

19. Action 19: Establish an efficient and effective ERA monitoring system

1.1. Purpose of the Action and expected outcomes

The Council Recommendation on a Pact for Research and Innovation in Europe states that “the Member States and the Commission should implement an enhanced monitoring mechanism, to ensure a proper basis for evidence informed policy making in the ERA and to provide evidence and analysis in the context of the European Semester”.

The new ERA monitoring mechanism shall be designed to assess the implementation of the ERA Actions and to measure progress towards the ERA priorities both at EU- and national levels.

In detail, this Action was defined to achieve the following outcomes:

- An online ERA Policy Platform to serve as an umbrella tool for sharing information on the implementation of Actions and allowing exchanges between all actors.;
- An ERA Scoreboard to show the overall progress at EU level for a limited number of indicators in view of realising the ERA priorities (as defined in the Pact for R&I);
- An ERA Dashboard to provide a more detailed monitoring of the overall progress at national level in view of realising the ERA priority areas (as defined in the Pact for R&I);
- A report on the state of play of the implementation of the ERA Policy Agenda and the progress made towards the ERA objectives (as set out in the Pact for R&I) at EU-level every 18 months (“EU-level Report”);
- Annual reports on each Member State’s progress in the implementation of the ERA (“ERA Country Reports”).

With the support of these different tools, the aim is to identify barriers and challenges in the achievement of the ERA Actions and priorities, outperforming and less performing actions as well as good practices which should feed and reshape EU and national policies to effectively accomplish the defined milestones and objectives.

1.2. Implementation of the Action

The Council conclusions on the future governance of the ERA of November 2021¹ invited the Commission “to present to the Council by mid-2022 a monitoring and evaluation framework for the implementation of the ERA”. **The Commission presented the framework for a future ERA Monitoring Mechanism to the Council on 10 June 2022.**²

The development and **implementation of this Action followed a thorough co-creation process within the ERA Forum**. To prepare the various elements of the monitoring mechanism, including the selection of relevant indicators for the Scoreboard and the Dashboard, the ERA Forum held two dedicated workshops in November 2021 and April 2022. The ERA Forum meetings in October 2021, May 2022, September 2022, February 2023, and July 2023 put a specific focus on the monitoring mechanism. The discussions were supported by two independent expert reports.³

Additionally, **key monitoring tools and mechanisms have been developed as part of the implementation of other actions**. In the context of ERA Action 1 on Open Science the monitoring framework of the EOSC observatory has been initiated. Similarly, as part of Action 4, the Research and Innovation Careers Observatory

¹ <https://data.consilium.europa.eu/doc/document/ST-14308-2021-INIT/en/pdf>.

² <https://data.consilium.europa.eu/doc/document/ST-9578-2022-INIT/en/pdf>.

³ “Data gathering and analysis of policy developments and reforms: Study to evaluate the ERA policy framework/ERA monitoring mechanism” (<https://op.europa.eu/en/publication-detail/-/publication/98a8edb4-c763-11ec-b6f4-01aa75ed71a1/language-en/format-PDF/source-256243590>); Analytical report of independent experts on “Design of the new ERA Monitoring System” (not published).

(RICO) will be developed and will enable to provide a more comprehensive analysis and monitoring of progress towards this action. In relation to this action the ERA Talent Platform will be developed which will be a key portal providing links to EURAXESS, HRS4R, RESAVER and the Research Careers Observatory.

The EU put great attention to the development of monitoring frameworks and/or reports in the field of R&I, therefore a great variety of policies and initiatives can be found. Since 2004, the EU develops the **EU Industrial R&D Scoreboard** with the objective of measuring performance of EU innovation-driven industries against major global counterparts.⁴ This monitoring framework provides key insights into the economic and financial information of the world's top 2500 R&D investors and EU 1000 R&D investors, identifying challenges and opportunities for the EU.

Over a decade ago, the **European Innovation Scoreboard** (EIS) was established.⁵ This annual monitoring framework provides a comparative analysis of innovation performance in EU countries, other European countries, and regional neighbours. Based on the assigned scores, EU countries are categorised in four performance groups: innovation leaders, strong innovators, moderate innovators and emerging innovators. This monitoring tool helps to identify the relative strengths and weaknesses of the countries' national innovation systems and to identify challenges they need to address.

Additionally, due to the growing importance and efforts devoted to gender equality globally but particularly in the EU, several initiatives have been developed in view of monitoring gender equality in R&I across the EU and its MS, enhancing ERA Action 5. The most relevant initiative is the **She Figures report** which is released every three years since 2003.⁶ It collects data through different available indicators (88 in the 2021 edition) and is presented throughout six chapters, following the 'chronological journey' of women from graduating from doctoral studies to participating in the labour market and acquiring decision-making roles, while exploring differences in women's and men's working conditions and research outputs. EU funded projects enhancing monitoring frameworks on gender equality in R&I institutions such as UNISAFE have conducted key surveys and or developed monitoring tools⁷.

⁴ <https://iri.jrc.ec.europa.eu/scoreboard/2022-eu-industrial-rd-investment-scoreboard>

⁵ https://research-and-innovation.ec.europa.eu/statistics/performance-indicators/european-innovation-scoreboard_en

⁶ <https://ec.europa.eu/research-and-innovation/en/knowledge-publications-tools-and-data/interactive-reports/she-figures-2021>

⁷ <https://unisafe-gbv.eu/project-news/results-from-the-largest-european-survey-on-gender-based-violence-in-academia>