Chapter 5.34

The Profession of Research Management and Administration in Italy

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Abstract

This chapter gives an overview of how the profession has been evolving in Italy and reports its milestones. After explaining the transformation of the national research ecosystem, which in the last decades undertook the transition from a direct state funding model towards a competitive base funding model, the chapter shows the fragmented landscape of associations in the profession and focuses on the features of the current research management and administration (RMA) community. The circumstances that led to the development of the national community are then described.

Finally, it gives some policy recommendations towards the acceleration of the professionalisation of research management in the country.

Keywords: Italy; RMA; Research Management and Administration; Conference of Directors General of Universities; RAAAP; demographics

Research Ecosystem

Those who recognise themselves as RMAs in Italy mainly work in universities and research centres as public servants. As in other countries, RMAs also work in hospitals, institutions, charities, government bodies, corporations or other related organisations. There are currently 67 state-owned universities, 29 legally recognised non-state universities, 11 online universities and 9 higher institutes at the national level having a special accreditation. The National Research Council (CNR),[1] founded in 1923, is the largest public research institution in Italy, performing multidisciplinary activities. Eleven more research centres are recognised by the Ministry of University and Research (MUR).[2]

Through the last decade of the 20th century and the first decade of the 21st century, the Italian research and university ecosystem faced a radical change. Previously, the MUR steadily supported public research organisations through two main types of funding streams, FFO and FOE[3] (FFO – *Fondo di Finanziamento Ordinario*, for Universities; FOE, *Fondo Ordinario per il finanziamento degli Enti e istituzioni di ricerca* for MUR-supervised research centres). The progressive decrease of these funds and the introduction of the assessment of research performance led to a reorganisation of the management system in universities, to ensure funding from different sources. That is why research support offices came to life in most of the Italian Universities within this national funding landscape, starting in the late 1990s.

Currently, the MUR – responsible for the accreditation of universities and research performing institutions operating at the national level – provides the most significant public investment in research and development activities.[4] MUR also secures continuous funding to the most important public research performing institutions. Moreover, it sets the Italian Research agenda which is the strategic document that leads to the release of the National Research Plan (PNR). This multiannual policy document aligns with the most relevant European research and innovation priorities, considers

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[1]www.cnr.it/en

[2]Ministry-vigilated research centres include the Italian Space Agency (*Agenzia Spaziale Italiana*, ASI); the Area Science Park (*Consorzio per l'Area di Ricerca Scientifica e Tecnologica di Trieste – AREA*), the Italian Institute for German Studies (*Istituto italiano di Studi Germanici, IISG*), the National Institute for Higher Mathematics (*Istituto Nazionale di Alta Matematica, INDAM*), the National Institute for Astrophysics (*Istituto Nazionale di Astrofisica, INAF*), the National Institute for Nuclear Physics (*Istituto Nazionale di Fisica Nucleare, INFN*), the National Institute for Geophysics and Vulcanology (*Istituto Nazionale di Geofisica e Vulcanologia, INGV*), the National Institute of Oceanographics and Experimental Geophysics (*Istituto Nazionale di Oceanografia e di Geofisica Sperimentale, OGS*), the National Institute for Metrological Research (*Istituto Nazionale di Ricerca Metrologica, INRIM*), the Historic Physics Museum and 'Enrico Fermi' Research and Studies Centre (*Museo Storico della Fisica e Centro Studi e Ricerche 'ENRICO FERMI', FERMI*), the Zoological Station ANTON DOHRN (*Stazione Zoologica 'ANTON DOHRN', SZN*).

[3]80% of FOE funds is retained by the bigger MUR-vigilated research centres, that is, CNR, ASI and INFN; the remaining 20% is distributed among the other 9 organisation.

[4]MUR supports over 75% of the expenditure on research and innovation by the state, which amounts on average over the period 2012–2015 to about EUR 3 billion, with a peak of almost EUR 3 billion and EUR 700 million in the 2013.

the national Smart specialisation strategies, and also attempts to identify areas of intervention and initiatives fostering impactful research to the benefit of the country.

Besides MUR and other Ministries, private companies and charities invest in research and development activities. A small – but still significant, especially for some disciplines like health studies – amount of research funding comes from national and international foundations.

However, despite the overview of national funding schemes depicted above, still the major source of funding for R&D at university level comes from the EU's research funding programs, such as Horizon Europe.

In 2021, the Next-Generation EU funding allocated to Italy following the COVID outbreak allowed universities to strengthen their core activities through the Italian Recovery and Resilience Plan (NRRP). The NRRP entails an exceptional and time-limited funding stream (EUR 191.5 billion) to be spent on new initiatives, including direct public grants for R&D, technology transfer and innovation, and green innovation.

