

Research management needs in PL and PT - identification of gaps and future actions

WorkPackage 4 - Deliverable 4.2

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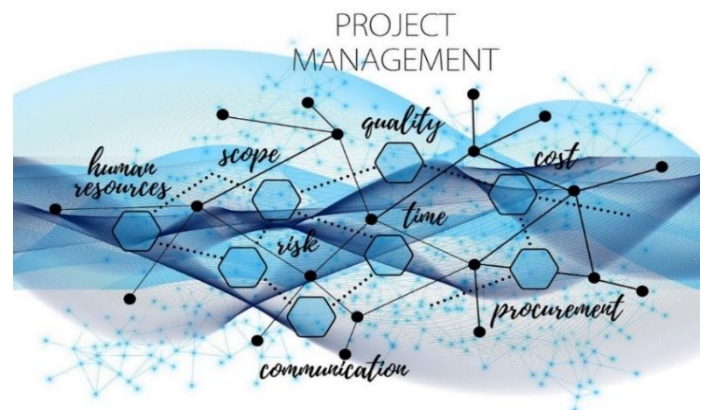
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1. Executive summary

This report “*Research management needs in PL and PT - identification of gaps and future actions*” is related to the Unite!Widening task 2.1 - Objective n. 2 “to strengthen the research management capacity of the Unite! Alliance with focus on the Widening countries”.

This report provides an overview and analysis of the Research support services of the Unite! Partners, with the aim (1) to identify research management needs and gaps in the partners from Widening countries – Wroclaw Tech and ULisboa - and (2) to prepare for future actions in the project for the strengthening of the research management capacity of the widening universities and, indirectly, of the whole Unite! Alliance.



The work behind this report has built upon and expanded the previous activities and outcomes of the IRIS (Integrated Research and Innovation Services) network, created in July 2022 in the UNITE.H2020 project (GA n. 101017408), whose core group involves at least one person working at central research support offices of each partner university.

Section 3. Among the activities performed in the past years, IRIS carried out an analysis of the research support services at the Unite! partner universities with an extensive survey about their structure and tasks. In the context of the Unite!Widening project, the IRIS network further addressed this analysis, updating the survey data and extending it to all the Unite! partners by including also to Wroclaw Tech and TU Graz (not present in the previous project) – see Annex 1. The research support structures across the Unite! university alliance varies significantly in terms of funding sources, organizational structures, and services offered. Central services at each institution provide support in e.g., project pre- and post-award as well as research development and policy. Services are also decentralized at the faculty or department level, with varying levels of support for pre- and post-award tasks. The Grant Offices collaborate closely with other university units, including technology transfer, HR, and legal services, to manage complex research and funding processes.

Section 4. IRIS supports research and innovation within the Unite! European University Alliance. Its main goals are to: (1) foster the sustainability of Unite! Alliance’s R&I dimension, (2) to empower researchers through a strong international network, and (3) to enhance the competencies of professionals in research and innovation support activities. IRIS joint R&I services for the Alliance and its members target at the I) Unite! Alliance – with strategic support on R&I policies and on strategic R&I focused Unite! proposals – II) faculty and research staff – with digital tools to facilitate collaboration such as map of competences, a research proposal marketplace, a research infrastructure catalogue and open science and innovation management handbook and III) Unite! Research Managers and Administrators (RMAs) – promoting networking opportunities and training for Unite! research managers and administrators.

Section 5. The overview of the research support services at the Unite! partner universities reported in Section 3 was complemented by a more in-depth analysis and discussion focused on the Widening countries universities - Wroclaw Tech and ULisboa - with the aim of identifying the current research managers and administrators' needs. This analysis allowed to identify common needs for strengthening and advancing research management support services at ULisboa and Wroclaw Tech. The key points are summarized below:

1) Standardizing and Coordinating Research Management Practices:

ULisboa: Seeks to standardize research support across its 18 faculties and institutes, which currently have varying levels of autonomy, information networks, and support structures. This includes aligning service levels and best practices while respecting the individual capacity of each institution.

Wroclaw Tech: Faces fragmentation in research support due to seven independent units, resulting in inconsistent knowledge sharing and collaboration. There is a need to clearly define the scope of activities of specific research support divisions to avoid duplication of competences, improve the flow of information, and ensure streamlined and coordinated support.

2) Training and Capacity Building for Research Staff:

ULisboa: Emphasizes training support for pre-award activities, such as budget planning, proposal drafting, application review, and consortium formation, which are critical for effective project development and proposal submission.

Wroclaw Tech: Identifies a need for both basic and advanced training in skills critical to project competitiveness and management, such as negotiation, public speaking, and funding knowledge. Continuous and specialized training is seen as essential for enhancing support services.

3) Enhancing Pre-Award and Post-Award Support:

ULisboa: Requires additional support across the full lifecycle of research projects, from funding opportunity mapping and application submission to post-award project management and closure, especially in large projects where dedicated project managers are involved.

Wroclaw Tech: Requires more comprehensive pre-award and post-award support, particularly for EU-funded projects. This includes establishing an Excellence Centre to guide researchers through project management and reporting.

4) Fostering better Internal Collaboration and Communication:

ULisboa: Encounters structural challenges due to the autonomy of its faculties and varying research management processes. More information guidelines are needed to foster collaboration across faculties, standardize support, and manage legal and financial project controls.

Wroclaw Tech: Lacks efficient information flow among independent support units, leading to task overlaps and reduced service efficiency. Improved internal collaboration is essential to minimize redundancy and better support the academic community.

5) Aligning and Operationalizing Research Goals:

ULisboa: There is still a need to align the research support infrastructure with institutional research objectives to enhance research capacity and impact across faculties.

Wroclaw Tech: Prioritizes operationalizing its 2023-2030 research strategy at the faculty level, requiring structured support and faculty training to align with the university's strategic objectives.

6) Establishing Centres of Excellence for Research Management:

ULisboa: While not explicitly stated, the need for consistent high-quality research support across all faculties suggests a potential benefit in centralizing certain levels of expertise or resources.

Wroclaw Tech: Plans to establish an Excellence Centre specifically for EU project support, providing centralized expertise and guidance for high-quality project applications and implementations.

In summary, both universities require improvement in coordinated research management support structures, enhanced training and capacity building for research staff, strengthened pre- and post-award support, improved internal collaboration, and alignment of research management practices with institutional strategic goals. These shared needs highlight the importance of cohesive, well-resourced research support offices in fostering research excellence and institutional alignment.

Section 6. Drawing from the common needs in research management support identified by ULisboa and Wroclaw Tech, the document provides some inputs and suggestions for the design of research management reinforcement actions in WP3 and WP4.

The definition of training topics for tutors and support staff in Task 3.2 to enhance both technical and non-technical skills in research management by addressing specific training needs at ULisboa and Wroclaw Tech and the organization of several staff weeks for research support staff by PL and PT should be planned. The training should ensure long-term impact and synergy with WP4.

The implementation/creation of 8 offices (TT, OS, MSCA Grant Writing and an HR Researchers office to support R&I Agendas implementation) - planned in WP4 - will require the collaboration between the Task 4.1 working group (IRIS group) and other experts, which will be crucial to ensure an alignment with the identified needs in research management support services at ULisboa and Wroclaw Tech.

An exchange with IRIS and with relevant stakeholders of the Widening ecosystems in PT and PL will be important for the organization of the 4 matchmaking events planned in WP4 – Task 4.1. For the first event (“Boosting success in Horizon EU calls participation”), it would be reasonable to not only involve researchers but also research managers as well as project managers – as the training of these staff categories is one of the key priorities for the Widening partners – with e.g., a peer exchange on best practices in these areas.

The staff training week – planned in WP3 – will aim at training teams with advanced skills e.g., on EU funding opportunities, grant writing, project management, open science and ethical research, technology transfer and innovation. (Some of) the research support staff involved in the staff training weeks could be involved in organizing Task 4.1’s matchmaking events, which could thus serve as a follow-up for the support staff. At the same time, the matchmakings ensure that new skills and knowledge sets are widely spread across the entire Unite! Alliance.

The ultimate goal is to embed the skills and knowledge acquired through training and event organization into the institutional frameworks of ULisboa and Wroclaw Tech. In this way, the efforts under WP3 and WP4 become coherent and sustainable, through a cycle of training, practical application through event organization, and institutionalization of knowledge. This will strengthen the research support and the research management capacity at ULisboa and Wroclaw Tech and, indirectly, of the whole Unite! Alliance (in line with ERA Action 17 key objectives).

To further complement and support the discussion about the needs and the possible actions to be planned in WP3 and WP4, the literature review about barriers and facilitators for improving grant funding success and achieving university research goals carried out in UNITE.H2020 is reported in Annex 2.

2. Introduction

In July 2022, the core group of IRIS (Integrated Research and Innovation Service) network was created in the context of the UNITE.H2020 project (GA n. 101017408), composed of at least one person working at central research support offices of each partner university. In this framework, IRIS carried out a survey to analyse the research support structure in each partners' university and their main tasks, the Grant Offices internal services processes of each Alliance institution, and its links with other support services. The survey comprised two thematic blocks: on the research support structure and on the services of the Grant Offices of the Unite! partners. Questions about research support structure addressed main tasks and number of Research Managers and Administrators (RMAs) at central and at School/Department/Faculties level. Regarding the services of the Grant Offices, internal processes were compiled and considered in terms of how they relate to other support services. Emphasis was put on communication tools and good practices that could be useful for the Unite! Alliance.

In the context of the Unite!Widening project, IRIS network updated the data of the survey and included the information of all Unite! Partners – including Wroclaw Tech and TU Graz that were not partners in UNITE.H2020.

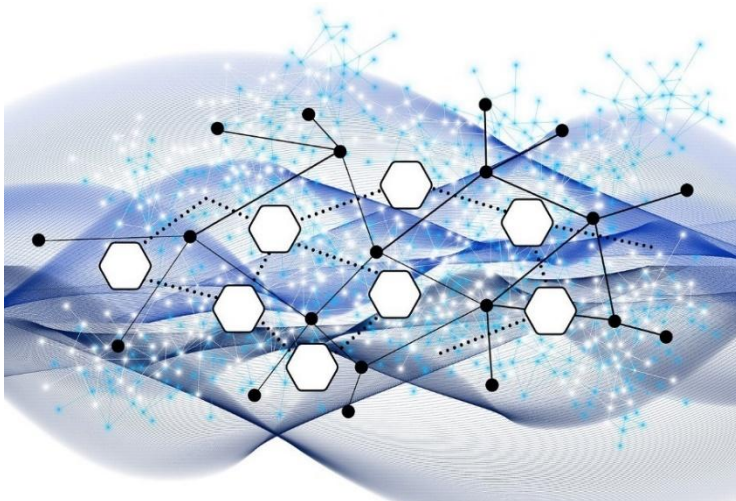
The complete survey data updated in Unite!Widening are reported in Annex 1, while the results and analysis of the survey are summarized in Section 3.

Section 4 summarizes the updated IRIS objectives and services targeted to the Unite! Alliance, the Unite! Alliance research managers and administrators and the faculty and research staff of the Alliance.

The next step is a more in-depth analysis and discussion focused on the Widening countries universities – Wroclaw Tech and Ulisboa – with the aim of identifying the research managers and administrators' needs – with reference to the survey results and to the specific inputs of the two universities (Section 5). To complement and support this discussion, IRIS referred also to the literature review previously conducted in

UNITE.H2020 about barriers and facilitators for improving grant funding success and achieving university research goals. The full literature review is reported in Annex 2.

This report aims at providing inputs – reported in Section 6 – for the design of the research management reinforcement actions that will be carried out in WP3 and WP4 for the strengthening of the research management capacity of the widening universities and, indirectly, of the whole Unite! Alliance (in line with ERA Action 17 key objectives).



3. R&I services provided by the Unite! partners' universities

A. The research support structure in each university alliance and its main functions

A.1 Breakdown of research funding at institutional level (% of funding, by source type: national, regional, EU, foundations)

The share of externally funded research by type of funding varies greatly among the UNITE! partners. The EU share, for instance, ranges from 10% to over 72%. The significance of EU research funding differs among the Unite! partners.

A.2 Structure of the research support services and n. of RMAs at Central Level

At central level, all Unite! universities have Grant offices that offer support to finding, managing and developing external research funding opportunities. Typical services are identifying and promoting funding opportunities, assisting in preparing proposals and giving legal advice. Usually, these services are provided for national, regional and EU funding, with different emphasis.

Usually, Grant offices are part of larger units that often comprise Policy units (PoliTO, INP-UGA, KTH, Aalto) and TT units (UPC, PoliTO, TUDa, Aalto). Sometimes the topics 'Early career researchers' (PoliTO, TUDa), 'Open science and platform services' (Aalto) and 'communication' as part of 'Knowledge Management Service' (UPC) are included. The difference in proximity to other service units implies different levels of close interaction. The size of the larger research support service units is usually in the range of 40 to 50 RMAs.

In particular, UPC has set up a 'Research and Innovation Support Service' (RISS) that consists of the teams of (i) International Projects Unit (7 RMAs), (ii) National Projects Unit (4 RMAs), (iii) Institutional Projects Unit (11 RMAs), and (iv) Contracts, Agreements and Tenders Unite (6 RMAs). RISS performs the functions of promoting, advising, consulting and managing Research and Innovation Institutional and projects and on business collaborations. Core services are identifying, disseminating and promoting funding opportunities, assisting in preparing proposals and being present in all stages of international projects. It is emphasized that the service is for teaching and research staff. RISS is part of the larger unit 'Research, Development and Innovation (RDI) Area' that groups also the Services 'Innovation management' (14 RMAs), 'Economy Management' and 'Knowledge Management'.

PoliTO merges the 'Research Support Department' (currently 30 RMAs) with the 'Technology Transfer Department' (currently 10 RMAs) to the new Department 'Research, Industry Liaison and Innovation' with 3 units and 6 services with related offices and around 50 RMAs. The 3 units are (i) Administration and Budget Unit, (ii) Legal Support for Research, Innovation and Ethics Unit and (iii) Dissemination and Impact Unit. The Research Services comprise 'Collaborative and Multi-disciplinary Research Service', 'Funded project management Support Service', 'University Transversal Programs Service', 'Corporate Relations and Research Enhancement Service', 'PhD and Talent Development Service', and 'Masters, Continuing Education and Challenge Service'.

INP-UGA has the unit 'Innovation Valorisation Europe' that is structured in a political team and a Grant Office. The political team sets the objectives for research at Grenoble INP-UGA (President, Vice President of the Scientific Board, and Deputy Vice President to the Scientific Board in charge of Europe). The Grant Office (9



RMA) offers services on regional and national projects (strategic advice to researchers according to orientations of the different calls for project, development of project proposals, financial securing of the grants) and on European projects (foresight and strategy for EU project proposals, participation to research networks and associations, analysis of EU programs, review of evaluation summary reports, advice to researchers, development of project proposals, financial reporting of EU projects). The head of the Grant Office leads a national association of 110 institutions (CAP Recherche!) involved in research projects funded by the national funding agency for research in France. The association is devoted to sharing information and developing good practise services for the administrative, financial and legal implementation of research projects.

At TUDa, the research support services are located in the Directorate 'Research Services and Technology Transfer' (45 RMAs). The Directorate consists of the unit 'Research funding' (9 RMAs) that supports the identification of national and European funding formats and the application process. Other units of the Directorate are 'contract management and strategic cooperation' (5 RMAs), 'Technology transfer' with IP and spin-off management (15 RMAs), 'Early career researchers' (5 RMAs) and 'Third-party funding administration' (11 RMAs). Other Directorates focus on 'Strategic Development', 'Study and Teaching, Higher Education Law', 'Personnel and Legal Affairs', and 'International Affairs'.

KTH has the 'Research Support Office' (38 RMAs) and offers support to KTH's researchers, management and other employees related to finding, managing and developing external research funding opportunities. The office is organised in five units: (i) Civil Law and Contracts Office, (ii) Development Office, (iii) Research Funding, (iv) Research Support, and (v) Strategic Initiatives. The Research Funding Unit is comprised of pre-award support function (3 RMA), post-award team of project managers (3 RMAs + a team leader), 4 RMA administrators, and a financial expert as well as 2 RMA experts in export control and ethics. In the unit for Research Support, there are also dedicated personnel for national funding support.

