RM FRAMEWORK

D2.1. Quality label method, owner and testing approach

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This deliverable (D2.1) presents the conceptual, methodological, and procedural foundations for a future European Quality Label for Research Management (RM) training developed within the RM Framework project. Building on WP1, including the RM Framework Handbook and RM COMP, this report proposes a flexible, developmental, and proportionate approach that responds to the growing need for RM professionalisation across the European Research Area (ERA).

RM Framework project has received funding from the European Union's Horizon Europe programme under grant agreement number 101188073

Project full title

"Creating a European Framework for Research Management Training and Networking"

Project acronym

RM Framework

Grant Agreement no.

101188073

Deliverable No. & Title

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Dissemination level[1]:	PU
Submission date:	30 January 2026
Start date of project:	1 February 2025
Duration of the project:	24 months
Organisation name of beneficiary responsible for this deliverable:	EARMA

Document metadata

Version	Date	Modification reason	Modified by
1.0	23.01.2026	First draft	Blanka Csite, Teodora Konach, Nik Claesen
2.0	29.01.2026	First review	Virág Zsár, Beáta Lázár
3.0	30.01.2026	Second draft	Blanka Csite, Teodora Konach

[1] Dissemination level:
PU – Public (fully open, automatically posted online on the Project Result platforms);
SE – Sensitive (limited under the conditions of the Grant Agreement);
CO – EU classified: EU restricted, EU confidential, EU secret under Decision 2015/444.

RM Framework project has received funding from the European Union's Horizon Europe programme under grant agreement number 101188073

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List of Abbreviations

ARMS	Australasian Research Management Society
ATTP	Alliance of Technology Transfer Professionals
CE	Continuing Education (points)
CEU	Continuing Education Unit
CPRA	Certified Pre-Award Research Administrator (RACC)
CRA	Certified Research Administrator (RACC)
CFRA	Certified Financial Research Administrator (RACC)
CRAMS	Japan Certification Board for Research Administration and Management Skills
DS	Diploma Supplement
DEQAR	Database of External Quality Assurance Results
EHEA	European Higher Education Area
EIC	European Innovation Council
EQF	European Qualifications Framework
EQAR	European Quality Assurance Register for Higher Education
ENQA	European Association for Quality Assurance in Higher Education
ERA	European Research Area
ESG	Standards and Guidelines for Quality Assurance in the EHEA
EU	European Union
EUI	European University Institute
FLAP	Foundation Level Accreditation Program (ARMS)
HEI	Higher Education Institution
IPRC	International Professional Recognition Council
JST	Japan Science and Technology Agency
NCURA	National Council of University Research Administrators
PCF	Professional Competency Framework (SARIMA/IPRC)
QA	Quality Assurance
QF-EHEA	Framework for Qualifications of the European Higher Education Area
RACC	Research Administrators Certification Council
RM	Research Management / Research Manager
RM COMP	European Competence Framework for Research Managers
RMAN-J	Research Manager and Administrator Network Japan
RMP	Research Management Professional (IPRC)
RMS	Research Management Specialist (SRAI LevelUP)
RPO	Research Performing Organisation
RFO	Research Funding Organisation
RTTP	Registered Technology Transfer Professional
SARIMA	Southern African Research and Innovation Management Association
SE	Sensitive (dissemination level)
SRMP	Senior Research Management Professional (IPRC)
SRAI	Society of Research Administrators International
WP	Work Package

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1. Executive Summary

This deliverable (D2.1) presents the conceptual, methodological, and procedural foundations for a future European Quality Label for Research Management (RM) training developed within the RM Framework project. Building on WP1, including the RM Framework Handbook and RM COMP, this report proposes a flexible, developmental, and proportionate approach that responds to the growing need for RM professionalisation across the European Research Area (ERA).

The work aims to address the clear gap in the current fragmented RM training landscape, characterised by strong community demand for short, flexible, but credible and recognised professional development opportunities. The proposed quality label offers a transparent, enhancement-oriented mechanism aimed at improving clarity, consistency, and comparability of RM training offers.

The concept defines minimum common benchmarks for transparency, coherence, and learning-outcome alignment, while allowing training providers to contextualise their programmes based on local needs and organisational realities. It introduces two recognition tracks, a Foundational Quality Label, designed to support emerging and diverse training offers, and an Advanced Quality Label, foreseen for later stages once the RM field has matured and robust internal quality structures are in place.

To operationalise this model, the deliverable introduces an assessment protocol supported by structured tools: a self-assessment checklist (Annex B), an Implementation Guideline (Annex A), and Promotion Plan (Annex C) to support structured reflection and documentation. Together, these tools translate the label's conceptual criteria into an actionable evaluation framework that is scalable across provider types, and adaptable to the heterogeneous European RM training landscape. The protocol is designed as a stand-alone, long-term mechanism, capable of functioning without continuous external oversight. Importantly, the protocol does not constitute a formal accreditation mechanism at this stage.

In the frame of the project, selected components will be piloted in WP3 by training providers representing diverse institutional types and national contexts. The pilot will gather evidence on the clarity, feasibility, proportionality, and perceived usefulness of the protocol, the checklist, and related tools. An ad-hoc group of selected experts from the consortium and External Expert Advisory Board representatives will provide methodological feedback only, without taking formal decisions. Insights generated through the pilot will inform further refinements to ensure that the label is credible, user-friendly, and aligned with real RM training practices across Europe.

Finally, to support the label's long-term sustainability, the deliverable explores potential governance models, including European institutional, global professional, and association-led approaches. These options will be further developed in the later stages of the project, informed by findings from the WP3 pilot and consolidated under WP4. Together, the conceptual model, assessment protocol, tools, and governance considerations presented in this deliverable form a solid foundation for a future European Quality Label for RM training, supporting greater transparency, comparability, and professional recognition across the ERA.

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2. Introduction

This deliverable (D2.1) forms part of Work Package 2 (WP2) of the RM Framework[2] project, which aims to support the development of a European qualification system for Research Management (RM) by standardising educational and training programmes and elaborating a quality label to enhance interoperability and improve the RM profession within the European Research Area (ERA).

The RM Roadmap[3] project laid the foundation for this work by highlighting the strategic importance of research management in strengthening the ERA. It demonstrated how RM professionals play a vital role in supporting institutions, researchers, and innovation ecosystems. However, despite growing recognition, the training landscape for RM remains fragmented, with significant disparities in access, structure, and accreditation across countries and institutions.

WP2 of RM Framework addresses this challenge by exploring the feasibility of a European quality label for RM training. A potential future label is intended to provide formal recognition for training programmes that meet defined standards, thereby promoting transparency, comparability, and mobility for RM professionals.

2.1. Aims

D2.1 will build on WP1 outputs, particularly the Preliminary RM Frame report and the Handbook as well as the revised RM COMP (European Competence Framework for Research Managers)[4]. The primary aim of the deliverable is to translate these conceptual foundations into an operational model for a European quality label for RM training. In doing so, D2.1 follows a sequential logic: it first defines the concept and structure of the quality label, then assesses its feasibility within the diverse European research management landscape, develops a proportionate, self-assessment-based pilot approach, and finally outlines possible ownership and governance options for long-term sustainability.

The primary objectives of this deliverable are therefore to:

- Articulate the conceptual basis and structural components of the proposed RM quality label,
- Develop a draft assessment method for training providers, aligned with RM COMP and European QA reference points but proportionate to the current maturity of the RM profession,
- Design a testing approach to be piloted under WP3,
- Investigate potential ownership models and governance arrangements that could support the long-term sustainability of the quality label.

The quality label is envisioned as a mechanism to enhance transparency and comparability, and recognition of RM trainings, and support career development and mobility within the ERA. It will also aim to potentially align with broader European policy frameworks, including the ERA Policy Agenda, the Bologna Process, the European Qualifications Framework (EQF), and the proposed European Degree Label.

This report provides the conceptual and methodological foundation for the pilot testing of the label under WP3. It contributes to the development of a coherent framework that, following

[2] Creating Framework Conditions for Research Management Training and Networking. Available at: https://rm-framework.eu/
[3] Creating Framework Conditions for Research Management. Available at: https://www.rmroadmap.eu/.
[4] RM Comp: The European Competence Framework for Research Managers
https://research-and-innovation.ec.europa.eu/jobs-research/rm-comp-european-competence-framework-research-managers_en

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validation and refinement, will support the proposal of a sustainable quality label for RM training across Europe.

2.2. Methodology

The methodology adopted for this deliverable combines several complementary approaches. The report starts with a literature review and mapping of relevant European policy frameworks to ensure alignment with existing initiatives. This is followed by an analysis of established accreditation and quality label models in research management, including those developed by the Alliance of Technology Transfer Professionals (ATTP), Southern African Research and Innovation Management Association (SARIMA), National Council of University Research Administrators (NCURA), Australasian Research Management Society (ARMS), and Research Manager and Administrator Network Japan (RMAN-J). A series of semi-structured interviews were conducted with organisations experienced in accreditation and certification frameworks. These interviews explored feasibility conditions, governance requirements, and the operational realities of running recognition systems. Together, these methodological components ensure that D2.1 is based on evidence, aligned with European policy, informed by international practice, and responsive to the realities of the European RM profession.

3. The context of the quality label

3.1. Needs of the RM community

The RM Roadmap project conducted a large-scale pan-European survey with more than 2,000 respondents and a series of co-creation consultations with RM communities in more than 34 countries. This investigation resulted in a comprehensive overview of the RM landscape across the ERA. The findings revealed the fragmented nature of RM roles, training pathways, and recognition across Europe. These findings underscored the need for a coherent approach that strengthens professional identity, career development, and institutional capacity.[5]

RM Roadmap expanded this evidence base by mapping more than 300 professional development opportunities for RMs across Europe. These were analysed by type, provider, career stage (RM1–RM4), and geographical reach.[6] This exercise shed light on the lack of accredited training opportunities for research managers, as only 15 training programmes offered ECTS credits, and just 4 granted professional accreditations.[7] Most training remains non-accredited or certified only through internal institutional mechanisms, limiting cross-border recognition and career mobility.[8]

Only 13.9% of RM Roadmap survey respondents viewed certification as useful for entering research management, while 22.6% found it useful for career progression. Certification is rarely required by employers and often inaccessible due to cost and limited availability. For this reason, RM Roadmap recommended avoiding mandatory certification frameworks at this stage, favouring voluntary models linked to competence development and institutional

[5] Zsár, V., Balázs, Z., & Koltai, L. (2025). D1.2 Final report on ERA-wide landscape. Zenodo. https://doi.org/10.5281/zenodo.16570546.
[6] Oliveira, C., Trindade, M., Carrapato, A., Campelo, D., Hourmat, B., & Varela, C. (2025). D2.3 Report on the professional development opportunities. Zenodo. https://doi.org/10.5281/zenodo.18223153
7 Oliveira, Cristina Isabel; Dias, Fátima; Varela, Carolina; Hourmat, Bernardo; Carrapato, Ana; Trindade, Margarida; et al. (2024). RM-Roadmap: Professional Development Opportunities (Data Collected Through Mapping Exercise - anonymized). figshare. Dataset. https://doi.org/10.6084/m9.figshare.27094096.v2 (ARMA UK, ASTP (ATTP-accreditation), PM², SRAI)
[8] Oliveira, C., Trindade, M., Carrapato, A., Campelo, D., Hourmat, B., & Varela, C. (2025).

