

# ERIC Forum Implementation Project

## Draft Policy Report– 3

### Work Package 6 - Deliverable 6.6

Deliverable no	6.6
Deliverable Title	Draft Policy Report 3
Contractual delivery month	M39
Responsible Partner	ECRIN-ERIC
Author(s)	Golbahar Pahlavan (GP)

### Executive summary

The objective of WP6 is to address, jointly with the ERIC Forum (EF) and national, European and international science policymakers, funding agencies, and representatives of the research communities, policy issues raised by the development of science and technology and the impact of ERICs on the European research ecosystem and to develop productive synergies.

Within this framework, WP6 deliverables ensure the production of periodic science policy reports on identified topics of critical interest for ERICS, which are further discussed and validated during the EF Policy Seminars, and disseminated by the Forward Looking Task Force (FLTF). The objective of these Policy Reports is to better inform the relevant national and European policy and decision-making bodies of topics critical to the ERICs, helping to expand their impact and their contribution to an innovative and sustainable European Research Area. Upon finalization, the reports are disseminated by the FLTF and all EF members.

The selection process of the priorities for the ERIC Forum Seminars and Policy Reports has been proposed by the FLTF (described in Deliverable D6.1, see Reference 1). The first topic selected, “Funding models for access to ERIC multinational / transnational services”, was presented during the ERIC FORUM seminar in M21

(September 2020). The second policy report topic “Socio-economic impact (SEI) of ERICs” was selected in M19 (July 2020). The selection of topics was carried out following the consensual participative procedure described in Deliverable D6.1 (Reference 1).

Following WP4 and WP6 discussions, and a WP6-wide consultation and vote, it was agreed with EF coordination, to synergize SEI-related deliverables to avoid fragmentation and to achieve greater impact by better alignment within the ERIC Forum as well as outreach and the inclusion of WP4 external collaborators working on the same theme.

Subsequently the topic “Scaling-up research projects ERICS: Impact of Big Science on the Research Ecosystem” was selected following the same participative methodology, and presented during the EF Annual Meeting 2022 and finalized (see Reference 2).

This report summarizes all the actions taken to produce the third and final Policy Report on the SEI of ERICs due in 2022 including the EF Seminar on this same topic that took place on April 29<sup>th</sup> 2022.

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## Document log

Issue	Date (yyyy-mm-dd)	Comment	Author/partner
1	2022-05-31		Golbahar Pahlavan, ECRIN
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## Background

**Clarify the background behind the problem the deliverable is aiming to solve.**

As defined in Task 6.1, annual science policy reports are drafted and disseminated by the WP6 “Forward Looking Task Force” (FLTF). The topics covered in these Policy Reports are chosen collectively by FLTF members following an agreed methodology (see Reference 1 D6.1). The Policy Reports inform the preparation of the ERIC Forum Seminars, during which they are further discussed (Task 6.13 - 15) with all the ERIC Forum representatives and relevant stakeholders in view of their finalization and dissemination by the FLTF through selected national, European and international channels.

This document reports the preparation process of the final Policy Report on *SEI of ERICs* including the EF Policy Seminar that took place on April 29<sup>th</sup> 2022.

## Approaches (Methods)

**Describe the steps that have been undertaken for the deliverable.**

This report summarizes all the actions taken to produce the final EF Policy Report on the *SEI of ERICs*.

The first step towards this activity was to establish a collaboration with WP4 and to work together on Task 4.3. The activities in Task 4.3 are designed to support ERICs by contributing to develop an ERIC-specific framework for socio-economic impact (SEI) assessment. This is achieved by:

- Mapping and analysing of existing SEI systems within the ERIC network,
- Understanding the current developments for establishing a standardised international approach,
- Development of an ERIC-specific SEI framework.

The result of Task 4.3 is Deliverable D4.3: Report on SEI ERIC Framework. Moreover, Task 4.4 will also indirectly contribute to the development of the SEI ERIC Framework within Task 4.3 by systematically improving the policy-funding-research-dissemination continuum. The outcome of Task 4.4 will be Deliverable D4.4: “Report and proposal for a model sustainability plan for ERICs”.

Collaboration between WP4 and WP6 began in 2020 with the collaborative design of the WP4 4.3 Survey to better understand the SEI assessment practices of the ERIC Forum members. The table below summarizes all the TCs carried out at different levels to coordinate the activities leading to the organization of the EF Policy Seminar and drafting the Policy Report:

WP4/WP6	WP6	Coordination	EIRO Forum
11/09/2020			
30/09/2020			
29/10/2020 WP4/WP6	16/10/2020	23/10/2020 ExBo	
	3/11/2020 LIFEWATCH		
	18/12/2020 TC1 PB2		
	22/1/2021 TC2 PB2	26-27/1/2021 Annual Meeting	
1/3/2021 TC1 D4.3/D4.4	4/3/2021 TC3 PB2		
31/3/2021 TC2 D4.3/D4.4	15/4/2021 TC4 PB2		
3/5/2021 TC3 D4.3/D4.4	21/5/2021 TC5 PB2	7/5/2021 PMT	
27/5/2021 TC4 D4.3/D4.4	25/6/2021 TC6 PB2		

	08/10/2021 WT Leads		
	11/10/2021		
	18/10/2021 WT		
18/11/2021 D4.3/D4.4	TC5		
15/12/2021			
21/1/2022			
31/1/2022			
14/2/2022 ESFRI	24/2/2022		
	11/3/2022		
	17/3/2022		
	4/4/2022		
11/4/2022			
25/4/2022			

The second step was the organization of the Policy Seminar bringing together the ERIC Forum, the EIRO Forum and relevant national and European stakeholders including entities and/or projects addressing methodology options for RI SEI assessment. The Seminar objectives, agenda and speakers, were discussed and finalized following joint WP4, WP6 and EIRO Forum TCs.

