ERA FABRIC

Funded by the European Union

Project 101094821 ERA_FABRIC - HORIZON -WIDERA-2022_ERA-01

Deliverable D2.5

ERA_FABRIC Self Assessment & Guidance Tool

Responsible Partner : UNIST

Contributing Partners : ART-ER, WUT, CNR, EURECAT, ECOPLUS, INESCTEC, MUNI, ADVRN, TTP

Dissemination level : PU – Public

Planned date of Delivery: 30/06/2025

Date of Issue : 30/06/2025

Document version : 01

Executive summary

The ERA_FABRIC Self Assessment and Guidance Tool is an on-line tool developed to help regional policymakers, innovation agencies, research and innovation (R&I) stakeholders, and other ecosystem participants evaluate how closely their knowledge ecosystems aligns with the ideal characteristics of a knowledge ecosystem within the broader European Research and Innovation Area. The tool is accessible via the ERA_FABRIC website: https://erafabric.eu/self-assesment-tool/

This report describes the methodology of the creation of the tool, validation methods used but also guide on how to use tool and provides an example of the report gathered after completing the individual assessment exercise using the tool.

ERA_FABRIC is a Horizon Europe funded project. The content of this document reflects only the author's view. The European Commission is not responsible for any use that may be made of the information it contains.

Table of Contents

Abbreviations

AT	Austria
CZ	Czech Republic
D	Deliverable
DK	Don't know
EEA	European Economic Area
ES	Spain
ERA	European Research Area
EU	European Union
HR	Croatia
IPR	Intellectual Property Rights
IT	Italy
NO	Norway
PL	Poland
PT	Portugal
RIS	Regional Innovation Scoreboard
RO	Romania
RP	Responsible Partner
R&I	Research and Innovation
TTO	Technology Transfer Office
WA	Weighted Average
WA-GWA	Difference between WA and the Group WA
WP	Work Package

Introduction

This document represents an integral part of ERA_FABRIC's research into success factors for Europe's knowledge ecosystems, ERA-Hubs.

With this deliverable ERA_FABRIC presents its self-assessment tool for knowledge ecosystems, based on the results from the task performed investigating the ERA Hubs as Knowledge ecosystems and also via the input of the other tasks that included stakeholder engagement and feedback.

The European Research Area (ERA) emphasizes the importance of well-functioning knowledge ecosystems—dynamic, mission-driven networks that bring together diverse stakeholders to foster research, innovation, and societal impact. These ecosystems transcend regional and national boundaries, enabling integrated governance, interregional collaboration, and knowledge valorisation.

This self-assessment tool was designed to help regional policymakers, innovation agencies, research and innovation (R&I) stakeholders, and other ecosystem participants evaluate how closely their local ecosystem aligns with the ideal characteristics of a knowledge ecosystem within the broader European Research and Innovation Area.

The remainder of this document assesses the methodology of the creation of the tool, validation methods used but also guide on how to use tool and an example of the tool and report gather after completing the tool.

1. METHODOLOGY

The development of the ERA_FABRIC Self-Assessment Tool was grounded in a multi-stage process designed to ensure scientific rigor, practical relevance, and stakeholder inclusivity. The methodology combined insights from prior project deliverables and tasks conducted within the WP2, direct stakeholder engagement, and iterative testing to create a tool that is both analytically robust and user-friendly.

1.1 Foundational Research and Conceptual Framework

The initial phase of the tool's design drew heavily on three key deliverables produced under WP2:

- Deliverable D2.1 provided a theoretical foundation by defining the core characteristics of knowledge ecosystems, synthesizing literature and case studies to identify critical dimensions such as governance, collaboration culture, and societal impact.
- Deliverable D2.2 complemented this by analyzing place-based research and innovation (R&I) ecosystems across Europe, highlighting successful models of regional policy support and cross-border cooperation.
- Deliverable D2.3 offered empirical validation through a stakeholder survey, which captured the perspectives of policymakers, researchers, businesses, and civil society organizations on the recurring strengths and weaknesses of existing ecosystems.

Building on these insights, the project team distilled seven key dimensions for assessment:

- **Vision and Intentionality**
- **Directionality and Strategic Focus**
- **Governance & Policy Support**
- **Cross-Border Collaboration**
- **R&I Infrastructure and Capacities**
- **Collaboration Culture & Knowledge Transfer**
- **Sustainability and Societal Impact**

Each dimension was addressed via into 5–7 specific statements, crafted to reflect actionable and measurable aspects of ecosystem performance. These statements were refined through internal workshops to ensure clarity and relevance for diverse stakeholders, including universities, SMEs, public agencies, and NGOs.

1.2 Tool Development and Platform Selection

To translate the conceptual framework into a practical assessment instrument, the team developed a questionnaire structured around a 4-point Likert scale (1 = Strongly Disagree to 4 = Strongly Agree).