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incentives.[9] These insights demonstrate that any quality assurance mechanism introduced in the RM field must be proportionate, flexible both for practitioners and training providers.[10]

The RM community expressed a clear preference for short-term, flexible, and accredited formats, such as micro-credentials and modular training programmes adaptable to diverse professional profiles and career stages. These findings underscore the need for a structured, yet flexible framework that supports RM career development and institutional capacity-building, while remaining responsive to the varied needs of professionals across Europe. In particular, the community favours training formats that are practical, time-efficient, and formally recognised.[11]

Therefore, the RM Framework project aims to propose a flexible, modular and competence-oriented training approach, grounded in RM COMP and supported by the RM Framework Handbook developed under WP1. Building on this foundation, WP2 explores how, and under which format, a potential European quality label for RM training could complement the handbook and contribute to greater transparency, coherence and comparability across the diverse RM training landscape in the ERA.

3.2. Policy alignment

The development of a potential RM quality label takes place within a wider European policy environment focused on strengthening research systems, improving skills development, and enhancing cross-border transparency and comparability. This chapter overviews European policy frameworks and initiatives to ensure relevance, interoperability, and long-term sustainability of the quality label. These include the European Research Area (ERA) Policy Agenda, the Bologna Process, the European Qualifications Framework (EQF), and the proposed European Degree Label.

3.2.1. European Research Area

The ERA was launched in 2000 with the aim of creating a single market for research and innovation fostering free movement of researchers, scientific knowledge and innovation, and fostering a more competitive European industry.[12] In November 2021, the Council of the European Union (Competitiveness/Research format) adopted a Pact for Research and Innovation in Europe[13] as the foundation of the "new ERA". It established a new governance framework, along with the ERA Policy Agenda for 2022-2024. This Agenda for the first time included Action 17 the so-called “Research Management Action”, which aimed at enhancing the training and skills development of research management staff, foster the management competences of researchers and innovators, increase networking of research managers and promote the recognition of the R&I management profession at institutional and government levels.[14]

The Council adopted the ERA Policy Agenda for 2025–2027[15] in the frame of its Council Recommendation of 24 June 2025. The Agenda differentiates between structural policies and

[9] Oliveira, C., Trindade, M., Carrapato, A., Campelo, D., Hourmat, B., & Varela, C. (2025). D2.3 Report on the professional development opportunities. Zenodo. https://doi.org/10.5281/zenodo.18223153
[10] Ibid.
[11] Ibid.
[12] Treaty on the Functioning of the European Union. Article 179. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A12016ME%2FTXT.
[13] Council Recommendation (EU) 2021/2122 of 26 November 2021 on a Pact for Research and Innovation in Europe. Available at: http://data.europa.eu/eli/reco/2021/2122/oj.
[14] European Commission, European Research Area Policy Agenda – Overview of actions for the period 2022-2024. Available at: https://commission.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf
[15] Council Recommendation of 24 June 2025 on the European Research Area Policy Agenda 2025-2027. Available at: http://data.europa.eu/eli/C/2025/3593/oj.

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targeted actions all aligning with the priority areas set out in the Pact for R&I in Europe.[16] The Research Management Action specifically supports the professionalisation of research management, recognising it as a strategic function within research-performing organisations. Assessing the feasibility of a quality label for RM training within the RM Framework directly contributes to this goal by promoting high, consistent standards across Europe. It strengthens the profession's recognition, supports career development, builds trust in training, and ensures alignment with ERA values.

3.2.2. Bologna Process and qualification frameworks

The Bologna Process was launched on 19 June 1999, when 29 European education ministers signed the Bologna Declaration. The objective of this initiative was to create a European Higher Education Area (EHEA) that ensures comparability of qualifications, fosters the mobility of students and staff, promotes transparency and quality assurance across Europe's diverse higher education systems. It was agreed to harmonise degree structures through the adoption of the three-cycle system (Bachelor, Master, Doctorate), supported by tools such as the European Credit Transfer and Accumulation System (ECTS), the Diploma Supplement (DS). [17]

The Framework for Qualifications of the European Higher Education Area (QF-EHEA) was launched in 2005 and revised in 2018 at the Paris Ministerial Conference. It provides a basis for understanding various European higher education systems in the Bologna Process and promotes transparency and comparability between qualifications. The QF-EHEA defines generic descriptors based on the learning outcomes for the short cycle, as well as for the first cycle (Bachelor), the second cycle (Masters) and the third cycle (Doctorate). These outline the expected knowledge, comprehension, and abilities graduates should demonstrate upon obtaining their degrees, categorised across five key dimensions.[18]

The European Qualifications Framework (EQF) was established in 2008 and revised in 2017[19] to enhance the transparency and comparability of qualifications across Europe. It functions as a translation tool that helps individuals, employers, and institutions understand and compare qualifications from different countries and education systems. EQF covers all levels of education (eight reference levels), each defined by learning outcomes in terms of knowledge, skills, and responsibility and autonomy. The EQF is compatible and complementary with QF-EHEA.[20]

3.2.3. European quality assurance and recognition system in higher education

Quality assurance and recognition are central pillars of the EHEA, and a tool to foster trust, transparency, and comparability across diverse national systems. The **Standards and Guidelines for Quality Assurance in the EHEA (ESG)**, first adopted in 2005 and revised in 2015. The ESG provide a shared framework for internal and external quality assurance,

[16] "*ERA structural policies are longer-term activities, embedded in national and European policy and R&I systems, that require efforts beyond the three-year cycle of the ERA Policy Agenda. They have a three-year work plan to ensure implementation of measures towards achieving the expected longer-term impact. ERA actions are concrete, policy-driven and goal-oriented to provide substantive added value for the EU, Member States, associated countries and stakeholders, and they are to be completed within the three-year ERA Policy Agenda." - Council Recommendation of 24 June 2025 on the European Research Area Policy Agenda 2025-2027.*

[17] Dutch Bologna Experts. (2023). The Bologna Process: An introductory module (English version). Erasmus+ Programme, FaBoTo+ Project. Available at: https://www.erasmusplus.nl/sites/default/files/2023-05/Bologna%20Module%20English%20March%202023.pdf.

[18] European Higher Education Area. (n.d.). Qualification frameworks. Bologna Process. Retrieved October 10, 2025, from https://ehea.info/page-qualification-frameworks.

[19] Council Recommendation of 22 May 2017 on the European Qualifications Framework for lifelong learning and repealing the recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the European Qualifications Framework for lifelong learning (2017/C 189/03) https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32017H0615(01)&from=EN

[20] European Higher Education Area. (n.d.). Qualification frameworks. Bologna Process. https://ehea.info/page-qualification-frameworks.

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applicable to all higher education institutions and programmes regardless of delivery mode or national context. The ESG is currently being revised to better reflect the ongoing developments, challenges and expectations. The proposal shall be presented in 2026 to the Bologna Follow-up Group, and it is foreseen to be adopted by EHEA Ministers at the Ministerial Conference in Romania/Moldova in spring 2027.[21]

The ESG are implemented through national quality assurance systems and monitored by agencies listed in the European Quality Assurance Register for Higher Education (EQAR). EQAR ensures that listed agencies operate in substantial compliance with the ESG, thereby promoting mutual trust and facilitating cross-border recognition of qualifications and institutional evaluations. The register also supports transparency through the DEQAR database, which provides public access to external quality assurance reports and decisions across the EHEA.[22]

ENQA also plays a central role in supporting and shaping quality assurance EHEA. As a membership-based organisation, ENQA brings together national and regional quality assurance agencies that operate in line with the ESG. Its primary function is to promote cooperation, mutual learning, and professional development among its members, and coordinate external reviews of agencies to assess their compliance with the ESG. Through its activities, ENQA contributes to the development of quality assurance policies, fosters dialogue between stakeholders, and supports agencies in enhancing their practices.[23]

3.2.4. European Degree Label

In March 2024, the European Commission presented a package of proposal for the European higher education sector[24], aimed at strengthening the European higher education sector. The initiative includes a blueprint for a European degree, a proposal for the path towards a European quality assurance and recognition system, and a proposal for attractive and sustainable careers in higher education. The overarching goal of the proposal was to foster deeper cross-border academic collaboration, reinforce institutional autonomy, and promote excellence in joint programmes.

On 7 May 2025, the Council adopted its resolution, setting out the member states' vision for a joint European degree label and proposed a roadmap towards a possible joint European degree, with three phases to be carried out by 2029. The accompanying Council Recommendation specifies the quality standards for awarding the joint European degree label. The label would be granted to joint programmes delivered via transnational cooperation between universities from different countries, including at least two EU Member States. In the first phase, the Commission was invited to establish a Policy Lab to develop a comprehensive framework for the joint European degree label. The outcomes shall be presented to the Council by mid-2026.

The Council Recommendation on a European quality assurance and recognition system in higher education specifies that the label should only be granted: a) when all criteria set out in Annex II are met (Programme organisation and European dimension), and b) to programmes

[21] The European Association for Quality Assurance in Higher Education. ESG. https://www.enqa.eu/esg-standards-and-guidelines-for-quality-assurance-in-the-european-higher-education-area/
[22] The European Quality Assurance Register for Higher Education. About EQAR. https://www.eqar.eu/about/close-up/
[23] The European Association for Quality Assurance in Higher Education. About ENQA. https://www.enqa.eu/about-enqa/
[24] European Commission: Directorate-General for Education, Youth, Sport and Culture, *Blueprint for a European degree – Communication from the Commission to the European Parliament, the Council, the European Economic and Social committee and the Committee of the Regions*, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2766/496478.

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that are quality assured either through the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) or through recognised national systems.[25][26]

The European degree label provides a valuable reference for the conceptual design of the RM quality label with its emphasis on quality assurance, transparency, and mutual recognition across borders. This alignment would support the development of high-quality, modular RM training programmes that are recognised across institutions and countries in several ways:

- A potential RM label may draw inspiration from ESG principles and EQAR mechanisms to ensure credibility, transparency, and mutual recognition across borders.
- Similarly to the European Degree Label, the RM label could support modular, stackable training formats, enabling flexible learning pathways and micro-credentials.
- Drawing on relevant principles from European QA frameworks could support interoperability and mobility of RM professionals across institutions and countries.
- The RM label could allow institutions with strong internal QA systems to self-assess and award the label, supported by external review when needed.

3.2.5. European approach to micro-credentials

In June 2022, the Council adopted the Council Recommendation on a European approach to micro-credentials for lifelong learning and employability[27], establishing common EU framework to support the quality, transparency and uptake of micro-credentials across the EU. Micro-credentials, as defined in this Recommendation, certify the learning outcomes of short, targeted learning experiences, offering a flexible, targeted way to develop knowledge, skills and competences. The Recommendation also sets out EU-level building blocks for micro-credentials, including a common definition, standard elements for describing them, and principles for their design and issuance.[28]

Within the European Education Area, micro-credentials are expected to align with common standards ensuring quality, transparency, cross-border comparability, recognition and portability.[29] The Council Recommendation highlights that these micro-credentials could be issued by a wide range of providers, including higher education institutions, training organisations, professional associations, and private providers. The initiative aims to improve recognition across institutions and borders, support upskilling and reskilling, and strengthen opportunities for personalised learning pathways.[30]

Given that RM training is typically short-format, modular, and offered by a diverse provider, the EU's micro-credential framework provides a highly relevant reference point. Embedding similar principles, such as flexibility, quality assurance and cross-border comparability would support RM professionals building coherent, interoperable and stackable learning pathways throughout their careers.