The objectives of the ERIC Forum Policy Seminar were the following:

- Showcase the diversity of ERICs and their impact (both at an individual level as well as their contributions to tackling societal challenges through, for example: EU Missions, Green and Digital Transitions, ERA Agenda, Sustainable Development Goals (SDGs)).
- Present the findings from the ERIC Forum Survey on the SEI assessment practices of ERICs, followed by case studies of SEI assessment from the EIROForum and ERICs belonging to different clusters during different phases of their lifecycle,
- Engage with the relevant ERIC national and EU stakeholders as well as cross-sectoral user communities, taking into consideration their perspectives,
- Propose joint recommendations on how capturing the diversity, value and impact of ERICs can be supported.

The Seminar targeted audience included all ERICs and prep-ERICs, the EIRO Forum, all RIs, as well stakeholders such as national/regional/EU funding bodies and/or policy-making entity(s), users from Academia and Industry as well as relevant projects/entities working on RI SEI assessment methodologies.

In order to avoid any potential disruptions due to COVID-19, the proposed format was online in 4 blocks with each session lasting a maximum of 1h30 over one morning. Prior registration was required with invitations sent to each single registration form.

Each block was chaired by ERIC representatives' as chair(s) and rapporteur. The WP6 lead prepared beforehand the discussion questions with all the panellists (Appendix C: Brief for Speakers). During the Seminar, the rapporteurs monitored the chat and provided the session chairs with the questions raised for the panelists.

## Results

The ERIC Forum Policy Seminar took place virtually on April 29<sup>th</sup> 2022. It brought together more than 90 participants (Appendix D) from Research Infrastructures and ERICs, with their national, regional and European stakeholders and collaborators, including funding and policy-making bodies as well as relevant projects and entities working on RI SEI assessment methodologies.

The Seminar underscored the rich landscape and the diversity of European RIs and raised many key points including the challenges regarding the design, the timing and M&E of SEI assessment. The proceedings of this Policy Seminar will serve as the basis for the third ERIC Forum Policy Report on the Socio-Economic Impact of ERICs.

The Seminar recording and presentations are available on the ERIC Forum portal:

<https://www.eric-forum.eu/2022/05/04/overview-eric-forum-policy-seminar-socio-economic-impact-of-erics/>

### ► EVENT PRESENTATIONS

#### ERICs and Socio-Economic Impact (SEI) Assessment:

- EIRO forum /EMBL Case Study, Jessica Vamathevan (EMBL): [here](#)
- ERIC Forum Survey findings on SEI evaluation practices by ERICs: Evi-Carita Riikonen (ICOS ERIC): [here](#)
- **Case Studies from the ERIC Forum:**
  - Jimmy Andersen (European Spallation Source ERIC): [here](#)
  - Ornella de Giacomo (CERIC-ERIC): [here](#)
  - Lorna Ryan (European Social Survey ERIC), Franciska de Jong (CLARIN-ERIC): [here](#)

#### Stakeholders perspectives from different constituencies:

- Michela Vellico (European Commission, DG RTD): [here](#)
- Nad'a Witzanovya (ELI ERIC): [here](#)
- Chris Hartley (CERN/ EIROforum): [here](#)
- Antje Keppler (Euro-Biolmaging ERIC): [here](#)
- Frédéric Sgard (OECD): [here](#)
- Elisabetta Marafioti (University of Milano–Bicocca; EMMRI): [here](#)

If delivery is late, enter here the explanation.

This deliverable due in M39 is submitted in M41 following the Policy Seminar held in M40.

## Discussion and Conclusions

Discuss and conclude your results.

The revised timelines for the EF Policy Report on the *SEI of ERICs* allowed the alignment of the activities with WP4 as well as the collaboration with the EIROForum. This alignment, with the generous and knowledgeable input, insight and experience of external key stakeholders, has enhanced already the content following the discussions during the EF Seminar and shall continue to do so for the final report. We thank the PO for having made this possible in order to produce a report that will contribute productively to the development and support of SEI assessment for RIs taking into account their diversity.

## Next Steps

Include the future work to be undertaken and recommendations.

The proceedings of this Policy Seminar will serve as the basis for the third and final ERIC Forum Policy Report on the Socio-Economic Impact of ERICs due in June 2022 (M42).

Considering the timelines to date for the preparation of the EF Policy Reports, given their participative nature since inception until completion, this type of bottom-up activity should benefit from more dedicated resources for the participating entities in order to lighten the workload for the WP coordinator and delivery within shorter timelines.

We foresee at this stage a slight delay on the submission deadline for the final Policy Report D6.9 and hereby take the opportunity to request an extension until D46.

## References

1. ERIC Forum Deliverables 6.1 and 6.2: Definition of priorities for the next ERIC Forum Seminar and Policy Report 1 & 2
2. ERIC Forum Deliverables 6.5 and 6.8: Policy Report 2

## Appendix

- A. Agenda EF Policy Seminar on the SEI of ERICs
- B. List of Speakers
- C. Brief for Speakers
- D. Participating entities



# ERIC Forum Policy Seminar ‘Socio-Economic Impact of ERICs’

29 April 2022 | Online

## AGENDA

Welcome & Introduction		09:00 – 09:15 CEST
<b>Welcome</b>		
- <i>Jacques Demotes, Director (ECRIN-ERIC)</i>		
<b>Capturing the value of ERICs</b>		
- <i>Francisco Colomer, ERIC Forum Chair, Director (JIVE-ERIC)</i>		
<b>Seminar rationale and agenda</b>		
- <i>Jimmy Andersen, Head of Innovation and Industry (European Spallation Source ERIC)</i>		

