



D5.2

ANNOTATIONS OF TRAINING SERIES ON RESEARCH MANAGEMENT SKILLS

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Abbreviations

CoARA – Coalition for Advancing Research Assessment
EDUC – European Digital UniverCity
EOSC – European Open Science Cloud
ERA – European Research Area
ERC – European Research Council
ESFRI – European Strategy Forum on Research Infrastructures
EU – European Union
GDPR – General Data Protection Regulation
IP – intellectual property
MSCA – Marie Skłodowska-Curie Actions
MUNI – Masaryk University
OpenAIRE – Open Access Infrastructure for Research in Europe
ORCID – Open Research and Contributor ID
PNU – Vasyl Stefanyk Precarpathian National University
R&I – research and innovation
R2 – Recognised Researcher
R3 – Established Researcher
ResearchComp –European Competence Framework for Researchers
RI – research infrastructure
RM – research management
RM Comp –European Competence Framework for Research Managers
RMA – research management and administration
UJI – Universitat Jaume I
UNICA – University of Cagliari
UNIVREN – University of Rennes
UP – University of Potsdam
UPECS – University of Pecs
UPN – Paris Nanterre University
USN – University of South-Eastern Norway
WP – work package

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1. Introduction

Research management has recently received increasing recognition as a self-standing profession. However, many elements of research management continue to be considered intrinsic to the researcher's role, as presented in the European Competence Framework (ResearchComp)¹ and are critical to improve researchers' own management practice as they progress in their career and take up responsibility for projects and staff. Already the first competence area refers to "Managing Research" – mobilizing resources, managing projects, understanding research evaluation or open access. But also the following competence areas involve management – "Making and Impact" through dissemination and knowledge transfer, "Working with Others" with team leadership or strategic networking, or "Managing Research Tools" including research data or intellectual property.

With the increasing professionalisation of research managers, it is also important for researchers to understand the role of research management professionals both for future collaboration and as a potential career path. Specialized research managers enhance the efficiency of R&I systems by taking specialized tasks, allowing researchers to focus on their core missions. Their work enhances policy alignment, impact and knowledge transfer, helps acquire and manage resources, facilitates governance and institutional development, ensures adherence to financial, ethical and legal requirements, and fosters interoperability and flexibility.

With the EDUC training programme in research management skills (hereinafter referred to as "EDUC RM Training"), we seek to empower researchers to efficiently collaborate with research managers in their institutional systems. The main target group of the training programme are R2 and R3 researchers – those, who are not yet in position to set up their research agenda independently, or those who have recently gotten into the position of research group and research project leaders. Efficient collaboration with research managers will accelerate their careers and ease their transition to leadership positions. Improved mutual understanding also enhances the performance of the organizations involved. As the program is carried out at the European level, it also fosters an appreciation of commonalities and promotes deeper integration.

During the preparatory stage of the EDUC RM Training, starting November 2024 and ending in July 2025, we have established a task force to develop a detailed programme and set up the format of the training. The task force met four times online to discuss topics and main parameters of the training modules. The resulting format involves nine modules, each with approximately one-hour duration.

The final task force meeting focused also on identification of EDUC universities with relevant experience and previous training programmes pertinent to the selected topics. We have chosen to build the EDUC RM Training using internal resources and knowledge of EDUC-WIDE, with lecturers and facilitators recruited mostly from staff of the EDUC universities. To promote networking of research management services across EDUC, we promoted content creation and delivery of individual modules through partnerships of involved universities. This is also a major opportunity to capitalize on previous activities and achievements of EDUC, particularly in EDUC-WIDE, where we can draw on the work of dedicated expert groups for the topics of Open Science (WP1/2), research assessment (WP3/4), and research infrastructures (WP7/8).

¹ European Union, 2022: ResearchComp: European Competence Framework for Researchers https://research-and-innovation.ec.europa.eu/system/files/2023-04/ec_rtd_research-competence-presentation.pdf

The EDUC RM Training will be organized as asynchronous learning experience making benefit of the Moodle e-learning infrastructure of EDUC. The core of each training module will be a video recording or a series of shorter videos, along with recommended literature for independent additional study. We will consider inclusion of skill assessment to issue EDUC certificates (informal).

