELI-DC and the European Spallation Source. The workshop dealt with a very important topic when it comes to the ERICs, the VAT issues.

The workshop was held at the premises of the European Commission in Brussels, on 7 June 2018. Altogether there were 35 participants. While there was a significant presence of ERICs and ERICs to be (participants coming from 10 ERICs and institutions applying for Step 1-2 to become ERICs) the workshop was also attended by Ministerial representatives from several countries. This shows the relevance of the topic not only for ERICs but also from the point of view of many other stakeholders and shareholders.

Webpage: <https://www.accelerate2020.eu/accelerate-workshop-on-erics-implementation-and-vat-issues/>

### 2.2. Content and objectives

ERICs have the right to be exempted from paying the VAT, unless otherwise specified in their statutes, but the implementation of this exemption is not straightforward. While it is clear from the ERIC regulation that the ERIC is exempted, the same is not clear for the members and Representing Entities. In addition, the local tax administrations are not familiar with ERICs, making it difficult for ERICs to benefit from the exemption.

The workshop aimed at gathering together different actors, from existing ERIC and future ERICs to the ministries, EC representatives and ERIC Committee members in order to share their views on the topics as well as to raise awareness and identify the bottlenecks in the implementation of the ERIC regulation when it comes to the VAT exemption.

The workshop was organised in 6 sessions, being the first an introduction to the topic and the last a final discussion. In addition, external experts have presented general aspects of the VAT exemption (implementation of the recognition of the ERICs having the most extensive legal personality and capacity), implementation of the tax exemptions and administrative and audit aspects. Analysing the legislation, the external experts gave their overview and contributed to constructive discussion. The practical experience of ESS ERIC has been presented as a case study of the day to day operation.

The choice of sessions and speakers allowed us to approach the topic from different points of view and to identify the main bottlenecks in the implementation, allowing to focus future actions.

### **2.3. Pre-workshop analysis of expectations and open issues**

In preparation for the workshop, a questionnaire was sent to the existing ERICs and to the ERIC committee members as well. From the questions related to the VAT exemption in ERICs we were able to understand the position of the parties in this specific topic as well as to focus the sessions better. It emerged that the approaches differ from country to country. In some countries the ERICs have to pay the VAT and afterwards hope that they can get it refunded, others have a very long VAT exemption procedure and so on. Another issue spotted is that being a relatively new type of entity, national tax agencies are not familiar with the ERIC legal form which make it harder to exploit this right for the ERICs.



After exposing and discussing the current practices and the obstacles in the implementation of the VAT exemption, we can conclude that this topic deserves more attention from policy makers, tax agencies and ERICs themselves in order to understand fully the given right and to exploit it in the best way possible.

### 3. In – kind contribution in the life of an ERIC

#### 3.1. General information



The managerial training **In-kind contribution in life of an ERIC** is the 3<sup>rd</sup> one organised in the task 1.4 Human Capital Development.

The workshop was organised with the support of ACCELERATE project partner TUM, and was held in their premises in Garching on December 5<sup>th</sup> 2019. It was attended by 37 participants altogether coming from 12 ERICs and 12 other type of institutions among which projects/organisations/initiatives that are in process of becoming an ERIC as well.

Webpage of the event: <https://www.accelerate2020.eu/in-kind-contributions-in-the-life-of-an-eric-2/>

#### 3.2. Content and objectives

The goal of the workshop was to increase the awareness among the existing and future ERICs about the emerging best practices and issues, as well as different practices when it comes to the in-kind contributions (IKC).



The contributions to the ERICs by the Member can be in cash and in-kind, as detailed in most ERIC Statutes. Members of ERICs choose to contribute in-kind, for different reasons.

Two main cases of in-kind contributions can be distinguished:

- a) contributions to the construction and operation of an RI by procuring and transferring goods and services and
- b) contribution to the implementation and operation of an RI by making available existing facilities, which may be improved “in-situ” within the contributing member during the ERIC operation.