Aalto set up 'Research Services' (71 RMAs) that comprises the units 'Pre-award services' (15 RMAs), 'Post-award services' (11 RMAs), 'Open science' (12 RMAs), 'Platform services' (6 RMAs), 'Library resources' (9 RMAs), Doctoral education services (18 RMAs) and 'Research strategic support' (2 RMAs). Besides 'Research services' there are 'Innovation Ecosystem Services' with the unit's 'Innovation', 'Startup centre', 'EIT' and the 'University legal services'.

ULisboa offers federated Pre- and Post-award services at faculties level that have a stronger development at Técnico and Ciências. Pre-award services are coordinated with dedicated staff hired by the research units (15); they work as a network identifying different funding opportunities and supporting proposal preparation. Furthermore, post-award services handle proposal and project budgeting and financial reporting (30). A central office at the Rectorate offers support to smaller faculties.

TU Graz (Research & Technology House) provides support for both pre-award and post-award, including TT services as well as services connecting researchers with companies and other industrial players. TU Graz divides the services in teams that work with i) project support, ii) technology transfer, iii) industrial liaison, iv) fundraising/sponsoring (including alumni association) and v) strategic projects of the rectorate. The number of RMAs at the central level at TU Graz is 24 of which 2 Heads and 22 staff members.

Research support services at Wroclaw Tech are provided by multiple university units operating across different divisions. The European Projects Office (EPO) and the National and International Projects Office are primarily involved in the pre-award stage, receiving support from various specialized units such as Centre for International Relations, Wroclaw Technology Transfer Centre, IP Office at the Business and Innovation Centre, Academic Entrepreneurship Incubator, HR Office, Open Science Officer, including others. Currently, EPO

employs 5 RMAs who specialize in and have mastered the pre-award phase, while also providing on-demand consultations for post-award challenges faced by Faculty Project Assistants and researchers. EPO plans to expand its strategic support in the post-award phase.

A.3 Structure of the research support services and n. of RMAs at School/Dept/Faculties Level

Six Unite! Partners have decentralized units at School/Dept/Faculties Level dedicated to project and financial management (UPC, PoliTO, KTH, Aalto, ULisboa, Wroclaw Tech). At Aalto the central services are partly located in the Schools. Larger thematic units such as schools or research areas with a clear service structure offer good starting points for strengthening the interaction network of central and decentralized service units. The number of RMAs at School/Dept/Faculties Level are in the range of 40 to 60.

In particular, School/Faculties at UPC have representatives of each unit (international projects, national projects and contract and agreement and tenders). Only Institutional Projects Unit are supported at central level. Depending on the size of the School/Faculty the services could be provided by a team of 4 - 5 RMAs or just one RMAs.

PoliTO has 11 Departments, each having a unit dedicated to financial management of projects funded by the EU and innovation projects with industries. The average number of RMAs per Department is 4 (around 50 people in total).

At INP-UGA research support services and the number of RMA in the 40 laboratories vary and are difficult to evaluate as of today. All laboratories have managers and administrators in charge of the financial management of research projects.

Also, at TUDa research support services in School/Dept/Faculties are not structured uniformly and vary greatly. Project management is done in the faculties. TUDa has 13 Faculties assigned to 3 Research Fields with 4 Profile Topics each. At KTH the EU financial officers are placed locally at the 5 schools to help with budgeting and reporting of EU projects.

At Aalto, each of the 6 Schools has a dedicated service team consisting of representatives of pre-award, post-award, open science, legal, and innovations. Depending on the size of the School, this is 6-12 people.

ULisboa is composed of 18 Faculties or Institutes, with significant autonomy in academic, research and management and have their own research management facilities, with different forms of organization and a varied number of research managers and administrators. The central research management office provides partial support to smaller Faculties.

At TU Graz, the services supporting schools and faculties are integrated into the centralized Research & Technology House, with specialized teams catering to the needs of the faculties i.e., individual researchers and projects during pre-award and post-award.

Research support services at Wroclaw Tech are provided by multiple university units operating across different divisions and assisting the 14 faculties. The EPO and the National and International Projects Office are primarily involved in the pre-award stage, receiving support from specialized central units such as the European Projects Office, National and International Projects Office, Centre for International Relations, Wroclaw Technology Transfer Centre, IP Office at the Business and Innovation Centre, Academic Entrepreneurship Incubator, HR Office and Open Science Officer and others. All these units assist also the Faculty Project Assistants (primarily responsible for financial management) during the post-award stage, which takes place at the faculty level.

Additionally, larger faculties or departments may employ extra research support staff to manage specific projects, ensuring more comprehensive and tailored services.

A.4 Tasks and activities of the research support service at central and School/Dept/Faculties level

Reference for tasks and activities is the RAAAP3 survey in 2022 (<https://inorms.net/activities/raaap-taskforce/raaap-survey-2022/>).

Considering the distribution of centralized and decentralized services, it is noticeable that services in the areas 'Research Development and Policy' and 'Other' were almost exclusively carried out in central service units. Thus, the distribution is relatively uniform among the Unite! Partners. Aalto, INP-UGA, UPC and PoliTO perform strong activities in the area 'Research Development and Policy'. In the category 'Other' only Aalto specified decentralized services for 'University Industry Collaboration' and 'IP management'.

In the categories pre- and post-award, on the other hand, distribution of tasks between the central and decentralized units varies. Though most Unite! Partners provide both central and decentralized services. Especially at Aalto, UPC and PoliTO a large part of the post-award tasks is performed in decentralized units, whereas at INP-UGA, TUDa, KTH, TU Graz, Wroclaw Tech and ULisboa central units also provide support for project management and accounting.

Looking at the type of central support, the greatest similarities are to be expected in the categories 'Other' and 'Pre-Award', as almost all UNITE! partners offer central support in these areas. In the category 'Other' there is strong support in the areas TT (IP), policy (partnership development), events and compliance (5 - 6 Unite! Partners each). Occasionally, central services were indicated for collaboration with educational programs (UPC, TUDa), for open access and related fields (Aalto), and for public relations (UPC). A large proportion of these services are not carried out by the Grant Offices but by other central units which are often grouped together into larger units (see A2).

In the category 'Pre-Award' there is strong support in the fields 'Collection of Funding Information - identifying funding sources and opportunities' and 'Support for Application - costing and pricing, partial drafting, and submission' (7 Unite! Partners each). Here, some of the established services could possibly serve as best practice examples.

B. Grant Offices internal services processes of each Alliance institution, its links with other support services

B.1 Activities related to support to EU/national funding you need help from other offices (i.e. Data Management Plan, Dissemination, Impact...)

The needs of Grant Offices and interactions with other offices are very similar. There are major interfaces with TT offices for exploitation and legal issues, with libraries for open access issues, with communication offices for dissemination and communication issues, with legal offices for contract reviews and HR offices for advice on staff hiring. Grant offices of ULisboa, TUDa, KTH, Wroclaw Tech and Aalto link with International Relations Offices, if it comes to student programs or research development and policy work. Therefore, it is of general interest how processes and communication at these interfaces are lived and how they can be improved.

B.2 Information/communication flow with other Offices

All Unite! Grant Offices practice communication with other offices on a need-oriented basis and naturally differ depending on the intensity of the cooperation. The spectrum ranges from regular meetings to case-related contacts. Face-to-face and online meetings, phone calls and e-mails are the main forms of communication.

Sometimes physical proximity facilitates exchange. Some offices need to be accessed through a ticket system, and some offices hold information events like the HR Office at UPC that gives general presentations when important legal changes have an impact on recruitment procedures. The Grant Office of KTH established an internal network with the HR Office to develop knowledge and processes related to MSCA and other EU projects. This could be a nice example of how to build and live a network and could perhaps be transferred to cooperation with other networks.

B.3 Most common tools used for the communication (intranet, newsletters, any project software, etc.) with other Offices

Face-to-face and online meetings, phone calls and e-mails are the main forms of communication. Otherwise, a variety of different tools are utilized. For online meetings and other collaboration various tools such as Teams (PoliTO, Aalto), Zoom (KTH, TUDa), Google Apps (UPC) and Slack (KTH) are established. Teams is also used as repository for shared documents. INP-UGA uses Valtech Software as repository, listing all research projects and stakeholders. TUDa uses SharePoint for cooperation with different offices. UPC developed apps for project management, timesheet management, travel expense management, and approval and signature document management. Also, newsletters (UPC, INP-UGA, TUDa, , KTH, ULisboa, Wroclaw Tech, TU Graz) are common tools for communication.

4. The IRIS services

The **Integrated Research and Innovation Services (IRIS)** network provides support services to advance international, inter/multi/transdisciplinary, and open research and innovation among the members of the European University Alliance: Unite!. It fosters cross-Alliance research and innovation collaboration among Unite! and other EU Alliances.

IRIS's specific objectives are to **(1) foster the sustainability** of Unite! Alliance R&I's dimension, **(2) to empower researchers** through a strong international network, and **(3) to enhance the competencies of professionals in research and innovation support activities**. It provides various joint R&I services for the Alliance and its members, acting as a **single point of contact for R&I issues related to the Unite! Alliance** and promoting collaborative research across its members.

These services, summarized in the picture below, are designed to promote open, multi/inter/transdisciplinary research and enhance collaboration within the Unite! Alliance, strengthening research impact across the European universities involved in the Alliance.



Since its establishment in July 2022, different target groups were identified for the achievement of these purposes.

Namely, services are structured along three targets:

- The Unite! Alliance
- Faculty and Research Staff of the Alliance
- The Unite! Alliance RMAs

Thus, the devised services are addressed to those target groups and have been structured along different sub-services that are described below.



Goal of service 1: Foster the sustainability of Unite! Alliance R&I's dimension

To foster the sustainability of the Alliance, IRIS will carry out the following services:

IRIS consulting: strategic advice on European, national and regional R&I policies

IRIS members exchange information about policies and strategies at regional, national and European levels that are relevant to the alliance strategy and provide opportunities for its future development. They also leverage their participation in other national and international networks, as well as any offices they have in Brussels. This activity is done in collaboration with R&I Advisor of the Unite! Secretariat, which reports to the Unite! steering committee.

IRIS strategic EU proposal drafting

IRIS aims to provide support to strategic R&I focused proposals of the alliance that involve all or most of the alliance partners and that are coordinated by one of the alliance partners. Applicants should seek the alliance's endorsement from their Key Liaison Officer.

The IRIS network has supported the following strategic projects:

- **University Partnership for Acceleration of European Universities (aUPaEu):** <https://www.unite-university.eu/unitenews/aupaeu-is-unite-s-new-acceleration-services-project-for-higher-education-institutions>
- **Unite!Widening:** <https://www.unite-university.eu/about-us/unite-projects/unite-widening-in-a-nutshell>

Goal of service 2: To empower researchers through a strong international network

Service 2.1: Digital environments and effective Tools and Guidelines to promote R&I collaboration

Digital environments have been developed to foster deeper cooperation and support networking both between Unite! members and with external stakeholders:

1. Map of competences - an interface that provides direct access to the alliance partners websites on research activity and results.

(<https://www.unite-university.eu/unite-staff/unite-s-research-innovation-services>)

2. Research and Innovation Proposals tool for researchers – a marketplace on the Unite!Agora virtual platform (platform developed within the aUPaEU [project](#)) where Unite! researchers can post information on current research activities as well as search partners for future proposals. All posts are public and fully visible to researchers of other universities and alliances.

(<https://agora.unite-university.eu/research/proposal>)

Effective tools and guidelines:

3. Research Infrastructure catalogue – a database containing more than 100 research infrastructures available across the Unite! alliance, available as digital tool on the Unite!Agora virtual platform (platform developed within the aUPaEU [project](#)) thereby facilitating the sharing of infrastructures among the partner institutions.

(<https://agora.unite-university.eu/resources/infrastructure>)

4. Unite! handbook of best practices for effective mainstreaming of open science and innovation at Universities (<https://zenodo.org/records/10262984>). This handbook is a practical guide for facilitating researchers, R&I support services, and university managers to transition from modern science to open science. Based on a comparative case study of 70 research teams across 7 European universities in the Unite! Alliance, this handbook reveals a high-impact understanding of the best open science and innovation practices on Unite! research teams and provides guidelines for the adoption of these practices. This handbook shapes a new governance model for the management of open science and innovation in universities in the digital era.

Service 2.2: IRIS support to matchmaking events

IRIS helps to match researchers' skills with the right call for proposals and support to spread information about workshops that involve researchers from the partners' universities. It also (co-)organizes matchmaking events among the alliance researchers and with researchers from other alliances.

Service 2.3: Training for Researchers (Faculty & Staff)

On-site and online courses are provided to boost faculty and staff's career, acquire new skills in open science and innovation management or learn a language, or a staff week offered by Unite! partners.

Goal of service 3: Enhance the competencies of professionals in research and innovation support activities

Service 3.1: Networking among RMAs

Unite! offers valuable networking opportunities for Research Managers and Administrators (RMAs) of the Alliance.

By fostering strong connections and professional development, Unite! ensures that research support teams are aligned with IRIS actions and well-equipped to tackle the challenges in the fast-evolving R&I landscape. This contributes to the improvement of the overall effectiveness of research support activities across the Unite!Alliance.

Service 3.2: Training for IRIS R&I support staff

IRIS is working on tailoring training for Unite! R&I support staff. This will be further addressed in WP3 Task 3.2.

5.Objectives, gaps and needs: ULisboa and Wroclaw Tech



ULisboa

ULisboa is composed of 18 Faculties or Institutes, with significant autonomy in academic, research and management. The current situation is that the largest of those institutions have their own research management facilities, with different forms of organization.

In Técnico and Ciências research management activities are mostly managed by private associations of which these institutions are the unique (Técnico) or largest (Ciências) associates. They provide a lighter management set of processes than what the institutions can run by themselves, due to different legal frames. The Rectorate of ULisboa has a small office to support the paperwork needed for small ULisboa institutions that do not have full research offices.

Both in Técnico and Ciências, the research offices have significant prospective and supporting activity from pre-award to post-award phases. In pre-award phase for example, there are:

- Mapping of funding opportunities per funding entity per year
- Scrutiny of calls' guidelines
- Identification of potential researchers interested in specific calls
- Consortium formation support
- Bridging with NCPs/Funding entities
- Budget design and approval
- Non-technical revision
- Application submission support
- Mock interviews support

In the financial and post-award activities, they have:

- Project budgeting
- Financial execution monitoring
- Financial reports
- Full support of management of running research projects up to project closure

All these tasks require support from project managers and other research support staff such as accountants and law professionals.

Larger projects usually have the need and the budget to hire specific project managers to handle the particulars of internal organization of the project team, the articulation with other teams and, in these cases, the project managers interact with the research support offices which take care of the legal and financial control of running projects.

ULisboa is planning to perform a survey of the different capabilities of the research management offices in the different institutions. One of the main challenges for ULisboa will be to foster common level of research offices support establishing a compromise between services and the capacity of the different institutions.

Wroclaw Tech

Wroclaw Tech is a university with nearly 80 years of history, comprising 14 Faculties (11 PSE, 1 LS and 2 SSH), 2 300 researchers, 7 700 PhD candidates, 21 000 students (including 1 200 international students from 60 countries), and 116 buildings. The university's core values, as outlined in its 2023-2030 strategy, are excellence, cooperation, and openness. The strategy also defines five strategic areas, each with five strategic objectives. Among these 25 objectives, the European Project Office (EPO) directly supports 12 and impacts another 2.