[25] Council Recommendation of 12 May 2025 on a European quality assurance and recognition system in higher education. Available at: https://eur-lex.europa.eu/eli/C/2025/3006/oj/eng

[26] *Member States are encouraged to: Allow EQAR-registered quality assurance agencies or those applying the European Approach for Joint Programmes to award the label, Enable institutions with robust internal QA systems to self-award the label, provided they comply with ESG and European criteria, Complement ESG reviews to ensure joint programmes meet European standards, Explore the extension of the label to EQF level 5 programmes, where applicable.*

[27] Council Recommendation of 16 June 2022 on a European approach to micro-credentials for lifelong learning and employability 2022/C 243/02. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32022H0627(02)

[28] Ibid.

[29] European Education Area. A European approach to micro-credentials. Available at: https://education.ec.europa.eu/education-levels/higher-education/micro-credentials

[30] Ibid.

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3.2.6. Implications and challenges

Despite strong policy alignment with these above-mentioned initiatives, several challenges must be addressed when designing the RM quality label:

- Scope and format differences: RM training often consists of short-term, non-degree formats such as micro-credentials, which do not fit easily within traditional higher education QA structures designed for full degree programmes.
- Diverse provider landscape: RM training is usually delivered by universities, professional associations, and private organisations, many of which operate outside national QA systems.
- Limited accreditation infrastructure: Many RM training providers lack formal accreditation pathways or internal QA mechanisms, making alignment with ESG and EQAR requirements challenging without additional support.
- Evolving policy environment: The ESG is currently under revision, and the European Degree Label is still being developed. Aligning the RM label too closely or prematurely may risk misalignment with future standards.
- Risk of over-regulation: Applying QA frameworks could discourage participation, particularly among smaller or emerging providers. The RM label must balance rigour with flexibility to remain inclusive and accessible.

Taken together, the community-level needs and the broader European policy direction create a clear justification for a proportionate and flexible quality label that can support transparency, comparability, and gradual professionalisation across the ERA.

3.3. Review of Existing Models

To support the development of a proportionate and feasible quality label for RM training, this subchapter aims to review and analyse existing professional recognition and quality assurance models developed by manager networks/associations. Examining how different communities structure training quality, recognition mechanisms, and governance provides relevant insights into the diverse ways quality is operationalised in practice and helps identify approaches that may inform later reflection and testing.

3.3.1. Alliance of Technology Transfer Professionals (ATTP)

The Alliance of Technology Transfer Professionals (ATTP) is a non-for-profit organisation established in 2010 and acts as a global alliance of technology transfer/knowledge exchange associations. It promotes the standards for the technology transfer/knowledge exchange profession.[31]

ATTP created the Registered Technology Transfer Professional (RTTP) accreditation, setting international professional standard for knowledge exchange/technology transfer (KE/TT) and commercialisation practitioners working in universities, industry and government labs.[32] Professional recognition is awarded in two levels: Candidate RTTP (for early-career professionals committed to developing their competencies) and RTTP (for experienced professionals who have demonstrated significant achievements and impact in technology transfer).[33]

Candidate RTTP status was established to allow early career professionals (typically 6 months into their post) to signal their commitment to a pathway of training and development that could

[31] ATTP. ATTP Structure and Governance. https://attp.global/about/attp-structure-and-governance/
[32] ATTP. RTTP Program. https://attp.global/rttp-program/
[33] ATTP. RTTP Program. https://attp.global/rttp-program/

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lead to the award of full RTTP status. They also need to showcase their experience (working at a KE/KT/TT role and member of one of the ATTP association), skills (through training or working with a mentor) and achievements (developing a Career Aspiration Plan) by completing the application form and having the support of their line manager/director. The application shall be checked by the National Associations to ensure that all elements of the online process have been correctly followed and that the relevant Director has approved the application.[34]

For the RTTP, applicants must demonstrate experience in a knowledge/technology transfer role (minimum 3 years for RTTP), skills aligned with six core competencies[35].To showcase their skills, applicants can opt for recognition of skills through the trainings route, earning minimum of 60 Continuing Education (CE) points, awarded through ATTP-accredited training activities, such as face-to-face or online training courses, trainings, webinars or conferences. Applicants can also choose the Mixed route, where they need to provide evidence of at least two of the following: professional qualifications, list of deals or projects led by them, description of leadership roles. To demonstrate the application of knowledge and skills relevant to the six core competencies, applicants shall provide a 1000-word Achievement Overview in an essay format, that is endorsed by their manager.[36]

ATTP oversees the quality and standards of professional recognition. ATTP set out criteria and process by which organisations can apply to have their training events recognised by ATTP, making it possible to award CE points. This is managed by the Course Review Committee (CRC).[37] To obtain recognition, training providers, whether ATTP member associations or accredited external organisations must apply detailing the course structure, learning objectives, trainer qualifications, and supporting materials. The CRC evaluates whether the training meets ATTP's standards for relevance, quality, and professional development value. The recognition process includes several steps:

1) Initial review: first-time applicants undergo a full review and may require a site visit by an RTTP,
2) Subsequent reviews: for providers with previously recognised courses, new submissions may only require a document review, unless significant changes are made,
3) Criteria-based assessment: courses are evaluated against a set of mandatory and preferred criteria, including competent administration, up-to-date content, diversity of trainers, and opportunities for networking,
4) Points allocation: CE points are awarded at one point per hour of training (excluding breaks), with a maximum of 20 points per course. Courses not meeting all mandatory criteria for multi-day events may be capped at 7 points.

Providers must also maintain attendance records, issue certificates with CE point values, and submit participant feedback. Recognition is valid for three years, after which a re-evaluation may be required. This structured process ensures that recognised training events contribute meaningfully to the professional development of technology transfer practitioners and uphold the integrity of the RTTP designation.[38]

[34] ATTP. Candidate RTTP. https://attp.global/application-process/candidate-rttp/
[35] Strategic & business insight, entrepreneurial leadership, legal, scientific and technical knowhow, effective engagement, governance and project management, knowledge transformation management.
[36] ATTP. RTTP Criteria. https://attp.global/application-process/criteria/
[37] ATTP. Course Review Committee. https://attp.global/course-review-committee/
[38] ATTP. Guidelines for training event recognition. https://www.attp.global/wp-content/uploads/2017/03/ATTP-CRC-Guidelines-Aug-2016.pdf

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3.3.2. Southern African Research and Innovation Management Association (SARIMA)

The Southern African Research and Innovation Management Association (SARIMA) aims to bring together research and innovation management practitioners with the aim to promote and facilitate best practices in building and strengthening capacity and capabilities of professionals and institutions. It plays a key role in professional development and in international structures that award professional status.[39]

SARIMA established the International Professional Recognition Council (IPRC) as an autonomous body to award professional recognition to research managers in Africa. IPRC oversees the quality and standards for individual professional recognition, conducts peer reviews and confer professional status on research managers, based on prior learning and experience demonstrated through a portfolio of evidence.[40] IPRC is responsible for awarding professional recognition across three professional designations: Research Administration Professional (RAP), Research Management Professional (RMP) or Senior Research Management Professional (SRMP), allocating continuing professional development points, managing dispute resolution and appeals, and advancing and promoting the professional recognition programme, as well as research management as a profession.[41]

The recognition status is valid for five years, after which renewal is required. Each designation has different renewal requirements, reinforcing a commitment to ongoing professional development. Candidates have to confirm their commitment to professional development to employers, colleagues and others in the research management environment, demonstrate core and transferable (cross-cutting) competencies, and contributions to significant achievements and impact in research management.[42]

To maintain professional recognition, individuals must accumulate training points, which are awarded through a Training Endorsement process. Quality assurance of training is maintained via a Training Endorsement Committee (TEC), which evaluates and approves training programmes eligible for continuing professional development points. Training activities must be offered by credible providers and aligned with SARIMA's Professional Competency Framework (PCF)[43]. Accredited degrees, diplomas, and certificate programmes in research management do not require endorsement, and can automatically contribute up to 60 training points, depending on the duration and the alignment with the PCF. For endorsing a training, training provider needs to submit a request form to the IPRC Secretariat. The request is reviewed by its members. Points are allocated based on duration, relevance, and alignment with PCF. If training points are not awarded, applicants will receive feedback from the TEC.[44]

SARIMA collaborates with the University of the Witwatersrand to offer six accredited online short courses. These are designed to build core competencies in research management and are aligned with the PCF. By completing courses, applicants can earn IPRC training points, which are essential for applying or renewing professional recognition designations.[45]

[39] Southern African Research and Innovation Management Association (SARIMA). About. Available at: https://www.sarima.co.za/about/.
[40] International Professional Recognition Council (IPRC). About. Available at: https://iprcouncil.com/about/.
[41] International Professional Recognition Council (IPRC). Professional Recognition. Available at: https://iprcouncil.com/about-2/
[42] Ibid.
[43] SARIMA - Professional Competency Framework (PCF) for research managers and administrators. Available at: https://iprcouncil.com/wp-content/uploads/2024/05/Professional-Competency-Framework-2024-web.pdf
[44] International Professional Recognition Council (IPRC). Training endorsement: https://iprcouncil.com/training-endorsement/
[45] SARIMA – Wits Online short-courses: https://www.sarima.co.za/sarima-online-short-courses/

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3.3.3. Society of Research Administrators International (SRAI)

The Society of Research Administrators International (SRAI) is a global professional association of research administration communities across diverse sectors, including universities, hospitals, nonprofits, and commercial institutions. SRAI aims to support the professional development of research administrators, empowering them globally with knowledge, resources and community they need to excel, collaborate and drive research together.[46]

SRAI's professional development offer aligns with its Professional Development Framework published in 2024, organising competences into key domains: pre-award, post-award, research compliance, leadership and management, clinical and translational research, information and data management, commercialisation and innovation, technology systems.[47]

SRAI offers a Certificate Program designed to support research administrators at all career stages in a flexible and achievement-based manner. The program includes 10 specialised certificates covering key domains such as Pre-Award (PA), Financial Management (FM), Global Research Management (GRM), Leadership (LD), Clinical Trials Research Administration (CTRA), National Institutes of Health Grants Fundamentals (NIH), etc. Each certificate combines required workshops and elective sessions, enabling participants to tailor their learning journey. Members have up to three years to complete requirements, and courses are available at SRAI's Annual Meeting as well as virtual conferences and section meetings throughout the year.[48]

SRAI has recently introduced its LevelUP micro-credential program, offering self-paced, on-demand learning platform for research administrators. The courses consist of Modules and so-called mGuides, with the first being 3-5 hours in duration, with a comprehensive 50-question exam, while the latter can be completed in 1-2 hours and include continuous knowledge checks.[49] With both options, the learner can earn Continuing Education Unit (CEUs). In order to receive the Research Management Specialist (RMS) Certificate, applicants (SRAI members) must complete a total of 39 CEUs, submit a case study within three years of starting the program. The Certificate also includes a Digital Badge. The integrity and quality control of the LevelUP program is upheld by the SRAI Micro-credential Council, which oversees the development, review, and ongoing enhancement of all LevelUP content to ensure it remains relevant, rigorous, and responsive to the field's evolving demands. Their leadership ensures that every module delivers trusted, high-quality learning.[50]