This scale was chosen to avoid neutral responses, encouraging participants to take a clear position on each statement.

Google Forms was selected as the platform for hosting the self-assessment tool for several reasons:

- Accessibility: Google Forms is free, widely recognized, and requires no technical expertise, ensuring broad usability across stakeholder groups, including those with limited resources.
- Flexibility: The platform allows for easy customization of questions, branching logic (e.g. tailoring follow-ups based on responses), and multilingual support, which is critical for a pan-European project.
- Automation: Responses are automatically collected and visualized in real time, streamlining data aggregation and preliminary analysis.
- Integration: The tool seamlessly connects with other Google Workspace tools (e.g. Sheets, Docs), enabling efficient report generation and sharing.
- Scalability: Google Forms can handle large volumes of respondents without performance issues, making it suitable for widespread dissemination.

While specialized survey software was considered, Google Forms offered the best balance of simplicity, cost-effectiveness, and functionality for the project's needs.

The tool is accessible via the ERA_FABRIC website: https://erafabric.eu/self-assesment-tool/

1.3 . Testing and Validation

The tool's design was validated through two primary mechanisms:

- **Internal Review**: Project partners tested the tool and provided feedback on statement clarity, relevance, and usability. After this iteration the questions within seven dimensions were tailored to the each of the stakeholder groups to make it easier to understand and recognize themselves within each of the statements. Furthermore, this phase of testing helped in drafting final categories to be part of the report.

- **Pilot Testing**: The first 100 survey respondents will serve as a validation cohort, allowing the team to identify patterns, set benchmarks, and further optimize the tool's reporting outputs.

This iterative approach ensures the tool remains aligned with real-world ecosystem dynamics while providing actionable insights for users.

2. Guidelines for Using the Knowledge Ecosystem Self-Assessment Tool

2.1 How to Use the Tool?

The tool can be used in **two ways**, depending on your needs and available resources. The exercise typically takes between **15 to 45 minutes** to complete the assessment.

Case 1. Group Assessment (Recommended for Robust Results)

For a **comprehensive and representative evaluation**, gather a diverse group of stakeholders from your regional ecosystem. This approach ensures a **holistic view** of strengths, weaknesses, and opportunities for improvement.

Steps for Group Assessment:

STEP 1 Assemble a representative group of stakeholders, including:

- Policymakers & public agencies
- Research institutions & universities
- Businesses (SMEs, start-ups, industry clusters)
- Civil society organizations
- Innovation intermediaries (e.g., clusters, incubators)

STEP 2 Read each statement across the **seven dimensions** of the assessment tool.

STEP 3 Rate each statement on a **1–4 Likert scale**, where:

1 = Strongly disagree (does not reflect our ecosystem)

2 = Disagree (only partially reflects our ecosystem)

3 = Agree (largely reflects our ecosystem)

4 = Strongly agree (fully reflects our ecosystem)

STEP 4 Discuss the results as a group, using the guiding questions to:

- Identify key strengths and weaknesses
- Highlight areas needing improvement

STEP 5 Prioritise actions—consider both:

- **Short-term "quick wins"** (easily implementable improvements)
- **Long-term structural reforms** (systemic changes for greater impact)

CASE 2. Individual Assessment (Preliminary Insight)

If a group exercise is not feasible, a **single organization or stakeholder** can conduct the assessment individually. However, for a **full picture**, we recommend sharing the tool with other ecosystem actors and comparing results.

Steps for Individual Assessment:

1. Follow **steps 2 and 3** from the group assessment (read and rate each statement).
2. **Share the survey link** with other ecosystem stakeholders to collect multiple perspectives.
3. **Compare individual results** to identify:
    - **Common strengths and weaknesses**
    - **Divergent views that may require further discussion**

2.2 How the Tool looks like?

The Seven Assessment Dimensions

The self-assessment tool evaluates your knowledge ecosystem across the following key dimensions:

1. **Vision and Intentionality** – Clarity of purpose and alignment among stakeholders.
2. **Directionality and Strategic Focus** – Long-term goals and targeted priorities.
3. **Governance & Policy Support** – Effective structures and policies enabling collaboration.
4. **Cross-Border Collaboration** – Engagement with regional, national, and European partners.
5. **R&I Infrastructure and Capacities** – Availability and accessibility of research and innovation resources.
6. **Collaboration Culture & Knowledge Transfer** – Openness to sharing knowledge and co-creation.
7. **Sustainability and Societal Impact** – Contribution to long-term economic, social, and environmental benefits.

Each dimension includes **5–7 statements** that describe an effective knowledge ecosystem. After rating them, you will have a structured way to **reflect, strategize, and act** on improvements.