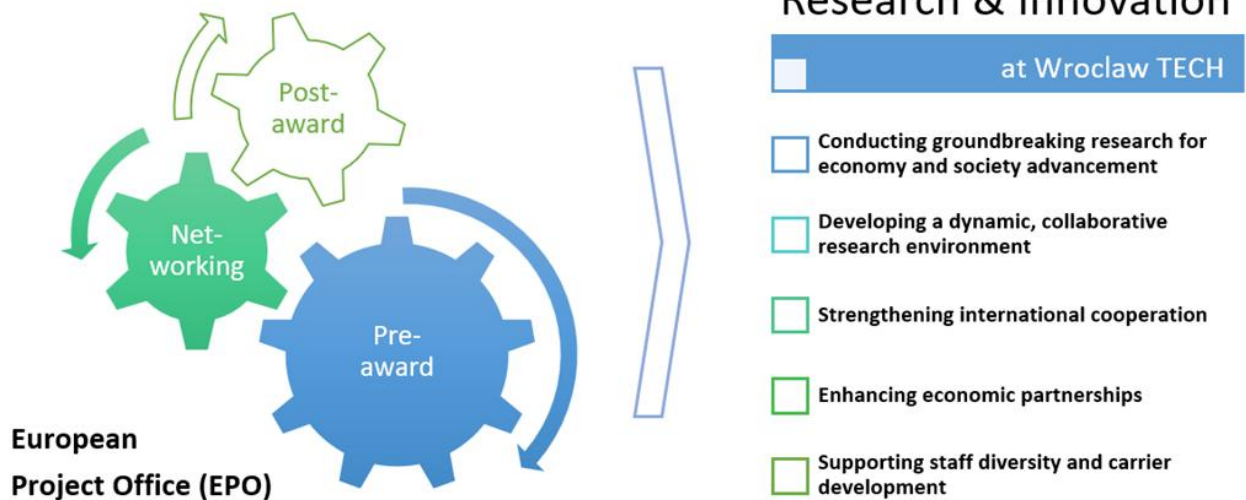
Within the research and innovation domain, EPO directly supports all the strategic objectives, which include:

1. Conducting ground-breaking research for the economy and society
2. Developing a collaborative research environment
3. Strengthening international cooperation
4. Enhancing economic partnerships
5. Supporting staff diversity and career development

To enhance research support, EPO has identified the following needs:

- **Implementing the research strategy** across the university and providing faculty management with training on its implementation at faculty level.
- **Continuous staff training** is essential in:
 - research project planning support,
 - funding information collection.
- **Basic training** is needed in:
 - negotiation skills,
 - personal branding and public speaking, to better prepare researchers to compete for projects (i.e., online presence, panels, international presentations),
 - public relations, particularly for disseminating research outcomes.
- **Specialized, advanced training and best practices exchange** within IRIS are recommended in:
 - internal and external negotiation,
 - application support (mostly basic training is currently available in Poland),
 - progress management,
 - accounting,
 - project evaluation support,
 - reporting,
 - running research-related events.

- **Post-award support of university's strategic EU projects** in EPO would be highly beneficial, fostering experience and establishing an Excellence Centre to provide high-quality application support and guidance for project implementers (researchers, faculty project assistants, decision-makers).



Wroclaw Tech European Project Office impact on university's Research & Innovation strategic objectives.

Wroclaw Tech research support services are currently highly fragmented and delivered by seven independent units. This structure limits the flow of information and knowledge among employees. Differing management and political approaches further hinder internal collaboration. There is a task overlap among some units, while others face staffing shortages. Combined, these issues impact both quality and efficiency of research support services.

The university's recent strategy aims to reorganize administrative divisions to better support research excellence and the academic community. Yet, from a bottom-up perspective, specific improvements are still needed.



Summary table: research management areas where improvements/actions are needed

Scale 1 to 5 (1: no improvements needed; 5: to be fully improved).

Please refer to the description of the needs above where you should specify/explain the type of improvements needed.

	Wroclaw Tech	ULisboa
Research Development and Policy - Institutional level support work (rather than project or PI focused) and comprises the following areas:		
1. Survey of Science and Technology Policy - Keeping track of the government research policy landscape	<p>4</p> <p>The University has a rector's plenipotentiary for European Cooperation who is working to connect the policy and researchers.</p> <p>EPO do not generally do this, yet reading EC documentation and participating in various events gives us an understanding of the landscape and we use this knowledge while working with researchers.</p>	<p>4</p> <p>The university has a Vice-Rector for Research and Innovation. Largest schools/faculties have a member of the management board following the research strategy.</p> <p>Identified need: having science and innovation managers dedicated to the monitoring and advising of the research and innovation landscape could accelerate the lobbying activities and connection to the research centres.</p>
2. Research Ability Analysis (Institutional Research) - understanding your own institution's research strengths	<p>3</p> <p>EPO does this if a research call requires it. If not -this kind of analysis is carried out in faculties for their own use with help from the Scientific Information Section of Wroclaw Tech Library.</p>	<p>4</p> <p>The number of research centres and interdisciplinarity is a major strength for ULisboa. There has been a strong effort from the rectors' team in establishing internal networks around certain challenges, contributing to a strong dynamic. Several research units already have offices dedicated to science management in close articulation with the governance bodies.</p> <p>Identified need: better coordination between the offices at University level, and improved processes of targeting the calls and the research stakeholders more related with the strengths of each school.</p>
3. Planning Research Strategy - Where to put internal resource to meet the institutional research ambitions	<p>5</p> <p>University has well defined Strategic Research Priorities, based on which the decisions are taken by Rector and Vice Rectors (Vice Rector for Cooperation and Vice Rector for Research)</p> <p>EPO can play a supportive role in identifying such a strategy.</p>	<p>4</p> <p>ULisboa governance structure, even at school level, provides the high-level strategic orientations.</p> <p>The implementation requires dedicated offices and skilled research managers that are slowly growing but still not meeting all research ambitions.</p>

		Identified need: development of better skills for strategic orientation of research.
Pre-Award - Supporting individual Principal Investigators and project proposals and comprises the following areas:		
1. Support Research Project Planning - helping faculty to develop research project proposals	1 EPO helps faculty to develop research project proposals.	3 Several research units have already implemented a research management office. At Técnico and Ciências there are a pre award network and an office, respectively, whose activities are oriented to support research proposals. But this support is uneven and not equally implemented in all ULisboa faculties. Identified need: development of this type of structure to serve every ULisboa school.
2. Collection of Funding Information - identifying funding sources and opportunities	1 EPO identifies funding sources and opportunities and spreads the information through various channels (newsletter, website, e-mail, workshops, face to face meetings).	3 Técnico and Ciências have offices that identify and disseminate funding opportunities. These funding opportunities are regularly communicated to the research units and to the researchers. A map of research facilities has been established. However, this strategy is uneven and not implemented in all ULisboa faculties/institutes. Identified need: development of this type of structure to serve every ULisboa school.
3. Internal Negotiation for Project Formulation - interdepartmental working, institutional sign off processes	3 EPO does this on demand – if asked by a researcher.	3 This subject is addressed at Técnico and Ciências via the pre award network and office on request but is not implemented as regular support. Identified need: development of this type of structure to serve every ULisboa school.
4. External Negotiation - contract negotiation and partnership development	3 Sometimes EPO is asked to support negotiations within a consortium.	3 Partnership development and contract negotiation is well established at Técnico and Ciências However, is uneven across the different faculties in ULisboa. Identified need: development of this type of structure to serve every ULisboa school.

5. Support for Application - costing and pricing, partial drafting, submission	1 EPO engages in costing and pricing, partial drafting and submission of the applications.	3 Support to costing and pricing is well established at Técnico and Ciências. Partial drafting and submission is available on request, but not fully implemented due to lack of skilled human resources. Identified need: development of this type of structure to serve every ULisboa school.
Post Award - comprises the following areas:		
1. External Adjustment - initial budget setting based on offer/ contract negotiation	2 EPO does it if it is needed in a project, yet usually we rely on information provided by the researchers (i.e.: in terms of equipment prices).	4 At Técnico this is performed by the project's office (that also run post award financial issues) that also covers contract negotiation (in articulation with pre-award). However, this varies, and, in some schools, such as Ciências this is done based on the researcher's request. Identified need: better development of this type of support to directly intervene in the process.
2. Progress Management - project management	5 Projects managed by researchers and/or faculty's project assistants in terms of budget and accounts. EPO ultimately plans to manage the university's strategic EU projects.	4 The technical contributions are managed by the research units and researchers. At Técnico and Ciências there are dedicated post award officers that manage the financial component. Large institutional projects often hire a project manager. Identified need: increased project management support.
3. Accounting - post award finance	3 EPO ultimately plans to manage projects finances as well. Now we act on demand and advise scientists if needed.	5 At Técnico and Ciências this is fully covered by the project offices that also monitor budget execution, alerting researchers when needed. Other schools have similar systems, but they are uneven.
4. Support for project evaluation - project evaluation and audit support	2 EPO ultimately plans to manage projects evaluation and audit support. Now we act on demand and advise scientists if needed.	5 Project evaluation and audits are fully managed by the project's office schools.
5. Reporting - internal and external (sponsor) reporting	4 EPO ultimately plans to manage internal and external reporting.	2 There are no relevant institutional facilities or offices to address this point. Support can be provided on request from the researchers.

		Identified need: development of this type of structure.
Other Areas - comprises the following		
1. Collaborate with educational program - support for projects or proposals that combine research and education (teaching) elements in a combined program	2 EPO supports such projects as well if it is needed, however, this is mainly the role of the team lead by the Vice Rector for Education (including Erasmus). There is room to extend the involvement of the university in research and education activities, international workshops and other combined programs.	3 At Técnico this is done by a dedicated office focused on educational projects. When education and research are combined there is strong articulation with the pre-award offices. Other schools follow casuistic approaches to provide the necessary support. Identified need: development of this type of structure to serve every ULisboa school.
2. International Collaboration - partnership development and working with foreign research institutions	3 These activities are primarily carried out by the International Relationship Centre which is responsible for Unite! at Wroclaw Tech. EPO builds its national and international network for the purpose of better proposal writing and advice as well as consortium building support if needed. New partnerships should be developed using the IRIS and UNITE! potential.	4 At Técnico these activities are fully covered by a dedicated office managed by the Area of International Affairs. It manages different networks and runs several institutional projects. In other schools, different models have been adopted but the level is very uneven. Identified need: development of this type of structure in other schools.
3. University Industry Collaboration - partnership development and working with industry	3 Wroclaw Tech Entrepreneurship area falls under the responsibility of the Rector's Representative for Industry Collaboration. It encompasses tasks of, among others, the Innovation and Business Centre, Wroclaw Technology Transfer Centre, and the Academic Incubator of Entrepreneurship.	5 At Técnico there is an area governed by a VP fully dedicated to the implementation and management of corporate partnerships and an innovation interface connects to the research units. At Ciências there is also an office to address this issue. It also exists in other schools, but the model is not uniform.
4. Intellectual Property - managing and protecting IP, for example patents and licencing	3 The Intellectual Property and Patent Information Department (IPPID) is a unit within the Centre for Innovation and Business at Wroclaw University of Technology. When needed, the EPO directs researchers to IPPID or the Wroclaw Technology Transfer Centre (for commercialization planning)	4 Fully implemented at Técnico and Ciências via dedicated offices. They support the research units and researchers. This support is, however, uneven across the different ULisboa schools and ULisboa Rectory services provide specific support when needed Identified need: development of the process of patenting initiatives.

5. Institution Branding - presenting and research finding to promote the institution	<p>4</p> <p>The promotion of research results is managed through the efforts of the Vice-Chancellor for External Relations, the Rector's Representative for EU Cooperation, the Centre for International Relations, and the Academic Incubator of Entrepreneurship. EPO publishes selected information on its website and Linked In profile.</p>	<p>3</p> <p>At Técnico and Ciências the science dissemination and outreach are fully covered by the communication area in articulation with the science dissemination officers at research units. Technology transfer and knowledge valorisation is implemented via an innovation interface that connects the research units with the external stakeholders.</p> <p>The model is not so well developed across the ULisboa faculties and institutes.</p> <p>Identified need: development of this type of structure in other schools.</p>
6. Public Relations - dealing with third parties to provide information and protect institutional reputation	<p>4</p> <p>This area is dealt with by the Vice-Chancellor for External Relations, the Rector's Plenipotentiary for EU Cooperation, the Centre for International Relations. EPO advises researchers on project results dissemination activities. It also publishes selected information on its website and Linked In profile.</p>	<p>5</p> <p>At ULisboa there is a high-level structure to address this issue. At Técnico this issue is managed via the communication area in direct dependence of the president. Different models have been adopted within different schools of ULisboa.</p>
7. Event - running and participating in research related events	<p>3</p> <p>This area is dealt with by the Vice-Chancellor for External Relations, the Rector's Plenipotentiary for EU Cooperation, the Centre for International Relations. EPO participates in research projects related events as well as runs workshops and meetings for researchers.</p>	<p>3</p> <p>At ULisboa there is an area dedicated to this issue. At Técnico and Ciências there are offices to plan and organize different high-level events. There is strong articulation with teams nominated in the research units of Técnico.</p> <p>Identified need: streamline this type of structure across ULisboa schools.</p>
8. Safety - including lab safety	<p>5</p> <p>Each faculty and laboratory at Wroclaw Tech have a designated person responsible for work safety. Each department and unit have at least one person professionally trained in first aid. EPO is not responsible for the safety of anyone other than its own employees and does not verify projects in this regard either at the preparation stage or at the implementation stage.</p>	<p>5</p> <p>In Ciências the Security, Health and Sustainability office oversees these areas in the school and enforces measures when needed. At Técnico each laboratory has a person responsible for safety. Some research units also have a safety officer. The model depends on the nature of the facilities and laboratories that may require different levels and different safety rules. This also varies across schools, depending very much on the nature of the facilities and activities.</p>
9. Compliance - regulatory compliance, for example human subjects, export controls	<p>5</p> <p>Wroclaw Tech has a Data Protection Officer who analyses contracts signed by the university (including project</p>	<p>5</p> <p>Several schools (those whose activity such requires) have ethical committees responsible for certifying projects with this</p>

	agreements) but does not monitor project compliance during the post-award stage. Additionally, the University has a relatively new Bioethics Committee that issues research approvals in accordance with statutory requirements. EPO supports researchers in conducting risk analysis at the pre-award stage, with particular attention to cases involving the collection of personal data; however, this support is not broad and in depth.	type of need. At ULisboa there is a commission that monitors specific ethical and regulatory aspects of projects and research activities, providing support to research units on demand. Also, ULisboa has nominated data protection officers.
Other: Library acquisitions, Support for open access, Support for research information system (CRIS)	4 Wroclaw TECH Library has an Open Science Officer.	4 Provided by library services, not in the frame of Research Offices. Schools' main libraries manage and implement the Open Science infrastructure. There is still needed to create dedicated data officers (data stewards). Identified need: data stewards.

Common needs in research management support for ULisboa and Wroclaw Tech

Standardization and Coordination of Research Management Practices:

ULisboa: Seeks to standardize research support across its 18 faculties and institutes, which currently have varying levels of autonomy, information networks, and support structures. This includes aligning service levels and best practices while respecting the individual capacity of each institution.

Wroclaw Tech: Faces fragmentation in research support due to seven independent units, resulting in inconsistent knowledge sharing and collaboration. There is a need to clearly define the scope of activities of specific research support divisions to avoid duplication of competences, improve the flow of information, and ensure streamlined and coordinated support.

Training and Capacity Building for Research Staff:

ULisboa: Emphasizes training support for pre-award activities, such as budget planning, proposal drafting, application review, and consortium formation, which are critical for effective project development and proposal submission.

Wroclaw Tech: Identifies a need for both basic and advanced training in skills critical to project competitiveness and management, such as negotiation, public speaking, and funding knowledge. Continuous and specialized training is seen as essential for enhancing support services.

Enhanced Pre-Award and Post-Award Support:

ULisboa: Requires additional support across the full lifecycle of research projects, from funding opportunity mapping and application submission to post-award project management and closure, especially in large projects where dedicated project managers are involved.

Wroclaw Tech: Requires more comprehensive pre-award and post-award support, particularly for EU funded projects. This includes establishing an Excellence Centre to guide researchers through project management and reporting.

Improvement in Internal Collaboration and Communication:

ULisboa: Encounters structural challenges due to the autonomy of its faculties and varying research management processes. More information guidelines are needed to foster collaboration across faculties, standardize support, and manage legal and financial project controls.

Wroclaw Tech: Lacks efficient information flow among independent support units, leading to task overlaps and reduced service efficiency. Improved internal collaboration is essential to minimize redundancy and better support the academic community.

Strategic Alignment and Operationalization of Research Goals:

ULisboa: There is still a need to align the research support infrastructure with institutional research objectives to enhance research capacity and impact across faculties.

Wroclaw Tech: Prioritizes operationalizing its 2023-2030 research strategy at the faculty level, requiring structured support and faculty training to align with the university's strategic objectives.

Establishing Centres of Excellence for Research Management:

ULisboa: While not explicitly stated, the need for consistent high-quality research support across all faculties suggests a potential benefit in centralizing certain levels of expertise or resources.