2. Training structure

The EDUC RM Training will start with a module outlining the **definition and significance of research management** – what it comprises, why it is important. As such, this introduction will frame the following modules into the context of European competence framework for researchers, ResearchComp. We will also present the big picture of research management – how research policies are designed, how they are relevant to individual research, and how researchers can influence and benefit from research policies.

In the second module, we will focus on **research managers** – how they can support researchers in particular areas. The research management profession and community recently got a strong boost from the ERA Action Plan, but getting the message of projects such as RM Roadmap, CARDEA, or RM Framework to the level of individual researchers, making them aware of how they can benefit from efficient collaboration with research managers, is critical to the success of European high-level initiatives.

The third module will step back from the bigger picture and introduce the participants to elements of **leadership**, in the context of management skills needed to supervise an independent research group. For the target groups of EDUC RM Training – researchers close to becoming independent leaders – the first steps in assembling and running a research team, in supervising and mentoring diverse team members, are crucial. We aim to empower them to do this successfully.

The fourth module will explore several facets of **Open Science** – open access publishing, sharing of research data, digital profiles and identifiers, and key European infrastructures. Open Science is nowadays considered as an integral part of research design and research methodology. The EDUC RM Training will provide basic orientation in the broad range of tools and professional support available to facilitate implementation of Open Science approaches.

The fifth module will introduce the participants to the world of **research infrastructures** – how they support the research communities. From the institutional to global level, pooling of equipment, expertise, and digital resources to make them available for broader groups of researchers under transparent conditions is increasing efficiency of the R&I systems. Access to research infrastructures, actively promoted in EDUC through dedicated calls, is often an important booster to scale and increase the significance of research. The EDUC RM Training will empower researchers to identify and use the opportunities to access research infrastructures.

The sixth module will address the **pre-award** stage of funding acquisition – how to get oriented on funding landscapes, understanding of proposal evaluation processes, and how to prepare competitive funding proposals. The ability to acquire funding is critical in early career stages of researchers, and efficient collaboration with research managers specialized in supporting project development is key to enter the pathway to leadership in research.

The seventh module will focus on **post-award** management of research funding, presenting several project management approaches. As research activities are dominantly pursued as projects – achieving time-bound objectives, with given scope and resources – acquiring elementary project management skills is essential for researchers, typically already in earlier career stages than those that we target. In the EDUC RM Training, we will focus on the review of relevant project management techniques, and on the collaborative dimension of research projects, often requiring lateral leadership and close cooperation with administration.

The eighth module will delve into **technology transfer**. It is vital for researchers to understand the importance of promoting the impact of their research results beyond academia. EDUC RM Training will cover the key aspects to keep in mind when considering technology transfer strategies – collaboration with industry and other sectors, protection of intellectual property (IP), and ways of actual transfer of the IP.

The ninth and final module will present elements of **research assessment**, what are the motivations for evaluating research, and what effects assessment methods have down to the individual level. The research assessment practice has been challenged significantly in recent years, with initiatives such as CoARA promoting a major reform of how research, researchers and research organizations are being evaluated. Yet, the practical impact of the reform initiatives in institutional and national systems is uneven, and researchers need a broader understanding of both the traditional assessment methods and the recent developments to properly navigate the areas where evaluation takes place – individual career assessment, grants, articles, research groups and larger organizations.

3. Annotations of training modules

3.1 Research Management

Subtitle: What do I need to know about research management to do my research efficiently? Research management policies, research management opportunities, and associated skills.