The share of expenditure on R&D with respect to GDP (1.4% GDP) in Italy is still one of the lowest among those recorded in the main European and industrial countries. According to official available data (Fig. 5.34.1), against a total expenditure of EUR 22.2 billion, spending from the public sector – including universities – resulted in EUR 8.6 billion in 2015; spending by the private sector was EUR 11.1 billion. Since 2008, the share of spending by the private sector overtook that of the public sector, which has remained constant (ANVUR, n.d.).
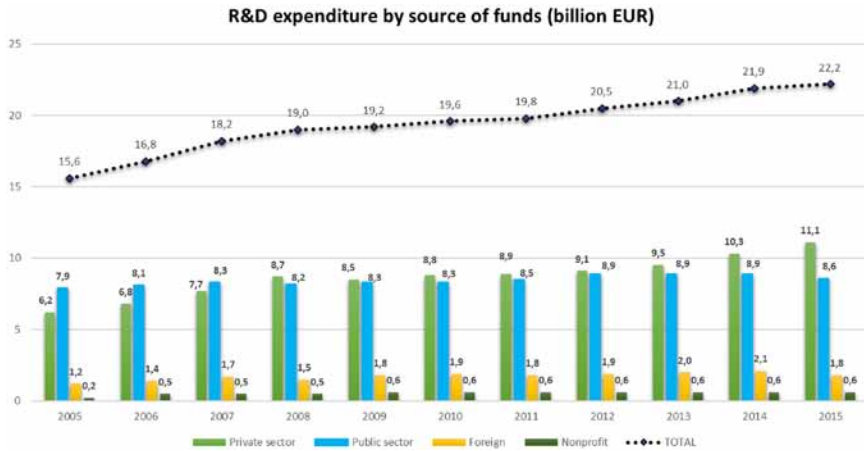
Fig. 5.34.1.   R&D Expenditure in Italy by Source of Funds. *Source*: Eurostat: Science, Technology and Innovation Database.

Since Italy's total research and development spending is behind compared to its peers, particularly in government and higher education institutions (HEIs), increasing budget allocations to basic research through universities is expected to raise long-term progress in research and innovation (OECD, 2021).

Current Communities

Professional communities were born in the university context more than 10 years ago when professionals were actively engaged through thematic working groups (WG). Currently, there are several national associations: CODAU (Conference of Directors General of Universities), APRE (Agency for the Promotion of European Research),

Netval (Network for the Enhancement of Research), APEnet (Network of Universities and Research Entities for Public Engagement), and AIB (Italian Library Association).[5]

An informal network of professionals working in research support services in universities was established for the first time within the CODAU Research Support branch. CODAU itself was established in 2014 to carry out activities of coordination and direction in the management of university institutions in all areas – not only in research and innovation – and to promote the professional development of top managers, by including heads of administration and senior managers all throughout university institutions.

Evolution of the Profession

RMA is currently not perceived as a profession in Italy, and job profiles or targeted training for RMAs have not yet been developed (Poli et al., 2019). Usually RMAs come into the profession by chance. As a consequence, it is extremely difficult to hire skilled people. This is becoming an issue at the country level due to the growing demand for RMAs especially in universities, where RMAs are now required to manage projects funded under the NRRP.

It was only at the end of 2019 though, that a first discussion on the professional role of RMAs started within the CODAU Research branch and that a WG on 'The Professional Role of the Research Managers and Administrators in Italy' was set up (Romano, 2020; Oliveira, Romano et al., 2022). The WG worked on the creation of a professional development framework that defines activities, skills and competences for all the individuals working in the profession as RMAs. The framework was meant to lay the basis for the recognition of research management as a profession (Italian Research Managers, 2022a).

As a first step, after checking definitions of RMAs in the existing literature, the WG decided to refer to professionals working in Research Support Offices as 'Research Managers and Administrators'. The RMA definition developed by the Research Administration as a Profession (RAAAP) project (Kerridge & Scott, 2016) was considered as the most appropriate for the Italian context.[6]

As a second step a survey addressed to Italian RMAs was launched in 2020 (Romano & Albanesi, 2021) to identify activities and training needs of RMAs in Italy. The final aim was to collect data for the creation of a professional development framework for RMAs in Italy: 259 records were gathered, mainly from RMA professionals working in universities.

The professional development framework consists of six macro-areas of activities:

1. Organisation, management and monitoring of the research management service.
2. Planning and development of research strategies and policies.