Wroclaw Tech: Plans to establish an Excellence Centre specifically for EU project support, providing centralized expertise and guidance for high-quality project applications and implementations.

Summary

In summary, both universities require improvements of coordinated research management support structures, enhanced training and capacity building for research staff, robust pre- and post-award support, better internal collaboration, and alignment of research management practices with institutional strategic goals. These shared needs underscore the importance of cohesive, well-resourced research support offices in fostering research excellence and institutional alignment.

6. Recommendation for Unite!Widening future activities (WP3 training and WP4 networking)



Drawing from the common needs in research management support identified at ULisboa and Wroclaw Tech it is possible to provide practical suggestions for the design of research management reinforcement actions in WP3 and WP4.

WP3 “Training and Capacity Building considering a Multi-Dimensional Roadmap”, Task 3.2: Design of “Train the Tutors” and “Train the Support Staff” programmes

Task 3.2 focuses on designing training programs for tutors and support staff, which will be developed in Task 3.3. These programs will build on preliminary topics from previous Unite! projects, but they will be customized for the specific needs of Wroclaw Tech and ULisboa, especially in Research Management.

The main goal of this task is to create training programs that enhance both technical and non-technical skills within the scientific community. This will support the careers of teaching-researchers and support staff at ULisboa and Wroclaw Tech. After identifying skills gaps and training needs through assessments, we will map available resources within the Unite! network. Based on these gaps, we will design targeted training programs. These programs may either build new modules or improve existing ones, ensuring they are relevant for the Widening context.

There will be ongoing discussions between the Task 3.2 working group and the IRIS group, involving other experts as needed. As a joint network of research and innovation services across the Unite! Alliance, IRIS can provide valuable expertise and resources for developing and delivering these training programs as well as sharing best practices, facilitating networking, and offering insights.

The training will cover the predefined areas (Research and Innovation Management, Research Communities, Internationalization, Doctoral School, Research Careers, Open Science, Digital & Green Transition, and Equity,

Inclusion, Gender Equality). More specifically, it will focus on the strategic area of research management according to the needs of ULisboa and Wroclaw Tech identified in this deliverable.

The training topics are:

- **Best practices** (including service-level agreements, information-sharing protocols, and collaborative workflows), **project lifecycle management training**, and **tools to facilitate digital management** can provide support on research management standardization and coordination, addressing the need for consistent practices across different faculties and units.
- Training related to both **basic and advanced proposal writing**, including ERC, **budget planning**, consortium forming, and **managing EU funded projects (finance, reporting, and compliance)**, can contribute to better pre-award and post-award support.
- **Research leadership and management skills training**, covering areas such as **public speaking, negotiation, and strategic planning**, can contribute to capacity building for support staff and research staff.
- Workshops regarding **R&I agendas, research strategy implementation, and faculty-level research management training** can support strategic alignment.
- Training should also aim to develop **high-level expertise in research management** to support the establishment of Excellence Hubs and centralized support structures.

Additionally, training can also be developed in the following areas of research management:

- **Intellectual property management strategies and research valorisation**, by leveraging existing courses like Inovalo 360.
- **Open science practices and principles**.
- **Digital tools for remote collaboration** and learning, along with implementing hybrid training models and data automation techniques, to support digital and green transitions in research.
- **Diversity management** focused on inclusive research management practices to promote equity, inclusion, and gender equality in research environments.

The training programs will be implemented in Task 3.3 of WP3 through diverse methods. As part of Milestone 3.2, "Network of Research Experts," **four workshops** should be held in Poland and Portugal to address key training needs and strategic areas could cover topics such as **research management and standardization, pre-award and post-award support, research leadership and capacity building, research strategy**. The training initiatives will use various formats, including in-person workshops, MOOCs, webinars, hackathons, and creative methodologies like the Canvas Model. Content will be developed with input from non-Widening academic partners and enhanced by insights from non-academic partners in Widening countries. All Unite! partners will have access to these training sessions and resources, such as the staff weeks, which will be open to the entire Alliance.

It is important that we align the matchmaking events from WP4 with our training initiatives to create synergies between activities, ensuring follow-up actions are effective and have a long-term impact.

WP4 "Building Inclusive Collaboration for Excellence, Task 4.1 "Joint interdisciplinary & Trans European R&I agendas to mitigate the gap between countries"

Task 4.1. includes several activities intended to address the research (management) needs of the Widening partners, ULisboa and Wroclaw Tech. These activities fall into two categories.

1) Research support offices

One of the milestones of Task 4.1 is ML 4.3 “Implementation/Creation of 8 offices in PL and PT (TT, OS, MSCA Grant Writing and an HR Researchers office to support R&I Agendas implementation)” - due in month 40, i.e., in April 2027.

Clearly, these new offices must answer the needs of ULisboa and Wroclaw Tech as described in this deliverable, such as the standardization and partial centralization of research support services. Until month 40, there will be a continuous discussion and exchange between the working group of “Task 4.1” on the one hand and the IRIS group on the other, also involving other experts wherever necessary. At the moment, we know of concrete plans on the side of Wroclaw Tech for the creation of a new Excellence Hub for pooling and enhancing its research support capacities. A more detailed discussion as to this Hub is scheduled to begin during the Unite! Dialogue in Barcelona in February 2025.

2) Matchmaking events

The other milestones of Task 4.1 take the form of matchmaking events, namely “ML 4.6: Perform 4 Matchmaking Events: (1 - Boosting success in Horizon EU calls participation | M24-M36; 2 - Open Science methodologies for ethical research | M37-M42; 3 - Research infra-structures and improvement of research careers | M43-M48; 4 - To define according to the Strategic Areas outputs | M49-M54)”

When planning and implementing these events, the team of Task 4.1. will be in close contact with IRIS and particularly with relevant stakeholders of the Widening ecosystems in Portugal and Poland. At this point, for instance, it seems reasonable for the first matchmaking event (Boosting success in Horizon EU calls participation) to not only involve researchers but also research managers as well as project managers – as the training of these staff categories is one of the key priorities for the Widening partners. The matchmaking may thus include a peer exchange on best practices in these areas. The topic of the fourth and final matchmaking is yet to be defined, based on the forthcoming identification of strategic priorities and the establishment of research expert communities (ML 2.3).

Furthermore, it will be crucial to align the activities of Task 4.1. with the staff training efforts of WP3. We need to make sure to exploit synergies between these initiatives, and to design them as interlinked steps towards clearly defined long-term goals. As of today, these steps may take the following shape:

1. WP3 organizes staff training for project managers and other research support staff. For example, a dedicated staff training week can be organized to equip teams with advanced skills.

This training week would be carefully structured over five days, each focusing on a specific theme:

Day 1: Understanding EU Funding Opportunities

- a. Provide an overview of Horizon Europe calls and strategies to navigate the EU funding landscape effectively.

Day 2: Advanced Grant Writing Techniques

- b. Teach participants how to draft compelling proposals and manage budget planning and financial compliance.

Day 3: Effective Project Management

- c. Focus on the project lifecycle, including initiation, planning, execution, monitoring, and closure, along with risk assessment and mitigation strategies.

Day 4: Open Science and Ethical Research

- d. Highlight the principles of open science, data sharing protocols, citizen science, and ethical considerations crucial for responsible research.

Day 5: Technology Transfer and Innovation

- e. Cover intellectual property rights, strategies for commercializing research findings, and methods for collaborating with industry partners to enhance the societal impact of research.

To enhance engagement and practical understanding, the training will include interactive elements such as workshops and group exercises where participants can apply concepts to real-world scenarios. Case studies of successful projects will provide tangible examples, and role-playing sessions will help develop skills in negotiation and stakeholder engagement.

Experienced research managers from within the Unite! alliance non widening countries will facilitate the training, bringing valuable insights and practical expertise. External experts specializing in areas like EU funding and open science may also be invited to contribute. To assess the training's effectiveness, pre- and post-training evaluations will be conducted to measure learning outcomes, and participant feedback sessions will be organized to inform future improvements.

Benefits for Widening Countries:

- Builds capacity and expertise in research support services.
- Enhances the ability to secure EU funding and manage projects effectively.

Benefits for Non-Widening Countries:

- Shares best practices and fosters collaboration across the alliance.
- Strengthens overall research management capabilities within Unite!.

2. (Some of) the same research support staff are involved in organizing Task 4.1's matchmaking events, which thus serve as a follow-up for the support staff. At the same time, the matchmaking initiatives ensure that new skills and knowledge sets are widely spread across the entire Unite! Alliance.

Research support staff members will take on responsibilities such as event logistics, agenda development, coordinating with speakers, and facilitating sessions. This active role not only consolidates their competencies but also offers opportunities for peer learning and networking. By engaging with counterparts from other institutions, they can share experiences, exchange best practices, and expand their professional networks.

Their involvement in these high-profile events also raises the profile of ULisboa and Wroclaw Tech on an international platform. It showcases the institutions' commitment to developing skilled research support personnel and highlights their proactive role in fostering collaboration and excellence within the Unite! Alliance.

Benefits for Widening Countries:

- Reinforces staff competencies through real-world application.
- Enhances visibility and creates networking opportunities.

Benefits for Non-Widening Countries:

- Benefits from shared expertise and collaborative events.
- Promotes cross-institutional partnerships and knowledge exchange

3. The skills and knowledge developed in steps 1 and 2 become institutionalized in the newly established research support offices at ULisboa and Wroclaw Tech.

The ultimate goal is to embed the skills and knowledge acquired through training and event organization into the institutional frameworks of ULisboa and Wroclaw Tech. By doing so, improvements in research management practices become sustainable and have a lasting impact

Institutions can integrate best practices into standard operating procedures and research management guidelines. Formalizing these processes promotes consistency, efficiency, and quality across all departments and faculties. Establishing a culture of continuous professional development is also essential. Regular workshops, refresher courses, and support for staff to pursue certifications in project management and related areas will help maintain and enhance the competencies of research support personnel.

Creating knowledge-sharing platforms within the institutions, such as internal networks or forums, enables staff to exchange ideas, discuss challenges, and collaboratively develop solutions. Documenting lessons learned and compiling case studies ensure that valuable insights are preserved and accessible for future reference.

Implementing performance metrics is crucial as well. By monitoring key indicators such as the number of successful grant applications, project completion rates, and researcher satisfaction levels, the institutions can assess the impact of the new research support offices. Feedback from these metrics will guide continuous improvement efforts, allowing for the refinement of processes and training programs to better meet the evolving needs of the research community.

By carefully developing these steps, the efforts under WP3 and WP4 become coherent and sustainable. The cycle of training, practical application through event organization, and institutionalization of knowledge strengthens the research support infrastructures at ULisboa and Wroclaw Tech. This comprehensive approach not only addresses existing gaps but also establishes a solid foundation for ongoing excellence in research management and collaboration across the Unite! Alliance.

Benefits for Widening Countries:

- Strengthens the research support infrastructure.
- Improves consistency, efficiency, and quality of research management practices.

Benefits for Non-Widening Countries:

- Encourages the adoption of successful models.
- Enhances overall research excellence and collaboration across the Unite! alliance.

Annex 1 RESEARCH SUPPORT SURVEY

A.1 Description of the research support structure in each university alliance and main tasks

A.1 Breakdown of research funding at institutional level (% of funding, by source type: national, regional, EU, foundations)

UPC	PoliTO	INP-UGA	TUDa	KTH	Aalto	ULisboa	TU Graz	Wroclaw Tech
46% National (Spanish Government, Regional Government and Local Governments) 27% EU 27% Collaboration with companies and entities	7% National 20% Regional 72% EU 1% Foundations	NA	37% Federal Funds 24% German Research Foundation (DFG) 12% Industry 10% EU 7% LOEWE (Funding State of Hesse) 3% German Federation of Industrial Research Associations (AiF) 7% Other	NA	69% National (Academy of Finland and Business Finland) 15% EU 15% Companies 1% Foundations	65% National 34% EU 1% Companies	39.58% Companies 29% National (FWF and FFG) 13.25% EU 5.67% Federal state 8.6% Foundation (CDG) 3.9% others	60 % National 40% International

A.2 Structure of the research support services and n. of RMAs at Central Level

UPC

Research, Development and Innovation (RDI) Area groups 4 Services:

Research and Innovation Support Service (RISS) Consisting of a team of more than 38 people, the Research and Innovation Support Service performs the functions of promoting, advising, consulting and managing on both RDI Institutional and Research projects, and business collaborations.

Innovation management Service: A team of 14 people with the mission of valuing technologies to bring them to market, establishing intellectual and industrial property strategies, supporting the creation and growth of technology-based companies at the UPC (spin-off and start-ups) and defining pre-incubation and incubation services.

RDI Economy Management Service: The mission of the RDI Economic Management Service is to plan, coordinate, train, execute and control the economic activities, in accordance with the current legal framework, with the aim of providing the best service to researchers and to support the Transversal Management Units (TMEs).

Knowledge Management Service: Technical support to the different services in the RDI area. Information systems, communication of activities, data quality, and information search, as well as facilitating the visualization of the UPC's research and transfer capabilities.

Chart: https://rdi.upc.edu/en/area/structure-and-staff?set_language=en

Research support services organization:

The internal structure of RISS is made up of the following teams:

- International Projects Unit
- National Projects Unit
- Institutional Projects Unit
- Contracts, Agreements and Tenders Unite

N. RMA's at Central Level:

- International Projects Unit – 7
- National Projects Unit – 4
- Contract, Agreements and Tenders Unit – 6
- Institutional Projects Unit – 11

The four units offer services in the various stages of research, development and innovation projects, as well as in university-company collaboration activities or the development of RDI strategies.

International Projects Unit

- Identifying, disseminating and promoting funding opportunities
- Advising teaching and research staff on appropriate calls
- Assisting teaching and research staff in preparing proposals
- Being present in all the stages of a project

Institutional Projects Unit

- Identifying management team strategies for making proposals
- Transforming ideas into institutional projects and opportunities
- Promoting UPC participation in RDI institutional proposals
- Advising research staff at various levels

National Projects Unit

- Consulting, identifying and disseminating funding opportunities
- Providing technical and financial advice to teaching and research staff throughout projects
- Preparing support materials and reviewing proposals

Contracts, Agreements and Tenders Unit

- Legal consulting (contracts, agreements, CAs, GAs and NDAs, intellectual property, etc.)
- Technical enquiries (SAP, FLUX, eTramita, etc.)
- Support for specific project management
- Preparation of tenders and other legal aspects of research

Catalogue of services
 This infographic brings together the name and description of all the services offered by the Research and Innovation Support Service. It also includes information on the participation of each unit in the execution of the various services. Explore its content in the [interactive infographic](#).



PoliTO

The Research Technology Transfer and Innovation Department was set up in Nov 2022. The Department's objective is to meet the need to increasingly support both individual professors and research teams by facilitating PoliTo research activities development, the integration of research, innovation and education, the sharing of knowledge and its impact on the economy and society. The staff in this Department are in charge of the promotion of strategies for research and innovation and contribute to the creation of a favourable environment for the attraction of funding and qualified researchers, for career development, for mobility of PhD candidates and researchers, as well as for talent attraction, in accordance with the principles of the European Charter for Researchers. The Department acts as an activation engine for collaboration opportunities with companies, by stimulating and directing the demand of companies and local authorities, as well as the exploitation and protection of research results. The Department promotes design in research, seizing opportunities at national and international levels, interacting with funding bodies and research actors, ensuring effective management. The Department integrates the activities of the PoliTO Master School. It supports and ensures the proper implementation of the National Recovery and Resilience Plan in connection with the University departments and offices concerned.

The Department has 2 Units and 6 Departments with related offices.

Units:

- Administration and Budget
- Legal Support for Research, Innovation and Ethics Unit

Research Divisions:

Career Service: career and talent development, funding for individual and breakthrough research, mobility of researchers in line with the principles of the European Charter for Researchers.

Collaborative and Multi-disciplinary Research: policy advising and support to collaborative research activities, at national and international level, according to the 17 Sustainable Development Goals, European Research Area pillars, European Commission (Horizon Europe) priorities, the National Plan for Recovery and Resilience and regional Smart specializations.

