European Strategy Forum
on Research Infrastructures

ESFRI

Strategy Report on Research Infrastructures

ROADMAP **2018**

METHODOLOGY

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Swiss ESFRI Delegate

Launch event

ICRI 2016

Cape Town

South Africa

4th October 2016

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ROADMAP 2018

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OVERVIEW

- strategic role & robust methodology
- evaluation of scientific case & assessment of implementation
- research infrastructure lifecycle
- evaluation & assessment of new proposals
- monitoring of Projects & periodic review of Landmarks

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STATE OF THE ART RI ROADMAPPING

STRATEGIC ROLE

- operate at forefront of European and global science policy
- carry out analysis of RI landscapes in five scientific domains
- ensure national commitments to implementation of RI on Roadmap
- provide advice & guidance on overcoming obstacles
- offer support to RI in portfolio and facilitate their implementation
- link regional, national, European & international levels

ROBUST METHODOLOGY

- apply & improve common definitions, models, methods and procedures
- addresses entire life cycle safeguarding long term sustainability of RI portfolio
- organise open calls, check eligibility & review against clear & transparent criteria
- apply independent & international peer review
- adhere to strict principles, avoid conflict of interest and safeguard confidentiality
- apply `parallel` evaluation of scientific case & assessment of implementation

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TWO SIDES OF SAME RI

STRATEGY WORKING GROUPS (SWG)
IN FIVE SCIENTIFIC DOMAINS
EVALUATE SCIENTIFIC CASE

1. SCIENTIFIC EXCELLENCE
2. PAN-EUROPEAN RELEVANCE
3. SOCIO-ECONOMIC IMPACT
4. E-NEEDS

IMPLEMENTATION GROUP (IG)
ASSESSES IMPLMENTATION

1. STAKEHOLDER COMMITMENT
2. USER STRATEGY & ACCESS POLICY
3. PREPARATORY WORK
4. PLANNING
5. GOVERNANCE & MANAGEMENT
6. HUMAN RESOURCES POLICY
7. FINANCES
8. RISKS

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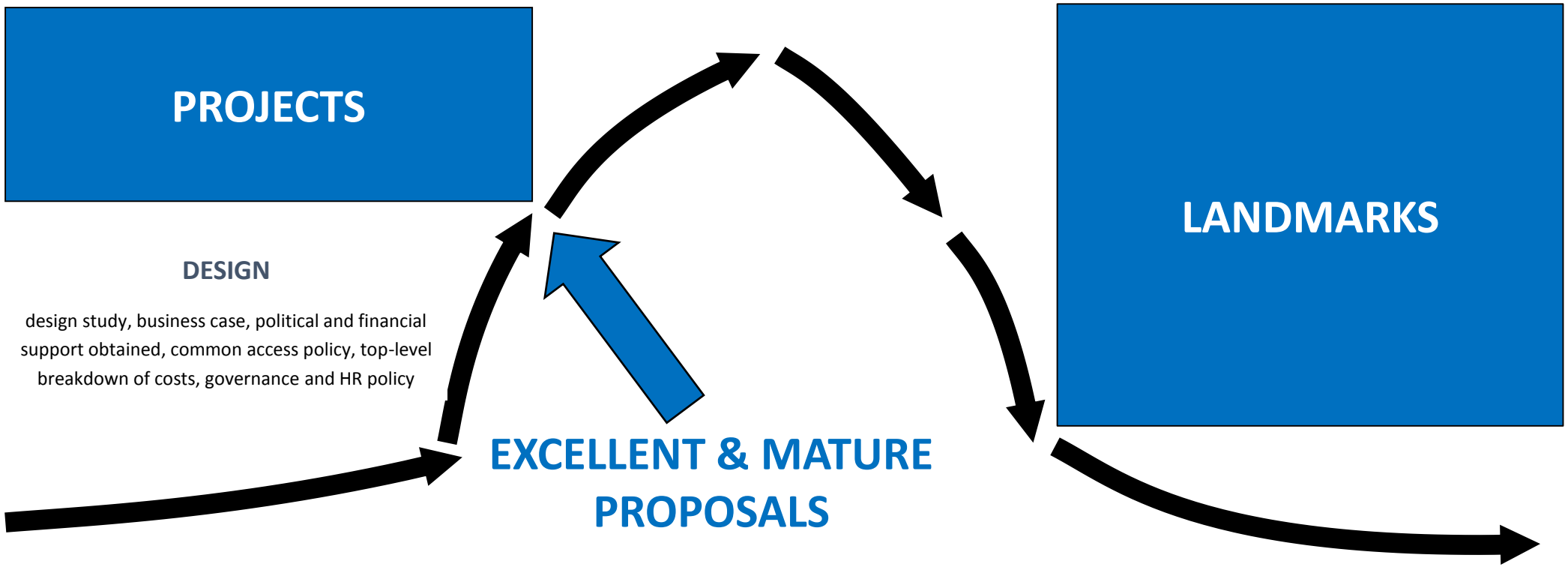
RESEARCH INFRASTRUCTURE LIFECYCLE