Contributors: USN, MUNI

Outline: Managing research is a complex task, performed at individual, team, institutional, national and international level. A good number of skills and competences that researchers need to successfully pursue their careers actually revolve around management – that of projects, knowledge transfer, open science, research infrastructures and other aspects. This is well demonstrated in the ResearchComp, European Competence Framework for Researchers, which we will briefly outline in this module. The lecture will discuss what research management is and what competences researchers need to efficiently manage their research. We will then follow with introduction to governance and organization of research in national and European context, seeking to inspire researchers to contribute to the formulation of high-level strategies for R&I and helping them find their place within the top-level strategic frameworks through strategic networking. Strong attention will be given to interpretation of R&I programme development on European level, how European policies are translated into thematic calls of Horizon Europe.

Learning outcomes:

- Research management competences in ResearchComp
- Research policy frameworks on national and European level
- How to pursue strategic networking
- Understanding the programming process of Horizon Europe
- How to read strategic documents and use them to your advantage

3.2 Research Managers

Subtitle: Empowering your research: How Research Managers and Administrators can help.

Contributors: USN, MUNI, UNIVREN

Outline: The lecture will introduce the role of specialized Research Managers and Administrators (RMAs) in research systems and institutions. We will discuss typical activities in which you can seek the support of RMAs, and how research management is usually embedded in institutions. The organization of support can be very diverse, depending on the size and setup of a university. RMAs work from the central level down to the level of departments and research group, with different missions and responsibilities. Also, there are agendas where research support is organized on regional or national level, such as the work of National Contact Points for Horizon Europe or infrastructures for Open Science. We will explain what researchers should look for when seeking RMA support, and present good practice in interactions of researchers and research managers to illustrate how research can be aided by professional support. Finally, we will introduce recent developments in European Research Area that pave the way for more reliable and competent research support across Europe.

Learning outcomes:

- Definition of research management as a distinct profession
- Roles and responsibilities of research managers
- Structures of research support in institutions
- Current trends in research management in European Research Area

3.3 Leadership

Subtitle: You Can't Delegate Leadership: Managing Research Teams and Networks.

Contributors: PNU, UP

Outline: The first part of the module explores which aspects of research management cannot be delegated, such as team building, motivation, networking, and strategic leadership. Through the lens of modern leadership frameworks, including Ichak Adizes' model of managerial roles, participants will gain insights into leadership concepts, understand effective team dynamics, and acquire practical tools to build and sustain high-performing research teams and networks. Building on the first part, the second part of the module explores how personal values, perceptions of power, and a shared sense of purpose influence leadership effectiveness in research settings. While Ichak Adizes' model describes what kinds of roles effective leaders must balance, the second part on personal values determines how to fill these roles in practice. Participants will receive practical guidance on reflecting their own leadership identity and developing a vision for their teams. This part emphasizes self-awareness, strategic goal setting, and the ability to navigate interpersonal challenges.

Learning outcomes:

- Differentiate between a group, collective, and team in the research context
- Identify and analyze leadership types using Ichak Adizes' model
- Design and manage effective research teams, taking into account individual competencies, team roles, and dynamics
- Apply motivation tools suitable for academic environments
- Reflect on personal leadership values and develop an individual leadership identity
- Recognize the role of personal experiences with power in shaping leadership behavior
- Formulate a shared vision and direction for a research team

3.4 Open Science

Subtitle: How to openly share my results and data? Open science and scientific data.

Contributors: UNICA, UPECS, PNU, UJI

Outline: We will start our introduction to Open Science with a brief overview of copyright and illustration of the different open access publishing options available to researchers (preprints, self-archiving in disciplinary/institutional repositories, gold way and diamond publishing, Open Research Europe). Then, we will proceed with open sharing of research data, which is becoming a growing expectation. However, legal, ethical, and practical considerations may justify limiting or delaying such sharing. Researchers must carefully assess the constraints, risks, and responsibilities involved. We will outline the legal and ethical frameworks that govern data sharing. Regulations like the GDPR restrict the sharing of personal data, while intellectual property laws and institutional policies may impose further limitations. Disciplinary norms and research ethics also influence what responsible data sharing looks like, highlighting the need for context-sensitive decisions. We will outline how to choose suitable data repositories, with attention to sustainability, metadata practices, security, and access controls, and will outline European infrastructures available for this purpose, e.g. OpenAIRE and EOSC. We will also discuss risks of open sharing, including data misuse, misinterpretation, and the potential loss of publication priority. Participants will learn practical methods for safe and ethical data handling. We will explain how applying FAIR principles helps researchers maximize the impact of their data through credible, reusable outcomes. By integrating legal, ethical, and practical perspectives, researchers will be empowered to make informed, responsible decisions about sharing their research data, and thus to harness the benefits of Open Science while mitigating potential risks and disadvantages. Finally, a section on digital identity will provide an introduction to research profiles. This will allow participants to create their profiles in both ORCID and Google Scholar. In addition, other digital profiles such as Web of Science ResearchID or Scopus ID will be presented.