Both cases include challenges which need to be addressed by exchanging experience and developing best practice approach and, if needed, further development of the ERIC Framework.

The workshop gathered managers, administrative staff and legal experts of ERICs as well as other institutions that have an interest in in-kind contributions either because of their participation in ERICs or to their contribution to ERICs.

The workshop was structured in 6 sessions, delivered by different ERICS and their partner institutions. The speakers provided an overview of different case studies describing their experiences and analysing different aspects of the IKC, such as how the VAT exemption affected the in-kind contribution provision, as well as the evaluation of the in-kind contribution values.



<https://www.accelerate2020.eu/workshop-on-human-resources-in-erics-2/>

### 3.3. Post workshop feedback

After the workshop, the participants evaluated the workshop as very good and meeting their expectations. The workshops gave a complete overview of all the relevant aspects of the IKC and experiences so far. It was once again exposed that meeting and sharing experiences and best practices is very useful for RI managers and needed, considering the complexity of the ERICs and their operation.

The workshop participants also concluded that since many ERICs rely on in-kind contributions for their operation, there is the need to develop further together the topic because there is a number of initiatives and organisations that are in the process of becoming an ERIC and considering the in-kind contributions as the most suitable model for their operation.

## 4. Workshop on Impact Assessment, Evaluation and Monitoring of Research Infrastructures

### 4.1. General information



The 4<sup>th</sup> managerial training workshop organised in task 1.4 was centred around Impact Assessment, Evaluation and Monitoring of Research Infrastructures. Due to the COVID-19 pandemic, it took place online on December 16<sup>th</sup> and 17<sup>th</sup>, 2020.

It was co-organised by CERIC together with the Rathenau Institute, European Spallation Source, and EFIS Centre, respectively representing the 3 co-organizing H2020 projects ACCELERATE, ERIC Forum and RI-PATHS. The event brought together more than 130 participants from over 65 different organizations, representing Research Infrastructures' (RI) communities (15 ERICs represented, 1 in step 1-2), policy makers, funding agencies and more, to discuss the topic from different perspectives.

### 4.2. Content and objectives

The event focused on 3 main areas: 1) scientific evaluation, 2) monitoring, and 3) socio-economic impact of research infrastructures.

To showcase the full picture of a scientific evaluation example, the ERIEC (European Research Infrastructure Evaluation Consortium) scientific evaluation methodology was presented through the ECRIN-ERIC experience, highlighting its process, timeline, efforts, results and usefulness.

Moreover, the event provided an overview on the ERIC Forum's survey and position paper on the development of Key Performance Indicators (KPIs) for RIs, grouping input from 32 European Research Infrastructures about their KPIs' status and motivation, as well as feedback on ESFRI KPIs. It was also an opportunity to get policy makers' updates on the topic, specifically referring to the ESFRI RI monitoring approach. These were important aspects to tackle considering that over

75% of the attendees monitor their performance with KPIs and consider them a useful tool for monitoring, however nearly 70% of them have difficulties in defining KPIs.

The session focusing on the socio-economic impact provided an overview on the societal impact protocol approach developed by the Rathenau Institute in the frame of the ACCELERATE project. The approach was a tool for project partners (CERIC, European Spallation Source, ELI, HZG and FRMII) to apply the methodology for their respective RIs/ERICs and therefore develop their social return report. During the workshop, each partner presented the results of this exercise and the main impact pathways and areas of their infrastructures identified throughout the assessment process.

In addition to the results, the presentation of the ACCELERATE and RI-PATHS' case studies included also an overview of the purpose of the assessment, the approach followed by the RI and the efforts in terms of person months needed for the completion of the societal impact report. The aim was to highlight to the audience the application of the protocols by RIs from different sectors, structures and objectives, showcasing the key learning points from the study of the impact and its added value.

For the event's attendees, over 80% of them define the main value of impact assessment in conveying the RI's impact to its stakeholders (such as its funders), and over 65% in its usefulness as a strategy tool to steer activities towards enhanced impact.