BLOCK 1	Setting the Scene	09:15 – 10:30 CEST
<b>ERICs and Socio-Economic Impact (SEI) Assessment</b>		
- <b>Chair:</b> <i>Jacques Demotes, Director (ECRIN-ERIC)</i>		
- <b>Rapporteur:</b> <i>Golbahar Pahlavan, Head Research Infrastructure Development (ECRIN-ERIC)</i>		
<b>EIROforum /EMBL Case Study</b>		
- <i>Jessica Vamathevan, Head of Strategy (EMBL)</i>		
<b>ERIC Forum Survey findings on SEI evaluation practices by ERICs</b>		
- <i>Evi-Carita Riikonen, Operations Officer (ICOS ERIC)</i>		
<b>Case Studies from the ERIC Forum</b>		
- <i>Jimmy Andersen, Head of Innovation and Industry (European Spallation Source ERIC)</i>		
- <i>Anne-Charlotte Fauvel, Head European Affairs (EATRIS-ERIC)</i>		
- <i>Ornela de Giacomo, Deputy Director (CERIC-ERIC)</i>		
- <i>Lorna Ryan, Research Manager (ESS-ERIC)</i>		
<b>Wrap-up and Conclusions</b>		
<b>BREAK 10:30 – 10:40</b>		

BLOCK 2	Stakeholders' perspectives	10:40 – 11:40 CEST
<p><b>PANEL DISCUSSION - Stakeholders perspectives from different constituencies:</b></p> <p>To better understand how current SEI evaluation practices and methodologies capture the Research Infrastructure (RI) value proposition across the value chain from users to funders, How best to support the SEI assessment process during the RI lifecycle.</p> <ul style="list-style-type: none"> <li>- <b>Chair:</b> Jimmy Andersen, Head of Innovation and Industry (European Spallation Source ERIC)</li> <li>- <b>Rapporteur:</b> Jana Pavlic-Zupanc, Head of Public Affairs (BBMRI-ERIC)</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>- Agnès Robin, Head of Sector, Research &amp; Technology Infrastructure's Policy, and Michela Vellico, Policy Officer (DG RTD European Commission)</li> <li>- Nad'a Witzanovya, Senior officer for International Affairs (ELI ERIC)</li> <li>- Jana Kolar, Chair (ESFRI)</li> <li>- Chris Hartley, Head Department of Industry, Procurement and Knowledge Transfer (CERN/EIROFORUM)</li> <li>- Antje Keppler, Director Bio-Hub (Euro-BioImaging ERIC)</li> <li>- Elina Griniece, Principal Researcher (EFIS Centre; RI-PATHS Project)</li> <li>- Frédéric Sgard, Project Administrator (OECD)</li> <li>- Elisabetta Marafioti, Professor of Management (University of Milano–Bicocca; EMMRI)</li> </ul> <p><b>Discussion and wrap-up</b></p>		
<p><b>BREAK 11:40 – 11:50</b></p>		

BLOCK 3	Panel Discussion	11:50 – 12:50 CEST
<p><b>PART 1. Gaps and Challenges in SEI Assessment: How capturing the diversity, value and impact of ERICs can be best supported?</b></p> <ul style="list-style-type: none"> <li>- <b>Chair:</b> Evi-Carita Riikonen, Operations Officer (ICOS ERIC)</li> <li>- <b>Rapporteur:</b> Golbahar Pahlavan, Head Research Infrastructure Development (ECRIN-ERIC)</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>- Blocks 1, 2 &amp; 3 speakers and panelists</li> </ul> <p><b>PART 2. Globalisation success stories: Global BioImaging, Global VLBI Alliance (SKA/IVIA/NDICI-Africa)</b></p> <ul style="list-style-type: none"> <li>- <b>Chair:</b> Inmaculada Figueroa, Spanish Ministry of Science &amp; ESFRI</li> </ul> <p><b>Panelists:</b></p> <ul style="list-style-type: none"> <li>- Antje Keppler, Director Bio-Hub (Euro-BioImaging ERIC)</li> <li>- Francisco Colomer, ERIC Forum Chair, Director (JIVE-ERIC)</li> </ul>		

- *Juan-Miguel González Aranda, Chief Technology Officer (LifeWatch ERIC)*

BLOCK 4

**Conclusions and Next Steps**

12:50 – 13:00 CEST

**Conclusions and next steps**

- *Francisco Colomer, ERIC Forum Chair, Director (JIVE-ERIC)*
- *Jacques Demotes, Director (ECRIN-ERIC)*
- *Golbahar Pahlavan, Head Research Infrastructure Development (ECRIN-ERIC)*



# ERIC Forum Policy Seminar 'Socio-Economic Impact of ERICs'

29 April (09:00 - 13:00) | Online

## SPEAKERS' OVERVIEW

- **Anne-Charlotte Fauvel**, Head of European Affairs (EATRIS-ERIC)
- **Antje Keppler**, Director Bio-Hub (Euro-Biolmaging ERIC)
- **Elina Griniece**, Principal Researcher (EFIS Centre)
- **Elisabetta Marafioti**, Professor of Management (University of Milano–Bicocca; EMMRI)
- **Evi-Carita Riikonen**, Operations Officer (ICOS ERIC)
- **[Frédéric Sgard](#)**, Project Administrator (OECD)
- **Francisco (Paco) Colomer**, ERIC Forum Chair, Director (JIVE-ERIC)
- **Inmaculada Figueroa**, Spanish Ministry of Science and ESFRI
- **Jacques Demotes**, Director (ECRIN-ERIC)
- **Jana Kolar**, Chair (ESFRI), Executive Director (CERIC-ERIC)
- **Jessica Vamathevan**, Head of Strategy (EMBL)
- **Jimmy Andersen**, Head of Innovation and Industry (European Spallation Source ERIC)
- **Juan Miguel González-Aranda**, Chief Technology Officer (LifeWatch ERIC)
- **Lorna Ryan**, Research Manager (ESS-ERIC)
- **Michela Vellico**, Policy Officer (DG RTD, European Commission)
- **Naděžda Witzanyová**, Senior officer for International Affairs (ELI ERIC).
- **Ornela de Giacomo**, Deputy Director (CERIC-ERIC)