Learning outcomes:

- Understand the importance of open licences in the scientific publishing context
- Ability to use different tools for digital identification of researchers
- Identify key features that support open data sharing and compliance with FAIR principles.
- Identify legal, ethical, and disciplinary factors that may limit open and immediate data sharing
- Evaluate and select appropriate data repositories
- Assess the potential risks of open data sharing
- Apply appropriate strategies and tools to ethically and securely manage sensitive research data
- Understand the purpose and structure of OpenAIRE and EOSC in the research ecosystem

3.5 Research infrastructures

Subtitle: How to get access to cutting-edge facilities, data, and other resources across Europe?

Contributors: MUNI

Outline: Research Infrastructures (RI) are facilities that provide resources and services for research communities to conduct research and foster innovation. In the current world, they play an increasingly important role since science these days is based on expensive technologies or data sets. RIs are present in various scientific fields but take different forms and shapes. In Europe the large-scale infrastructures are concentrated in ESFRI projects and landmarks (ESFRI = European Strategic Forum on Research Infrastructures). The training is going to familiarise participants with what RIs are, examples from different scientific fields, the ecosystem of RIs that are there around the EU, as well as introduce new policy developments in the RI field.

Learning outcomes:

- What is it a research infrastructure
- Different types of infrastructures in various scientific fields, examples
- Local-Regional-National-European (ESFRI) RI ecosystem and what it stands for
- Usual pathways to access RIs
- New policy developments in the RI field on the EU level (Technology Infrastructures, EOSC – European Open Science Cloud, digital infrastructures)

3.6 Pre-award

Subtitle: Preparing winning research proposals for research career advancement.

Contributors: UP, USN, MUNI

Outline: Winning funding for research is an important driver for research careers at all stages. For independent principal investigators, it is a crucial skill. The lecture will present insights and tips along the pathway to funding. We will start with the identification of funding opportunities and the interpretation of calls for proposals. We will help participants to better understand the evaluation process, particularly under Horizon Europe programmes such as MSCA and ERC. Finally, we will provide tips and recommendations on writing style, structure and content. The lecture will prepare the participants to step into the mind of the evaluators, understand their challenges and prepare immersive and readable proposals.

Learning outcomes:

- Identifying funding opportunities
- Interpretation of the call documentation
- Understanding the evaluation process
- Understanding the difference between grant writing and academic writing
- Improving writing style and structure

3.7 Post-award

Subtitle: How to efficiently manage research projects? Post-award strategies and tools.

Contributors: UP

Outline: This video lecture introduces key principles of research project management in the post-award phase. Participants will learn how to design and implement research projects using classical, agile, or hybrid approaches, depending on the project context. The session covers core elements of project planning and effective collaboration between researchers and administrative staff. Practical tools and tips for structuring, monitoring, and adjusting projects in academic environments will be provided.

Learning outcomes:

- Distinguish between classical, agile, and hybrid project management approaches
- Select an appropriate project structure based on project size and complexity
- Apply core project design tools for planning and monitoring
- Manage research projects flexibly under changing conditions (agile mindset)
- Collaborate effectively with administrative stakeholders
- Use analogue and digital tools for efficient project communication and coordination

3.8 Technology transfer

Subtitle: How to make my results count beyond the academic community? Technology transfer and intersectoral collaboration.