2.3 Who Should Use This Tool?

This tool is designed for:

- **Regional policymakers & public agencies** shaping R&I strategies

- **Research institutions & universities** engaged in knowledge exchange
- **Industry clusters, SMEs, and start-ups** driving innovation
- **Civil society organizations & innovation actors** contributing to societal challenges

2.4 How are results generated?

After submitting your assessment, you will **shortly receive a PDF document** with the main scores per dimension as well as strongest and weakest areas identified.

You will also receive main guiding questions for further discussion and links to the useful resources including examples of the best practices and well-functioning ecosystems and some guidance about the actions you can take in order to support the progress within each of the dimensions.

You will receive this email from the era_fabric.unist@gmail email address. Please check your Spam folder.

2.5 Next Steps After Assessment

- **For groups:** Use the findings to inform policy adjustments, funding priorities, or collaborative initiatives.
- **For individuals:** Advocate for broader stakeholder engagement to validate and refine results.

  By systematically assessing your knowledge ecosystem, you can **enhance its effectiveness, strengthen European collaboration, and maximize societal impact.**

In case of any further clarification or support needed please contact: media@erafabric.eu

2.6 Next Steps

The methodology underscores the tool's dual role as a diagnostic instrument and a catalyst for improvement. By combining rigorous research with accessible technology, the ERA_FABRIC Self-Assessment Tool empowers stakeholders to evaluate their ecosystems systematically and take targeted steps toward greater alignment with ERA Hub ideals.

ANNEX 1

ERA_HUBS self-assessment tool: full list of questions

Baseline Questions (Profile)

1. **Name & Organization**:
2. **Type of Stakeholder** (Dropdown: University/Research organisation; SME/Industry; Public Agency/Policy Maker; NGO/Civil Society representative)
3. **Ecosystem/Region You Are Assessing**:
4. **Geographic Coverage**: (Regional / National)
5. **Does your ecosystem have any kind of legal form**: (If yes, specify)
6. **Main Technological / Thematic Domains** (Dropdown: Sustainable Manufacturing, Bio-based Circular Economy, Clean Renewable Energy, other, etc.)
7. **How do you access the questionnaire:** (Checkbox: as individual / as a group of stakeholders from single ecosystem)

Dimension 1: Vision and intentionality

This dimension assesses whether the region has a clear, shared vision for research and innovation (R&I) and how well it aligns with broader European, national, and local priorities.

Q1_ 1. Our region/knowledge ecosystem has a jointly agreed vision for R&I that aligns with national, and local priorities.

Researchers: Our region has a shared R&I vision that aligns with institutional research priorities

Policy makers: Our region has a co-created R&I vision aligned with national priorities

Industry/Business: Our region's R&I vision supports business innovation needs

Civil society: Our region's R&I vision incorporates civil society perspectives.

Rating:
1 = No shared vision exists or stakeholders are unaware of it
2=A vision exists but lacks alignment or broad awareness
3=A shared vision is in place and somewhat guides actions
4=A robust, co-created vision is widely understood and used to guide all stakeholders

Q1_2. Regional stakeholders (public authorities/government, businesses, academia, civil society) regularly come together to update strategic goals.

Researchers: We regularly collaborate with policymakers, businesses, and NGOs to update research priorities and goals

Policy makers: We facilitate structured stakeholder meetings to refine R&I goals

Industry/Business: We engage with researchers and policymakers to shape R&I priorities

Civil society: Civil sector and public are actively involved in setting regional R&I goals

Rating:
1 = No regular meetings or coordination among stakeholders
2 = Meetings occur occasionally but lack structure or follow-through
3 = Stakeholders meet regularly with some coordination mechanisms
4 = Well-structured, regular processes ensure collective updates to goals

Q1_3. Our region's R&I vision is focused on addressing societal and global challenges (e.g., climate change, digital transformation, health crisis).

Researchers: Our research directly addresses societal challenges (e.g., climate change, health).

Policy makers: Societal and global challenges are central to our regional R&I strategy

Industry/Business: The R&I strategy addresses market-relevant societal and/or global challenges

Civil society: The R&I strategy has a substantial focus on addressing public and social needs and fostering sustainability.

Rating:
1 = Societal challenges are not considered in R&I vision
2 = Some challenges are mentioned but not central to the strategy
3 = Societal goals are integrated in parts of the vision
4 = Societal impact is a central driver with specific targets and actions

Q1_4. Our regional knowledge ecosystem actively aligns its R&I activities and priorities with European strategies (e.g., ERA Policy Agenda, Smart Specialisation Strategies).

Researchers: Institutional projects and research activities are aligned with European strategies (e.g., Horizon Europe)

Policy makers: Our policies actively align with EU frameworks (e.g., Smart Specialisation, Green Deal...).

Industry/Business: Our business activities are designed to follow main European strategies and aligned with EU funding opportunities.