### **4.3. Post workshop feedback**

A set of polls were launched during the workshop to collect participants' feedback (both Research Infrastructures and Policy Makers) and facilitate the discussions. The Polls' results are available [here](#).

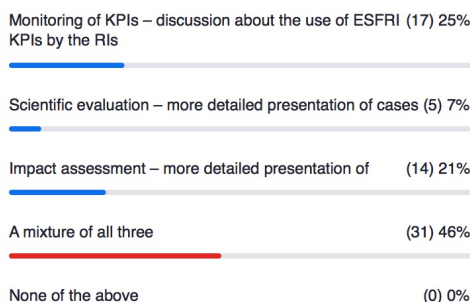
The extent to which the workshop satisfied the participants' expectations was also assessed, and it was also asked to indicate a preference for a follow-up. Most of the voting participants indicated that the discussion should proceed taking into account a mixture of the topics proposed in this workshop, that is monitoring of KPIs, Scientific evaluation and impact assessment.

# Workshop on Impact Assessment, Evaluation and Monitoring of Research Infrastructures

1. We hope you have enjoyed the workshop and find it useful. Please rate it between 1-5, 5 being excellent.



2. If a follow-up event is organized, I would be most interested in:



ACCELERATE, ERIC Forum, and RI-PATHS have received funding from the European Union's Horizon 2020 Research and Innovation Programme. The respective grant agreement numbers of the three projects are as follows: ACCELERATE – 731112, ERIC Forum – 823798, RI-PATHS – 777563.



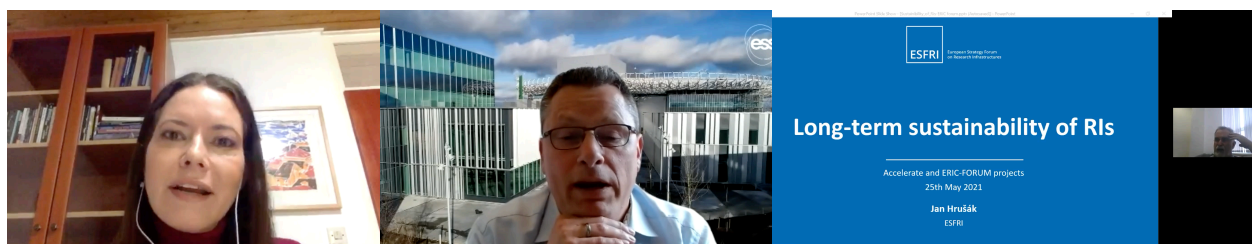
## 5. Planning for Sustainability of Research Infrastructures

### 5.1. General information

The 5<sup>th</sup> and last event related to task 1.4 was held online on the 25<sup>th</sup> of May 2021. This managerial training workshop focused on the instruments adopted by Research infrastructures' managers to plan for long-term sustainability of their facilities. The training was co-organised by the Horizon2020 projects [ACCELERATE](#) and the [ERIC Forum](#) Implementation Project.

The event brought together **158** participants from the Research Infrastructures/ERIC communities policy makers, funding agencies, NGOs and industry. Among the Participating Organizations are 16 ERICs and policy makers from 5 different ministries, the European commission and a research council

Webpage: <http://www.accelerate2020.eu/overview-%E2%96%BA-planning-for-sustainability-of-research-infrastructures/>





**Long-term sustainability of Research Infrastructures**

Where are we now?

