



# Pilot Review of ESFRI Landmarks

Strategy Report on Research Infrastructures  
**ROADMAP 2018**

Workshop on ESFRI Landmarks

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# Public Guide for ESFRI Roadmap 2018: PILOT PERIODIC REVIEW LANDMARKS

- ESFRI will perform a periodic review of four Landmarks, as a pilot exercise only and without consequence for their Landmark status.
- The purpose of the exercise is to test the process of periodic review. Periodic review refers to the evaluation of the scientific case and the assessment of implementation of the Landmarks on the Roadmap.
- The goals of this pilot periodic review of Landmarks are to:
  - address their scientific case and their implementation;
  - identify their main long-term sustainability challenges;
  - update all public information on the Landmarks for the Roadmap 2018;
  - develop a comprehensive and robust methodology for the periodic review applicable to all Landmarks for future updates of the Roadmap together with clear and well accepted criteria.



# Key requirements

- ESFRI applied minimal key requirements on all eight dimensions along the RI life cycle.
- Minimal key requirements for Implementation or Operation were applied for the Pilot review of ESFRI Landmarks (Elixir, Spiral2, ESS and ICOS).
- The minimal key requirements served as the basis for the scoring in the assessment.
- The minimal key requirements are described in detail in the **Public Roadmap 2018 Guide**



## ESFRI assessed the Landmarks along the following dimensions

- Stakeholder commitment
- User strategy and access policy
- Preparatory work
- Planning
- Governance and management
- Human resources policy
- Finances
- Risks
- Scientific excellence
- Pan-European relevance
- Socio-Economic Impact
- E-needs



# Results...and some conclusions

- ✓ The minimal key requirements described in detail in the Public Roadmap 2018 Guide served as the basis for the scoring in the assessment.
- ✓ Most scores were Very high or High.
  - ✓ The Questionnaire was very extensive....too detailed
  - ✓ We should consider having specific tailor made questions instead of general ones
  - ✓ Overlap with internal or other external assessments
  - ✓ We should define methodologies on principles
  - ✓ We should ask for all information that they can provide during the periodic review of scientific plans, advisory boards, etc.
  - ✓ It would be important to keep some of the information we acquired and continue the process
  - ✓ A periodic review has to look at how it evolved since the former review
  - ✓ Not suitable to understand whether the Landmark is in a sustainable regime...or not...
  - ✓ Key performance indicators should be requested from all Landmarks
  - ✓ We need input from the Landmarks on how the questionnaire worked with them...



# EU Council Conclusions of 29 May 2018

**“...INVITES Member States and the Commission within the framework of ESFRI to develop a common approach for monitoring of their performance and**

**INVITES the Pan-European Research Infrastructures, on a voluntary basis, to include it in their governance and explore options to support this through the use of Key Performance Indicators”.**



# ESFRI Roadmap 2018

- The goal of future periodic reviews of ESFRI Landmarks – henceforth referred to as Periodic Updates of ESFRI Landmarks – is to understand the scientific status of each Landmark, considering its specific position in its lifecycle, and enabling ESFRI to fully deploy its strategic role and support the Landmarks.



# The periodic update of ESFRI Landmarks

- Independent from the ESFRI roadmap updates
- Based on evaluations carried out within the Landmarks
- The role of ESFRI is to identify generic and specific KPIs together with the RIs
- The updates of the Landmarks are meant to establish a lasting dialogue between ESFRI and Landmarks
- This kind of approach has the scope to reinforce the strategic role and position of ESFRI in supporting these RIs and the maintenance of the Landmarks' list.



# How to design a future system?

- **The general questionnaire was not suitable**
  - How to do it without generate extra working loads to RIs?
  - How to use the internal evaluations of the RIs
- **How to introduce the update in the culture of the RIs as part of their planning**
- **How to define a way to use the internal RIs evaluations run by the owners of the RI in the periodical update**