3.3.4. The National Council of University Research Administrators (NCURA)

The National Council of University Research Administrators (NCURA) is a non-profit professional association dedicated to advancing research administrators through comprehensive education, training, and community-building. With over 9,000 members across universities, research institutes, and organisations, NCURA serves as a central hub for professional development, knowledge exchange, and institutional support in research administration.[51]

NCURA offers diverse professional development opportunities to various career stages and needs, ranging from in-person workshops and hybrid models to on-demand modules, and are tailored to different audiences. Topics covered include pre-award and post-award processes,

[46] SRAI – Society of Research Administrators International. Who we are. https://www.srainternational.org/about/who-we-are
[47] SRAI – Professional Development Framework. Available at: https://framework.srainternational.org/
[48] SRAI – SRAI Certificate Available at: https://www.srainternational.org/access-resources-publications/certificate-programs
[49] SRAI – LevelUP Micro-credential Program. https://www.srainternational.org/find-professional-development/levelup
[50] SRAI - LevelUP Research Management Specialist Certificate. Available at: https://www.srainternational.org/find-professional-development/levelup/researchmanagementspecialist
[51] National Council of University Research Administrators (NCURA). About us: https://www.ncura.edu/AboutUs.aspx

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regulatory compliance, financial reporting, proposal development, and institutional systems for research management.[52]

At its last Annual Meeting, NCURA offered a Certificate Program that allows participants to earn a certificate by attending 11 sessions. Attendees selected one track and must completed 7 sessions within that track and 4 electives from other tracks. Tracks offered included Departmental, Financial/Post-Award, Human Capital & DEI, International/Global, Medical/Clinical/Industry, Organizational Leadership, PUI/ERI, Research Compliance and Ethics, and Systems/Data/AI.[53]

3.3.5. Australasian Research Management Society (ARMS)

The Australasian Research Management Society (ARMS) is the professional body for research managers and administrators across Australasia and Singapore. Established in 1999, ARMS plays a central role in professionalising research management through structured accreditation, training, and peer learning opportunities. Its members are universities, research institutes, government agencies, and industry, ARMS fosters excellence in research support services across the region.[54]

ARMS offers an Accreditation Program designed to support research management professionals at all career stages. The program includes three levels: Foundation Level Accreditation Program (FLAP), Established Level Accreditation Program (ELAP), and Advanced Level Accreditation Program (ALAP). Each level is structured around a points-based system, allowing participants to tailor their learning journey. Successful candidates earn the post-nominal ARM(F), signifying formal recognition of their foundational competencies.[55]

ARMS maintains a Professional Development Framework (PDF) that identified six core knowledge areas[56] across three levels: Foundation, Management, and Leadership. The framework identifies six core domains of research management and guides the design of training modules for the Accreditation Program to ensure relevance and consistency. It supports continuous learning and helps professionals align their development with institutional and sectoral needs.[57]

Quality assurance is part of the ARMS' training and accreditation programme. Each module is developed in accordance with the ARMS Professional Development Framework and undergoes regular review to maintain relevance and accuracy. The ARMS Accreditation Committee, in collaboration with the Education and Professional Development Committee (EPDC), oversees the development and continuous improvement of training content. These committees ensure that modules reflect current best practices, regulatory changes, and feedback from the research management community.[58]

3.3.6. Research Manager and Administrator Network Japan (RMAN-J)

The Research Manager and Administrator Network Japan (RMAN-J) is Japan's only nation-wide professional association dedicated to individuals engaged in research management and administration. Established in 2015, RMAN-J plays a central role in enhancing the capabilities

[52] NCURA Online Training Platform. https://onlinelearning.ncura.edu/
[53] NCURA Education. https://www.ncura.edu/Education.aspx
[54] ARMS. About. https://www.researchmanagement.org.au/about-arms-0
[55] ARMS Accreditation Programs. Available at: https://www.researchmanagement.org.au/accreditation-programs.
[56] Contextual Knowledge, Relational, Technical, The Research Funding Cycle, Higher Degree by Research Candidature Cycle, Ethics and Integrity, Data and Information Management, Engagement and Impact. More information: https://www.researchmanagement.org.au/professional-development
[57] ARMS Professional Development. https://www.researchmanagement.org.au/professional-development
[58] ARMS Accreditation Program Policy. August 2025. Under review. https://www.researchmanagement.org.au/sites/default/files/uploaded-content/field_f_content_file/arms_accreditation_policy_2025_-_under_review.pdf

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of Japanese universities and research institutions by supporting the professional development of University Research Administrators (URAs) and fostering collaboration across the national research ecosystem.[59]

In 2020, Japan launched a three-year national project funded by the Ministry of Education, Culture, Sports, Science and Technology (MEXT) to establish a national quality assurance and training infrastructure for URAs. As part of this initiative, RMAN-J was tasked with the development of the training curriculum on which the URA training and certification system is based.[60]

The outcome of this project was the establishment of the URA Skills Certification System, currently administered by the Japan Certification Board for Research Administration and Management Skills (CRAMS), which is also responsible for the overall certification framework. The certification system is designed to validate the competencies of URAs and support their career development, while also enhancing the research management capacity of Japanese institutions.[61]

The training curriculum consists of into Fundamental and Core levels and is structured into 15 subjects across 10 thematic groups, covering almost the full range of research management activities, including research strategy and institutional planning, pre- and post-award management, industry-university-government collaboration, intellectual property and compliance, and outreach.[62] Each module includes an online confirmation test, with a passing score of 80%. Since 2024, the training is commissioned through a national e-learning platform managed by the Japan Science and Technology Agency (JST) and conducted by RMAN-J.[63] The review of module content and potential updates are handled mainly by volunteers, with only minor financial support from CRAMS.

CRAMS continues to oversee the certification system, including certification standards, assessment, and recognition of URA competencies within a structured framework.[64] The certification framework is two-tiered: The first one is the “Certified URA” status, which requires a minimum of three years of relevant work experience, successful completion of 15 core-level training modules, and a written review. The Advanced level builds on the ‘Certified URA’ status and includes advanced-level training, essay and an interview-based assessment.[65] This centralised governance model ensures that training providers meet strict eligibility criteria and that the quality of training remains high and standardised across all institutions.[66][67][68]

3.3.7. Analysis

To support the development of a quality label for RM trainings, this section presents the overview of five representative organisations’ (ATTP, SARIMA, NCURA, ARMS, and RMAN-J) approaches to accreditation, training delivery, QA oversight, and mechanisms for ensuring

[59] RMAN-J. https://www.rman.jp/english/
[60] https://www.jst.go.jp/innov-jinzai/program/ura/index.html
[61] Makiko Takahashi, Shin Ito, 2023. "The Profession of Research Management and Administration in Japan", The Emerald Handbook of Research Management and Administration Around the World, Simon Kerridge, Susi Poli, Mariko Yang-Yoshihara. https://www.emerald.com/books/oa-edited-volume/12493/chapter/82699010/The-Profession-of-Research-Management-and
[62] Development of a system to develop and secure research administrators (URA). Achievement report: https://www.mext.go.jp/a_menu/jinzai/ura/detail/1349663.htm
[63] Japan Science and Technology Agency. URA Training. Available at: https://www.jst.go.jp/innov-jinzai/program/ura/index.html
[64] Japan Certification Board for Research Administration and Management Skills. Available at: https://www.crams.or.jp/
[65] Japan Certification Board for Research Administration and Management Skills. Training and Screening Application. https://www.crams.or.jp/general_info/
[66] Japan Certification Board for Research Administration and Management Skills. (2024). 2024 URA Training Manual. Available at: https://www.crams.or.jp/wp/wp-content/uploads/2024/06/240612_2024_%E5%8F%97%E8%AC%9B%E3%83%9E%E3%83%8B%E3%83%A5%E3%82%A2%E3%83%AB.pdf
[67] CRAMS. URA Training and Certification System. Available at: https://www.crams.or.jp/system/jst_uratraining.php
[68] CRAMS Training Overview https://www.crams.or.jp/training/

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consistency and credibility. While their scope and governance models differ, several recurring patterns emerge: most systems link recognition to competence frameworks, rely on structured evidence or point-based mechanisms, and integrate regular review cycles to maintain quality. At the same time, the analysis highlights limitations relevant to the European RM landscape, including resource intensity, regional specificity, and varying degrees of transferability. These insights help illustrate how quality, recognition and professional standards can be operationalised in practice across diverse contexts. This analysis supports the RM Framework's goal of designing a flexible, inclusive, and scalable quality label.

Model	Recognition Framework	Training delivery	QA body	QA mechanism
ATTP	RTTP and Candidate RTTP accreditation; CE point system	Member associations and accredited external providers	Course Recognition Committee (CRC)	Review type: document review + occasional site visit; Evidence: CE hours, materials, trainer info; Periodicity: 3-year validity
SARIMA	3-tier individual recognition (RAP, RMP, SRMP); training endorsement	Accredited institutions and endorsed providers	Training Endorsement Committee	Review type: document review; Evidence: alignment to Professional Competency Framework (PCF), duration, relevance; Periodicity: 5-year renewal
SRAI (LevelUp)	RMS Certificate, CEU-based micro credentials	Centralised online LevelUP modules and mGuides	LevelUP Micro-credential Council	Review type: internal content review; Evidence: exams, case study, CEUs; Periodicity: ongoing content review
NCURA	Certificates of completion and peer validation	NCURA-led and affiliated trainers	-	Review type: expert peer review (institutional); Evidence: documentation; Periodicity: on request
ARMS	Accreditation levels (Foundation, Established, Advanced)	ARMS and accredited trainers	Accreditation Committee & Education and Professional Development Committee (EPDC)	Review type: module review; Evidence: alignment to PDF, points system; Periodicity: regular review cycle
RMAN-J	National certification system for URAs	RMAN-J commissioned by the Japan Science and Technology Agency (JST)	Japan Certification Board for Research Administration and Management Skills (CRAMS)	Community based and peer driven at the moment, supported by CRAMS

Table 1. Comparison of international QA and recognition frameworks

The SWOT analysis below synthesises the key features of the reviewed recognition and quality assurance models by examining their strengths, weaknesses, opportunities, and threats. Rather than assessing their suitability for direct adoption, the analysis highlights the different ways professional communities structure training quality, formal recognition, competence alignment, and governance. It also shed light on structural tensions such as resource intensity, scalability, and regional specificity that shape how these systems function in practice. By comparing these diverse approaches, the SWOT analysis identifies patterns, limitations, and design considerations that are relevant for understanding how quality mechanisms operate across sectors and contexts.