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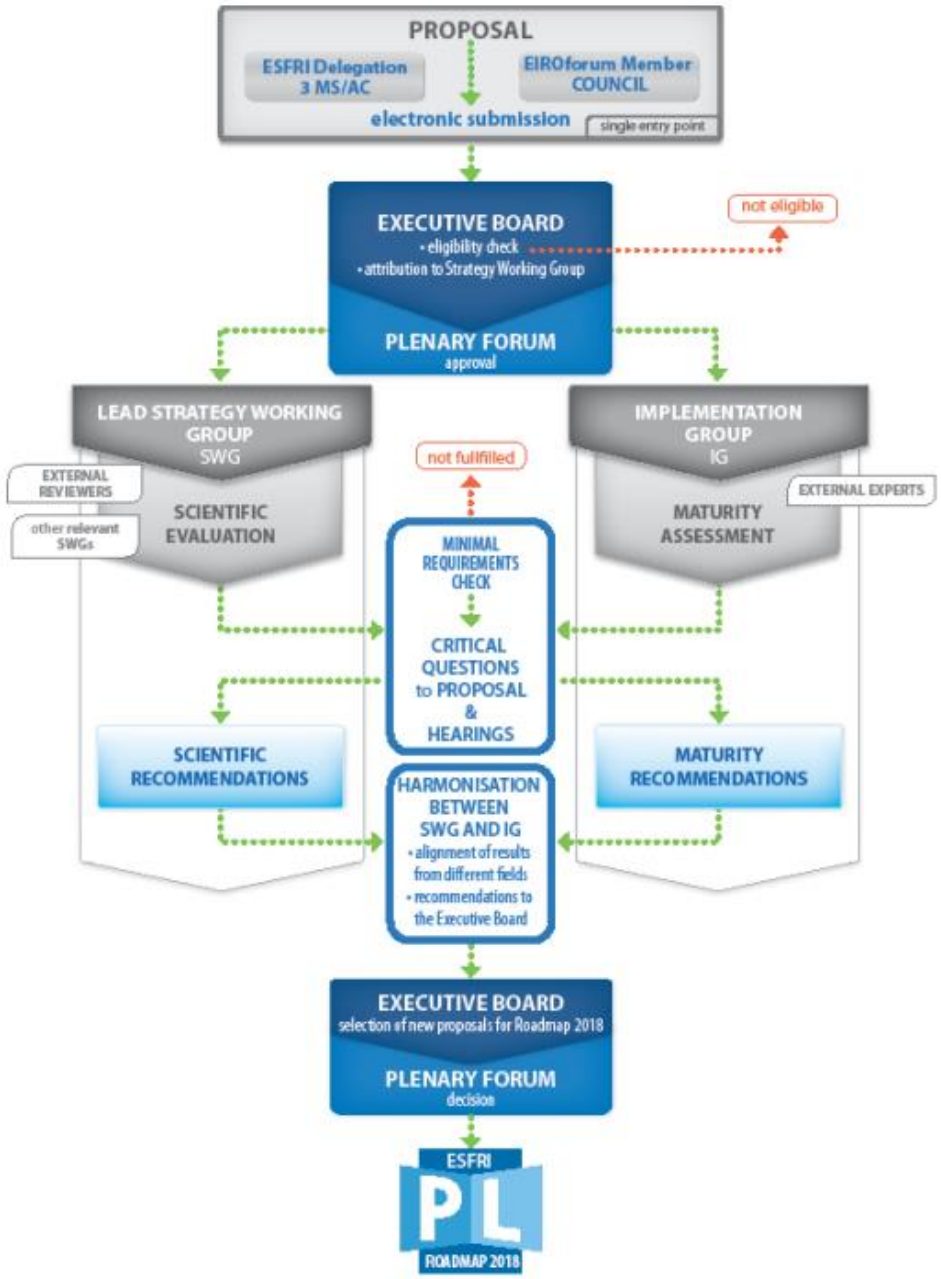

NEW PROPOSALS

- Guide for Proposers & submission form online in January 2017
- Infoday for Proposers in Malaga on 17th January 2017
- only EU MS, AC & EIFOforum members can apply until 31st August 2017

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NEW PROJECTS MUST DEMONSTRATE MATURITY

