**Note to ERA Forum Delegates**

**Mutual Learning Exercise (MLE)**

**on “Research Careers – More Attractive & Sustainable Research Careers and Better-Balanced Talent Circulation”**

**under**

**Horizon Policy Support Facility**

*PSF Challenge*

1. **Aim**

This concept note aims at:

1. Asking ERA Forum delegates of countries willing to participate to nominate a national representative for the proposed MLE.
2. Asking the countries willing to participate to identify priority topics they wish to address in this MLE and to describe their expectations.

**ERA Forum delegates from the countries willing to participate are kindly asked to provide their feedback (via Annex I) by 14 December 2023**.

The results of the questionnaire will be used to develop the priority topics to be addressed within the scope of the MLE. **A scoping workshop to discuss and agree on the final scope of the MLE with participating countries will take place on 31 January 2024 online (tentative date).** The national representatives nominated for this Mutual Learning Exercise (via Annex I) are invited to participate in the workshop.

The MLE will run between Q2 2024 and Q2 2025.

1. **Horizon Policy Support Facility (PSF)**

To support countries in reforming their research and innovation (R&I) systems, DG Research and Innovation has set up a 'Policy Support Facility' (PSF, Horizon Europe), aimed at improving the design, implementation and evaluation of national R&I policies. The PSF provides best practice, leading expertise and guidance to Member States and Associated Countries, on a voluntary basis, through a broad range of services tailored to their specific needs.

Mutual Learning Exercises, now organised within the *PSF Challenge* service, are one of the type of activities offered by the PSF to the Member States and Associated Countries. Their aim is to facilitate the flow of information, experiences and lessons learned, as well as the identification of good/ bad practice and success factors, around a specific R&I topic of interest to several countries.

1. **Proposed scope of the MLE: More attractive & sustainable research careers and better-balanced talent circulation**

The foundation for a strong and competitive research and innovation system is constituted by researchers. We have reached the impressive number of [2 million researchers in Europe](https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20221206-1), and we must make sure that all these researchers have attractive careers in all sectors of the society, and that the positive trend continues.

That is why the Commission adopted on 13 July 2023 a [proposal for a Council Recommendation on a European framework for research careers](https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52023DC0436) (actual title: Council Recommendation on a European framework to attract and retain research, innovation and entrepreneurial talents in Europe). The adoption of this proposal was accompanied by a proposal for a new Charter for Researchers, to improve researchers’ working conditions, and by the launch of the [European Competence Framework for Researchers (ResearchComp) website](https://research-and-innovation.ec.europa.eu/jobs-research/researchcomp-european-competence-framework-researchers_en) to effectively support researchers’ transversal skills and inter-sectoral mobility.

The recommendation on a European framework for research careers is currently pending adoption in the Council, under Spanish Presidency, anticipated for 8 December 2023.

The standards for attractive and sustainable careers described in the Recommendation, will play a key role in helping necessary reform at national and organisational level, with the objective of keeping our talents in Europe and in making Europe an attractive destination for both foreign and domestic research talents. Implementation of these standards at national level throughout the ERA is anticipated to also support a more balanced circulation of talents between European countries.

The implementation will foster a proper recognition of the researcher profession, support better working conditions and fight researchers’ precarity, sustain researchers’ skills and mobility, and ensure a fair and attractive career development and progression. In addition, the Recommendation foresees specific measures for early-career researchers, such as for example safeguards for doctoral candidates, dedicated incentives (e.g. financial or social protection), or cooperation between ecosystem actors to foster recruitment of early-career researchers.

The proposed Council Recommendation and the new Charter for Researchers, together with the launch of ResearchComp website, are key elements of an overall package in support of attractive research careers on which the Commission is working under Action 4 of the ERA Policy Agenda 2022-2024. This ERA Action received the highest number of Member States commitments: 26 Member States, with additionally 4 Associated Countries and 13 Stakeholder organisations committing to it.

This package for attractive research careers includes four strands:

1. the standards for attractive working conditions and sustainable careers laid down in the proposal for a Council recommendation, which is the basis for action;
2. tools to help Member States and organisations implement the standards (including the Research & Innovation Careers Observatory, the ERA Talent Platform, ResearchComp, the HRS4R assessment process to support implementation of the Charter for Researchers, and this potential Mutual Learning Exercise);
3. a process inducing cultural change in the assessment of research careers (cfr. the ongoing work of the Coalition for the Advancement of Research Assessment under ERA Action 3, [CoARA](https://coara.eu/));
4. an investment pathway, which the Commission will pilot in 2024 (call for Talent Ecosystems under Horizon Europe WIDERA-2024, aimed at supporting organisations to implement the standards for attractive and sustainable research careers, expected to be upscaled in 2025-2027).

One of the implementation tools the Commission presents within this package is addressed to the Member States and Associated Countries: a Mutual Learning Exercise (MLE) aiming to exchange practices between countries on attractive working conditions and career development systems for researchers and on how to implement the new standards laid down in the European framework for research careers.

1. **Preliminary identification of priority topics**

A key factor of effectiveness of the MLE is that the chosen topics need to be sufficiently precise and concrete, to enable focused discussions with strong practical relevance for the participants. Given the broad spectrum of topics addressed in the Council recommendation on a European framework for research careers, some prioritisation needs to be done.