**Dominik Sobczak**  
Deputy Head of Unit, DG R&I

Planning for sustainability of RIs, 25 May 2021

#ResearchImpactEU  
#EURResearchArea

European Commission



**SUPPORTING THE TRANSFORMATIVE IMPACT OF RESEARCH INFRASTRUCTURES ON EUROPEAN RESEARCH**

REPORT OF THE HIGH-LEVEL EXPERT GROUP TO ASSESS THE PROGRESS OF ESFRI AND OTHER WORLD CLASS RESEARCH INFRASTRUCTURES TOWARDS IMPLEMENTATION AND LONG-TERM SUSTAINABILITY

[https://ec.europa.eu/info/publications/supporting-transformative-impact-research-infrastructure-european-research\\_en](https://ec.europa.eu/info/publications/supporting-transformative-impact-research-infrastructure-european-research_en)

**HLEG: JELENA ANGELIS, FILIPA BORREGO, JOY DAVIDSON, ELENA HOFFERT, GIORGIO ROSSI\*, RICHARD WADE\*\***  
**EC: PATRICIA POSTIGO McLAUGHLIN**

\*CHAIR, \*\* RAPPOREUR

Supporting the Transformative Impact of Research Infrastructures on European Research

Report of the High-Level Expert Group to Assess the Progress of ESFRI and Other World Class Research Infrastructures Towards Implementation and Long-Term Sustainability

Independent Expert Report

ACCELERATE

ERIC FORUM

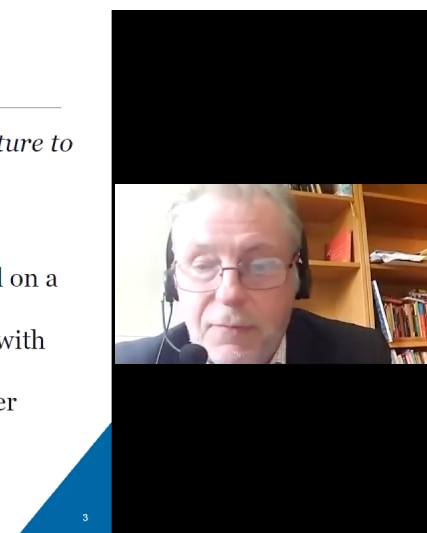
Virtual Event May 25<sup>th</sup> 2021



## Challenges

Sustainability understood as “*The capacity for a research infrastructure to remain operative and effective over its planned lifetime*”

- Maintaining a high level of competitiveness
- Managing data throughout the research infrastructure life time
- Setting up and securing funding with long-term commitment based on a solid business case
- Attracting and retaining leading scientists and qualified personnel with necessary skills and expertise
- Responding to more general strategic objectives of host and member countries, particularly for socio-economic returns.





## 5.2. Content and objective

Research Infrastructures are considered one of the success stories of the European Research Area (ERA), and have transformed the way science is done as they facilitate access to large-scale facilities to perform excellent and ground-breaking research. Moreover, Research Infrastructures support in building bridges and linking communities across different regions, in Europe as well as globally, through scientific research and collaborations.

The continuum of the value of Research Infrastructures, as innovation hubs and pillars of the science system, is based on their long-term sustainability, which represents a crucial, important and challenging aspect, not only for the infrastructure but also for policy makers and funders.

The approach towards sustainability planning varies according to the objectives, domain and development stages of a Research Infrastructure.

The training opened with an overview of the main findings from policy makers (from the European Commission, ESFRI, OECD and more) of their working groups on sustainability of RIs. Some of these outputs are the need to demonstrate the RIs socio economic impact (OECD), and the need to adapt existing business and sustainability planning instruments, to meet the varied expectations of different stakeholders.

In the 2<sup>nd</sup> session, the training exposed through four ERICs' case studies, the approaches adopted by CERIC, CLARIN, EPOS and Instruct, in planning for the medium to long-term sustainability of their research infrastructures according to the requirements of their stakeholders, phase of operation and specific environment.

In general, Research Infrastructures are supported throughout their construction and set-up phase. However, the ability for a Research Infrastructure to remain operative and effective over its planned lifetime relies also on several other relevant external factors. Among others, these factors include the policy horizons, with the renewed European Research Area (ERA) under construction, the European Research Framework programme "Horizon Europe", the new Cohesion policy, the ERIC instrument and the European Open Science Cloud (EOSC) initiative, among others. The concluding policy panel with high-level policy makers and shapers addressed the positions of the RIs in this wider European policy framework, largely under development, yet with strong relevance to sustainability planning of the RIs.