# ERIC Forum Policy Seminar 'Socio-Economic Impact of ERICs'

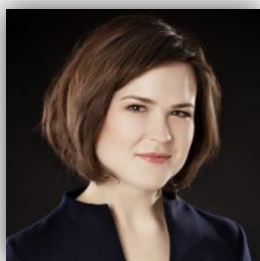
29 April (09:00 - 13:00) | Online



**Anne-Charlotte Fauvel** is Head of European Affairs for the European Research Infrastructure for Translational Medicine (EATRIS) based in Amsterdam. She is in charge of EATRIS' advocacy and partnerships strategy and manages the organisation's portfolio of EU-funded projects (IMI, H2020, Erasmus Plus). Prior to joining EATRIS, she worked as EU funding expert and Head of International Relations for a non-profit organisation based in France. She also represented France in the strategic committees of a cross-border cooperation programme. She obtained a Double Masters in European Affairs and International Relations from Sciences Po Lille (France) and Aston University (United Kingdom) in 2011.



**Antje Keppler** is Director of the Euro-Biolmaging ERIC Bio-Hub at the European Molecular Biology Laboratory (EMBL) in Heidelberg. She leads an international team to coordinate and operate the Euro-Biolmaging services for biological imaging. She studied biochemistry and conducted her PhD in chemical biology and imaging applications at the EPFL in Lausanne. Since 2009 she has been working for Euro-Biolmaging, starting as manager of the preparatory phase. Antje also is coordinator of the international Global Biolmaging network, which promotes open science and open access to imaging research infrastructure services.



**Elina Griniece** has been working on the topic of socio-economic impact assessment of research infrastructures since 2012 developing methodological guidance materials and providing technical assistance to research infrastructure construction projects. From 2018-2020, Elina was the project manager of H2020 RI-PATHS that aimed to provide RI funders and managers the tools to assess RI impact on the economy and contribution to society. She has been driving the development of participatory approach to charting impact pathways of investment in research infrastructures. The project outcomes contributed to more common approach in scoping and understanding RI impact at international level. Elina continues to collaborate and support individual research infrastructures to help operationalise the developed impact pathway approach.

Currently she is leading a technical assistance project to ELIXIR to help training staff members and embedding impact assessment across the national nodes of the infrastructure. She is also engaged in similar type of support services for EATRIS ERIC, ELI ERIC and previously also for ESO.



# ERIC Forum Policy Seminar 'Socio-Economic Impact of ERICs'

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**Elisabetta Marafioti** is Professor of Management at the University of Milano-Bicocca (Italy). She holds a Ph.D. in Strategic Management and a Degree in Business Administration from Bocconi University. She teaches Strategic Management, International Management, Innovation Management and Management and Social Entrepreneurship both at undergraduate, graduate, master (also including EMMRI – Executive Master in Management of Research Infrastructure) and executive level. She is President of the MsC in Management and Service Design and Director of the Master in Management and Digital Transformation at the University of Milano-Bicocca. Her research focuses on digital transformation, sustainability, sustainable innovation and business model innovation, networks, complex and co-opetitive systems, international management, and system dynamics application in strategy implementation.



**Evi-Carita Riikonen** is an operations officer at ICOS ERIC Head Office in Helsinki, Finland. She joined the HO in 2015, during the end of the preparatory phase, and is involved in the operational management of ICOS RI. With a background in human geography, focusing on the human – place relationship, he specialises in community engagement, organisational identity and issues related to socio-economic impact and its assessment.



**Frédéric Sgard** is project administrator at the Global Science Forum of the OECD, where he manages selected Forum activities. He has been involved in many of the Forum's projects on research infrastructures. His current portfolio includes work on “mobilising science in the time of crisis” and a new project on “Very Large International Research infrastructures”. Frédéric Sgard acts as an independent expert for various European research infrastructure projects. Prior to joining the OECD, he worked as a senior scientist in a pharmaceutical company until the end of 2002, on the discovery of new pharmacological targets. Trained as a molecular biologist, he studied Molecular Genetics at the University of Paris-Saclay (France), and obtained his Ph.D. from the University of Reading, UK, in 1994.





# ERIC Forum Policy Seminar 'Socio-Economic Impact of ERICs'

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**Francisco (Paco) Colomer** is director of the Joint Institute for VLBI ERIC (JIVE), a European Research Infrastructure that serves as the central organization of the European VLBI Network, a collaboration of more than 20 radio telescopes distributed around the world. Colomer earned his PhD in astrophysics from Chalmers University of Technology (Sweden) and is an MBA in "Management of Research Infrastructures" by the University of Milano-Bicocca (Italy). He is the permanent staff of the National Astronomical Observatory in Spain. During his career, he has participated in more than 100 scientific papers, numerous conferences and workshops, international projects and outreach activities. He is the current chair of the *ERIC Forum*, which comprises 23 European Research Infrastructure Consortia grouped in 5 clusters, to discuss the strategies, best practices and efficiently interact with the European Commission and other stakeholders.



**Inmaculada Figueroa** is currently the Deputy Vice Director General for Internationalization of Science & Innovation in the Spanish Ministry of Science & Innovation. ESFRI Vice Chair and EU-LAC RESInfra H2020 Project coordinator.



**Jacques Demotes** is the director general of the European Clinical Research Infrastructure Network (ECRIN), which he founded in 2004. In this role, he is responsible for the strategy and overall management of the infrastructure with the support of the ECRIN Management Office (located in Paris, France), the ECRIN European Correspondents (located in each Member / Observer country), and ECRIN's Scientific Partners (i.e., national networks of clinical trial units). A neurologist and professor of cell biology, Demotes is an advisor to the Biology and Health Research Department at the French Ministry of Higher Education and Research. While at ECRIN, he has contributed to numerous initiatives and collaborative projects related to multinational clinical trials. In particular, he chaired the working group that drafted the OECD Council Recommendation on the Governance of Clinical Trials.