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Model	Strengths	Weaknesses	Opportunities	Threats
ATTP	Internationally recognised accreditation with structured CE point system; Formal QA mechanisms for training recognition via Course Recognition Committee (CRC); Clear criteria and review processes (site visits, document reviews).	Focused on KE/TT professionals, too specific;	Adapt CE point system for RM systems, Use CRC-style review for RM training.	Risk of narrow scope if not adapted to RM diversity; Overly formal processes may deter smaller providers.
SARIMA	Competency-based recognition aligned with RM roles; Structured endorsement process for training providers; Clear QA mechanisms via the Training Endorsement Committee.	Regional scope; limited visibility in Europe; Peer review model may be resource-intensive and hard to scale.	Adapt endorsement process for European RM label; PCF as a model for RM COMP integration.	Sustainability of peer review;
SRAI (LevelUP)	Alignment with SRAI's Professional Development Framework; Flexible, on demand learning with micro-credentials; Structured CEU system with applied learning (case study requirement);	Internal QA only; Primarily US-based, limited visibility in Europe.	Potential use of CEU and micro-credential model.	Rapid evolution of RM roles may require frequent content updates.
NCURA	Strong peer validation, Diverse training formats, Large professional network.	No formal accreditation; Recognition is informal, lacks external validation.	Inspiration for flexible QA.	Informal recognition may hinder mobility; Perceived lack of rigour could affect stakeholder trust.
ARMS	Modular accreditation levels tailored to RM career stages; QA embedded in training development and review; Alignment with Professional Development Framework.	Internal QA may lack external validation; Regional focus may limit European applicability.	Inspiration of layered structure for RM label tracks;	Over-reliance on internal QA; Potential stagnation without external review mechanism.
RMAN-J	Government-backed certification system with formalised, independent authority (CRAMS); Standardised training curriculum, delivery and testing;	Nationally specific; limited international recognition; Dependent on Japanese policy and institutional structures; Multiple stakeholder involvement might cause governance complexity	Adapt modular certification for RM micro-credentials; Centralised e-learning infrastructure.	Limited adaptability. Review is based on continued government policy and resourcing.

Table 2: SWOT analysis of QA and recognition international models

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3.4. Ownership Models

Establishing an ownership framework for the research management training quality label on the long term is essential to ensure credibility, sustainability, and long-term impact. Ownership defines governance, how decisions are taken, and how stakeholders are represented, which impact legitimacy and adoption across diverse European contexts. This report investigates three types of 'owners', which will feed into a business model and sustainability pathway under WP4. A clear framework shall provide transparency and accountability, while leaving room for flexibility and adaptation. Our aim is to outline possible approaches and criteria for consideration, which will be then adapted based on the lessons learned during the piloting phases.

The future ownership approach should:

- Ensure neutrality and legitimacy by dividing decision-making responsibilities and manage conflicts of interest transparently.
- Support scalability and inclusiveness, accommodating diverse training formats and provider profiles.
- Enable stakeholder participation, including universities, professional associations, and private providers.
- Provide a pathway to sustainability, through clear governance and funding mechanisms.

The following models illustrate different approaches that could be explored:

- **European institutional model**

This approach embeds the label in an EU-level structure operating independently of national QA systems, with potential hosting/endorsement via the European University Institute (EUI) and/or linkage to the ERA Talent Platform. The European University Institute (EUI) provides a relevant example because it has developed its own European accreditation and quality assurance system for doctoral and postgraduate programmes, ensuring recognition across member states.

- **Global professional model**

This approach leverages a global accreditation model, building on the Alliance of Technology Transfer Professionals (ATTP) and its European partner, ASTP. This model provides strong portability and recognition beyond Europe, while benefiting from established course endorsement and continuing education mechanisms. However, it requires careful adaptation to ensure inclusivity across the full spectrum of research management roles.

- **Association-led model**

This approach builds on existing professional networks, leveraging community-driven governance and responsiveness to practitioner needs. It offers agility, community legitimacy, and rapid responsiveness. However, it depends on a robust business model to ensure sustainability and must implement strong neutrality safeguards including independent awarding committees and transparent decision-making).

3.4.1. Interviews

Methodology

To explore the feasibility of potential ownership model for the RM quality label, semi-structured interviews were conducted with three different organisations, with direct experience in developing or implementing training accreditation or recognition mechanisms related to

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research management. Interviewed organisations were selected through purposive sampling based on their direct experience with such systems, ensuring that the insights collected were closely aligned with the exploratory aims of this deliverable. Each interview followed a shared structure, covering topics such as governance structures, decision-making processes, sustainability considerations, stakeholder engagement, and lessons learned.

Interviews were conducted online in English via Microsoft Teams between December 2025 and January 2026 and lasted approximately 45–60 minutes. All participants received an information letter and consent form outlining the interview purpose, confidentiality procedures, GDPR-compliant data handling, and voluntary nature of participation. The interviews were recorded, anonymised, and analysed thematically. Coding was informed by the predefined analytical dimensions of the interview guide, while allowing for the integration of additional themes where relevant.

The interviews provided insights into how different organisations develop, structure, govern, and sustain training quality assessment mechanisms. Although the organisations consulted varied in scope and maturity, recurrent principles emerged across cases, informing the analysis of feasible ownership models for a potential European RM quality label.

Governance

Across organisation, governance arrangements for training quality and certification mechanisms were characterised by established oversight structures with clearly defined mandates. While their structures differed across context, interviewees consistently described arrangements that separate oversight from operational activity. In practice, this meant that decisions about training quality were made in committees, councils, or independent bodies that are separate from teams responsible for designing or delivering training. Several interviewees outlined concrete measures used to protect neutrality, such as appointing members through formal organisational processes, diversifying representation across institutions or roles, and ensuring that operational staff do not participate in recognition decisions.

Across the interviews, three governance features appeared repeatedly**: independence of the body making quality decisions, clear division of responsibilities, and balanced representation to avoid dominance by a single group.** These elements were seen as essential for credibility. They also provide relevant considerations for a potential European RM training quality label, where neutrality and clarity of governance would be important for building trust among diverse training providers.

Decision-making processes

Interviewees also highlighted the importance of decision-making principles that balance structured procedures with adaptability. In most cases, decisions were guided by defined criteria and established review processes but implemented with adequate flexibility to accommodate different formats. Organisations relied on clear quality criteria that guide the review of training proposals and ensure that decisions are made consistently and transparently.

A recurring feature across the interviews was the use of peer or expert review for training materials. Organisations relied on experienced practitioners or subject-matter experts to assess modules, check accuracy, and confirm that learning outcomes were appropriately addressed. In several cases, this involved multi-stage review processes involving expert input, user testing, or feedback from partners, ensuring that decisions were informed by both professional expertise and practical applicability.

In most cases, training offers are examined with regard to the clarity of their learning outcomes, the alignment between outcomes and content, and their fit with relevant competence frameworks. Across the systems described neutrality in decision-making is usually supported

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through conflict-of-interest practices and by ensuring that individuals involved in developing training are not responsible for assessing its quality. Decisions are documented and communicated clearly, often accompanied by constructive feedback to support further improvement.

Overall, the interviews suggest that **decision-making in training-quality systems works best when processes are transparent, proportionate, and grounded in shared criteria, allowing judgments to remain credible** while accommodating the diversity of training formats across research management.

Sustainability

Interviewees emphasised that sustainability depends on proportionate design, pragmatic resourcing, and gradual growth over time. Some of these systems expanded gradually as organisational capacity increased to support more regular or more complex review activities. **Financial sustainability was generally achieved through diversified income sources,** such as modest fees for participation in training activities or charges associated with submitting trainings for review or recognition**.**

Interviewees also described a strong reliance on practitioners and volunteers, who contributed to reviewing training content or advising on improvements. These contributions were often supported by modest honoraria or in some cases by targeted use of digital platforms to streamline processes and limit administrative workload.

The interviews highlight the importance of designing any future training quality mechanism so that it is scalable and proportionate. Introducing overly complex procedures too early risks creating administrative burdens that are difficult to sustain. A **phased, flexible approach therefore appears essential for ensuring long-term viability and fairness** across the diverse RM training landscape.

Stakeholder engagement

Interviewees described the importance of structures that involve a broad mix of stakeholders in quality assessment, reflecting the diversity of the research management landscape. This diversity was seen as essential for ensuring that different institutional perspectives and professional roles inform the interpretation of standards and the assessment of training quality. In some cases, stakeholder engagement was extensive: for example, councils drawing members from large, medium, and small institutions or from different organisational roles, reflecting diverse operational realities.

Overall, **stakeholder engagement was viewed as most effective when it was inclusive enough to capture different perspectives, but manageable enough to remain operationally feasible**. This balance was highlighted as important for any future European RM training quality label, given the diversity of providers and institutional contexts across the European Research Area.

Implementation and lessons learned

When reflecting on their own quality assurance and recognition systems, interviewees highlighted several common challenges. One recurring difficulty concerned the initial scope of the system: early designs often proved too ambitious relative to available resources, reviewer capacity, or the maturity of the training ecosystem. Building consensus on what constitutes “quality” across diverse institutional cultures required extensive consultation.

Interviewees also noted that assessment criteria and review processes need regular adjustment. As professional practices, regulatory requirements, or training formats evolve, quality criteria must be revisited and review procedures adapted accordingly. **Maintaining the relevance of assessment systems** therefore **requires sustained attention, a reliable pool**

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of trained reviewers, and mechanisms to incorporate feedback from practitioners or participating institutions.

Interviewees emphasised the value of iterative refinement. They described systems that evolved through repeated feedback cycles, periodic reviews, and engagement with practitioners or national associations. This allowed assessment processes to remain relevant as professional expectations changed, and new training needs emerged. For a European RM training quality label, interviewees advised a similar incremental approach: starting with core, broadly shared elements and expanding only when mechanisms are sufficiently established and supported by the community.

SUMMARY

The interview findings demonstrate that, despite operating in different organisational and geographical contexts, the explored systems share a set of principles. Across interviews, clarity of roles, transparent and fair decision-making, and proportionate operational arrangements emerged as essential for credible training quality assessment mechanisms. These insights suggest that the ownership model for a European RM training quality label will need to reflect these core standards.

At the same time, the interviews indicate that no single ownership model on its own would fully meet the needs of the European RM training landscape at this stage. A more feasible approach appears to be one that builds on the strengths of each model, including neutrality, procedural clarity and the responsiveness to practitioner's needs, but also addresses their limitations. In combination, these elements point towards an arrangement that is proportionate, transparent, and capable of evolving over time.

Building on these insights, the following section outlines a proposed label structure and tracks that translate these principles into a practical, testable framework. This model should be understood as a starting point for piloting. It is intentionally designed to be flexible and adaptable, enabling experimentation during the RM Framework project and allowing the governance and ownership arrangements to be refined as further evidence, stakeholder feedback, and lessons from the pilot phase become available.

3.5. Label structure and tracks

The proposed quality label for Research Management (RM) training is designed as a flexible, modular, and progressive framework that reflects the diversity of RM roles, institutional capacities, and training ecosystems across Europe. Rather than imposing a single prescriptive model, the label aims to establish a set of minimum common benchmarks for quality and transparency, while explicitly allowing contextual adaptation at national, institutional, and organisational levels.

This design choice responds to the heterogeneous nature of RM training offer in the European Research Area (ERA), where programmes vary significantly in scope, duration, degree of formalisation, and provider type. The quality label therefore aims to act as a shared European reference point, supporting convergence without uniformity.

The architecture of the label is guided by three overarching objectives. First, **accessibility**, ensuring that entry-level and emerging training providers can engage with the label without disproportionate administrative or financial burden. Second, **progression**, allowing programmes to evolve over time towards higher levels of quality, maturity, and demonstrable impact. Third, **interoperability**, ensuring alignment with European policy instruments and quality assurance principles, enabling recognition in various institutional set-ups, while remaining compatible with national legal, administrative, and educational frameworks.

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Together, these objectives position the label not as a gatekeeping mechanism, but as an enabling instrument for structured professionalisation.