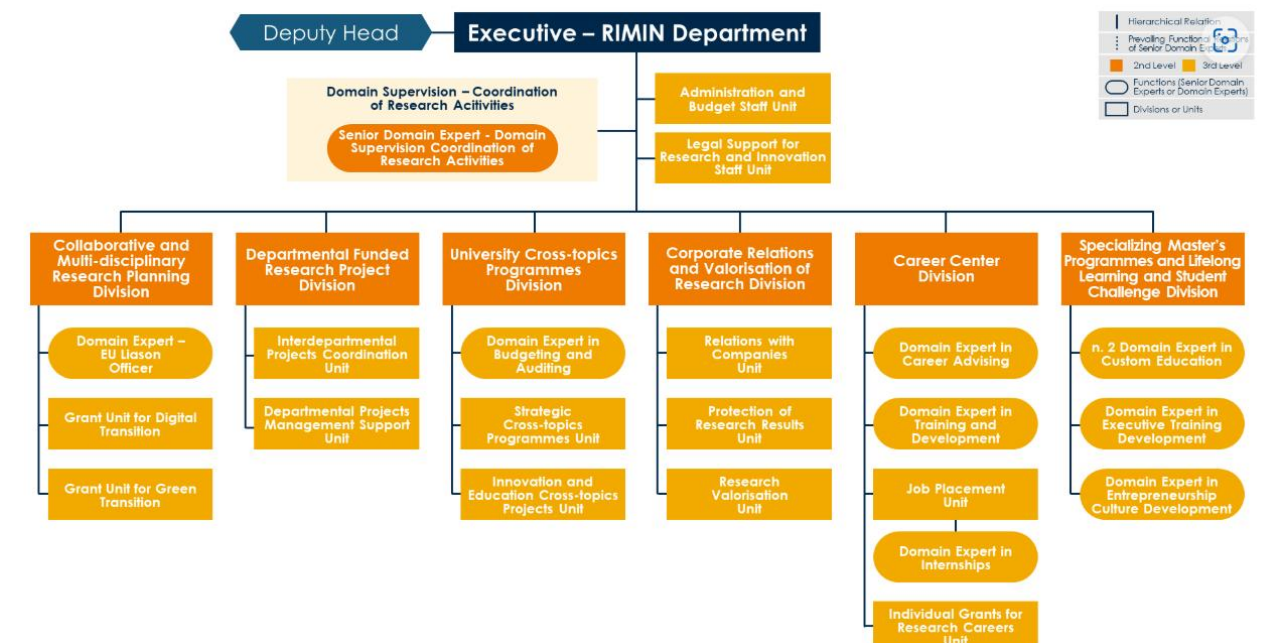
Funded project management Support: advice to the university Department on rules and mechanisms relating to research programs financed by regional, national and international competitions.

University Transversal Programs: coordination and management of institutional programs and strategic initiatives with foundations, public and private bodies.

Corporate Relations and Valorisation of Research: activate opportunities for collaboration with companies, knowledge sharing and funding for innovation.

Masters, Continuing Education and Challenge: design and delivery of the professional postgraduate training offer.

Currently the Research and Innovation Department has 90 staff (Chart below).



INP-UGA

The Research and support office is part of the Direction for Research, Innovation, Valorisation and European affairs (Direction Recherche Innovation Valorisation Europe).

The research support services are structured as follows:

- A political team sets the objectives for research at Grenoble INP-UGA, under the supervision of Vivien Quema, President:
 - Lorena Anghel, Vice President of the Scientific Board, and
 - Gaelle Calvary, Vice President for Valorisation and innovation.

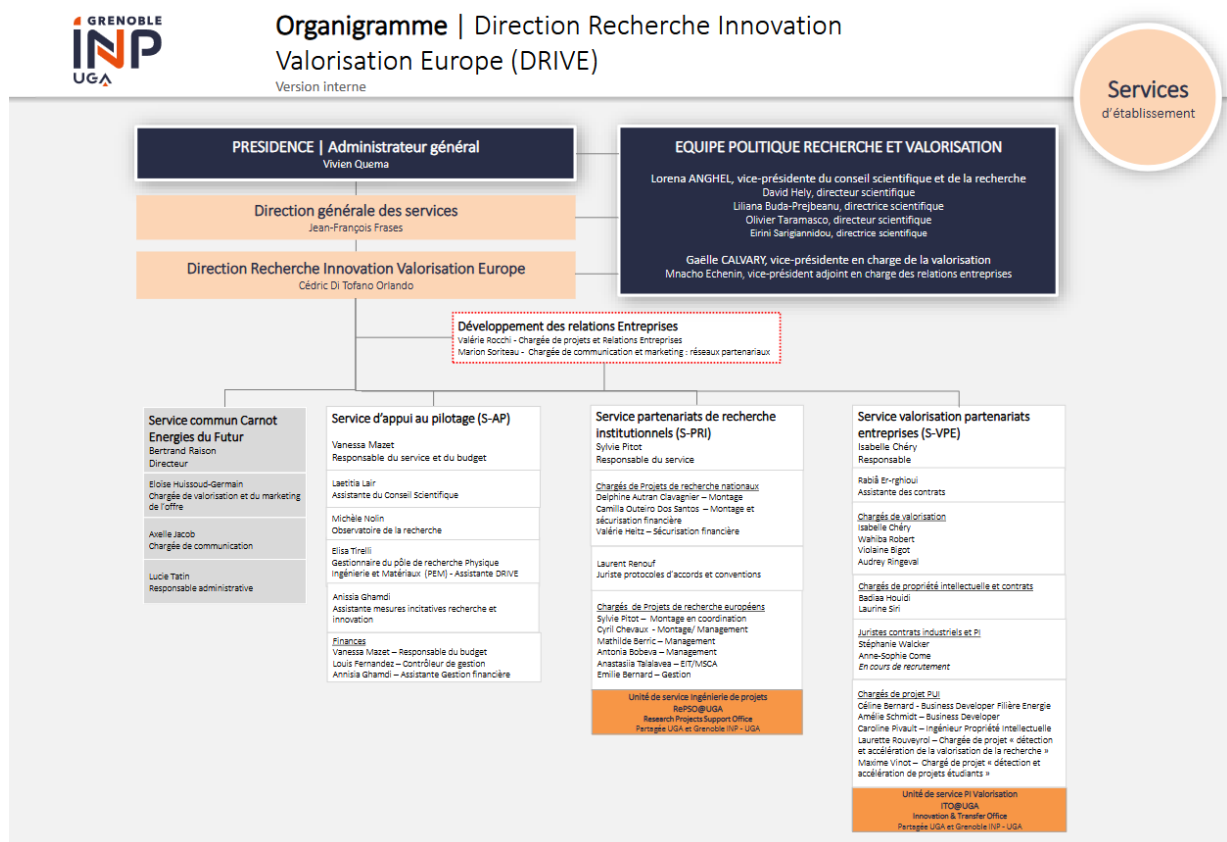
- A Grant Office devoted to institutional project proposals and projects offering the following services:
 - 1) Regional and national projects: strategic advice to researchers according to orientations of the different calls for project, development of project proposals, financial saucerization of the grants.

Additionally, members of the Grant Office are part of the governing body of a national association of 110 institutions (CAP Recherche!) involved in research projects funded by the national funding agency for research in France. The association is devoted to sharing information and developing good practice services for the administrative, financial and legal implementation of research projects.

- 2) European projects with support of the Vice Presidents: foresight and strategy for EU project proposals, participation to research networks and associations, analysis of EU programs, review of evaluation summary reports, advice to researchers, development of project proposals, financial reporting of EU projects.

All projects: legal advice, development and negotiation of consortium agreements and non-disclosure agreements.

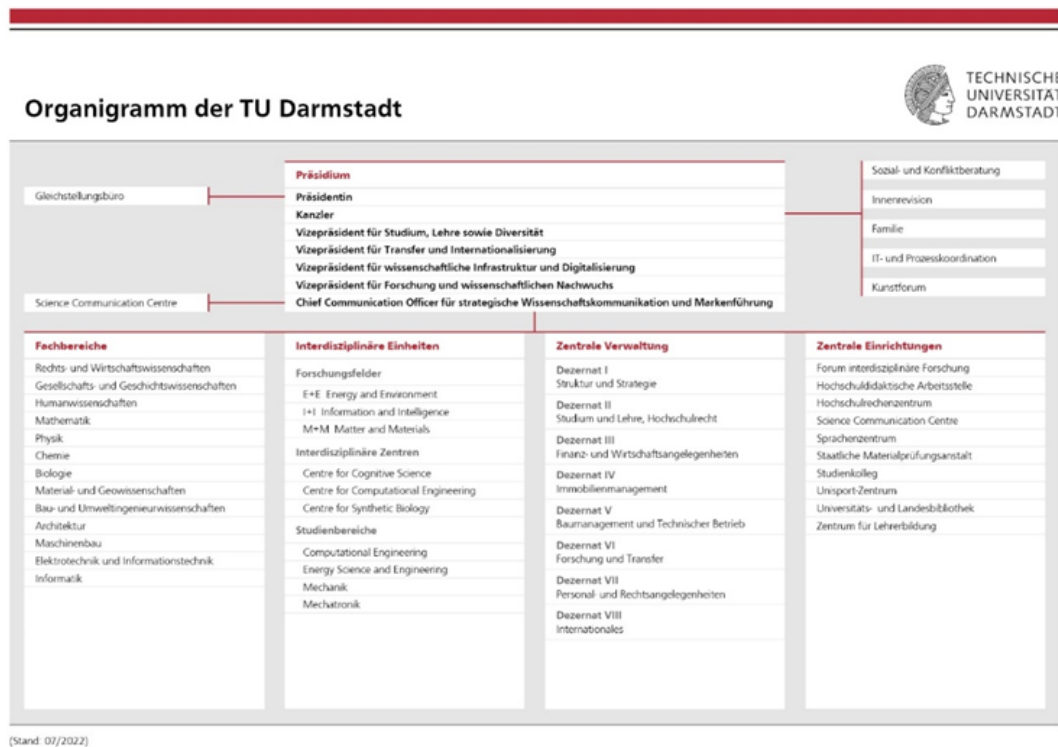
The Grant Office counts 11 research managers and administrators at the central level. They are part of a joint Research Projects Support Office with the University of Grenoble Alpes (RePSO), as shown in the organization chart below. Additionally, RePSO has a representative office in Brussels, whose strategic objectives and missions are still in the process of being finalized.



TUDa

The research support services are located in Directorate VI - Research and Tech Transfer.

Subunits of Directorate VI	Number of RMAs (mostly part time) 45
VI A Research funding	
VI A.1 National funding	6
VI A.2 EU funding	3
VI B Contract management & strategic Cooperation	5
VI C Transfer	2
VI C.1 IP & Innovations management	5
VI C.2 Spin-off management	8
VI D Third-party funding administration	11
VI E Early Career Researchers	5



Other central administrative units are:

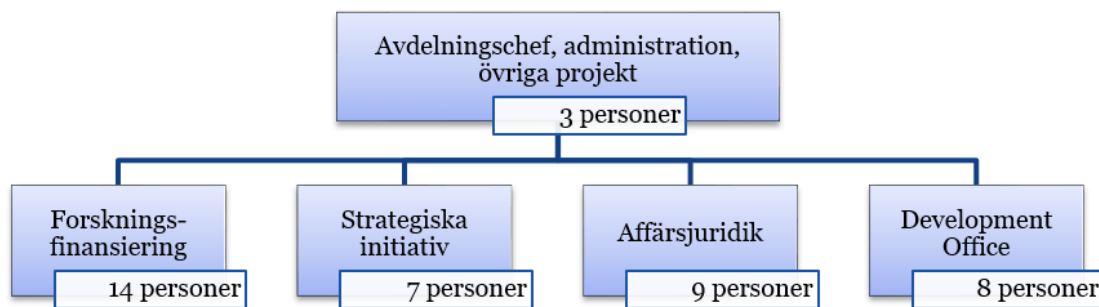
- Directorate I – Strategic Development
- Directorate II - Study and Teaching, Higher Education Law
- Directorate III – Finance and Economic Affairs
- Directorate IV – Property Management
- Directorate V - Construction Management and Technical Operations
- Directorate VII - Personnel and Legal Affairs
- Directorate VIII – International Affairs

KTH

Research Support Office, RSO, offers support to KTH’s researchers, management and other employees related to finding, managing and developing external research funding opportunities. The total number of RMA is 38.

The office is organized in five units:

- Civil Law and Contracts Office
- Development Office
- Research Funding
- Research Support
- Strategic Initiatives

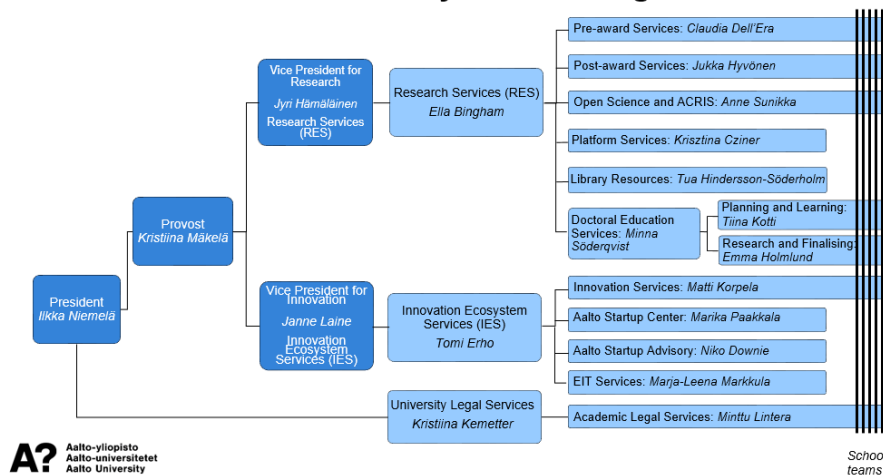


Aalto

- Research Services (pre-post award, open science, platform services, library, doctoral education services, research strategic support)
- Innovation Ecosystem Services (Innovation, start up, EIT, Academic legal service)
- University legal services

At the central level there are 54 (16+11+4+8+9+6) people working in research support (funding, open science, legal, innovations, startups, library acquisitions etc.).

Research, Innovation Ecosystem and Legal Services



ULisboa

Técnico Lisboa Pre- and Post-award management system

ULisboa is made of Schools that have a high degree of autonomy. These Schools have different needs in terms of Pre-award and Post-award management.

Técnico Lisboa is the Engineering School of the University and has an extensive system in place that was recently expanded in order to improve pre-award capabilities. Many R&I activities are managed through IST-ID, a non-for-profit private association.

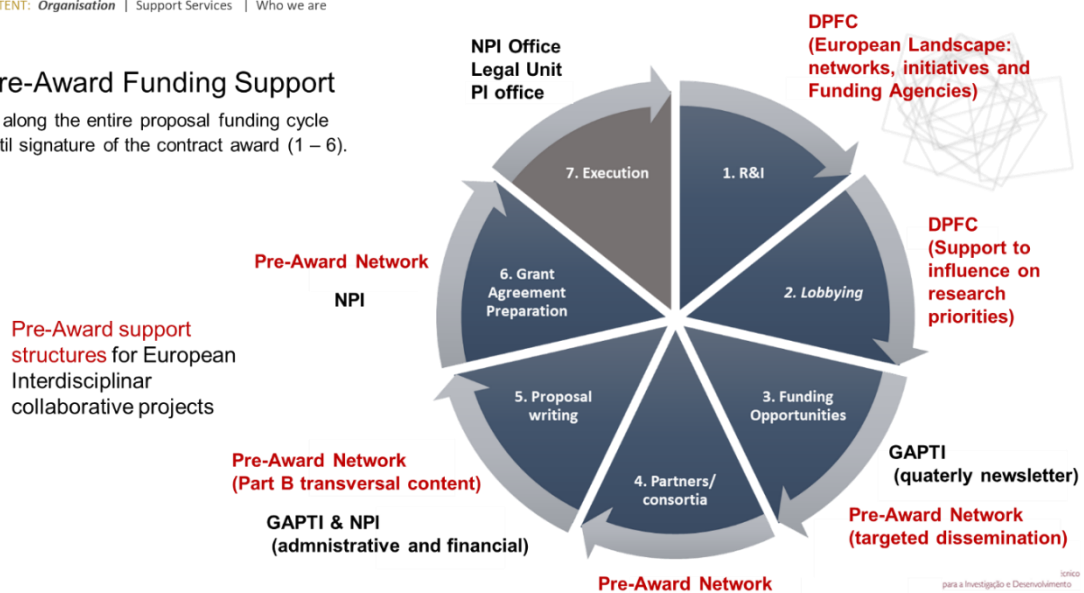
The competitive funding cycle of a research project consists of two phases: pre-award and post-award.