## **Annex 1**

### **Programmes of the five managerial training workshops**

## Workshop on Human Resources issues in ERICs

November 17<sup>th</sup>, 2017

MED Campus, Hörsaal 5, Neue Stiftingtalstrasse 6, 8010 Graz

### Programme

Time	Session title	Speaker
13:30 – 14:00	HR Management in BBMRI	Markus Pasterk (BBMRI-ERIC)
14:00 – 14:30	HR Management in ESS	Anna Hansson-Kalaris (European Spallation Source-ERIC)
14:30 – 15:15	Mobility of personnel in ERICs – international aspects of taxes, social security and labour law	Angelika Horzer (Deloitte Wirtschaftsprüfung Styria GmbH)
15:15 – 15:30	Coffee Break	
15:30 – 16:00	Mobility, pension schemes and an update on the RESAVER pension fund	Andrea Crivelli (Resaver/CERIC-ERIC)
16:00 – 16:30	Specific skills and attractiveness – Training	Andrea Crivelli (Resaver/CERIC-ERIC) Markus Pasterk (BBMRI-ERIC)
16:30 – 16:50	Introduction to ERA policies	Jana Kolar (CERIC-ERIC)
16:50 – 17:15	Wrap-up and closure of the workshop	Jana Kolar (CERIC-ERIC)

## **Workshop on ERICs' implementation and VAT issues**

**7 June 2018 – 10:00-16:30**

European Commission  
DG RTD – Directorate-General for Research and Innovation  
Square Frère Orban 8 –1000 Brussels – Belgium

The Workshop on ERICs' implementation and VAT issues will be held at the premises of the European Commission in Brussels, on 7 June 2018.

The workshop will focus on issues spanning ERIC Regulation's implementation, membership, rules and procedures applied by Representing Entities, tax exemption's implementation, HR, administrative and procurement issues, and audit aspects in different host Countries.

The event aims to gather internationally renowned experts in the field and representatives of Ministries, to share their experiences and issues they have encountered on the discussed topics, with the goal of facilitating the implementation of ERIC Regulation.

### **AGENDA**

- |             |   |
|-------------|---|
| 10.00-10.30 | Introduction to the workshop topics (C. Rizzuto)  |
| 10.30-11.30 | General aspects: implementation of the recognition of the ERICs having the most extensive legal personality and capacity (S. Carbone) |
| 11.30-12.00 | Coffee break  |
| 12.00-13.00 | Implementation of the tax exemptions (P. Centore)   |
| 13.00-13.30 | Lunch Break   |
| 13.30-14.30 | Implementation Aspects of Procurement and In-Kind Contributions (A. Weeks)  |
| 14.30-15.30 | Administrative and audit aspects (S. Carbone and A. Pinto)  |
| 15.30-16.00 | Coffee Break  |
| 16.00-16.30 | General discussion and indications for guidelines   |

# In-kind Contributions in the life of an ERIC

05 December 2019

TUM Entrepreneurship Research Institute (ERI),  
Research Campus Garching, Lichtenbergstraße 6, 85748 Garching. Groundfloor: lecture hall 1