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[5]https://www.codau.it; https://apre.it/; https://netval.it/; http://www.apenetwork.it/it; https://www.aib.it/

[6]'The Italian Research Manager Administrator is a person working to support the research lifecycle process. This includes (but is not limited to) the following tasks: strategic planning of research activities, organisation of services supporting researchers, lobbying, networking, promotion of research, pre-award and post-award project support (i.e. scouting of funding opportunities, support to project management – from drafting to submission – and to budgeting and cost planning, handling of internal institutional relations, negotiations with funders, partnership management, supervision of financial report towards funders), support and advice on research impacts, innovation and promotion, on training matters, on research policy, strategy and assessment and a number of topics such as data processing, research integrity, communication, ethics, governance, IT, audits, statutory returns, and career development of researchers'.

3. Pre-award phase: partnership, collaborations, fund raising, research planning.
4. Post-award phase: management of funded research projects.
5. Ethics, open and citizen science.
6. Evaluation of research.

Each macro-area is divided into specific tasks related to three professional levels (leader, manager, and administrator). For each professional level a set of soft skills is identified.

Demographics

The lack of recognition and awareness of the profession made it difficult to collect data on RMAs working outside universities. That is why the size of the RMA community in Italy is not clearly quantified. This community is estimated to roughly count 500–600 individuals working in research support offices in HEIs and research centres. This number is expected to increase sharply, due to the urgent need of the workforce to manage the projects funded under the NRRP.

An overview of this population shows that RMAs in universities are largely women, reflecting the international position from the RAAAP-3 survey (see Oliveira et al., 2023, Chapter 2.2). This is also consistent with a more general gender distribution of roles and responsibilities in the Italian – and not only Italian – academic landscape where professors (as well as heads of departments, deans and rectors) are mainly men (European Commission, 2021c), while professional staff, the category that includes the majority of RMAs working in university, are mostly women.

The survey results show some interesting features of RMAs in Italy:

● The distribution of the answers highlights a greater awareness of research management in universities/institutions in Northern and Central Italy.
● RMA appears to be an emerging profession: more than 90% of the sample has up to 15 years of work experience in the sector.
● The concept of professional level has been introduced: respondents have been asked to assess themselves with regard to three professional roles, used and defined by Kerridge and Scott (2018a):

   ○ *Leader* – Responsible for the strategic functions of the institution.
   ○ *Manager* – Directly reporting to Leader and Responsible for a Team or for specific missions (regardless of formal appointment).
   ○ *Administrator* – Responsible for specific and operational tasks.

The Italian survey showed that respondent roles are equally divided between Managers and Administrators, whereas a smaller percentage self-declare themselves to be Leaders.

However, professional levels may not be homogeneously perceived by the sample. Fig. 5.34.2 shows some interesting differences in relation to the activities carried out by each of the three levels. Managers and administrators seem to carry out the same type of activity, and leaders in some cases dedicate themselves to rather operational tasks. The responses could be influenced by a different interpretation of the definition of professional levels, which does not necessarily coincide with the ones provided within the Italian national contractual conditions of professionals working at universities (Contratto Collettivo Nazionale dei Lavoratori (CCNL)[7]). Additionally, another influencing factor could be the lack of a shared definition among RMAs of

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[7]Contratti Collettivi Nazionali Istruzione e Ricerca (aranagenzia.it).
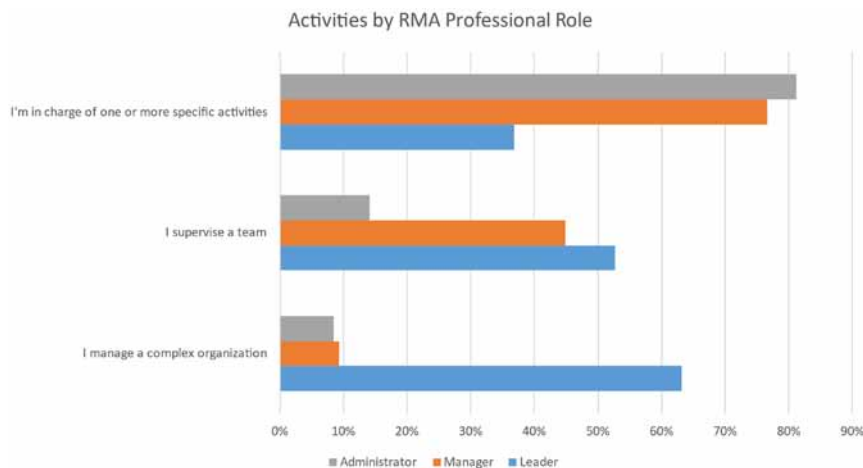
Activities by RMA Professional Role

Fig. 5.34.2.   Activities by RMA Professional Role in Italy. *Source*: Authors' elaboration.

the activities and the skills associated to each professional level. A further investigation on their tasks and role within the institution should target this issue.