Pre-award support involves assistance throughout the competitive funding acquisition cycle until the contractualisation of the Grant Agreement, and post-award support involves project management to ensure the optimal execution of activities and project funding (Figure below). At Técnico, the central-level structures responsible for supporting the project funding cycle are the Directorate for Competitive Funding Propection (DPFC) for pre-award and the Project Directorate (DP) for post-award. Within these directorates, other structures directly related to funding acquisition support and assistance with applications and projects include the Pre-award Network, made by the managers at the Research Unit (UI) level, and the Project and Investigator Technical Support Office (GATPI), serving as the front office for the DP.

CONTENT: Organisation | Support Services | Who we are

Pre-Award Funding Support

— along the entire proposal funding cycle until signature of the contract award (1 – 6).



05/2021

1. R&D:

Responsible: DPFC, Involved: Pre-Award Network, Research Units (UIs)

- Map internal competencies and capabilities (e.g., facilities, equipment, research ideas, etc.):
 - a. Identify information about research capabilities and competencies (UIs);
 - b. Compile information centrally and update (DPFC);

OUTPUT: Internal mapping of research competencies and capabilities

- Monitor policies, regulations, and funding agencies (DPFC):
 - a. Monitor public research policies and funding program regulations (DPFC);
 - b. Identify specificities in the regulations that require institutional alignment and present to the IST-ID Directors Board for a decision on participation in a particular competition or not. Ensure that the necessary conditions are met or will be created for researchers to participate. Alternatively, ensure that there are clear indications that it is not possible to compete in a specific competition, so that researchers do not invest their time in a competition in which the institution cannot participate (DPFC);
 - c. Monitor the landscape and evolution of policies, track funding agency policies (DPFC);

OUTPUT: Mapping of policies, funding agencies, and regulations, updated with each new document; Proposals to the IST-ID Directors Board for the institution's stance on competitions.

- Monitor the participation of Research Units (UIs) in funding programs (DPFC):
 - a. Provide the IST-ID Directors Board with statistics on participation in European funding programs (DPFC);
 - b. Provide each UI with its statistics on participation in European funding programs (DPFC);
 - c. Analyse participation in funding instruments and propose improvement strategies (DPFC);

OUTPUT: Statistics on participation in competitive funding programs.

2. Lobbying/Strategic Networking:

Responsible: DPFC; Involved: Research Units (UIs), Cross-Cutting Platforms, Sectoral Facilitators

- Mapping of relevant networks and initiatives for institutional representation (DPFC);

OUTPUT: Mapping of networks and initiatives updated every 6 months
- Institutional representation in networks and initiatives (DPFC, Sectoral Facilitators, Cross-Cutting Structures);
 - a. Mapping of existing representation of researchers by Técnico, UI, in networks and initiatives;
 - b. Identify the most suitable profiles for institutional representation in networks and initiatives;
 - c. Coordinate with different representatives to communicate research competencies and capabilities to influence research and innovation priorities and the design of competitions;

OUTPUT: Mapping of the institution's representation in networks and other initiatives; Coordinate with internal Sectorial promoters

3. Funding Opportunities:

Responsible: DPFC; Involved: DP, Pre-Award Network, Communication, NDF

- Identify funding opportunities (DPFC)
 - a. Dissemination of funding opportunities targeted to the specific areas of each UI and Cross-Cutting Structures (e.g., IST-Environment, Técnico Advanced Materials) (DPFC);
 - b. Dissemination of funding opportunities targeted to relevant researchers (UIs);
 - c. Communication to the Pre-Award Network regarding rules, eligibility, interpretation of the context, competition topics, and alignment of ideas with competitions (DPFC);
 - d. Support for researchers, provided by the local manager, in administrative, legal, and financial information and in interpreting the context, topic, and alignment of the idea (UI);

OUTPUT: Funding opportunities tailored to UIs, Cross-Cutting Platforms, and researchers; Structured information and procedures for different funding instruments; Technical and administrative support for UIs.

- Organization/dissemination of events (DPFC, DP, TT, Pre-Award Network, Communication, NDF): organization/dissemination of training sessions, workshops, relevant information to support the preparation of applications for the Pre-Award Network, individual UIs, and researchers.

OUTPUT: General and targeted dissemination.

4. Partnerships/Consortium:

Responsible: Pre-Award Network; Involved: UIs, DPFC

- Identify potential consortia/partnerships (UIs, Pre-Award Network, DPFC):
 - a. Compile and forward consortium formation events, including the management of CrowdHelix and In-Part platforms (DPFC);
 - b. Participate in consortium formation events (Pre-Award Network, UIs);

OUTPUT: Partnership formation events, Management of CrowdHelix and In-Part platforms.

- MoU, Confidentiality Agreements, IP Agreements, Hi Letter (GATPI):
 - a. Create institutional templates with standardized text for MoU, Confidentiality Agreements, IP Agreements, Letters of Commitment (DP, PI, DAJIST);
 - b. Receive official documents from UIs, and after reviewing by the appropriate structures, forward them for signature (GATPI);
 - c. Review official documents (PI, DAGIST);

OUTPUT: Institutional templates and review and signing of documents.

5. Proposal Writing:

Responsible: Pre-Award Network; Involved: DPFC, DP, UIs, TT, Communication, Library, Ethics Committee, Postgraduate Area

- Support in preparing the proposal:
 - a. Compile administrative, legal, and financial information (e.g., eligible expenses, budget tables, etc.) (DP, DPFC);
 - b. Support in Part A and budget construction (Pre-Award Network, UIs);
 - c. Financial eligibility feasibility (GATPI);
 - d. Non-scientific content of Part B (cross-cutting aspects such as ethics, open science, data management, impact, dissemination, communication, results exploitation, Work Plan, etc.) (Pre-Award Network), UIs;
 - e. Reviewing the proposal before submission (Part A and Part B) (Pre-Award Network, UIs);

OUTPUT: Templates, examples, guidelines for preparing proposals; Structured information and procedures for administrative, legal, and financial aspects.

6. Grant Agreement:

Responsible: GATPI; Involved: DP, UIs

- Support in preparing the grant agreement
- Management on the platform (e.g., declaration of honour; assign PLSign and FSign, signature request)
- Verification of the Consortium Agreement
- Provision of templates and verification of procedures.

OUTPUT: Support, management, Templates, examples, guidelines, signature requests

7. Project Management:

Responsible: DP; Involved: Pre-Award Network, UIs

- Any need of support to researchers responsible for the proposal during negotiation phases
- Analysis of proposals and project initiation
- Monitor and ensure the financial execution of the budget and preparation of financial reports
- Budgetary and cash flow control, and audit monitoring
- Project closure

OUTPUT: Support, management, financial control, and closure

Schematic representation of inputs, outputs, and responsibilities:

Suppliers	Input	→	Output/Input	→	Output/Input	→	Output	Recipients
DPFC	European R&D Policies / Funding Agencies / Call Regulations	DPFC	External mapping of research priorities and opportunities	DPFC	Proposals to Técnico Management for the institutions' position in competitions	DPFC	Based on Técnico decision, communication of structured procedures for different funding instruments	Faculty and Researchers / Pre-Award Network
UIs	Skills / Infrastructures / R&D Ideas / Researchers	DPFC	Internal mapping of research skills and capabilities	DPFC	Organization/ General dissemination of events, competitions, relevant information for proposal preparation	Pre-Award Network	Opportunities for funding, events, and relevant information for proposal preparation	Faculty and Researchers / Pre-Award Network
UIs	R&D Areas identified by the UIs	DPFC	Mapping of relevant networks and initiatives and matching with identified areas Monitoring the institution's representation in networks and initiatives Network of Sectoral Promoters Funding opportunities directed to UIs					Pre-Award Network
DPFC	Participation statistics per UI	UIs	Validation of participation statistics in European funding programs	DPFC	Participation statistics in European programs, per UI, by funding scheme, by area, etc.			Técnico Management UIs
UIs / Faculty and Researchers	Coordination of application / participation in proposals	Pre-Award Network	Filled-out forms Examples / Guidelines Search for partners / consortia	GATPI	Institutional forms Review and signing of official documents Financial viability of the Budget			Faculty and Researchers
UIs / Faculty and Researchers	Signing the Grant Agreement	GATPI	Platform Management (e.g., DoH, PLSign and FSign, GA signing request) Support needed for responsible researchers in negotiation phases Analysis of the Consortium Agreement Verification of procedures					Faculty and Researchers
Faculty and Researchers	Funded Project	GATPI	Analysis of proposals and project opening Monitoring and ensuring financial execution of the budget and preparation of financial reports Budget and cash flow control, and audit follow-up Project closure					Faculty and Researchers

Pre-award - Direction coordinating with dedicated staff from research units (15)

Post-award/budget - Direction handling project budgeting and execution (30)

TU Graz

The Research & Technology House provides scientists at TU Graz with services focused on research. It provides support for projects all the way from the idea to project planning, to the application and offer stage (pre-award), providing support at the start and during the implementation phase (post-award), all the way to project completion and the utilization of research results and technologies. Acting as an interface to businesses and other research institutions, it supports all forms of modern knowledge and technology transfer.

The Research & Technology House provides TU Graz researchers with a comprehensive selection of services, see Services for Researchers. Companies can find out about possibilities for cooperation on the pages Research and Business. Graduates of TU Graz and students in higher semesters can look up job vacancies in technology and the natural sciences on the Career Info-Service pages.

Services for Researchers:

- [Research Newsletter F&T News](#)
- [TU Graz Internal Funding Programmes and Prizes](#)
- [Support of Third Party Funded Projects](#)
 - Project Planning, Application and Offer Stage (pre-award)
 - During or After Project Start and During Project Run Time Post Award)
 - Project Management and Administration
- [National Research Funding and the EU Programme Horizon Europe](#)
 - EU Programme Horizon Europe
 - Databases for Funding
- [Offers for Post-docs](#)
- [Research Documentation](#)
 - Electronic Registration Process for Third-party Funded Projects
 - R&D Areas and Projects
 - Theses
 - Publications
- [Commercialization of Research Results: Patents, Inventions, Technology Exploitation](#)
- [Wissenstransferzentrum \(WTZ\) Süd](#)
- [Founding a Company](#)
- [TU Graz Internal Funding Programmes and Prizes](#)
- [Initial Funding Programme](#)
- [Lead Projects of TU Graz](#)
- [Award of Excellence](#)
- [WKO Research Grants](#)
- [Nikola Tesla Medal](#)
- [Competitive Call for Research and Teaching Infrastructure of the TU Graz](#)
- [More Services for Research](#)
- [International Research](#)
- [Advancement of Women in Academia](#)
- [IT Services for Research](#)

Services for Companies:

- [Projects with companies](#)
- [Become a partner company](#)
- [Publish job advertisements](#)
- [Research cooperation ventures](#)
- [Business partners](#)
- [Technology offers](#)
- [Wissenstransferzentrum \(WTZ\) Süd](#)

Number of RMA at Central Level – 24 = 2 Heads, and 22 Staff Members

Research & Technology-House

U. Diefenbach, C. Adametz + 22 Staff
about 19.5 FTE global, partially refinanced + project staff

Project Support

- „Pre-award“: guidance on research funding (EU, FFG, FWF ...)
- „Post-award“: project administration and -management
- Electronic project reporting for third-party funded projects
- Databases (R&D projects, external partners, start-ups...)

Technology Transfer

- Inventions, patents, technology exploitation
- Coordinator of the Knowledge Transfer Center (WTZ) South and Spin-off Austria

→ Science Park GmbH

Industrial Liason

- Key account management
- Framework agreements with industry
- Expert matching
- SME outreach projects

Fundraising/Sponsoring (with Alumni Association)

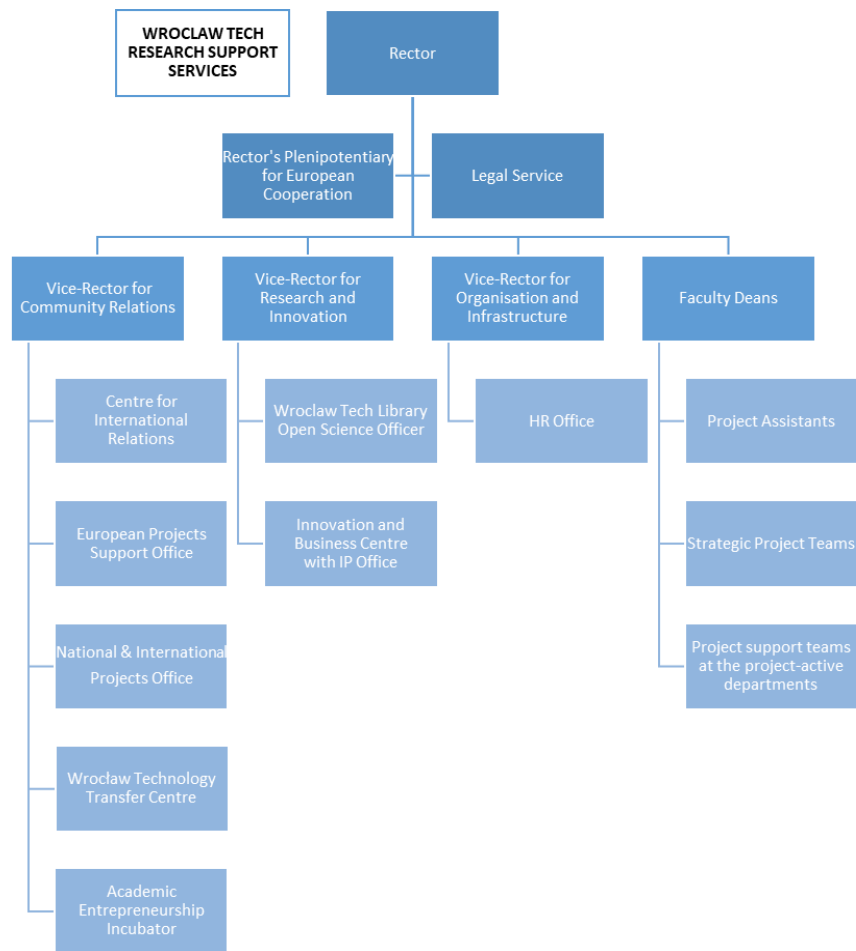
- Career Info-Service
- Forum Technology and Society

Strategic Projects of the Rectorate

- Profile Formation – Fields of Expertise (FoE): Initial Funding Programme, Infrastructure Funding...
- Entrepreneurial University
- Management / Support of strategic Industrial Liason and Research Centers

Wroclaw Tech

Research support services at Wroclaw Tech are provided by multiple university units operating across different divisions. The European Projects Office (EPO) and the National and International Projects Office are primarily involved in the pre-award stage, receiving support from various specialized units such as the Centre for International Relations, Wroclaw Technology Transfer Centre, IP Office at the Business and Innovation Centre, Academic Entrepreneurship Incubator, HR Office, Open Science Officer, and others. All these units subsequently assist Faculty Project Assistants during the post-award stage, which takes place at the faculty level. Depending on the faculty's strategy and researchers' involvement in projects, the Assistants may work independently or as part of teams. Additionally, larger departments may hire extra research support staff dedicated to their specific project implementations. The next scheme is not a comprehensive overview but rather a summary of the key offices directly supporting researchers in projects preparation and implementation at Wroclaw Tech.