## Program

8:30 – 9:00	Registration and Coffee	30'
9:00 – 9:20	<b>1. Welcome and Introduction</b> (Why IKC, what kind of IKC, outlines of the IKC in operation and construction, VAT, rationale). Speaker: <b>Carlo Rizzuto (CERIC-ERIC)</b>	20'
9:20 – 9:40	<b>2. Construction of a RI based on IKC</b> (Explaining the motivation, procedures and opportunities arising from deciding to use the IKC, best practices, open issues). 1 <sup>st</sup> Speaker: <b>Sara Cavallo (CTAO)</b>	1:10'
9:40 – 10:10	2 <sup>nd</sup> Speaker: <b>Mauro Zambelli (European Spallation Source ERIC)</b>	
10:10– 10:30	<b>Discussion</b>	
10:30 – 11:00	<b>Coffee break</b>	30'
11:00 - 11:30	<b>3. IKC to the implementation and operation of an RI/ERIC</b> (Based on the availability and use of equipment existing and planned to be improved “in-situ”.) Speaker: <b>Massimo Cocco (EPOS-ERIC)</b>	30'
11:30 – 11:50	<b>4. Providing the In-kind contributions to an ERIC</b> (View of an IKC provider, advantages, challenges and possible improvements) Speaker: <b>Jürgen Neuhaus (FRM II)</b>	20'
11:50 – 12:10	<b>5. Evaluation, Reporting and Auditing on IKC</b> (Methodology for evaluation, reporting, financial statements, auditing). Speaker: <b>Andrea Santelli (CERIC-ERIC)</b>	20'
12:10 – 12:20	<b>Discussion</b>	10'
12:20 – 12:40	<b>6. Conclusions</b> <b>Carlo Rizzuto (CERIC-ERIC)</b>	20'
12:45	Lunch	

# Workshop on Impact Assessment, Evaluation and Monitoring of Research Infrastructures



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**16-17 December 2020, Online**

## DAY 1: DECEMBER 16<sup>TH</sup>

09:00	<b>Opening of the plenary meeting</b> <ul style="list-style-type: none"> <li>- Jana Kolar, Project coordinator of ACCELERATE &gt;&gt;</li> <li>- Johannes Klumpers, Head of Unit, Research &amp; Industrial Infrastructures (RTD.G.3), <b>European Commission</b></li> </ul>	
09:20	<b>Scientific evaluation</b> <ul style="list-style-type: none"> <li>- Werner Kutsch, <b>ICOS</b></li> </ul> <b>European Research Infrastructure Evaluation Consortium (ERIEC)</b> <ul style="list-style-type: none"> <li>- Dany Vandromme, <b>HCÉRES</b> &gt;&gt;</li> <li>- Christine Kubiak, <b>ECRIN</b></li> </ul>	
09:50	<b>Monitoring of research infrastructures</b> <ul style="list-style-type: none"> <li>- Peter Wenzel-Constable, ESFRI RI monitoring approach – updates, <b>ESFRI</b></li> <li>- Ute Gunseheimer, Presentation of the KPIs survey of the ERIC Forum, <b>European Spallation Source</b> &gt;&gt;</li> </ul>	
10:10	<b>ACCELERATE project: Societal impact protocol approach</b> <ul style="list-style-type: none"> <li>- Leonie van Drooge, <b>Rathenau Instituut</b> &gt;&gt;</li> </ul>	
10:25	<b>RI-PATHS project: Modular Socio-economic impact framework</b> <ul style="list-style-type: none"> <li>- Elina Griniece, <b>EFIS Centre</b> &gt;&gt;</li> </ul>	
10:40	Break	
10:50	<b>Interactive parallel session 1</b> Moderated by Leonie van Drooge	<b>Interactive parallel session 2</b> Moderated by Alasdair Reid >>
	<b>Presentation of case studies</b> <ul style="list-style-type: none"> <li>- Case 1, ACCELERATE protocol: Jana Kolar, CERIC-ERIC &gt;&gt;</li> <li>- Case 2, ACCELERATE protocol: Florian Glikson, ELI-DC &gt;&gt;</li> <li>- Case 3, ACCELERATE protocol: Sira Cordon, ESS Bilbao &gt;&gt;</li> <li>- Case 4, RI-PATHS: Corinne Martin, Elixir</li> <li>- Case 5, Other: Evi-Carita Riikonen, ICOS</li> </ul>	<b>Presentation of case studies</b> <ul style="list-style-type: none"> <li>- Case 1, RI-PATHS: Irene Del Rosario, CERN &gt;&gt;</li> <li>- Case 2, RI-PATHS: Gaston Garcia, Alba &gt;&gt;</li> <li>- Case 3, Other: Rory Fitzgerald, European Social Survey &gt;&gt;</li> <li>- Case 4, ACCELERATE protocol: Jürgen Neuhaus, FRM II</li> <li>- Case 5, ACCELERATE protocol: Marc Thiry, HZG-GEMS &gt;&gt;</li> </ul>
	Discussion	Discussion
12:00	Break	
12:10	Plenary session: report on the main findings from parallel sessions and discussion	
12:45	End of the first day of the workshop	