Civil society: EU social/environmental policies are reflected in local R&I actions.

Rating:
1 = No alignment with European strategies
2 = Some references to EU priorities, but little practical integration
3 = Active but partial alignment with some updates over time
4 = Full and dynamic alignment with regular updates based on EU strategies

Q1_5. There are mechanisms in place to ensure that the vision is translated into actionable R&I projects.

Researchers: There are institutional/regional/national mechanisms in place to ensure that the vision is translated into actionable R&I projects.

Policy makers: There are mechanisms in place to ensure that the vision is translated into actionable R&I projects.

Industry/Business: There are mechanisms in place to ensure that the vision is translated into industry collaborations and actionable projects

Civil society: Civil society has channels and mechanisms to influence R&I project implementation.

Rating:

1 = No mechanisms to turn vision into projects
2 = Occasional efforts without consistent processes
3 = Some mechanisms exist, though not widely applied
4 = Clear, systematic mechanisms result in tangible R&I initiatives

Dimension 2: Directionality and Strategic Focus

This dimension evaluates how well the region mobilizes stakeholders around shared objectives and ensures that R&I efforts are directed toward impactful outcomes.

Q2_1. Our region has a clear strategy for mobilizing public and private stakeholders around shared R&I objectives.

Researchers: Our region has a strategy to align interest of research institutions with other stakeholders needs, mainly industry and society

Policy makers: Our region has a clear strategy for mobilizing public and private stakeholders around shared R&I objectives.

Industry/Business: Our region has clear strategies to link business R&D with academic research.

Civil society: Our region has a clear strategy for mobilizing public and private stakeholders around shared R&I objectives.

Rating:
1 = No strategy exists or efforts are fragmented
2 = Some strategy exists but lacks broad support or coordination
3 = Strategy in place with active participation from some key actors
4 = Well-defined strategy with broad stakeholder buy-in and active mobilization

Q2_2. There are joint R&I roadmaps or strategies that align public and private actors around major societal challenges.

Same for all respondent' types

Rating:
1 = No shared roadmaps or strategies exist/ I am not aware of existance
2 = Roadmaps exist but are not jointly developed or applied
3 = Joint strategies are developed and partially implemented
4 = Coordinated, widely applied roadmaps guide joint action toward key challenges

Q2_3. Our regional/knowledge ecosystem prioritizes long-term, systemic transformations over incremental improvements.

Researchers: Our region priorities long-term research impact over short-term gains.

Policy makers: Policies support systemic and sustainable R&I change rather than incremental short-term goals covering political cycles

Industry/Business: Regional policy and investments measures focus on transformative innovation.

Civil society: The region focuses on long-term systemic transformation for the benefit of the economy and society.

Rating:

1 = Focus is mostly on short-term, isolated projects
2 = Some long-term goals are acknowledged but not emphasized
3 = Systemic change is a goal in selected areas
4 = Strategic emphasis on long-term, transformative change across the board

Q2_4. There are mechanisms to assess/monitor that R&I outcomes are translated into economic and societal impact.

Researchers: There are mechanisms to assess/monitor how research translates into real-world economic and societal impact.

Policy makers: There are mechanisms to assess/monitor that R&I outcomes are translated into economic and societal impact.

Industry/Business: There are mechanisms to assess/monitor how business results and innovations influence regional economy

Civil society: There are mechanisms to assess/monitor how R&I results are creating impact for society

Rating:
1 = No monitoring mechanisms exist
2 = Some informal tracking occurs but lacks structure or continuity
3 = Impact is partially monitored through defined mechanisms
4 = Structured, outcome-oriented mechanisms ensure impact is measured and used for improvement

Q2_5. Our region actively engages in foresight exercises to identify future R&I priorities.

Researchers: Foresight exercises from research institutions (e.g., trend analysis) inform R&I priorities.

Policy makers: Our region actively engages in foresight exercises to identify future R&I priorities and planning.

Industry/Business: Policymakers respond to industry input when preparing R&I policies and investments

Civil society: Policymakers respond to civil society input on priorities when preparing R&I policies

Rating:
1 = No foresight activities take place
2 = Foresight is ad hoc or isolated
3 = Foresight is conducted periodically with stakeholder input
4 = Regular, inclusive foresight shapes strategic R&I direction

Q2_6. The different levels of the Public Administration are directly or indirectly involved through formal and informal practices in giving an overall directionality to the R&I investment strategy of the regional ecosystems.

Researchers: Different levels of Public Administration actively shape our region's R&I investment strategy through formal/informal engagement.

Policy makers: Our public administration actively co-develops R&I investment strategies across governance levels.

Industry/Business: Public authorities at different levels systematically guide R&I investments relevant to our sector.

Civil society: Civil society has channels to influence how public administrations direct R&I investments.