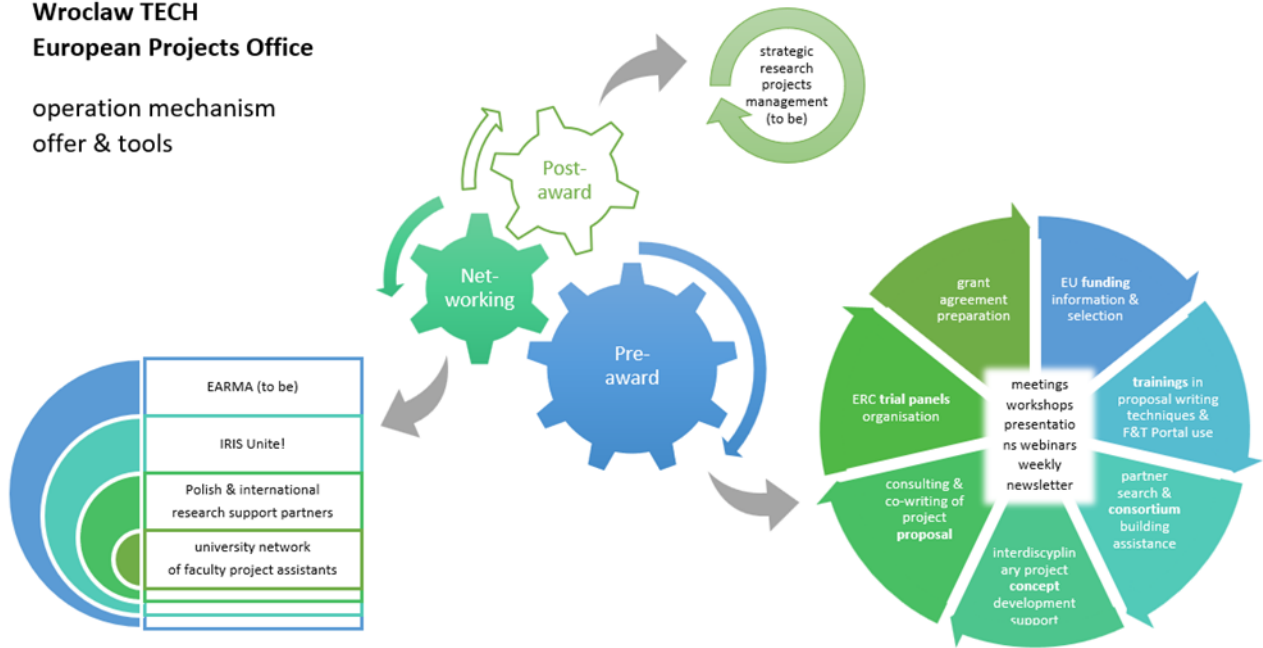


Wroclaw Tech key offices directly supporting research projects preparation and implementation

The EPO is a dedicated unit supporting researchers in applying for EU projects. Currently, it employs five Research Management Administrators (RMAs) who specialize in and have mastered the pre-award phase, while also providing on-demand consultations for post-award challenges faced by Faculty Project Assistants and researchers. EPO actively strengthens the university's research and support networks by participating in national and international events that cover the full lifecycle of EU projects. In the long term, EPO plans to expand its strategic support in the post-award phase, with the goal of evolving into a Centre of Excellence that offers comprehensive assistance to all RMAs across the university. A detailed overview of EPO's operation mechanism, services, and tools is provided in the Figure below.

**Wroclaw TECH
European Projects Office**

operation mechanism
offer & tools



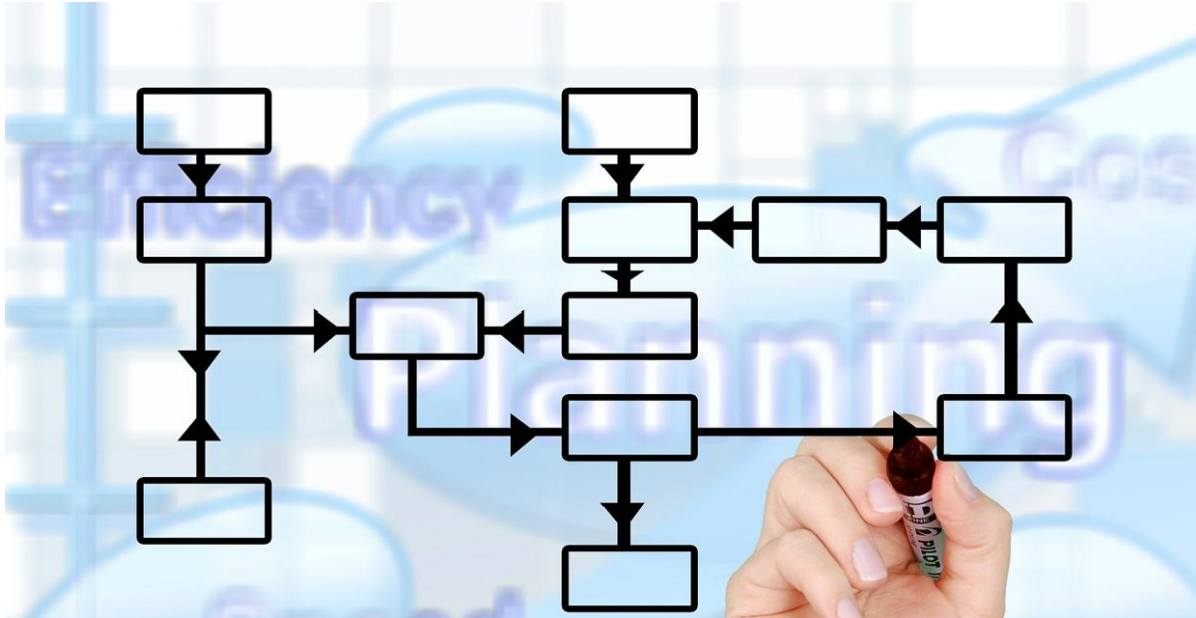
Wroclaw Tech European Projects Office operation mechanism, services, and tools

Notably, Wroclaw Tech has introduced Internal Funding Programs and Awards, including initiatives like *Academia Iuvenium* and *Profesorum Iuniorum*, to motivate and provide focused support to its most promising researchers.

A.3 Structure of the research support services and n. of RMAs at School/Dept/Faculties Level

UPC	PoliTO	INP - UGA	TUDa	KTH	Aalto	Wroclaw Tech	ULisboa	TU Graz
<p>At School/Faculties Level there are representatives of each unit (international projects, national projects and contract and agreement and tenders) except Institutional Projects Unit that is only at central level.</p> <p>Depending on the size of the School/Faculty the services could be provided by a team of 4-5 RMA's or just one RMA's.</p>	<p>PoliTO has 11 Departments, each having a unit dedicated to financial management of projects funded by the EU and innovation project with industries. Average n. of RMAs per Department is 4 (around 50 people in total).</p>	<p>Research support services and the number of research managers and administrators in the 40 laboratories are varied and difficult to evaluate as of today. All laboratories have managers and administrators in charge of the financial management of research projects.</p>	<p>Research support services in School/Dept/Faculties are not structured uniformly. It varies greatly.</p>	<p>The EU financial officers are placed locally at the schools to help with budgeting and reporting of EU projects.</p>	<p>Each School has a dedicated service team consisting of representatives of pre-award, post-award, open science, legal, and innovations. Depending on the size of the School this is 6-12 persons.</p>	<p>Wroclaw Tech has 14 Faculties. Each unit has a dedicated administration/project support team responsible for financial management of national, international and EU projects.</p>	<p>ULisboa is composed of 18 Faculties or Institutes, with significant autonomy in academic, research and management. The institutions have their own research management facilities, with different forms of organization and a varied number of research managers and administrators. A central research management office provides partial support to smaller Faculties.</p>	<p>Data Management Plan is supported by the Research Data Management Team, under the Library Services</p> <p>https://www.tugraz.at/sites/rdm/home</p>

A.4 Explain tasks and activities of the research support service at Central and School/Dept/Faculties



Central level:

Research Development and Policy - Institutional level support work (rather than project or PI focused) and comprises the following areas:

1. Survey of Science and Technology Policy - Keeping track of the government research policy landscape (INP-UGA, PoliTO, Aalto)
2. Research Ability Analysis (Institutional Research) - understanding your own institution's research strengths (UPC, INP-UGA, Aalto, Wroclaw Tech)
3. Planning Research Strategy - Where to put internal resources to meet the institutional research ambitions (UPC, PoliTO, INP-UGA, Aalto)

Pre-Award - Supporting individual Principal Investigators and project proposals and comprises the following areas:

1. Support Research Project Planning - helping faculty to develop research project proposals (UPC -only institutional projects PoliTO, INP-UGA, TUDa, ULisboa, Wroclaw Tech, TU Graz)
2. Collection of Funding Information - identifying funding sources and opportunities (UPC, PoliTO, INP-UGA, TUDa, ULisboa, Wroclaw Tech, TU Graz)
3. Internal Negotiation for Project Formulation - interdepartmental working, institutional sign off processes (INP-UGA, TUDa, Wroclaw Tech)
4. External Negotiation - contract negotiation and partnership development (UPC-National, International and Institutional projects, PoliTO - only institutional projects, INP-UGA, TUDa, Wroclaw Tech)
5. Support for Application - costing and pricing, partial drafting, submission (UPC - only institutional projects, PoliTO, INP-UGA, TUDa, ULisboa, Wroclaw Tech, TU Graz)

Post-Award - comprises the following areas:

1. External Adjustment - initial budget setting based on offer/ contract negotiation (UPC - only institutional projects, PoliTO, INP-UGA, TUDa, Wroclaw Tech, TU Graz available upon request against hourly rate)
2. Progress Management - project management (UPC and PoliTO - only institutional projects, INP-UGA, TUDa, ULisboa, Wroclaw Tech, TU Graz available upon request against hourly rate)
3. Accounting – post-award finance (UPC - only institutional projects, INP-UGA, TUDa, ULisboa, TU Graz available upon request against hourly rate)
4. Support for project evaluation - project evaluation and audit support (UPC - only institutional projects, PoliTO, TUDa, Wroclaw Tech, TU Graz available upon request against hourly rate)
5. Reporting - internal and external (sponsor) reporting (UPC and PoliTO - only institutional projects, TUDa, ULisboa, TU Graz available upon request against hourly rate)

Other Areas - comprise the following:

1. Collaborate with educational program - support for projects or proposals that combine research and education (teaching) elements in a combined program (UPC, TUDa)
2. International Collaboration - partnership development and working with foreign research institutions (UPC, PoliTO, TUDa, Aalto, Wroclaw Tech, TU Graz)
3. University Industry Collaboration - partnership development and working with industry (UPC, PoliTO, TUDa, Aalto, TU Graz)
4. Intellectual Property - managing and protecting IP, for example patents and licensing (UPC, PoliTO, INP-UGA, Aalto, Wroclaw Tech, TU Graz)
5. Institution Branding - presenting and research finding to promote the institution (UPC)
6. Public Relations - dealing with third parties to provide information and protect institutional reputation (UPC)
7. Event - running and participating in research related events (UPC, PoliTO, INP-UGA, Aalto, TU Graz)
8. Safety - including lab safety
9. Compliance - regulatory compliance, for example human subjects, export controls (UPC, PoliTO, INP-UGA, Aalto, TU Graz)

Other: Library acquisitions, Support for open access, Support for research information system (CRIS) (Aalto)

School/Faculty/Department level:

Pre-Award - Supporting individual Principal Investigators and project proposals and comprise the following areas: (UPC, Aalto, TU Graz)

1. Support Research Project Planning - helping faculty to develop research project proposals
2. Collection of Funding Information - identifying funding sources and opportunities
3. Internal Negotiation for Project Formulation - interdepartmental working, institutional sign off processes
4. External Negotiation - contract negotiation and partnership development
5. Support for Application - costing and pricing, partial drafting, submission

Post-Award - comprises the following areas: (UPC, PoliTO, Aalto, TU Graz)

1. External Adjustment - initial budget setting based on offer/ contract negotiation
2. Progress Management - project management (TUDa)
3. Accounting - post award finance
4. Support for project evaluation - project evaluation and audit support
5. Reporting - internal and external (sponsor) reporting (TUDa)

Other Areas - comprise the following:

1. Collaborate with educational program - support for projects or proposals that combine research and education (teaching) elements in a combined program (TU Graz)
2. International Collaboration - partnership development and working with foreign research institutions (TU Graz)
3. University Industry Collaboration - partnership development and working with industry (Aalto, TU Graz)
4. Intellectual Property - managing and protecting IP, for example patents and licensing (Aalto, TU Graz)
5. Public Relations - dealing with third parties to provide information and protect institutional reputation

B. Description of Grant Offices internal services processes of each Alliance institution, its links with other support services

UPC	PoliT0	INP - UGA	TUDa	KTH	Aalto	Wroclaw Tech	ULisboa	TU Graz
<p>-DMP: task coordinated with library services.</p> <p>-Advice or support regarding hiring processes.</p> <p>-Dissemination: in collaboration with Communication Office, sometimes.</p> <p>-Project justification: support form Research Economy Management Service is needed.</p> <p>-Legal Service at UPC level are required sometimes both pre-award and post-award phases.</p> <p>-IT application developments: collaboration with Knowledge Management Service</p>	<p>-DPM support and advice by the Library Dept</p> <p>-Open access: support by Library Dept.</p> <p>-IP issues on grant and consortium agreement by TTO</p> <p>-Gender: support by the dedicated Vice Rector</p> <p>-Communication (website, success stories) in collaboration with the Communication Dept</p>	<p>-Data Management Plans are supported by another office: Cellule Data Grenoble Alpes.</p> <p>-Information on Patents and creation of start-up is provided by another office: Innovation and Transfer Office</p>	<p>Support from:</p> <p>-Library, TU data team Open access/open data</p> <p>-Equal Opportunities Office: Gender aspects</p> <p>-Early Career Researchers: Training opportunities for early career scientists</p> <p>-Directorate VIII Dual degrees and Directorate VII: Information on personnel matters</p> <p>-Directorate III: Information on depreciation</p> <p>-Communication office: Dissemination VI C Transfer: Exploitation Ethics Committee: Ethics</p>	<p>Research Data Office led by the KTH Library</p>	<p>-Pre-award and Post-award get support for the Data Management Plan from our Open Science and ACRIS team which belongs to Research Services.</p> <p>-The dissemination and impact are handled by researchers themselves</p>	<p>-Pre-award EU projects receive support from EPO. National and international projects are supported by the Project Department.</p> <p>-Post-award projects are implemented on Faculties & receive support from central administration: Legal Service, Technology Transfer Office, Intellectual Protection Office, etc</p>	<p>Communication is handled by a dedicated office. Technology Transfer and IP are also handled by a dedicated office.</p>	<p>Services for Researchers:</p> <p>-Data Management Plan is supported by the Research Data Management Team, under the Library Services</p> <p>https://www.tugraz.at/sites/rdm/home</p>

UPC	PoliT0	INP - UGA	TUDa	KTH	Aalto	Wroclaw Tech	ULisboa	TU Graz
<p>-TT Office: face-to-face (we work in the same office), e-mail and meetings.</p> <p>-Research Economy Management</p>	<p>-TT Office : email</p> <p>-HR Office: teams meetings</p> <p>-Communication Office: daily communication</p>	<p>Regular information flow exists with the following offices:</p> <p>-HR department: follow-up of recruited staff</p>	<p>E-Mail</p>	<p>-TT Office</p> <p>-HR Office – internal network to develop knowledge and processed related to MSCA</p>	<p>-TT Office: In case a research project is suitable for TT funding, the service personnel liaise here.</p>	<p>TT Office: supporting collaboration with companies/industry in licensing/ selling the patents;</p>	<p>-TT Office - Before contract signing, before patent application, before licensing.</p> <p>-HR Office - Staff hiring and</p>	<p>Research and Technology House (R&T House) Services for Researchers:</p> <p>1. Research Newsletter</p>