3.5.1. Core and specialised training dimensions

To reflect the breadth and depth of research management roles, institutional context and training formats across the ERA, the quality label adopts a distinction between transversal (core) and specialised training dimensions. This structure does not prescribe how training must be organised, rather, it provides a clear and flexible way for training providers to describe the scope, focus, and intended audience of their programmes. The distinction is fully aligned with the RM Framework Handbook which is based on RM Comp.

1) **Core RM training** applies to all research management professionals, irrespective of institutional setting, disciplinary focus, or career stage. Transversal competences represent broadly applicable skills and attributes relevant to all RM professionals, regardless of institutional setting or role profile.

Transversal competences include:

- Cognitive abilities: cultural sensitivity, problem solving, stress management, adaptability and professional flexibility, conflict management, strategic planning, critical thinking, prioritization, time management and multitasking, reliability and trustfulness.
- Line Management and Talent Development: people management and managing team performance.
- Research project oversight: research project management.
- Stakeholder engagement: diplomacy, negotiation, mediation skills, engagement with key stakeholders.
- Communication: building and maintaining relationships with research funders, partners or other stakeholders.
- Technical proficiency: Legal skills and artificial intelligence.
- Subject matter expertise/specialised knowledge: managing equality, diversity and inclusion.
- Others: self-motivation, initiation, proactiveness, knowledge of R&I ecosystem and governance, resilience, effective communication.

While trainings can have diverse format, length and target audience, addressing these core competences is inevitable to equip professionals with the most needed competences. Programmes applying for the label under the core dimension should demonstrate that learning outcomes are clearly articulated, aligned with RM COMP, and appropriate to the intended target audience in terms of the level addressed, the workload, and the learning design.

2) **Specialised RM training** targets specific roles, domains, or professional pathways within research management. These include:
   - Research Strategy and Policy Development
   - Proposal Development (Pre-Award)
   - Project Support (Post-Award)
   - Science Communication and Impact Management
   - Translation of Results: Uptake and Utilization & Collaboration with Industry
   - Managing Information and Related Functions
   - Research Support Delivery
   - Training, Researcher Development, Postgraduate Researchers
   - Research Ethics and Integrity
   - International Collaboration, Institution Branding
   - Research Infrastructure Management

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- Research Data, Information, Intellectual Property Management

This layered approach reflects the multidimensional and evolving nature of RM roles, supporting both initial role differentiation and advanced professional development. Each of these areas require a mixture of skills and competences defined by RM Comp at the different levels. Training providers are not expected to cover all possible domains. Instead, they are required to **clearly define the scope, level, and relevance** of each specialised offering, ensuring transparency for learners, institutions, and assessors.

Whereas it is envisaged that trainings can be designed to address either core competences or specialised RM areas, given the importance of core competences, even specialised trainings are recommended to address core competences.

3.5.2. Recognition tracks

To balance inclusiveness with excellence, the quality label foresees two recognition tracks, corresponding to different stages of quality maturity.

The **Foundational Quality Label** is foreseen to recognise RM training programmes that demonstrate alignment with RM COMP and the RM Framework Handbook, meet essential quality standards related to learning outcomes, assessment integrity, inclusiveness, and transparency, and show readiness for structured quality development. This track is intentionally designed as a foundational entry point, prioritising capacity-building and transparency over selectivity. It enables a wide range of providers to engage with the label as a quality enhancement tool rather than a competitive accreditation.

The **Advanced Quality Label** is envisaged as a future track, that will recognise programmes that go beyond introductory compliance. These programmes shall demonstrate mature pedagogical design and innovation, systematic evaluation and impact measurement, structured stakeholder engagement, embedded quality assurance and continuous improvement mechanisms. While not required for initial implementation, this track could provide a clear progression pathway for experienced providers and frontrunner institutions, ensuring that the label remains aspirational and future oriented.

3.5.3. Responsibilities of training providers

Training providers applying for the quality label are envisioned to demonstrate alignment with RM COMP and the RM Framework Handbook, clearly specify whether programmes fall under core and/or specialised training, and provide proportionate evidence of learning outcomes, assessment methods, and inclusiveness. They are also expected to commit to transparency, stakeholder engagement, continuous improvement, as well as interoperability as it might be possible that one training provider cannot cover the whole spectrum of programmes necessary for professional development.

A key design principle is proportionality: the type and amount of evidence requested scale with the scope, complexity, and intended recognition level of the programme. This ensures that smaller providers and modular training formats are not disadvantaged, while maintaining credibility, consistency and interoperability.

The quality label shall establish a shared reference point for quality and transparency. It enables diverse providers to demonstrate good practice in a flexible, context-sensitive manner, supporting comparability without constraining innovation or local adaptation.

3.5.4. Labelling process

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The labelling process is conceived as a lightweight, operational model for recognising and enhancing the quality of research management training, designed to function with limited resources and to remain adaptable across institutional and national contexts.

Within the RM Framework project, this process will be implemented and tested with a selected group of pilot institutions, in coordination with WP1 conceptual work and WP3 pilot activities. The project period is used to validate, refine, and calibrate the model, rather than to exhaustively deploy all its possible components.

The labelling process is structured around the following core elements:

- Providing information on RM training programmes by participating institutions – the pilot testers;
- Completing a structured self-assessment checklist aligned with the RM Framework Handbook, RM COMP, and relevant European quality assurance reference points (notably Bologna tools, ESG and EQF); (See Annex B)
- In a pilot phase, assessing the feasibility and usefulness of digital and automation-supported features for consistency checks and structured feedback.
- Reviewing the self-assessments by a temporary pilot-phase review group composed of selected consortium representatives and members of the External Expert Advisory Board.
- Formulating recommendations, intended to support reflection and quality enhancement.

The process is designed to operate in a digital and self-paced manner, minimising ongoing resource requirements and allowing institutions to engage according to their capacity. During the project, interaction with pilot institutions will support validation of clarity, feasibility, and perceived usefulness, while informing adjustments necessary for broader applicability. Outcomes generated during the project will be used to assess whether the model can function credibly and sustainably beyond the project timeframe.

3.5.5. Implementation Guideline and Promotion Plan

An **Implementation Guideline** (See Annex A) and a **Promotion Plan** (Annex C) are developed as integral components of the quality label model, supporting both its application during the project and its potential usability beyond the project duration.

The Implementation Guideline provides structured orientation on:

- The purpose and scope of the quality label;
- Interpretation of self-assessment criteria;
- Expectations regarding evidence and documentation;
- Use of feedback outputs for internal quality reflection.

The guideline is designed to be generic and reusable, allowing future users to apply the model independently of the project consortium. Its use during the project enables testing whether such guidance is sufficient to support consistent and meaningful engagement in a largely self-directed process.

The Promotion Plan focuses on exploring communication approaches for the quality label, including how its purpose, scope, and outcomes can be presented to different stakeholder groups. During the project, this will support learning on visibility and comprehension, without implying permanent branding, endorsement, or formal recognition mechanisms.

Together, these instruments support the ambition of developing a low-threshold, transferable quality label model that could be taken up or further developed beyond the project. The

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following section outlines the accompanying assessment protocol that operationalises this model during the pilot phase.

The quality label and its supporting tools are designed in complete alignment with Horizon Europe's objectives on exploitation, sustainability, and European added value. The implementation model emphasises reusability, scalability, and resource-efficient operation, enabling institutions across the European Research Area (ERA) to adopt and adapt the framework beyond the project lifetime.

The quality label supports the exploitation of project results through:

- **Sustainability**, by providing a self-paced, low-maintenance model.
- **Transferability**, through open, structured tools that can be integrated into diverse national and institutional quality assurance systems,
- **Capacity-building**, by promoting shared reference points for RM competences and training quality across the ERA,
- **European added value**, by fostering coherence, interoperability and comparability in RM professional development while respecting local contexts,
- **Uptake and openness**, enabling training providers, institutions, networks, and policymakers to reuse and build on the framework.

The model therefore positions the quality label as a sustainable and exploitable outcome, supporting long-term professionalisation and alignment with ERA priorities.

4. Assessment protocol

The assessment protocol aims to translate the quality label concept into an operational evaluation process that is feasible under limited resource conditions and adaptable to different institutional environments. Within the RM Framework project, the protocol will be applied and tested with pilot institutions to validate and refine its components. It is designed with the capacity to operate beyond the project duration without continuous external oversight.

While the protocol provides a structured approach to evaluating RM training provision against shared European reference points, it does not function as a formal accreditation or regulatory quality assurance mechanism. During the pilot, it is tested exclusively for its clarity, proportionality and practical usefulness. Pilot institutions therefore provide feedback that will inform the refinement of the protocol, the self-assessment checklist, and related components of the emerging quality label model, ensuring that the future framework is robust, usable, and adaptable across diverse institutional and national contexts.

No binding certification, award decision, or rejection is foreseen during the project. Outcomes are explicitly non-binding and exploratory, serving to test the usefulness and credibility of feedback mechanisms. In the longer term, the model is designed to move towards self-reflection tools and automated feedback, allowing institutions to engage with the framework independently and at their own pace.

4.1. Scope and principles

The assessment protocol will be guided by four principles that underpin both its design and testing:

- **Proportionality**, ensuring that engagement requirements correspond to the scope and complexity of the training;
- **Context sensitivity**, allowing institutions to contextualise their provision within national and organisational frameworks;

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- **Transparency**, ensuring that criteria, processes, and outputs are clear and understandable;
- **Interoperability,** ensuring that training offers can complement one another over time, supporting coherent, stackable learning pathways for RM professionals;
- **Developmental orientation**, framing outcomes as inputs for quality enhancement rather than binary decisions.

These principles are applied consistently during the project and assessed for their suitability in a self-directed, scalable model.