Rating:
1 = No involvement from public authorities
2 = Limited or informal involvement exists
3 = Public bodies contribute through consultations or advisory roles
4 = Public administration is a key actor in co-defining and guiding investment strategy

Dimension 3: Governance and Policy Support

This dimension assesses the transparency, inclusivity, and effectiveness of governance structures and policy support for R&I.

Q3_1. Our ecosystem's leadership and decision-making processes are transparent, collaborative, and inclusive of multiple levels of governance (regional, national, European).

Researchers: Our region's R&I decision-making processes actively include researchers from all governance levels (local/national/EU).

Policy makers: Our ecosystem's leadership and decision-making processes are transparent, collaborative, and inclusive of multiple levels of governance (regional, national, European).

Industry/Business: Industry, and business (including SMEs)have formal collaborative channels to influence R&I decision-making at multiple governance levels.

Civil society: Civil society has formal collaborative channels to influence R&I decision-making at multiple governance levels.

Rating:
1 = Decision-making is ad hoc, controlled by a small group with minimal consultations
2=Some openness exists but lacks formal structures or multilevel inclusion
3 = Decision-making involves key stakeholders and some coordination across levels
4 = Transparent, participatory governance is in place, with active multilevel collaboration

Q3_2. There are formal or informal leadership groups that represent diverse types of stakeholders (government, industry, academia, civil society).

Researchers: Leadership groups in our ecosystem have meaningful representation from academic institutions.

Policy makers: There are formal or informal leadership groups that represent diverse types of stakeholders (government, industry, academia, civil society).

Industry/Business: Industry representatives hold decision-making roles in R&I leadership structures.

Civil society: Civil society representatives hold decision-making roles in R&I leadership structures.

Rating:
1 = No leadership bodies or groups are in place
2 = Leadership exists but lacks diversity or inclusivity
3 = Multi-stakeholder groups exist with some coordination role
4 = Well-established, diverse leadership structures drive coordinated ecosystem governance

Q3_3. Governance decisions (e.g., priority-setting, project selection) are made based on clear data, open criteria, and objective assessment.

Same for all respondent' types

Rating:
1 = Decision processes are blurred, with limited data or publicly available rationales.
2 = Some criteria are used but not consistently or publicly shared
3 = Decisions follow defined procedures and are partly evidence-based
5 = Decisions are well-documented, open for public scrutiny, and informed by thorough evidence.

Q3_4. There are policies or frameworks that facilitate public-private collaboration (e.g., memoranda of understanding, cluster associations, dedicated funding schemes).

Researchers: Clear institutional policies exist to support collaboration between researchers and industry (e.g., IP frameworks, joint funding)

Policy makers: There are policies or frameworks that facilitate public-private collaboration (e.g., memoranda of understanding, cluster associations, dedicated funding schemes).

Industry/Business: Effective policies facilitate business-academia collaboration (e.g., co-funding mechanisms).

Civil society: Policies exist to support community-academia-industry collaboration on local challenges.

Rating:
1 = No enabling policies or frameworks exist
2 = Some policies exist but are underused or informal
3 = Collaboration frameworks are in place and occasionally used
4 = Robust, institutionalized frameworks consistently support public-private cooperation

Q3_5. Our region/knowledge ecosystem actively works to reduce regulatory barriers to R&I collaboration (e.g., researcher mobility, IPR rules).

Researchers: Our region actively works to reduce bureaucratic hurdles that limit research collaboration (e.g., visa processes for international researchers, flexible IP agreements).

Policy makers: We implement policies that systematically reduce administrative barriers to R&I collaboration (e.g., streamlined permits, harmonized regulations across jurisdictions).

Industry/Business: Our region has taken concrete steps to remove regulatory obstacles that hinder business participation in R&I (e.g., simplified contract processes, faster technology transfer approvals).

Civil society: Our region has made it easier for community organizations to participate in R&I by reducing administrative burdens (e.g., simplified grant applications, inclusive participation rules).

Rating:
1 = Significant barriers exist with no mitigation efforts
2 = Some efforts to reduce barriers exist, but impact is limited
3 = Specific steps have been taken to ease collaboration barriers
4 = Active and ongoing efforts have resulted in a flexible, enabling regulatory environment

Dimension 4: Cross-border Collaboration

This dimension evaluates the region's ability to form and maintain cross-border and international partnerships. Interregional collaborations at national level are not taken into consideration in this context.

Q4_1. Our region has a clear strategy for establishing partnerships with other regions or countries on shared R&I priorities.

Researchers: Our region has a clear strategy supporting international research partnerships in our research field.

Policy makers: Our region has a clear strategy for establishing partnerships with other regions or countries on shared R&I priorities.

Industry/Business: Our region has a clear strategy supporting businesses to join R&I partnerships.

Civil society: Our region includes civil society in international R&I partnership strategies and partnership.