Prior to ECRIN, he worked as a clinical neurologist and basic neuroscientist, then as director of the clinical investigation centre in Bordeaux. Demotes holds an MD (with a specialisation in neurology), a PhD in neuroscience, a Master of Science (MS) in neuroscience, and a Bachelor of Arts (BA) in mathematics and computer science from the University of Bordeaux. He also received an MBA from IAE Paris, and completed a training course in science policy with the Institute of Advanced Studies in Science and Technology in Paris.



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Dr. **Jana Kolar** is the chair of ESFRI and the Executive Director of CERIC-ERIC, a research infrastructure for characterisation of materials and biomaterials, established by the EC's implementing decision. She is also EIC ambassador.

She has a broad range of expertise, ranging from policy development and implementation, research and innovation, to entrepreneurship. Among others, she was Director-General of Science in Technology at a ministry in Slovenia, chairman of the Boards of Slovenian Technology Agency and of Slovenian Research Agency, a member of the Governing Board of the European Institute of Innovation and Technology. She was a member of the High-Level Group of Innovators for a European Innovation Council, that advised the Commission on how to strengthen support for breakthrough, market-creating innovation and of the ERA Council Forum Austria - a high-level expert body advising the Austrian Minister responsible for Science and Research, for which she was awarded a Golden badge of honour for services to the Republic of Austria.

She has authored/co-authored several expert reports contracted by the European Commission.

Trained as a chemist, she had published more than 60 peer-reviewed papers and a European patent.



**Jimmy Andersen** is Head of Innovation and Industry and Interim Head of Grants and External Relations at ESS Spallation. Previously, Jimmy established the Danish industry portal LINX (Linking Industry to Neutrons and X-Rays), a collaborative innovation platform developed as a feeder for ESS. With an engineering degree in electronics and computer science, Jimmy got into project management early, working in the space, defence and aviation industries. After a decade of working in operational and tactical management, he took on a number of strategic leadership roles as CEO for innovative high-tech companies working very closely with science. Jimmy is Danish and lives in Denmark, but has spent 13 years working in Turkey, Germany and Switzerland.



**Jessica Vamathevan** is EMBL's Head of Strategy and is responsible for developing and shaping EMBL's strategic planning across its six sites. A key role is leading specific initiatives related to the implementation and execution of the EMBL Programme: EMBL's five-year programme 2022–2026 'Molecules to Ecosystems'. Jessica joined EMBL in 2016 as a Strategy Officer for EMBL-EBI and later as Head of EMBL-EBI's Strategic Partnership Office, responsible for strategy and industry initiatives. Prior to joining EMBL, Jessica held several





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roles at GSK, most recently as the Operations Director for Open Targets, a public-private partnership. Jessica oversaw the management of informatics and experimental target validation projects and ensured the strategic deployment and operational translation of the initiative. Jessica was also a Team Leader in GSK Computational Biology, working with discovery scientists in many therapeutic areas including Infectious Diseases, Respiratory, Immuno-Inflammation and Rare Diseases to deliver impactful bioinformatics projects.

She spent over six years at The Institute for Genomic Research (TIGR) in Maryland, US working on many pathogen genome sequencing projects and a year at the Wellcome Trust Sanger Institute in human genome annotation. She also taught as a Lecturer in Molecular Evolution at University College London. Jessica holds a PhD in Bioinformatics from University College London, an MSc in Computer Science from Johns Hopkins University and a Bachelor of Medical Science from the University of Sydney.



**Juan Miguel González-Aranda** has a PhD. Engineer on Telecommunications, and Industrial Organization-Enterprise Management European Master. LifeWatch ERIC Chief Technology Officer & Spain Common Facility Director. Former ERIC Forum Acting Chair and Executive Board Member (ENVRI cluster), former Chair (2018-2021). July 2012-June 2018: HoU Nanomaterials & e-Science Spain Science & Innovation Ministry public officer. Ministry Delegate for: GBIF" ([www.gbif.org](http://www.gbif.org)); European Commission: e-IRG ([www.e-irg.eu](http://www.e-irg.eu)); ESFRI ([www.esfri.eu](http://www.esfri.eu)) & Open Science (Group European Data Experts GEDE-Research Data Alliance RDA [www.rd-alliance.org](http://www.rd-alliance.org)); EOSC ([www.eosc-portal.eu](http://www.eosc-portal.eu)) & EuroHPC ("Sherpa", <https://eurohpc-ju.europa.eu>) establishment; support Environmental ESFRI ([www.esfri.eu](http://www.esfri.eu)) & related initiatives. European Structural and Investment Funds-RIS3 expert for ICT & ENV Research Infrastructures according to EU regions RIS3 & FP policies. EIT Climate Change KIC startup activities. November 2004-June 2012: Spanish Council for Scientific Research-CSIC: Technical Director at Doñana Natural Area Singular S&T Research Infrastructure; Contract Agent-Research Technologist EUroMediterranean & LAC projects. January 1998-October 2004: Researcher at University of Seville (biomechanics, digital image processing). Independent Consultant-ICT freelance Public & Private sector. (Co-)author of approximately half a hundred of publications.



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29 April (09:00 - 13:00) | Online



**Lorna Ryan** joined City University of London in May 2008 as a Research Manager for the European Social Survey Infrastructure Preparatory Phase. Previously she was a Senior Researcher at National University of Ireland Galway (2004-2006) and a Development Centre Research Manager (social science) at Dublin Institute of Technology (2000-2003). She has been involved in EU social and research programmes (ESF & Framework Programmes) since 1994 in research, management and gender expert capacities. She gained her PhD (Sociology) from the University of Kent and LLM (International Intellectual Property Law) from Brunel University. She is a registered data protection practitioner (Certified Practitioner - Data Protection (PC-DP) and PC-GDPR). She is a Fellow of the Higher Education Academy, UK. She was a member of Senate Research Ethics Committee (SREC) from 2008, Deputy Chair (2017 - 2019) and Acting Chair for the academic year 2019-2020.