- have successfully completed a design/feasibility study
- have planned its business case/delivery strategy
- provide proof of political support, i.e. EoS by lead country AND at least two additional MS & AC signed by national ministries responsible for RI (or Council resolution)
- provide proof of financial commitment, i.e. EoC to financially contribute to preparation and implementation phases by an authority from lead country (or financial commitment in Council resolution)
- provide proof of an inter-institutional and multi-lateral agreement, e.g. MoU signed by core partners - being research institutions - formally involved in the consortium

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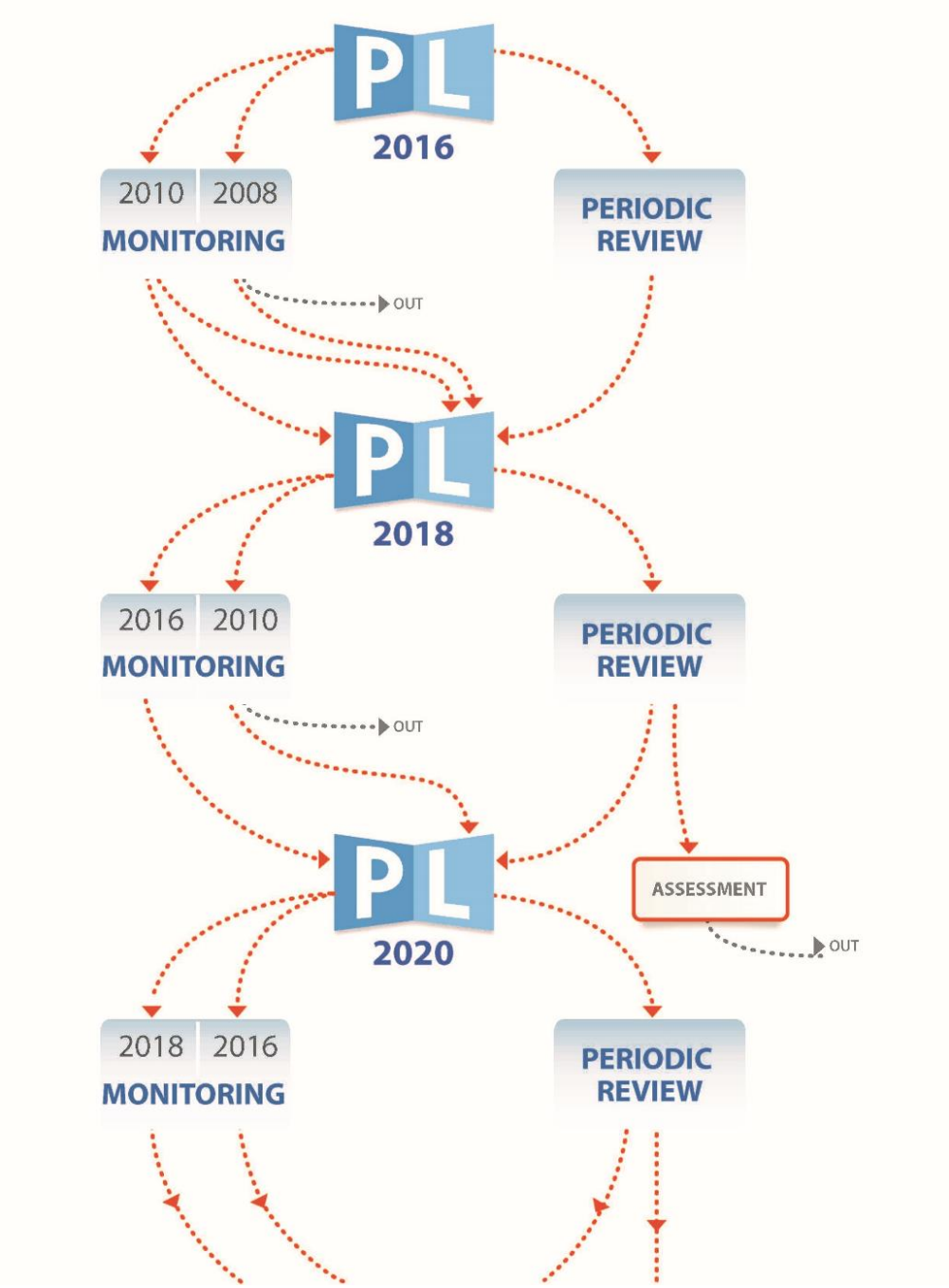

MONITORING & PERIODIC REVIEW

- Guide for Projects & Landmarks in January 2017
- Exchange of Experience Workshop for Projects & Landmarks in Malaga on 17th January 2017
- various publication dates & deadlines for specific questionnaires

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THANK YOU FOR YOUR ATTENTION!

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