Rating:
1 = No formal strategy for cross-border collaboration
2 = Some partnerships exist but lack a strategic approach
3 = Strategy exists and guides selected interregional/international initiatives
4 = A strong, proactive strategy drives high-impact alliances with strategic partners

Q4_2. There are formal agreements (e.g., Memorandum of understandings, Letters of Commitment) to coordinate R&I efforts with other regions.

Same for all respondent' types

Rating:
1 = No formal collaboration agreements in place
2 = A few informal agreements exist, with limited follow-through
3 = Formal agreements exist and guide selected joint efforts
4 = Multiple, active agreements support structured and sustained collaboration

Q4_3. Our region/Knowledge Ecosystem engages in interregional or transnational collaborative projects, sharing infrastructures and pooling resources.

Researchers: Our institution regularly participates in cross-border projects with shared facilities/data/resources.

Policy makers: Our region/Knowledge Ecosystem engages in interregional or transnational collaborative projects, sharing infrastructures and pooling resources.

Industry/Business: We participate in transnational projects accessing shared testbeds/equipment.

Civil Society: Programs exist to include civil society or/and citizen scientists to collaborate internationally, share knowledge and pool resources.

Rating:
1 = Collaboration rarely goes beyond local partners
2 = Some joint projects exist but are limited in scope or impact
3 = Interregional collaboration occurs regularly with resource sharing
4 = Strong, institutionalized partnerships involve shared infrastructure, funding, and strategic coordination

Q4_4. There are mechanisms to facilitate the mobility of researchers, students, and entrepreneurs between our region/knowledge ecosystem and external partners.

Researchers: There are mechanisms to facilitate the mobility of researchers, students between our region/knowledge ecosystem and external partners.

Policy makers: There are mechanisms to facilitate the mobility of researchers, students, and entrepreneurs between our region/knowledge ecosystem and external partners.

Industry/Business: There are mechanisms to facilitate the mobility of entrepreneurs between our region/knowledge ecosystem and external partners.

Civil Society: There are mechanisms to facilitate the mobility of NGOs and other civil society organisations between our region/knowledge ecosystem and external partners.

Rating:
1 = No formal structures support mobility
2 = Mobility opportunities exist but are fragmented or infrequent
3 = Mobility is encouraged through targeted programs
4 = Well-established culture and infrastructure for cross-border mobility and joint exchange programs

Q4_5. Our regional knowledge ecosystem is recognized internationally for its R&I strengths, attracting foreign partners, investments, and talent.

Same for all respondent' types

Rating:
1 = Low international visibility or engagement
2 = Some recognition in specific niches or events
3 = International reputation is growing, with regular foreign collaboration
4 = Region is widely recognized as a leading hub, with consistent inflow of talent, funding, and partnerships

Dimension 5: R&I Infrastructure and Capacities

This dimension checks whether the region has strong research facilities, innovation services, and capacities to maintain skilled staff and to facilitate the operation of R&I consortia.

Q5_1. Our region/Knowledge ecosystem offers sufficient research facilities, labs, or test beds to cover the main needs of local public and private actors.

Researchers: Our region/Knowledge ecosystem provides adequate research facilities and labs for our research field.

Policy Makers: Our region/Knowledge ecosystem offers sufficient research facilities, labs, or test beds to cover the main needs of local public and private actors.

Industry/Business: Local testbeds, labs and research infrastructure meet our company's R&D requirements.

Civil Society: Community organizations can access relevant R&I facilities for societal needs.

Rating:
1 = Infrastructure is limited, outdated, or inaccessible
2 = Some modern facilities exist, but coverage is uneven
3 = Adequate infrastructure serves key sectors and users
4 = Comprehensive, modern infrastructure supports diverse and advanced R&I activities

Q5_2. Access to the infrastructures is transparent, with clear procedures and cost models for all (e.g., SMEs, universities).

Same for all respondent' types

Rating:
1 = Access is restricted or lacks clear procedures
2 = Some access is allowed, but processes are unclear or inconsistent

3 = Transparent processes exist for many stakeholders
4 = Well-documented, inclusive access procedures promote broad and equitable usage

Q5_3. There are professional innovation support services (e.g., TTOs, accelerators, incubators) available to both academic, industry and civil society partners.

Same for all respondent' types

Rating:

1 = Few or fragmented services with limited outreach
2 = Support exists but is underdeveloped or unevenly distributed
3 = Functional services support selected actors or stages
4 = A strong, interconnected support ecosystem assists various innovation pathways

Q5_4. Our region invests in developing and retaining skilled staff (researchers, entrepreneurs, innovation support staff) through targeted programs and training.

Researchers: Our region invests in developing and retaining skilled researchers and supporting staff through targeted programs and training.