Contributors: UPECS

Outline: The true value of research emerges when its results exceed publications and ignite real societal change. Technology transfer and intersectoral collaboration offer essential bridges between scientific discovery and the needs of industry, government, and society at large. Achieving this impact requires courage, openness, and strategic thinking. The lecture will support participants in asking new questions, defining shared goals, and seeking innovative pathways. We will empower researchers to be not only explorers but also bridge-builders, capable of transforming laboratory results into life-changing products, services, and solutions, through strong intersectoral partnerships, to enrich not only the academic community but also make a tangible difference in everyday lives. Learning experiences in the module will provide researchers not only with practical tools and inspiration for technology transfer and intersectoral collaboration, but also with a renewed mindset: seeing research not as an end, but as a starting point for broader social impact.

Learning outcomes:

- Understanding the importance of transferring research beyond academia to create social and economic impact
- Ability to identify stakeholders and find appropriate non-academic partners
- Recognizing key mechanisms of technology transfer (e.g., licensing, patents, spin-offs)
- Basic knowledge of intellectual property management and commercialization pathways

3.9 Research assessment

Subtitle: What is recognized and rewarded in research?

Contributors: MUNI

Outline: Assessment of different kinds accompanies the entire career of researchers and life at research organisations. Grant proposals, article reviewing, promotions, rewarding excellence, feedback for improvement, all of these (and many more) are a kind of evaluation. Assessment practices and whole regimes should be inclusive, responsible and fair, in reality may elsewhere suffer from evaluation gap, cause unwanted effects and undermine right-minded research motivations or be even unfair. Many scholars just accept these routines due to the low awareness and disciplinary traditions. To raise the awareness, this lecture will reveal the details and mysteries of research assessment and disentangle the consequences. We will talk about the mission of different evaluation levels, pros and cons of different methods and inform about recent developments and best practices.

Learning outcomes:

- Basic principles of research evaluation
- National and institutional assessment regimes
- Bibliometrics in research evaluation
- Responsible research assessment

4. Piloting

Video presentations for the outlined modules will be recorded during September to December 2025. The video recordings will be uploaded to Moodle e-learning infrastructure of EDUC, which is already in place and being used for staff training programmes resulting from Task 5.5 of EDUC 2 project.

From October to November 2025, registration of participants for the EDUC RM Training will be open. The programme will be announced via OpenUp and EDUC website and the communication channels of the participating institutions. The opportunity to register will also be promoted on the social media channels of EDUC.

Pilot run of the EDUC RM Training will be scheduled for the period from January to June 2026. Participants will be able to complete the modules in a self-paced mode. Each of the modules will end with a short quiz to assess the students' understanding of the topic.

After going through all the modules, participants will receive an informal certificate on successful completion of the training. The participants will also be asked to provide feedback on the training, including suggestions for improvement.

The feedback from participants will be used to design a final on-site workshop, preliminarily scheduled for December 2026 in Brno, Czechia. We will seek to address topics that have raised the most interest during the online training with targeted sessions. The primary target group invited to the on-site workshop will be graduates of the online training programme.

5. Conclusions

EDUC houses a vibrant community of researchers and research managers, which is becoming increasingly interconnected via the activities of EDUC-WIDE. These activities include Seed Projects, research infrastructure sharing, and expert groups in key transformational areas such as Open Science, research assessment, and career diversification. With the EDUC RM Training, we will empower researchers to fully benefit from the opportunities at hand, and to promote the emerging EDUC collaborations via efficient management of teams, open sharing of results and their translation to real-world impact, and successful acquisition of external funding.

We plan to open the EDUC RM Training programme recurrently after the end of the EDUC-WIDE project, as it will be integrated into the EDUC e-learning environment. Upgrades and updates will be considered based on the feedback received from participants. We are confident that research management training will be an asset in the skill set of early-stage researchers at EDUC universities, and that researchers and research managers of EDUC will be enabled to cooperate in a smoother way, delivering excellent results with outstanding impact.