As a basis for discussion in the scoping workshop with interested countries, this MLE is proposed to focus on the following topics related to the framework and the Charter for Researchers (it is expected that the MLE will ultimately include four targeted workshops, potentially combining some of the topics proposed below):

* **Recruitment, working conditions, career development and progression**: selection and recruitment of candidates based on Open, Transparent, and Merit-based Recruitment principles, attractive working conditions, and an adequate framework for career development and progression are essential elements for attractive research careers. This is particularly true for young and early-career researchers, but it is an important aspect for all career stages. These aspects are highly relevant to counter the phenomenon of precarity, by offering stability and a long-term perspective, together with career services that can help researchers have continuity in their employability, and funding models suitable for sustainable careers.
* **Skills and inter-sectoral, inter-disciplinary and interoperable careers**: Only a fraction of researchers will be able to pursue a career within academia. At the same time, often researchers are either not equipped with the transversal skills needed for inter-sectoral careers, not aware of the competences they possess, or are not able to communicate their competences to potential employers outside academia. It is indispensable to close these gaps, in particular for young and early-career researchers, in order to ensure a seamless multi-directional flow of researchers between sectors, and at the same time to sustain and reward inter-disciplinary careers and interoperability between sectors and Member States.
* **Enabling conditions for attractive R&I systems and balanced circulation of talents**: Brain drain is a complex issue, caused by the interplay of several factors, including for example unattractive research environments and inadequate working conditions, and there is a need to address the roots of the problem, in particular via system reforms. A wide implementation of the standards set by the Council Recommendation on research careers and by the new Charter for Researchers is crucial for a long-term upgrade of the national R&I systems, making them more attractive for both domestic and foreign talents, thereby increasing inflow and replacing brain drain with balanced circulation of talents at all career stages.
* **A conducive policy and legal context for attractive research careers**: In some cases, it is difficult to address issues in a way that would make research careers more attractive due to some existing legal and regulatory barriers. This is an area where sharing experiences of national approaches can be particularly important to make national policy and legal contexts more conducive for attractive research careers, including for young and early-career researchers, who deserve a particular attention as they constitute the core of the future of research and innovation.
* **Incentives for the implementation of the Charter for Researchers**: While the implementation of the new Charter for Researchers via the Human Resources Strategy for Researchers (HRS4R) is voluntary (as it has been the case for the Charter and Code for Researchers), it plays a key role in improving working conditions and the overall attractiveness of research careers. The exchange of experiences and lessons learnt on incentives for the implementation of the Charter is therefore very important to further increase the trend of institutions approaching the HRS4R process.

The final definition of topics will be determined at the kick-off meeting, based on the answers of the participating countries to the attached questionnaire (Annex 1) and the results of the scoping workshop.

1. **Expected outcome**

Striving for more attractive and sustainable research careers as well as establishing a better-balanced circulation of research talent (avoiding brain drain) are dependent on a complex interplay of factors, often requiring systemic and organisational change, relying on a policy mix based on a toolbox of policy actions and programme instruments, which may vary across countries with different strengths in science and industry, among others. The MLE will enable an in-depth exchange of experiences on **lessons learned and success factors of different strategies and measures** based on the available evidence and collective experience and with an emphasis on policy learning.

With the help of external experts, the MLE will highlight advantages, trade-offs and drawbacks of different approaches to foster reform and change of mind-sets towards more attractive research careers and better-balanced talent circulation at national and at EU level. It will identify and facilitate the **exchange of best practices** and thus provide a toolbox on which Member States can draw to enhance their national strategies according to their specific needs and conditions and in line with the new ERA directionality.

The MLE **contribute to the** **implementation of the novel European framework for research careers and the new Charter for Researchers** in terms of strategy development, selection of instruments and initiatives for implementation.

1. **Working approach**

The MLE on “Research Careers” will involve:

* *Participating countries*: They are expected to actively participate, contribute and exchange experiences on an equal basis. The project is based on open, frank and confidential knowledge exchanges between the participating countries. It requires that each participating country is willing to provide detailed information on its experience in view of allowing other participants to learn from it.

Member States will be kindly requested to ensure coordination with relevant national stakeholders upfront of workshops – to collect input relevant for the exercise – as well as after the MLE – to support the implementation of measures.

* *External experts*: Experts will support the MLE by providing expertise and advice. They will work under the guidance of the Chair, who will steer the whole MLE process. One of the experts will act as Rapporteur.
* *Commission services*: The Policy Support Facility Team in Unit A1 – ‘European Semester and Country Intelligence’ and Unit A.2 “ERA, Spreading Excellence and Research Careers” will actively support the work of this MLE.

As an input to the scoping workshop on 31 January 2023, all countries willing to participate to the MLE are asked to provide their initial written contributions as specified in Annex I.

Responses should be sent by **14 December 2023** to RTD Unit A.1 (Annamaria.Nemeth@ec.europa.eu) and Unit A.2 (Dario.Capezzuto@ec.europa.eu and RTD-A2-UNIT-SUPPORT@ec.europa.eu).

1. **Tentative timeline**

The following tentative timeline is proposed:

* 8 December 2023: Adoption of the Council recommendation (tbc)
* 14 December 2023: expression of interest of Member States / Associated Countries for this MLE
* 31 January 2024 (tentative date): Scoping Workshop with participating countries
* 2nd quarter 2024: Kick-off meeting of the MLE with participating countries and external experts (Brussels)
* 3rd quarter 2024 – 1st quarter 2025: implementation of 4 country visits
* 2nd quarter 2025: dissemination event

**Annex 1:**

**MLE “Research Careers”**

During the preparatory phase of the MLE “Research Careers”, volunteering countries are kindly asked to provide the following information:

1. **Country:**
2. **National Representative:**
3. **Suggestions for scope and topics, expectations:** please fill in the three boxes below.

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| **Overall approach, definition of objectives and priority topics you wish that the MLE addresses: please see the approach and objectives mentioned under point C and the list of topics proposed under point D: Do you agree with what is proposed or would you like to propose any modifications? Are there any more specific and concrete aspects on which you would like the MLE to focus?**  |
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| **What are your key expectations from the MLE:** |
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| **Any other suggestions that you may have for the MLE:** |
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