Policy Makers: Our region invests in developing and retaining skilled staff (researchers, entrepreneurs, innovation support staff) through targeted programs and training.

Industry/Business: Workforce training programs address our sector's specialized skill gaps.

Civil Society: Training programs build R&I literacy and skills among diverse populations.

Rating:
1 = Little or no targeted investment in skills or talent retention
2 = Some programs exist but are not strategic or sustained
3 = Targeted initiatives support skill-building in key areas
4 = Well-funded, strategic programs build and retain a competitive talent pool

Q5_5. Research priorities industry and civil society needs are well-aligned, driven by ongoing dialogue and joint agenda setting.

Same for all respondent' types

Rating:

1 = Research agendas are disconnected from local industry, business, or societal challenges
2 = Occasional alignment efforts, but limited follow-through
3 = Dialogue occurs and influences some agendas
4 = Ongoing collaboration ensures technology development matches industry roadmaps

Dimension 6: Collaboration and Knowledge Transfer

This dimension looks at the culture and mechanisms for collaboration among research, industry, government, and civil society.

Q6_1. Researchers, businesses, the public sector, and civil society actors are routinely and actively involved in designing and implementing R&I projects, policy reforms, or strategic initiatives.

Same for all respondent' types

Rating:
1 = Stakeholder involvement is minimal or top-down
2 = Occasional collaboration, but ad hoc
3 = Regular involvement, though not systematic
4 = Structured co-creation with all stakeholders

Q6_2. Our ecosystem has an established culture of trust, with frequent partnerships and open exchange among key stakeholders.

Same for all respondent' types

Rating:
1 = Stakeholders operate in silos
2 = Some informal exchanges, but limited trust
3 = Active partnerships, though uneven across sectors
4 = High trust with systematic collaboration mechanisms

Q6_3. There are mechanisms for transferring research outputs (e.g. products, prototypes, services) to the market or into public use as well as a smooth connection between basic and applied research and research and business innovation.

Same for all respondent' types

Rating:
1 = No formal process for commercialization
2 = Ad-hoc efforts with limited success
3 = Some structured channels (e.g., TTOs)
4 = Robust transfer pathways with measurable outcomes

Q6_4. Collaboration between local universities/research centres and industries (including SMEs) is active and mutually beneficial.

Same for all respondent' types

Rating:
1 = Minimal engagement beyond sporadic projects
2 = Occasional joint projects
3 = Regular partnerships with shared outputs
4 = Deep integration (e.g., co-developed IP, joint roadmaps)

Q6_5. Civil society organizations and end-users are frequently engaged in knowledge valorisation activities trough co-creation, living labs, and pilot projects.

Same for all respondent' types

Rating:
1 = Little to no engagement
2 = Token involvement (e.g., surveys)
3 = Participatory methods in select projects
4 = Systematic co-creation with citizen panels or user groups in R&I design

Q6_6. Research or project results are widely communicated to stakeholders and the community, improving knowledge flow and ecosystem awareness.

Same for all respondent' types

Rating:
1 = Little or no dissemination
2 = Basic reporting (e.g., annual summaries)
3 = Active outreach (e.g., workshops, webinars)
4 = Strategic communication with feedback loops

Q6_7. There is a strong culture and capacity to form consortia and launch advanced R&I projects, leveraging multiple disciplines.

Same for all respondent' types

Rating:
1 = Limited project management experience
2 = Developing project management capabilities with moderate success
3 = Established processes for project management and managing interdisciplinary teams
4 = Consistent formation of effective consortia that secure high-level R&I funding

Dimension 7: Sustainability and Societal Impact

This dimension evaluates how well the region integrates sustainability and societal impact into its R&I activities.

Q7_1. Local R&I strategies explicitly encourage sustainable and inclusive innovation, balancing economic growth with societal benefits.

Researchers: Our research aligns with regional strategies that prioritize both innovation and societal benefit.

Policy Makers: Local R&I strategies explicitly encourage sustainable and inclusive innovation, balancing economic growth with societal benefits.

Industry/Business: We access specific funding/tax benefits for environmentally-friendly R&D projects.

Civil Society: Local R&I strategies explicitly encourage sustainable and inclusive innovation, balancing economic growth with societal benefits.

Rating:
1 = Sustainability or societal inclusion are rarely referenced
2 = Sustainability or societal inclusion are mentioned but not operationalized
3 = Sustainability or societal inclusion are partially integrated into priorities
5 = Clear emphasis on green, social, and digital transitions with tangible targets

Q7_2. There are policies or funding mechanisms that prioritize environmentally sustainable R&I projects.

Same for all respondent' types

Rating:
1 = No policies or funding mechanisms exist

2 = Minor incentives without impact
3 = Some dedicated programs exist
4 = Robust policies and funding mechanisms in place

Q7_3. Our region actively engages civil society groups (e.g., NGOs, citizen panels) in shaping sustainability objectives.