4.2. Tools supporting the assessment process

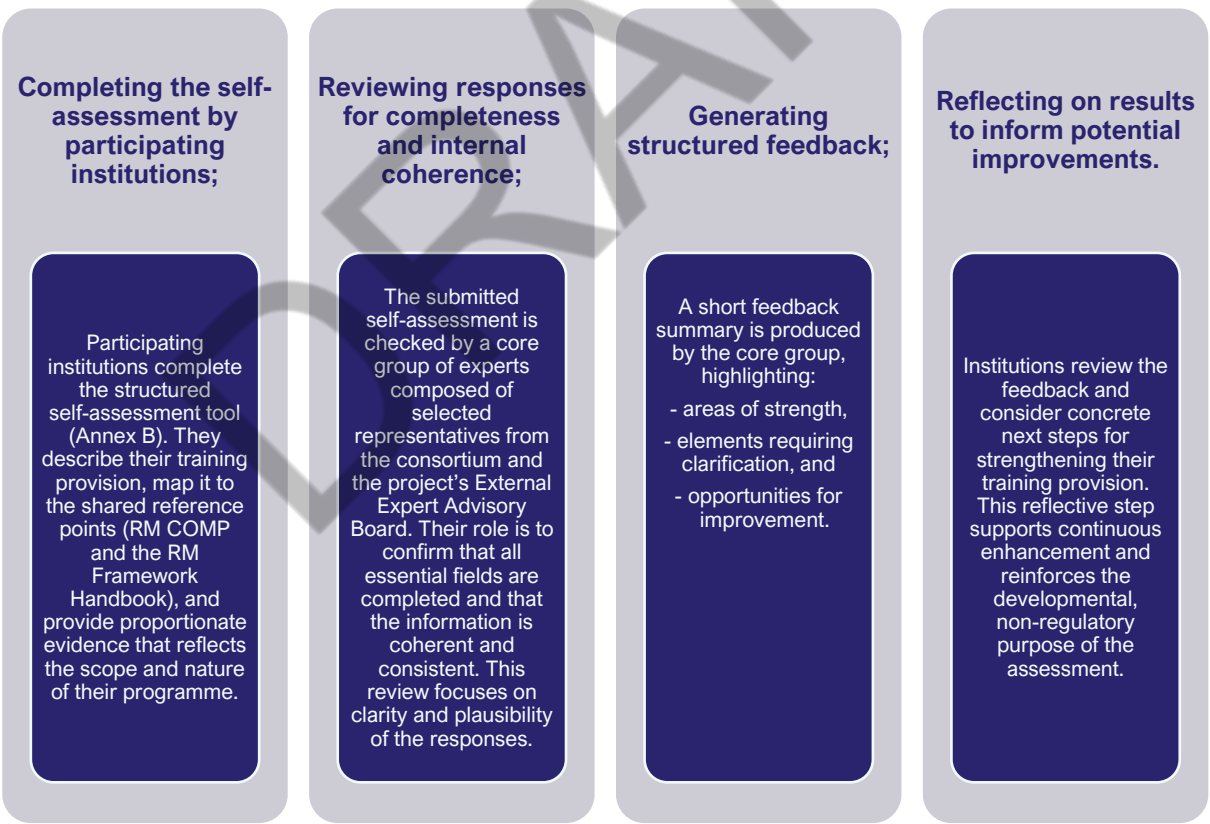
The assessment protocol will rely on a set of structured tools, including:

- A self-assessment checklist aligned with RM COMP and the RM Framework Handbook;
- Templates or guided formats for qualitative information;
- Digital and automation-supported features, where feasible, to assist with coherence checks and feedback generation.

During the project, these tools are used and refined with pilot institutions to evaluate usability, clarity, and robustness, while keeping the design intentionally simple.

4.3. Assessment procedure

The assessment procedure consists of the following steps:



Feedback on the clarity, feasibility and usefulness of these steps will be gathered through the pilot-testing questions included in D3.1, which focus on assessing the practical value of the protocol and its supporting tools. The project includes interaction with pilot institutions for learning and refinement purposes.

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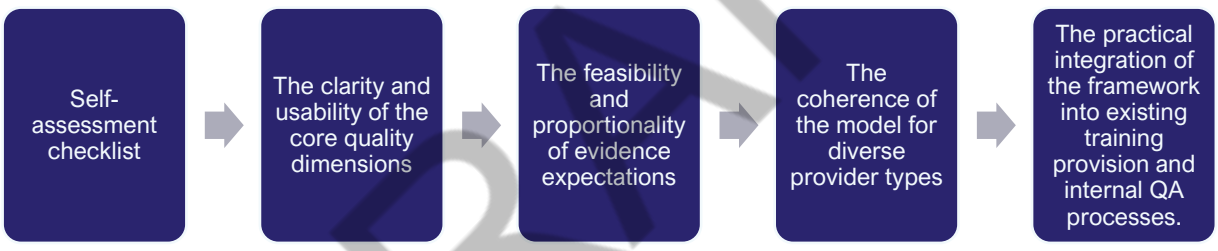
4.4. Connection between the conceptual model and the pilot testing

If providers use a structured self-assessment to align learning outcomes with RM COMP, articulate assessment and recognition transparently, and embed feedback-driven improvement, then their programmes become more understandable and comparable for learners and employers across borders. Therefore, a voluntary label signalling achievement of foundational benchmarks will improve trust, mobility, and capacity in the ERA.

The quality label model presented in this deliverable outlines a long-term framework for supporting transparency, coherence, interoperability and comparability in RM training across the ERA. While this model includes structural elements such as recognition tracks, governance considerations, and broader quality assurance principles, only selected operational components of the model can be meaningfully piloted in WP3 within the scope, resources, and maturity of the RM Framework project.

Accordingly, the pilot does not aim to implement or validate the full quality label model, nor does it involve formal accreditation, award decisions, or the operational structures described in the conceptual framework. Instead, the pilot focuses on testing an initial, lightweight, self-assessment-based approach, reflecting the voluntary, proportionate, and developmental character that WP2 identified as essential for a future RM quality label.

The components tested during the pilot include:



During the piloting phase, expert input from consortium partners will support methodological development, testing, and calibration of the assessment protocol. This input is not embedded as a permanent feature of the model but serves to ensure that the resulting approach is credible, usable, and transferable. The project will assess whether the protocol can, over time, rely primarily on self-assessment and digital support. Pilot testing therefore serves as a proof-of-concept exercise, aimed at validating and refining the foundational components of the potential quality label. Insights generated through WP3 will inform adjustments to the model, support the calibration of criteria and guidance tools, and help determine which elements of the conceptual framework are viable for future European uptake.

This connection between conceptual design (WP2) and pilot testing (WP3) ensures that the quality label evolves through iterative refinement, grounded in the real needs, constraints, and capacities of RM training providers across the ERA.

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5. Conclusions

This deliverable (D2.1) set out the conceptual, methodological, and operational foundations for a potential European Quality Label for Research Management (RM) training. Drawing on the basis of WP1, the extensive ERA-wide landscape analysis, European policy frameworks, international models, and targeted interviews, the report demonstrates that there is both a strong need and a strategic opportunity to introduce a proportionate, flexible, and development-oriented mechanism to support the transparency, coherence, and comparability of RM training across Europe.

The fragmented nature of the current RM training landscape, and the increasing expectations for professionalisation within the ERA, highlights the value of a shared European reference point. The proposed quality label model responds to this need by providing minimum common benchmarks while allowing contextual adaptation for different provider types, institutional settings, and national environments. Its structure, distinguishing core and specialised dimensions, and offering a Foundational and future Advanced track supports both inclusiveness and progression.

The assessment protocol and supporting tools developed in this deliverable operationalise the concept into a scalable, and user-friendly framework suitable for pilot testing under WP3. Their design follows principles of proportionality, transparency, context sensitivity, interoperability, and developmental orientation, ensuring that the label can function as a genuine quality enhancement instrument rather than as a regulatory accreditation mechanism.

The analysis of international models confirms that no existing system can be adopted wholesale for Europe. Instead, elements of good practice, including peer-driven review, competence-based criteria, modular recognition structures, and clear governance will inform the recommended approach.

Taken together, the work conducted in WP2 demonstrates the feasibility and added value of a future RM Quality Label, while also clarifying its limitations and necessary safeguards. The next phase of testing will be essential to validate usability, refine criteria and tools, and assess readiness across diverse institutional and national contexts. The findings of the WP3 pilot will directly feed into WP4, where options for governance, ownership, and sustainability will be finalised.

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7. Annexes

7.1. Annex A

RM Framework Quality Label – Implementation Guideline

(Draft – foundational version)

A.1 Purpose and scope

This Implementation Guideline provides structured guidance for training providers and institutions seeking to apply for and implement the RM Framework Quality Label for Research Management (RM) training.

The guideline supports a development-oriented, proportionate, and context-sensitive approach to quality assurance. It is designed to be applicable across diverse legal, administrative, and educational systems within the European Research Area (ERA), and across a wide range of training formats, including short courses, modular programmes, and micro-credentials.

The guideline does not prescribe a single implementation model. Instead, it offers a common procedural reference, enabling institutions to integrate the quality label into existing internal quality assurance and professional development systems.

A.2 Underlying principles

The Implementation Guideline is based on the following principles:

- **Voluntariness** – participation in the quality label is optional and non-mandatory;
- **Proportionality** – requirements scale with the scope, level, and maturity of the training;
- **Interoperability** - diverse training offers can complement one another over time, supporting coherent, stackable, multidimensional learning pathways.
- **Transparency** – criteria, procedures, and outcomes are clearly documented;
- **Context sensitivity** – national and institutional diversity is respected;
- **Continuous improvement** – the label supports learning and quality enhancement over time.

The overall logic follows a cyclical implementation model, inspired by established European good practices in organisational change and quality assurance.

A.3 Implementation cycle

The RM Framework quality label follows a four-phase implementation cycle, enabling iterative development rather than one-off certification.

Phase 1 – Preparation and diagnosis

Objective: Assess institutional readiness and define the scope of the training to be labelled.

Recommended actions:

- Identify which training programme(s) will be submitted for labelling.
- Define whether the programme addresses core RM competences, specialised RM competences, or both.
- Clarify target audience, level, workload, and delivery format.
- Map intended learning outcomes against RM COMP and the RM Framework Handbook.
- Identify existing internal quality assurance mechanisms relevant to the training.

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Guiding questions:

- Which RM competences are addressed, in which area(s) and at what level?
- What evidence documenting programme's learning outcomes, design, delivery, and quality assurance is already available?
- Which aspects may require further development prior to submission?

Phase 2 – Self-assessment and application

Objective: To enable training providers to assess and demonstrate alignment with the essential quality dimensions of the quality label, while supporting structured internal reflection and learning.

Recommended actions:

Training providers are invited to:

- Complete the quality label self-assessment checklist,
- Provide relevant supporting information or documentation demonstrating the programme's learning outcomes, content, delivery, assessment approach, and quality assurance practices, proportionate to the scope and maturity of the training,
- Review internal coherence between intended learning outcomes, training content, learning and assessment methods, and forms of recognition or certification offered.

Expected outputs:

- A completed self-assessment checklist,
- An indicative evidence package, scaled to the size, format, and objectives of the training programme.

The self-assessment is designed to function primarily as a structured reflection and learning tool. During the pilot phase, it also supports testing of the clarity, relevance, and feasibility of the quality label criteria. In the longer term, the model is intended to support a self-paced approach, relying on structured checklists, guiding questions, and automated support features rather than external validation.

Phase 3 – Feedback and reflection

Objective: To provide formative, improvement-oriented feedback on alignment with the quality label framework and to support learning during the pilot phase.

Process elements (pilot configuration)

The core group:

- reviews self-assessment submissions and supporting information;
- identifies strengths, gaps, and areas requiring clarification;
- provides written observations and, where appropriate, engages in feedback discussions with other WPs.

Indicative outcomes (pilot):

Training providers receive:

- confirmation of whether key quality dimensions have been addressed;
- identification of areas that would benefit from further development or clarification;
- guidance for internal follow-up and quality enhancement.

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No binding certification, award decision, or rejection is foreseen during the project. Outcomes are explicitly non-binding and exploratory, serving to test the usefulness and credibility of feedback mechanisms. In the longer term, the model is designed to move towards self-reflection tools and automated feedback, allowing institutions to engage with the framework independently and at their own pace.

Phase 4 – Monitoring, improvement and integration

Objective: To encourage continuous quality enhancement and integration of quality reflection into routine RM training provision.

Recommended actions:

Training providers are encouraged to:

- Reflect on feedback and insights generated through the self-assessment process and pilot-phase review,
- Monitor participant feedback and learning outcomes using existing internal mechanisms as well as the survey designed for evaluation and impact assessment,
- Identify priority areas for short-term adjustment, such as refining learning outcomes, updating documentation, or clarifying assessment criteria.