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## DAY 2: DECEMBER 17<sup>TH</sup>

09:00	ACCELERATE project: practical session - Leonie van Drooge and Isabelle van Elzakker, Rathenau Instituut >>
	<b>Introduction of goal and agenda, and introduction of participants and workshop leaders</b>
09:15	<b>Part 1: The RI, its stakeholders and the expected societal impacts</b> <ul style="list-style-type: none"><li>- introduction by workshop leaders (plenary)</li><li>- participants inventory stakeholders and expectations regarding societal impacts (breakout)</li><li>- reporting and discussion (plenary)</li></ul>
10:00	Break
10:10	<b>Part 2: Pathways to societal impact</b> <ul style="list-style-type: none"><li>- introduction of impact pathways by workshop leaders (plenary)</li><li>- participants construct impact pathway narrative (breakout)</li><li>- reporting and discussion (plenary)</li></ul>
11:15	Break
11:25	<b>Part 3: Monitoring and evaluating societal impacts</b> <ul style="list-style-type: none"><li>- introduction by workshop leaders (plenary)</li><li>- participants enrich the narrative with quantitative and qualitative indicators (breakout)</li><li>- reporting and discussion (plenary)</li></ul>
12:15	Wrap up
12:30	End of meeting



ACCELERATE, ERIC Forum, and RI-PATHS have received funding from the European Union's Horizon 2020 Research and Innovation Programme. The respective grant agreement numbers of the three projects are as follows: **ACCELERATE – 731112**, **ERIC Forum - 823798**, **RI-PATHS - 777563**.

# Planning for Sustainability of Research Infrastructures

25 May 2021, Online



ACCELERATE and ERIC Forum have received funding from the European Union's Horizon 2020 Research and Innovation Programme. The respective grant agreement numbers of the two projects are as follows: ACCELERATE - 731112, ERIC Forum - 823798.



## Program

14:00	Welcome address: Jana Kolar, CERIC-ERIC
<b>1<sup>st</sup> Session: Sustainability of RIs</b>	
14:10	Jan Hrusak, Chair, ESFRI
14:25	Dominik Sobczak, Deputy Head of Unit, European Commission
14:40	Giorgio Rossi, Chair of the EC's High-Level Expert Group to Assess the Progress of ESFRI and Other World Class Research Infrastructures Towards Implementation and Long-Term Sustainability
14:55	Frederic Sgard, Science and Technology Policy Division, OECD
15:10	Ilaria Nardello, Elements of RI sustainability planning, ERIC Forum Project
15:25	Discussion
<b>2<sup>nd</sup> Session: RIs' Approaches to Sustainability Planning</b>	
15:30	Jana Kolar, CERIC-ERIC
15:40	Susan Daenke, INSTRUCT-ERIC
15:50	Franciska de Jong, CLARIN-ERIC
16:00	Massimo Cocco, EPOS-ERIC
16:10	Discussion
16:25	<b>Break</b>
<b>3<sup>rd</sup> Session: Policy Panel and Wrap-up</b>	
16:40	<b>RIs in the wider EU policy framework</b> Karina Angelieva, Adviser to the Minister of Education and Science, Bulgaria
	Tomaz Boh, Director General, Ministry of Higher Education, Science and Sport, SI
	Anna Panagopoulou, Director, DG Research and Innovation, European Commission
	Carlo Rizzuto, Chair of the EC's expert group on ERICs
	Maria Luisa Lavitrano, Appointed Director in the Board of Directors of EOSC Association
17:40	Wrap up by Francisco Colomer, ERIC Forum Chair
17:50	<b>End of Workshop</b>



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