Same for all respondent' types

Rating:
1 = No engagement of civil society
2= Civil society is consulted occasionally with no clear plan or structure
3= Civil society is involved in key decisions
5 = Systematic involvement of civil society in shaping objectives

Q7_4. There are clear metrics or KPIs to track the environmental and societal impact of R&I projects.

Same for all respondent' types

Rating:
1 = No systematic measurement
2 = Basic indicators, inconsistently applied
3 = Defined KPIs with partial reporting
4 = Clear KPIs used to track performance and inform continuous improvement

Q7_5. Our region promotes a circular economy or other sustainable economic models through its R&I activities.

Researchers: Our research results contribute to developing circular economy solutions or sustainable business models.

Policy Makers: Our region promotes a circular economy or other sustainable economic models through its R&I activities.

Industry/Business: Our operations increasingly adopt circular economy approaches supported by local R&I.

Civil Society: We initiate/collaborate in concrete circular economy initiatives emerging from local research.

Rating:
1 = No focus on sustainable economic models
2 = Pilot projects only are implemented
3 = Sector-specific initiatives exist
4 = Strong focus on circular economy and other sustainable models

ANNEX 2

ERA_HUBS self-assessment tool: example of report

ERA FABRIC

Your survey results

Knowledge ecosystems: Self-Assessment and Guidance Tool

Overall Summary

marino.listes92@gmail.com

Stakeholder Type: **Policy makers/Public Agency**

Overall Score: **2.97** / 4.0 — **Developing**

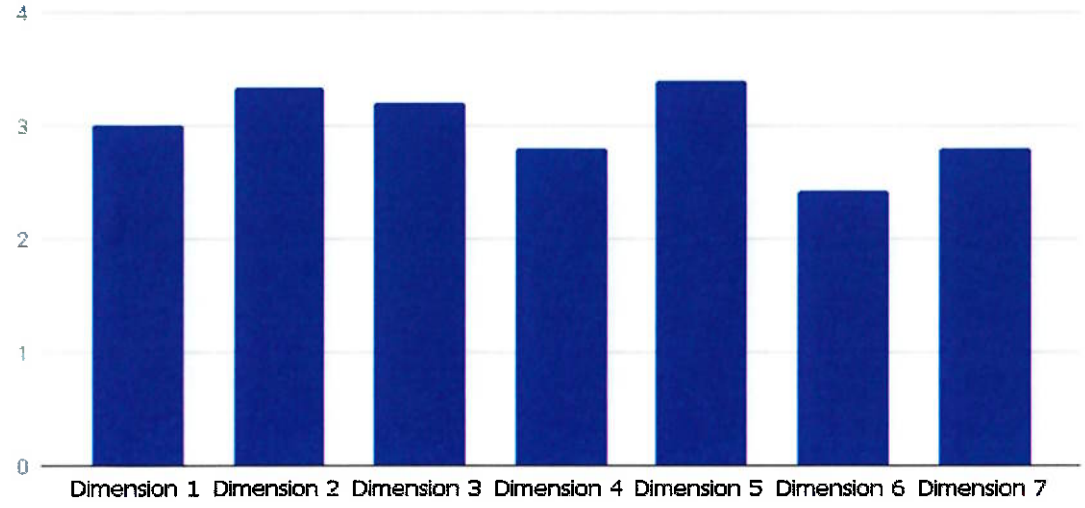
The detailed summary can be found below

ERA FABRIC

Key Findings Summary Tables

Dimension	Average Score	Stage
1. Vision and intentionality	3	Advanced
2. Directionality and Strategic Focus	3.33	Advanced
3. Governance & policy support	3.2	Advanced
4. Cross-board collaboration	2.8	Developing
5. R&I infrastructure and capacities	3.4	Advanced
6. Collaboration Culture & Knowledge transfer	2.43	Developing
7. Sustainability and Societal Impact	2.8	Developing

Score per dimension



ERA FABRIC

Standard deviation of dimension averages: 0.319

Lower values of the standard deviation indicate balanced development across all dimensions,
while higher values may indicate unbalanced overall development.
Example: A value of around 1 can be considered a high deviation and a value of 0.4 or lower is rather well balanced.

Priority Areas

Weakest dimension: **Collaboration Culture & Knowledge transfer** (Score: **2.43**)

Next steps and resources

Systematic improvements and clearer strategies.

ERA FABRIC

General recommendations:

1. Engage Stakeholders: Organize a workshop to discuss these results and co-create an action plan.

---

2. Leverage EU Funding: Explore Horizon Europe, Interreg, and other instruments for support.

---

3. Benchmarking: Compare with other regions using the ERA_FABRIC good practices database.

Useful links:

ERA_FABRIC Good Practices

EU Funding & Tenders Portal