**Michela Vellico**. Seconded National Expert at the European Commission, DG RTD. She's part of the ERIC Team and of the Research Infrastructure sector. She is an Engineer for Environment and Territory (Master Degree + vocational qualification). She holds a Phd in Applied Geophysics and Hydraulics, a Professional Master's Degree (II level) in Open Innovation and Knowledge Transfer (MIT) and a MBA Master's Degree (II level) in Management of Research Infrastructures (EMMRI). She has been seconded from OGS (Italian National Institute of Oceanography and Applied Geophysics), where she has been working since 2003 in the Research Infrastructures Sector, mainly coordinating the Italian National Node of ECCSEL ERIC. OGS she holds the role of executive technologist.



**Naděžda Witzanyová** is Senior officer for International Affairs at ELI ERIC. Member of the H2020 and Horizon Europe Programme Committee for RIs and senior expert in CZ for ERIC negotiations. At the Ministry of Education, Youth and Sport, she was Head of units, and Department director dealing with ERA related initiatives, CZ PRES 2009 (adoption of the ERIC regulation) and research Infrastructures. Also involved in ESFRI activities as national representative, ESFRI EB member, Chair of ESFRI Regional Issues, and Evaluation WGRs. Initiated and coordinated drafting of several CZ Roadmaps for large research infrastructures and the joint use of European, national and SF funds for their implementation. Later she was dealing with energy policy (European Energy Research Alliance), set up a Grant and TTO offices at a private energy research organisation and proposed and managed large structural funds projects (e.g. CZ in-kind contribution to ESS Scandinavia or FAIR GmbH).

# ERIC Forum Policy Seminar 'Socio-Economic Impact of ERICs'

29 April (09:00 - 13:00) | Online



Dr. **Ornella De Giacomo** is Deputy Executive Director of CERIC-ERIC since 2015. As such, she oversees the operations of the consortium and supports the Executive Director and other consortium bodies in the definition and implementation of the consortium strategy. She has 18+ years of experience in large analytical Research Infrastructures in roles dealing with open access, quality and project management. In her professional career she also performed technology transfer and scale up for a private company. Her background is in Food Engineering (2000) and she completed her PhD in Nanotechnology in 2008. She was trained in Strategic Management of Research Infrastructures and Project management for engineers in Virginia, US, in 2018. She is currently the Chair of the PaNOSC Executive Board (2022) and part of the Task Force Funding Models for EOSC. She is also a member of the EPOS SP External Advisory Body (since 2020) and the Conseil scientifique d'E-RIHS France (since 2019).

**Chairpersons & Panelists briefing note**

Time (CET)	Agenda item	Speaker(s) Technical manager BBMRI
09:00 – 09:05	<b>Welcome</b>	Jacques Demotes, <i>ECRIN Director, ERIC Forum WP6 leader</i>
09:05 – 09:10	<b>Introduction</b>	Paco Colomer, <i>JIVE-ERIC Director, Chair ERIC Forum</i>
09:10 – 09:15	<b>Seminar rationale and Agenda</b>	Jimmy Andersen, <i>ESS-Spallation-ERIC, Director, ERIC Forum WP4 leader</i>
<p><u>Chair notes:</u>            Welcome and any housekeeping points.            Some suggested points for co-chairs to cover:</p> <ul style="list-style-type: none"> <li>- Introduce the session and offer some context in terms of its relevance</li> <li>- Importance of SEI assessment and difficulties: lack of well-established method nor allocated time</li> <li>- Impact and performance indicators (ref. OECD document)</li> <li>- Diversity of ERICs: access, service, economic model, diverse societal impacts</li> <li>- Importance of monitoring of impact in the context of ERA</li> <li>- Diversity: finding a common denominator, rationale Seminar and agenda</li> </ul> <p>Outline the <u>objectives</u> of the session as being to:</p> <ul style="list-style-type: none"> <li>• Showcase the diversity of ERICs and their impact (both at individual level as well as their contributions to tackling societal challenges through for example the EU Missions, Green and Digital Transitions, ERA Agenda, SDGs)</li> <li>• Present:               <ul style="list-style-type: none"> <li>○ The findings from the ERIC Forum Survey on the SEI assessment practices of ERICs,</li> <li>○ Case studies of SEI assessment by ERICs belonging to different clusters during different phases of their lifecycle,</li> </ul> </li> <li>• Engage with the relevant ERIC national and EU stakeholders, taking into consideration their perspectives,</li> <li>• Propose joint recommendations on how capturing the diversity, value and impact of ERICs can be supported best.</li> </ul>		
09:15 – 10:30	<b>Setting the Scene</b>	
<p>ERIC Chair: Jacques Demotes, <i>ECRIN-ERIC Director, Leader ERIC Forum WP6</i>            ERIC Rapporteur: Golbahar Pahlavan, <i>ECRIN-ERIC Head RI Development, WP6</i></p> <p>Some suggested points for session chair to cover:</p> <ul style="list-style-type: none"> <li>• Context conference, WP4 and WP6 synergies</li> </ul>		

- Introduce the session and provide context: Relevant case studies from ERIC FORUM WP4 survey respondents from different clusters having carried out a SEI evaluation using different methodologies to share experiences, challenges and identify remaining gaps.