On the long-term, training providers are invited to:

- Update training content, methods, and learning objectives as RM roles, institutional needs, and policy frameworks evolve,
- Integrate quality label–related reflection into existing internal review or evaluation cycles where feasible.

The quality label framework is intended to complement and reinforce existing practices, rather than to introduce parallel or burdensome quality assurance structures. Its design supports gradual integration and adaptation over time.

A.4 Visibility and use of the quality label (pilot and beyond)

During and after the project, training providers engaging with the quality label may:

- Reference their participation in the quality label framework in training descriptions and internal documentation,
- Use the framework as a reference point for internal quality assurance and strategic development,
- Signal alignment with European RM competence frameworks and shared quality principles.

Any use of the label concept during the project will be clearly framed as participation in a pilot or testing phase. Conditions for future use, including validity periods or formal recognition, will depend on outcomes of the piloting and subsequent decisions beyond the project scope.

A.5 Progression and renewal (conceptual orientation)

The quality label is conceived as a progressive and dynamic framework, rather than a one-off endorsement. During the project, aspects such as validity periods, renewal cycles, or progression to higher recognition tracks will be explored conceptually and tested in principle, without being formally implemented.

In a future implementation context, progression or renewal could encourage:

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- Structured reflection on developments since a previous engagement with the framework,
- Adaptation to evolving professional, institutional, and policy contexts,
- Reinforcement of continuous improvement mechanisms.

By design, the quality label framework supports ongoing professionalisation and learning, while remaining adaptable to different levels of institutional capacity and available resources.

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7.2. Annex B

RM Framework Quality Label – Preliminary self-assessment checklist

(Pilot testing version)

Important note on scope and status

This self-assessment checklist is developed for pilot testing purposes within the RM Framework project. It is a preliminary, non-binding diagnostic tool intended to test the feasibility, clarity, and usability of a potential quality label for Research Management (RM) training. It does not lead to accreditation, certification, or formal recognition. It is designed to support self-reflection, structured description, and feedback. Criteria and indicators may be revised based on pilot testing results.

How to use this checklist

Mandatory (M) items are expected to be addressed by all pilot participants.

Optional (O) items are developmental and may not be applicable to all training formats.

Items should be answered with *Yes / Partly / No / Not applicable*, with short comments where helpful.

1. Programme profile and scope

1.1 Basic information (M)

- ☐ Programme title
- ☐ Training provider / organising unit
- ☐ Delivery mode (online / blended / in-person)
- ☐ Duration and estimated learner workload
- ☐ Target audience defined (role and/or career stage)

1.2 Training scope (M)

- ☐ Programme addresses the following core RM competences
- ☐ Programme addresses the following specialised RM competences (domain specified)
- ☐ Scope of the programme is clearly described

(See Annex A for the definition of core and specialised RM competences aligned with RM COMP).

2. Alignment with RM COMP and RM Framework

2.1 Competence coverage (M)

- ☐ Learning outcomes are defined
- ☐ Learning outcomes are linked to RM COMP competence areas
- ☐ Intended learner level (e.g. introductory, intermediate, advanced) is indicated

2.2 Internal coherence (M)

- ☐ Learning outcomes align with training content
- ☐ Learning outcomes align with learning activities
- ☐ Learning outcomes align with assessment or completion criteria

3. Learning outcomes and learning design

3.1 Learning outcomes (M)

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- ☐ Learning outcomes are clear and understandable
- ☐ Learning outcomes are appropriate for the target audience
- ☐ Learning outcomes are realistic within the programme workload

3.2 Learning methods (M)

- ☐ Learning methods are suitable for students or adult/professional learners
- ☐ Training includes applied or practice-oriented elements
- ☐ Opportunities for reflection or knowledge application are included

(O)

- ☐ Opportunities for peer exchange or interaction are provided

4. Assessment and recognition

4.1 Assessment or completion criteria (M)

- ☐ Criteria for successful completion are defined
- ☐ Criteria are communicated to participants
- ☐ Assessment or completion approach matches learning outcomes

4.2 Recognition (M)

- ☐ Participants receive documentation of completion or participation
- ☐ Type of recognition (credit, micro-credentials, certificate, confirmation, badge, etc.) is described

(O)

- ☐ Recognition aligns with internal or external credential frameworks

5. Trainers and contributors

5.1 Expertise (M)

- ☐ Trainers/contributors have relevant RM or domain expertise
- ☐ Roles of trainers/contributors are clearly defined

5.2 Trainer quality assurance (O)

- ☐ Trainer selection criteria are defined
- ☐ Trainers receive guidance or briefing on learning objectives
- ☐ Trainer performance or feedback is reviewed

6. Inclusiveness and accessibility

6.1 Accessibility (M)

- ☐ Training design considers different educational and professional backgrounds
- ☐ Participation requirements are reasonable and transparent
- ☐ Fee structures do not create disproportionate barriers to participation

6.2 Inclusiveness (M)

- ☐ Participation conditions are non-discriminatory
- ☐ Training is accessible regardless of institutional background

(O)

- ☐ Flexible or asynchronous participation options are available

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- ☐ Language or accessibility needs are considered

7. Governance and transparency

7.1 Responsibilities (M)

- ☐ Responsibilities for programme design are defined
- ☐ Responsibilities for programme delivery are defined

7.2 Transparency (M)

- ☐ Information on content and structure is available to participants
- ☐ Information on recognition or completion is available

(O)

- ☐ Programme is embedded in an institutional training strategy

8. Quality reflection and improvement

8.1 Feedback collection (M)

- ☐ Participant feedback is collected
- ☐ Feedback collection method is defined

8.2 Use of feedback (M)

- ☐ Feedback is reviewed
- ☐ Feedback informs adjustments or improvements

(O)

- ☐ Planned review or update cycle exists

9. European and policy awareness

9.1 Reference frameworks (M)

- ☐ Alignment with RM COMP
- ☐ Awareness of relevant European reference points (e.g. ESG, EQF)

9.2 Transferability and Interoperability (O)

- ☐ Training is potentially relevant beyond one institution
- ☐ Learning outcomes are understandable across contexts
- ☐ Training can complement other RM learning offers over time

10. Overall reflection (Pilot-specific)

10.1 Self-reflection (M)

- ☐ The checklist was understandable and feasible to complete
- ☐ The checklist supported structured reflection on training quality

10.2 Pilot feedback (M)

- ☐ Elements that worked well identified
- ☐ Elements that were unclear or burdensome identified:

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Completion of this checklist during the RM Framework project does not result in formal recognition. It contributes to pilot testing, learning, and refinement of a potential quality label model intended for future self-paced and low-resource use.

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7.3. Annex C

RM Framework Quality Label – Preliminary Promotion Plan

The Preliminary Promotion Plan outlines how the concept, purpose, structure, and potential added value of the RM Framework Quality Label will be communicated during the project, and how visibility, comprehension, and stakeholder engagement will be supported. Its aim is to test communication approaches that may later inform a fully developed, long-term dissemination and recognition strategy. As such, the Promotion Plan serves a developmental function fully consistent with the voluntary, proportionate, and exploratory character of the quality label model. Its further elaboration will be carried out in close cooperation with WP4.

A. Objectives of the Preliminary Promotion Plan

The Preliminary Promotion Plan has four overarching objectives:

- Increase awareness of the emerging quality label concept among key stakeholders across the ERA,
- Support understanding of the label's purpose, structure, and developmental nature, ensuring clarity around what the label is and what it is not,
- Identify, define and test communication formats and messaging to identify what resonates with diverse stakeholder groups during the pilot phase,
- Lay the groundwork for a future, scalable communication and visibility strategy that can support the long-term sustainability of the label beyond the RM Framework project.

B. Target audiences

The Promotion Plan considers the diversity of the RM ecosystem across the ERA by distinguishing several audience groups:

- RM training providers (HEIs, research organisations, agencies, RM associations, networks),
- Research managers and administrators at different career stages,
- Institutional leadership (e.g. academic leadership, Research support offices, HR units, strategy departments),
- National and regional stakeholders (research funders, ministries, RM networks, RM Roadmap ambassadors),
- European-level actors (policy bodies, other associations).

Each group has different needs, expectations, and levels of familiarity with RM professionalisation. The Promotion Plan therefore emphasises tailored communication, avoiding a one-size-fits-all approach.

C. Key messages

Targeted for RM training providers & RFO leadership:

- Designing and providing trainings with quality label signalling the high interoperability and usefulness of the trainings.
- Enabling the RMs within the institutions take trainings with the quality label will strengthens trust among researchers, funders and partners, and supports institutional reputation.
- Collective uptake by universities and associations can drive a culture shift towards recognised, professional RM roles.

Engagement message: *By seeking training programmes with the quality label and/or designing trainings with the quality label, your organisations signal a clear commitment to high*

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competitive environment for excellent research. Your offer will be attractive for Research Managers seeking professional development opportunities.

Targeted for RPO leadership and Research Funding Organisations (RFOs):

- Strategic research management strengthens institutional governance, competitiveness and the capacity to attract top talent and funding.
- Investing in trainings developed with the handbook and the quality label to upskill RM teams directly translates into higher grant success rates, greater research impact, and a thriving research environment.

Engagement message: *Using or designing training with quality label will strengthen your institution's capacity to upskill research management roles, driving higher grant success rates, more impactful research outputs, and a research environment where excellence can truly thrive, adapting to the evolving needs.*

D. Communication channels and approaches

To achieve its objectives, the Promotion Plan will use a combination of communication channels, each suited to testing different aspects of stakeholder engagement:

1. Project-internal channels

- RM Framework website and project communication materials, i.e. LinkedIn, podcasts,
- Presentations and updates to partners and Advisory Board,
- Briefing notes, and infographics,
- Online and offline user events, workshops and consortium meetings.

2. External communication channels

Used proportionately to avoid implying operational validation:

- Conference presentations (EARMA, RM networks),
- Stakeholder briefings, including targeted updates for relevant umbrella networks of universities and research institutes.
- Policy-relevant communication (ERA Forum),
- Targeted outreach to RM communities.

All external communication will emphasise the pilot status of the model.

E. Activities during the pilot

During WP3 pilot testing, the Preliminary Promotion Plan will support:

- A clear explanation of the draft label model,
- Visual aids to explain the assessment process,
- Identification of communication barriers (e.g., terminology, expectations),
- Refinement of messaging and guidance materials.

Feedback generated through pilot testers' feedback will directly inform the refinement of communication strategies.

F. Post-pilot refinement

Based on WP3 results, the Preliminary Promotion Plan will be adapted to:

- Address misunderstandings identified during the pilot,
- Improve clarity of messaging around scope, purpose, and voluntary nature of the label,
- Identify the most appropriate channels for future dissemination,

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- Inform the design of a scalable long-term communication approach for potential future uptake

This phase contributes directly to the iterative refinement of the Quality Label model described in Section 4.4.

G. Longer-term considerations (beyond the project)

Although the Quality Label will not be fully operationalised within the RM Framework timeframe, the Preliminary Promotion Plan lays the foundations for longer-term sustainability by outlining potential future needs:

- A communication narrative aligned with whichever ownership model is eventually adopted,
- Consistent messaging across different actors and national contexts,
- Visibility mechanisms that support trust, transparency, and uptake,
- A transition from testing-phase communication to implementation-phase communication, if pursued under future initiatives.

Lessons learnt will be incorporated into D4.5 Business Model and Sustainability Report.

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