- The age of respondents does not show a specific trend in the three categories of Italian RMAs. The majority of leaders are between 40 and 50, managers between 35 and 45. Administrators are younger. The oldest administrators mainly work in decentralised structures (such as University Departments), perhaps providing an added value from their experience and their competencies in the field.
- Further analysis on the respondent's background shows that the basic level of education that an individual has completed in the case of a leader and a manager is 'Laurea', which is a 3+2 degree, equivalent to EQF7 (CEDEFOP, 2021).[8] The range of educational degrees of RMAs spans from STEM subjects – science, technology, engineering and mathematics – to SSH – social science and humanities. Additionally, some managers and leaders have further master degrees, especially in Business, Public Administration and Management-related subjects. The RAAAP-3 survey shows that 44% of ($n = 45$) respondents from Italy have a doctoral degree.
- Regarding the bulk of activities carried out by RMAs in Italy, these almost entirely focus on supporting the whole Project Cycle Management (PCM) of research projects funded by International (or external) funding; this latter funding is typically run by Grant Offices. The Italian RMA community guides and supports the researcher from the project idea to the very last report to the sponsor with the largest workload residing in the pre-award and post-award phases.
- A common thread through all professional levels is the need to receive continuous training. RMAs need to be very up-to-date and focused on the continuous procedural changes and evolutions of European and national legislations. Indeed, the survey shows that RMAs regularly attend training opportunities. 85% of the survey sample declares to have attended PCM training courses in the last five years, provided by accredited Italian and European trainers belonging to the international research system. Participants considered these courses useful for the execution of their daily tasks in a 74% of cases. However, Italian RMAs are poorly involved

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[8]https://europa.eu/europass/en/european-qualifications-framework-eqf

as trainers (only 30%) whereas their expertise might be particularly useful to col-
leagues and researchers managing international project activities. Training providers
are mostly universities or institutions in which these RMAs work, while trainers
are often university professors or consultants. The design, management and finan-
cial reporting of projects financed through European funds is a recurrent topic in
courses in which also RMAs act as trainers.

- Data regarding the formal certification of such training is still unsatisfactory: over 90%
  of the sample did not receive a certificate of attendance. In addition, there is neither a
  formal recognition by Italian authorities (e.g. Ministries or their own University, etc.) of
  any of these courses nor there is a certified professional accreditation body responsible
  for this procedure and assessment which may be used for career advancement purposes.
  Overall, the profession of Italian RMAs emerges from data as valuable, but it is yet still
  'unqualified' and therefore 'invisible' in the Italian job market.
- The survey also provided an extensive list of soft skills options that are considered
  very important by RMAs, such as the ability to coordinate WGs, to manage conflict
  and problem solving, the ability to motivate people and to master an innovation-
  driven attitude.

Directions/Future

In line with the growing importance of research management in Europe, also men-
tioned by the European Commission within the European Research Area[9] (ERA)
priorities, the 'development of a new generation of research managers' is stated as
a priority also in 2021–2027 Italian National Programme for Research (PNR).[10]The
role of high-skilled research managers is also mentioned in NRRF documents.[11]
The upcoming negotiations for the update of the national contractual conditions
of professionals working at universities and research centres (CCNL) make the cur-
rent age decisive for the actual development and adoption of the RMA professional
framework and for the introduction of training for the professionalisation of Italian
RMAs.

The WG on 'The Professional Role of the Research Managers and Administrators
in Italy' that became permanent and now open to non-university RMAs, continues to
enhance the professional figure of the RMA within the Italian community – through its
website and social media (Italian Research Managers, 2022b) – and to strengthen collab-
orations at the national, European and international level with the existing communities.

Under these premises, the goal of the current RMA community should be threefold.
First, the community should focus on raising awareness on the profession not only for
those within universities but also for those working in research institutes, hospitals,
charities, government bodies, corporations or other related organisations. Secondly,
the community should call for promoting the formal recognition of the profession in
Italy. And last, there should be a common effort to set up certified training paths, to
help hiring skilled students/professionals and to define a clear career progression for
those already into the profession.

It is hoped that the creation of a formal RMA association will make the difference
in order to achieve these goals and promote the dialogue with policy makers.

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[9]European research area (europa.eu).
[10]Slides_Pnr2021-27.pdf (mur.gov.it).
[11]Home – Italia Domani – NRRP Portal (italiadomani.gov.it).

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