**Speaker notes:**

**Max. 10 minutes presentation, with presentation slides (*please share any slides in advance with the organisers; template provided*)**

Template provided:

<b>09:15 – 09:25</b>	EMBL case study	Jessica Vamathevan, <i>EMBL, Head Strategy</i>
<b>09:25 – 09:35</b>	WP4 findings regarding the status of SEI evaluation based on the survey	Evi-Carita Riikonen, <i>ICOS Operations Officer</i>
<b>09:35 – 10:15</b>	4 Case studies of SEI assessment from ERIC FORUM	Jimmy Andersen, <i>ESS-Spallation Director</i> Anne-Charlotte Fauvel, <i>EATRIS Head European Affairs</i> Ornela di Giacomo, <i>CERIC Deputy Director</i> Lorna Ryan, <i>ESS-Social ERIC Research Manager</i>
<b>10:15 – 10:30</b>	<b>Discussion and wrap-up</b>	Session Chair
<b>BREAK 10h30-10h40</b>		
<b>10:40 – 11:40</b>	<b>Stakeholders' perspectives</b>	Michela Vellico, <i>EC DG R&amp;I</i> Nad'a Witzanovya, <i>ELI ERIC</i> Jana Kolar, <i>ESFRI</i> Chris Hartley, <i>Department Industry, Procurement and Knowledge Transfer CERN/EIROFORUM</i> Antje Keppler, <i>Eurobioimaging ERIC</i> Elina Griniece, <i>EFIS CENTRE</i> Frédéric Sgard, <i>OECD</i> Elisabetta Marafioti, <i>EMMRI</i>
<p>ERIC Chair Jimmy Andersen, <i>ESS Spallation Director, Leader ERIC Forum WP4</i> ERIC Rapporteur Jana Pavlic, <i>BBMRI, Head of Public Affairs, ERIC Forum Coordination</i></p> <p>Stakeholders perspectives from different constituencies to:</p> <ul style="list-style-type: none"> <li>- better understand how current SEI evaluation methodologies capture the RI value proposition across the value chain from users to funders and</li> <li>- how best to support the SEI assessment process during the RI lifecycle.</li> </ul> <p><u>Proposed overarching question(s):</u> Provide Stakeholder perspective on how ERICs can best address the SEI assessment requirements to strengthen ERICs as sustainable pillars of Europe's leadership in R&amp;I</p> <p><b>Panelists:</b></p>		

**Michela Vellico**, Policy Officer, EC DG R&I

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to:

- Provide your expectations regarding ERIC complementarities, SEI assessment and sustainability
- ERA policy agenda ERIC landscape actions to improve ERIC (ERA ACTION 8)
- Sustainability & access

**Nad'a Witzanovya**, ELI ERIC

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to provide perspective:

- Regarding Member State (MS) expectations of ERICs and their impact
- MS engagement eg through in-kind contributions /funding
- The involvement of different actors eg Industry
- CZ SEI process: share experience and new activities
- Experience ELI ERIC policy for scientific evaluation currently being setting up. KPIs vs SEI pathways

**Jana Kolar**, ESFRI Chair

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to provide us with your perspective on:

- How to strengthen the strategic partnership and cooperation between ESFRI and the ERIC Forum to better support ERICs for the assessment of their SEI, showcase their impact to stakeholders and to ensure their competitiveness and sustainability?
- Importance of impact assessment and its role in sustainability, different methodologies available eg paths
- Role of ESFRI providing support: assessment of evaluations, impact of RIs and remaining gaps, dissemination
- Further discussions with RIs regarding impact indicators currently with policy changes

**Chris Hartley**, Head Department Industry, Procurement and Knowledge Transfer CERN/EIROFORUM

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to:

- Provide your perspective on the lessons learned and advice for ERICs regarding SEI assessment
- Different assessments carried out over the years and reports (eg OECD report)
- Current impact indicators being used

**Antje Keppler**, Director EuroBioimaging-ERIC

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to:



- Provide your perspective on the value of ERICs for user communities and how to best address their different needs

**Elina Griniece**, Principal Researcher, EFIS Centre/RI PATHs

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to provide your perspective on:

- When, how to capture the diversity and value of ERICs by SEI assessment methodologies?
- What kind of support do ERICs need to be able to assess their SEI?
- Impact areas mapping as first step and view point, conceptual framework. Support required for identification of key indicators: gap output indicators, selection. Institutionalize this monitoring is essential.
- Timing: SEI assessment before operational phase recommended

**Frédéric Sgard**, Project Administrator, OECD

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to provide your perspective on:

- When, how to capture the diversity and value of ERICs by SEI assessment methodologies?
- Suggestions in terms of support, general guidelines, lessons learned from COVID crisis: eg synergies between RIs

**Elisabetta Marafioti**, Professor of Management, University of Milano–Bicocca; EMMRI

Speaker notes:

Max. 5 minutes intervention, either unaided or with 2-3 presentation slides (*please share any slides in advance with the organisers*)

We would encourage you to provide your insight on:

- The best way to support and assess the SEI of ERICs?
- Communication, how to do so in a meaningful/effective way with stakeholders, sharing the same language
- Circularity of the SEI assessment process
- Support: key points based on shared experiences

**Discussion and Wrap-up 20min**

**BREAK 11h40-11h50**

**11:50 – 12:50**

**Panel Discussion**

**PART 1**

ERIC Chair Evi-Carita, ICOS Operations Officer, ERIC Forum WP4

Rapporteur *tbc*

30 min Gaps and challenges in SEI assessment: how capturing the diversity, value and impact of ERICs can be best supported

**Panelists All Blocks 1, 2 & 3**

Questions, comments and feedback from the audience:

- Notes from rapporteurs of previous BLOCKS and suggested questions
- Points raised by the Survey will be fed into the discussion

## PART 2

**Chair Inmaculada Figueroa**, Spanish Ministry of Science & ESFRI

30 min Globalisation success stories Global Bioimaging, Global VLBI Alliance (SKA/IVIA/[NDICI](#)-Africa)

