

SUMMARY OF THE RULES FOR MAKING THE ROADMAP

The following is a short reminder of some important elements of the procedure for making the roadmap, considering the recent developments within the Expert Groups and RWGs:

- To fulfill their tasks, and before analyzing specific initiatives (which should have received the previous support of an ESFRI member), the Expert Groups should have reviewed the **NEEDS** of the potential user scientific communities **WITHIN THE NEXT 10 TO 20 YEARS**.
- Only proposals with **PAN-EUROPEAN** dimension should be considered:
 - ESFRI should focus on pan-European interest from the scientific point of view. If the project happens to be so big that only multi-national efforts are feasible, then it makes sense to talk about financially pan-European RIs, but the basic principle should be scientifically Pan-European.
 - Some of the projects currently discussed are purely national. In a pan-European project either the contributions of the other countries should be substantial, or the access to the all European community should be clearly specified in a legal framework. Also, a network of national infrastructures should demonstrate real complementarities at pan-European level.
- Each EG and RWG should review the identified Research Infrastructures according to two main criteria:

THE SCIENTIFIC CASE, i.e. THE SOLIDITY OF PROJECTS

- The consequences of the roadmap are (a) for the funding agencies to help to decide and (b) to stimulate good projects and to get people acting together. Therefore, only “solid”, i.e. credible, proposals can go on the roadmap.
- The proposed new RI should correspond to priority needs of the scientific communities in Europe, support new ways of doing science in Europe and participate to the enhancement of the European Research Area.
- Accompanying documents should demonstrate its pan-European value.
- ESFRI should not be afraid of having scientific priorities different from political priorities. Proposals must be solid also worldwide, since they will be linked with other international roadmaps.

THE TECHNICAL & BUSINESS CASE, i.e. MATURITY OF PROJECTS:

- Solid and mature are not the same thing. The proposed new RI should be technologically and financially feasible and meet the necessary degree of maturity which is defined as the existence of (a) a conceptual design report for the realisation of the project, and, (b) a projection of life-cycle costs (since the business case is also the credibility of the costing in all phases -

construction, maintenance, operation, decommissioning - including the credibility that someone is going to fund it). The budgets presented should therefore be realistic.

- In addition, to judge maturity, we need to have (c) an expression of interest from funding agencies. The ESFRI analysis would therefore require additional information on (d) any consortium, that could support the potential for risks- and costs-sharing, (e) the mechanisms for other partners to join later on, and, (f) the mechanisms to ensure the use and continuous upgrade of the RI in the most open and effective way.
- A report of the Expert Group to the RWG is due in **early SPRING 2006** (see attached timetable) detailing which RI project (mature or maturing) is recommended to be included in the first ESFRI Roadmap; the RWGs are then due to report to ESFRI (ESFRI meeting on **JUNE 16**), on the basis of which the roadmap will be prepared. It is reminded that ESFRI will ultimately decide whether individual projects should be included in the Roadmap.
- In addition, during its Nottingham meeting, ESFRI decided that:

NUMBER OF PROJECTS:

- Knowing that the DOE Road Map (without BMS and HSS) had 27 projects, and considering that, if ESFRI puts too many proposals it will not be taken seriously and the whole exercise will be undermined, the first edition of the ESFRI roadmap should not go beyond **40-50 projects**.

THRESHOLD

- One has to clearly state that projects below a certain threshold (depending on the field) should not be considered (in terms of financial size, a criterion could be NOT to include in the Roadmap those RIs which are invisible in the overall budget of the national funding agencies).
- Having different thresholds for different fields makes sense, however the negative effect of NOT having some proposals on the roadmap must also not be underestimated.

EDITING

- The reports of the EGs will not be public but they will be important basic documents. This raises a key point. We should have these reports available, (1) from all EGs, (2) in an harmonized format (there is already an agreed template for each identified RI project), (3) with sufficient background information and justification, and (4) with a summary that could be published and reported in the ESFRI web site.
- Finally it is reminded that the first edition of the roadmap is not the whole story, there will be updates.

Proposed Time Schedule for the publication of the ESFRI ROADMAP for New (or major upgrades) Research Infrastructures of Pan-European character	
	When?
Review of Process by ESFRI (Brussels meeting)	24 March 2006
Start of the ESFRI drafting group First expected Expert Group <u>draft reports</u> to RWGs	Early April 2006
Expert group <u>executive reports</u> to RWGs Other inputs to RWGs, e.g. from ETPs - deadline	End April 2006
Expected RWGs <u>draft report</u> to ESFRI secretariat	Early May 2006
RWGs <u>executive report</u> to ESFRI ESFRI drafting group + Executive Board meeting (24 May)	End May 2006
ESFRI <u>assessment of RWGs reports</u> ESFRI identification of “priority” projects (Vienna meeting)	15-16 June 2006
ESFRI drafting group + Executive board meeting	29-30 June 2006
<u>First draft</u> ESFRI Roadmap report	Early July 2006
Review of draft report / comments to ESFRI drafting group	July / August 06
<u>Final draft</u> ESFRI Roadmap report	Early Sept. 2006
Finalisation of all supporting documents	September 2006
Agreement of ESFRI (Brussels meeting)	28-29 Sept. 2006
Publication and press conference	19 Oct. 2006