<p>Service: periodic meetings to coordinate justifications. -Knowledge Management Service: face-to-face (we work in the same office), e-mail and meetings. -HR Office: in case it be necessary its support, contact ticket application, e-mail, phone and meetings. General presentations carried out by HR Office when major legal changes impact in hiring processes. -Communication Office: weekly scheduled coordination meetings. -International Relations Office: in case it be necessary it support, e-mail, phone and meetings. -Library Service: in case it be necessary its support, e-mail, phone and meetings</p>	<p>(phone, emails, meetings) -International Relations Office: email -Departments: emails, on-line meetings, phone</p>	<p>involved in research projects -Finances department: follow-up of financial management of research projects</p>		<p>and other EU-projects -Communication Office -International Relations Office -Other</p>	<p>-HR Office: Not so much collaboration. Researchers handle their recruitment needs with HR, without the help of Research Services. -Communication Office: Not so much collaboration. - International Relations Office: Not so much collaboration except at Research Development and Policy work. The School-level RMAs do not collaborate with International Relations Office, mainly because the researchers don't need help in finding international collaborators. -Other</p>	<p>IP Office: supporting the patent application process; HR Office: supporting in recruitment and hiring team workers; International Relations Offices: supporting in international cooperation, partnerships, students' program <u>Tools</u>: face to face/online meetings; emails, phones</p>	<p>contracts are administratively handled by the HR Office. -Communication Office - Communication of results and interaction with media are handled by this office. - International Relations Office - handles academic partnerships (and student programs).</p>	<ol style="list-style-type: none"> 2. TU Graz Internal Funding Programmes and Prizes 3. Support of Third Party Funded Projects Project Planning, Application and Offer Stage (pre-award) During or After Project Start and During Project Run Time (Post Award) Project Management and Administration 4. National Research Funding and the EU Programme Horizon Europe EU Programme Horizon Europe Databases for Funding 5. Offers for Post-docs 6. Research Documentation 7. Commercialisation of Research Results: Patents, Inventions, Technology Exploitation 8. Founding a Company (Start-ups)
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UPC	PoliTO	INP - UGA	TUDa	KTH	Aalto	Wroclaw Tech	ULisboa	TU Graz
<ul style="list-style-type: none"> -Google apps -UPC apps (project management, timesheets management, travel costs management, authorization and signature documentation process management, etc.) -SAP -Communication Service Newsletters -E-mail general communications -Websites -Contact ticket application -Face-to-face meetings -Phone -Email 	<ul style="list-style-type: none"> -Teams: chats and on-line meetings -Teams: repository for shared documents -Emails Face-to-face meetings 	<ul style="list-style-type: none"> -Valtech Software (repository listing all research projects and stakeholders), -Newsletter 	<ul style="list-style-type: none"> -E-Mail -Newsletter -SharePoint 	<ul style="list-style-type: none"> Depending on preferences by the individuals: -Slack -Zoom -Meetings -email 	<ul style="list-style-type: none"> -Teams channels -Face-to-face meetings -email 	<ul style="list-style-type: none"> -Website -LinkedIn Profile -Newsletter -Face to face/online meetings -Workshops -email 	<ul style="list-style-type: none"> -Regular meeting -Intranet -Newsletters 	<ul style="list-style-type: none"> -Newsletters -Cloud document repository -Regular meetings (online and f2f) -Workshops -email

UPC	PoliTO	INP - UGA	TUDa	KTH	Aalto	Wroclaw Tech	ULisboa	TU Graz
<ul style="list-style-type: none"> -IT tool ideas for boosting multidisciplinary and international research: RISS Office has defined some IT tools not still developed at UPC that could be useful as a starting point to design IRIS IT tools requirements. -Knowledge map: 	<p>The Research Support Department led in 2020 a working group with RMA from different Department in order to understand activities, roles, skills and training needs. As a result, a workflow was designed for activities related to</p>	<p>The research managers and administrators are all experts in a specific domain, for ex: EIT projects, national projects, management of coordinated projects</p>	<p>Promote MSCA actions</p>		<p>Aalto University has adopted the general guiding principle of open science: Research outputs (scientific publications, research data, methods, software codes, and infrastructure) should be as open as possible, as closed as</p>	<p>The European Projects Office team supports scientists from the very beginning of the project, starting from the idea stage. They provide assistance in finding the appropriate competition. In the case of the selected</p>	<p>Pre-award functions in a decentralized manner, i.e., there is a central coordination directorate coordinating a network of research unit staff, dedicated to specific areas.</p>	

<p>The UPC knowledge map is a graphic tool that allows you to locate and find the knowledge generated at UPC. Based on the different topics, the research groups/centres and the respective scientific production are connected. https://futur.upc.edu/knowledge_maps?locale=en</p> <p>-Demand-oriented expertise portfolio: Designed on demand, these dossiers show the highlights of scientific production at the UPC in specific areas. https://rdi.upc.edu/ca/ssri/projectes-institucionals/mapes-de-recerca/2020_energia_research_portfolio_upc_v-2.pdf</p> <p>-Territory connection and local impact activity design: The UPC has a widespread presence in</p>	<p>the pre-award phase, to be considered as a reference for who does what (central admin or dept)</p>				<p>necessary. Our services for researcher are extensive: in addition to the ordinary service organization helping researchers in opening their research articles and research data, we have established a service network of "data agents" whose main job description is in research but who devote a fraction of their working hours in supporting their colleagues in area specific data management questions. We also have a service address researchdata@aalt.o.fi which is read by a team of data experts (IT specialists, legal counsels, Data Agents, and information specialists). We offer research data management training openly to anyone interested, reaching audiences in several European</p>	<p>competition, they conduct analysis, collaborate on writing the application, and develop the budget. They participate in project consortium meetings and, if necessary, conduct training and workshops.</p> <p>For ERC projects, broader assistance is offered, including developing the most advantageous application structure and preparation for the second stage, namely interviews.</p>		
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<p> Catalonia, with nine campuses located in Barcelona and nearby towns. One of the UPC commitments is the territory connection and their local impact development. RISS designs and supports R&D local activities to engage all the territorial stakeholders and contribute to the regional development and growth. https://www.upc.edu/en/press-room/news/the-besos-coast-sustainable-territory-project-receives-a-grant-from-the-erdf -Funding opportunities observatory International, national and local R&D funding opportunities search engine for researchers and students. https://rdi.upc.edu/ca/ssri/observatori-opportunitats-financament/ </p>					<p> countries. We network with similar endeavours in other universities (e.g., Unite, TU Delft) </p>			
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<p>-R&D associations, platforms and networks portfolio participated by UPC: UPC plays an important strategic role in institutional networks involving universities, governments, associations and companies from all over the world. UPC currently participates in 154 R&D networks. All these contributions are compiled into in a single public webpage so as researchers can search and find the most appropriate and interesting networks for their research areas. https://rdi.upc.edu/ca/el-centre/xarxes-upc/</p>								
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Annex 2 LITERATURE REVIEW

The purpose of this document is to draw the conclusion from the Literature review carried out within the first 6-8 weeks of the UNITE! IRIS network with regards to Objective O1 “UNITE! Integrated R&I services”.

The literature review was aimed at analysing barriers and facilitators for improving grant funding success and achieving university research goals, which indeed represent a useful guideline for the development of the UNITE! R&D Agenda.

- **We are currently facing the fourth era of research, in which fostering international cooperation is mandatory to keep up excellent research.**

The fourth age of Research requires a strong international and multidisciplinary approach. Jonathan Adams (Adams, J., 1st article) has shown that the best science comes from international collaboration: indeed, international collaborative papers are cited relatively more often than purely domestic papers because the authors are more likely to be doing excellent research.

The 4th era of Research challenges the ability of nations to conserve their scientific wealth either as intellectual property or as research talent (as a result of the scarcity of high-level researchers). To overcome these aspects, Adams has outlined some facilitators, like increasing incentives, resources and facilities to attract and support excellent scientists and foster international collaboration: “the older economies can no longer rely on the best foreign researchers to come and visit. (...) if a nation really wants to remain at the highest level scientifically, it needs to get its talent out and about – and then bring it back again. One way of doing this is to create worthwhile travel and exchange programs that include an assured post for the returning researchers” (Adams, J., 1st article).

Incentives should be put in place to enable the participation of universities in international networks and create flourishing partnerships. The international collaboration represents an invaluable opportunity to promote an “interactive process among individuals and organizations with diverse expertise and resources, joining together to devise and execute plans for common goals as well as to generate solutions for complex problems” thus allowing the achievement of a vision that would not be possible/successful if working independently. Besides this aspect, international collaboration is also fundamental to remaining competitive in a growing research environment (White-Jones, A. – 3rd article).

- **Projects entail a wide range of non-research aspects and require a multidisciplinary approach: more complexity and more challenges**

On the other hand, besides facing an international context, the current increase in funding opportunities’ size and complexity, as well as the number of different problems faced by the current society, has led to further challenges for research office personnel, particularly in light of a more interdisciplinary and multidisciplinary research environment (6th article; Arnold, A. et al. – 7th article). Nowadays, grant programs have increasingly shifted to support multidisciplinary consortia composed of industry, academia, and end-users (from academic research projects to innovation research projects). (Arnold, A. et al. – 7th article; Wedekind, K. & Philbin, S. – 2nd article).

The combination of different disciplinary elements within Multidisciplinary collaboration and research (MDR) helps improve understanding of complex issues, questions or problems, provoking a significantly major impact than disciplinary bound researchers (Arnold, A. et al. – 7th article).

Nowadays, European grant applications and projects often entail a wide range of non-research-related aspects and criteria, like socio-economic impact and visibility of the envisaged project, project and risk management processes (Wedekind, K. & Philbin, S. – 2nd article).

This results in **an increase in the challenges and difficulties that researchers face in applying for** funding: when dealing with MDR requires individual faculty to learn entirely new disciplinary languages, seek different sources of fiscal support, and integrate entirely new bodies of literature into their own (Arnold, A. et al. – 7th article). In this framework, Arnold suggests that these difficulties can be overcome on one side by increasing communication (e.g., increasing the opportunities to establish relationships with colleagues in other disciplines, encouraging campus-wide conversations, etc.), which can be implemented by faculty and chairs, and on the other side, attracting and allocating resources for multidisciplinary research infrastructure, for instance (Arnold, A. et al. – 7th article).

In 2019 ExLibris commissioned Alterline (4th and 5th article), an independent research agency, to assess the experience of researchers and senior members of university research offices in conducting and supporting the production of research at institutions of higher education, outlining that many variables affect the funding application process, like:

- Limited time and resources to focus on finding funding opportunities;
- Difficulties in scouting and in applying for funds (this is often reckoned the most challenging part);
- Difficulties in measuring the research impact which often reflects the interest within the academia (different metrics and lack of a standardized process);
- Bad User Experience in management systems: platforms are usually not user-friendly; researchers want easier and more streamlined systems;
- Difficulties in showcasing and keeping updated their profiles with publication data, also due to lack of time;
- This analysis has highlighted how Research Offices, Research Managers and Administrators (RMAs) and Libraries (e.g., open access support) play a key role in the activity of researchers for several aspects that do not entail mere scientific knowledge, also in terms of relief of administrative burden for Principal investigators both in bid management and in post-award duties.

- **The importance of PMOs and Research Administrators to provide support across entire (complex) grant projects**

As a result of the international cooperation, the multidisciplinary approach, and many complex variables when applying for funding, the role of RMAs is essential to address all these different aspects (Wedekind, K. & Philbin, S. – 2nd article). Nowadays, projects and associated problems are becoming more global, and the collaboration of research administrators within international/multi-national teams is growing and will grow in size and complexity (White-Jones, A. – 3rd article).

Project Management Offices (PMOs) can provide focused support across the entire grant project lifecycle (entailing: ideation, proposal preparation & submission, grant preparation & negotiation, project implementation, and project closure) and contribute effectively to successful projects; on the other hand, at a more strategic level, they foster “economies of repetition, ensure compliance and alignment with the

institution's mission and vision and facilitate organizational learning"; indeed, they "can act as the linchpin between the grant-making authority (i.e. the European Commission), project partners (including academic and non-academic entities) and academic support such as faculty administrations or central research offices" (Wedekind, K. & Philbin, S. – 2nd article).

In such a context, the jobs of RMAs are becoming more complicated (Shimazoe, J., 8th article) as **PMOs are required to get several different skills to address the challenges encountered**, especially when working in collaborative and international teams.

According to a survey conducted by White-Jones (3rd article), the most significant challenges in international collaboration are related to people-centered issues, such as interpersonal communication, compliance, and negotiation.

Cultural communication (or lack thereof) remains a significant barrier: RMAs should be aware of **cultural differences** and sensitivities (never assume that the international partner knows the way their institutions operate or the rules in their country). "Agreement and understanding of the terms and language used in research within international teams are vital".

Besides this aspect, RMAs "must be familiar with **policy** and **governance** on a variety of subjects in countries aside from their home country. These subjects include statutory and regulatory requirements, terminology and language, and the use of electronic application systems that are funder required" (White-Jones, A. – 3rd article).

As the internationalization of research increases, it is critical to ensure RMAs are appropriately trained to work effectively with people (also thorough a clear definition of roles and responsibilities), project management details, and compliance requirements of international teams.

To sum up, White-Jones in her article lists several best practices for RMAs when participating in international team projects are:

- *definition of formal roles and responsibilities for team members to support good governance effectively and to ease communication among collaborators;*
- *employing organizational skills to keep projects on track while adding value by being the single point of contact and taking on the role of coordination;*
- *supporting more junior RMAs or rising career professionals to be ready to take on this collaborative work with international partners, also by sharing positive experiences in multi-national research collaborations;*
- *developing a training and compliance mechanism to be customized per project.*

These mechanisms would discuss potential cultural differences, provide communication guidance, and specify roles and responsibilities for each team member so as not to duplicate efforts and to produce high levels of organization and coordination.

These attitudes seep into daily activities including negotiation, planning, communication, and shared understanding (White-Jones, A. – 3rd article).

In addition, in knowledge-intensive organizations (KIOs), "RMAs are often exposed to sometimes contradicting expectations from researchers, who value the innovative, free-thinking subculture, and non-research administrative workers, who value the subculture of bureaucratic control" RMAs thus need to survive in two organizational subcultures. "**Researchers may not understand why their desires are not fulfilled** when working with the RMAs, RMAs have to follow the researchers' demands AND comply with

bureaucratic requirements, and non-research administrative workers do not tend to understand that the bureaucratic mode of operation is not as natural to researchers and RMAs as it is to themselves” (Shimazoe, J., 8th article). This aspect becomes even more challenging because anyone can expect anything from them when their job is not clearly defined. A clearer definition of the role of the RMAs would definitely help to align expectations of research and non-research staff, as well as establish more effective and operational cooperation, avoiding overlapping of tasks.

- **The importance of RMAs’ training**

The current state-of-the-art shows that **training is valuable, necessary, and required** for specific project management competencies and knowledge of relevant governance, and it also increases cultural awareness and understanding. Learning-by-doing is still an essential part of the profession due to the lack of formal education and training for RMAs (Shimazoe, J., 8th article).

According to a survey conducted by White-Jones (3rd article), RMAs’ training should encompass the following aspects: regulations, intellectual property and related items, funder regulations and expectations, terminology, language and typology, stakeholder engagement, routine auditing practices, reporting requirements, budget management, and proposal writing.

However, the need to rapidly move up the “learning curve” in terms of knowledge of the project and the university infrastructure (processes and systems) and establish working relations with all the partners represents a real challenge for PMOs and RMAs, also considering limited resources and personnel (Wedekind, K. & Philbin, S. – 2nd article).

- **Other barriers**

Another major issue is constituted by the lack of personnel and resources for managing funding: “research offices may sometimes be forced to prioritize support for researchers based on the potential monetary value of the grants sought or the seniority of the scholar involved, under the assumption that the selected academic is able to attract more funding” (6th article).

- **Conclusions**

Given the concerns/barriers of the researchers in funding application and management, several actions can be made to improve grant funding success and achieve university research goals:

- Foster cooperation of Researchers with PMOs/RMAs and libraries;
- Foster opportunities to enhance MDR, like encouraging campus-wide conversations (to be effective, this strategy should be implemented top-down by Chairs and governing bodies);
- Investing in **customized training** for RMAs and **personnel** to enable greater support for researchers: all articles have shown that RMAs play a very important role to address issues related to complex, international, and interdisciplinary projects, providing focused support in the project management lifecycle. Within this context, RMAs represent an **added value** to support researchers and increase the possibilities of successful proposals and projects. In this scenario, effective educational support should entail many different aspects, considering that collaboration is recognized as a multi-dimensional framework and is a variable construct made up of different aspects, including governance and administration, mutuality and norms, and organizational autonomy. Training should

focus on lots of facets: from cultural communication, IPR, stakeholder engagement, and Funder's regulations, to knowledge or relevant governance and compliance requirements aside from one's home country;

- Making clearer definitions of RMAs' jobs, also to align expectations from research and non-research personnel and establish a more fruitful cooperation between them;
- Standard metrics and processes would significantly help to act more effectively (e.g., when measuring impact);
- Streamlining and simplifying systems would improve effectiveness to attract more funding;
- keeping institutional profiles of researcher current represents a good opportunity for showcasing.

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