### Panelists:

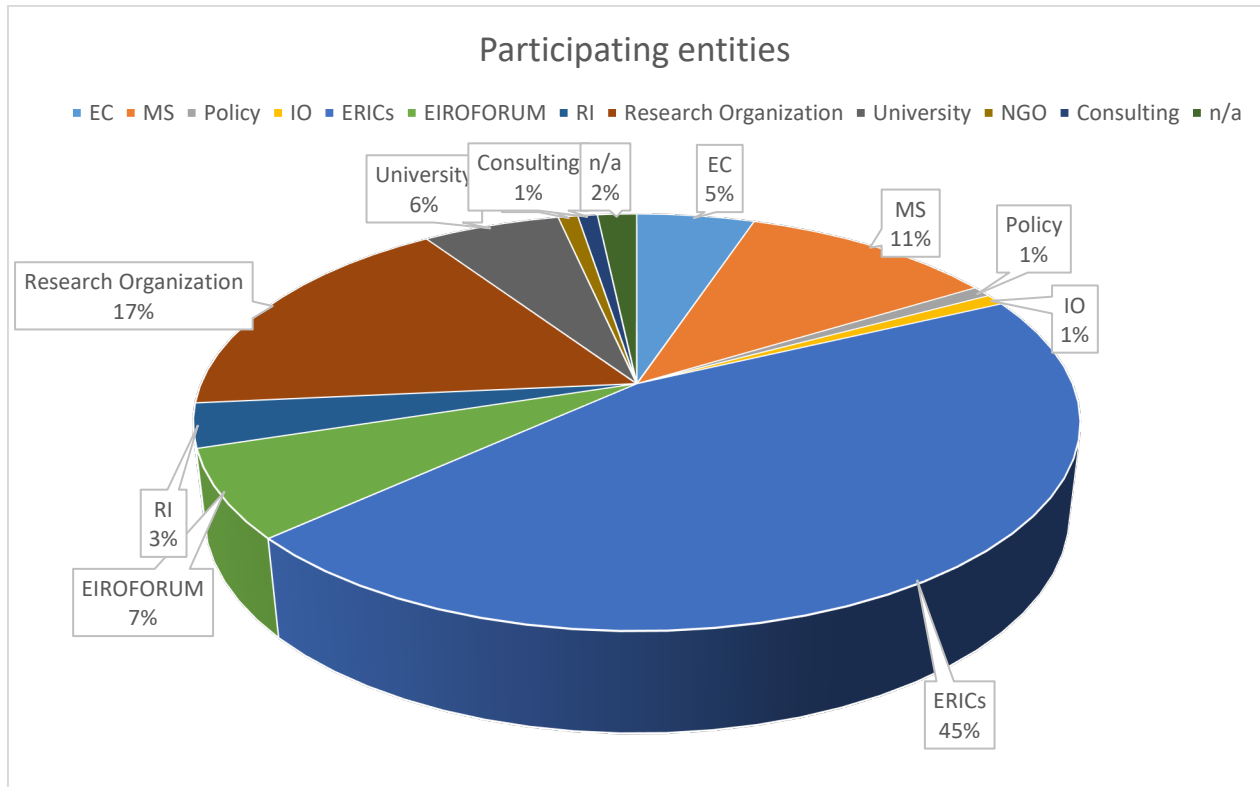
- **Antje Keppler**, Director Bio-Hub (Euro-BioImaging ERIC)
- **Francisco Colomer**, ERIC Forum Chair, Director (JIVE-ERIC)
- **Juan-Miguel González Aranda**, Chief Technology Officer (Lifewatch ERIC)

<b>12:50 – 13:00</b>	<b>Conclusions and Next Steps</b>	Jacques Demotes Paco Colomer Golbahar Pahlavan
<p><u>CoChair notes:</u> Some suggested points to cover:</p> <ul style="list-style-type: none"> <li>• Thank the speakers and panelists.</li> <li>• Summarise main take home messages from the speakers and feedback provided by the audience and reflect on how ERIC FORUM and partners can consider taking these forward.</li> <li>• Next steps Policy Report</li> </ul>		

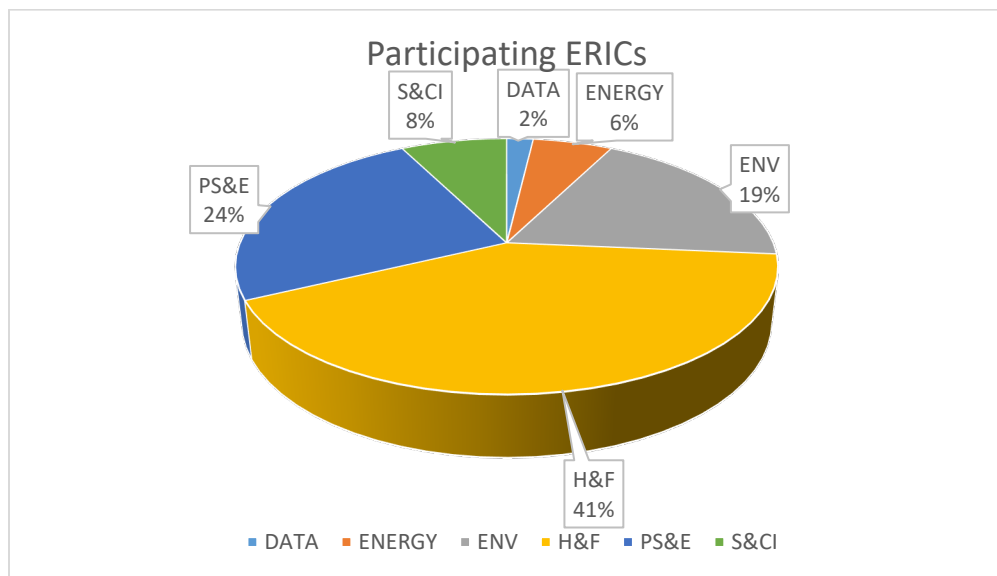


APPENDIX D\_WP6\_D6.6\_ERIC FORUM Policy Seminar SEI of ERICS, April 29<sup>th</sup> 2022

Participation entities



EC: European Commission; MS: Member States including Funding Agencies; Policy; IO: International Organisation; ERICs; EIROForum; RI: Research Infrastructure; University, NGO: Non-governmental Organisation; Consulting firms; n/a: non-applicable



ERICs as per ESFRI Clusters: Data; Energy, Environment, Health and Food; Physical Sciences & Engineering; Social & Cultural Innovation

### Participating countries

