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# ROMANDIC

Robot Manipulation of Deformables through Dynamic Actions

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## Executive summary

Deliverable D2.3 “Project Management Model” presents an analysis of existing institutional support structures for research proposal preparation and project implementation, and proposes an enhanced model aimed at improving funding success rates. The document builds on the current practices at the Jožef Stefan Institute (JSI) and lessons learned through collaboration with project partners, identifying both strengths and areas for improvement in institutional research support. While JSI already provides structured assistance through the Director’s office (U1) and the International Project Office (U6), the increasingly competitive funding environment within Horizon Europe and other international programmes requires additional, more embedded and structured strategic forms of support.

Based on internal analysis and exchange of best practices within the ROMANDIC consortium, the deliverable proposes four complementary service pillars: (1) structured career guidance and obligatory soft-skill education for researchers, including gender equality and funding strategy training; (2) the establishment of internal “mini project offices” embedded within research groups to provide targeted, research-line-specific support; (3) continuous administrative presence during proposal preparation to ensure strict adherence to call requirements and real-time clarification; and (4) positioning the project office as an operational project partner that can assume defined tasks such as dissemination, communication, IPR coordination, and project management, funded directly from project budgets. Together, these measures aim to professionalize proposal development and project implementation, reduce administrative burden on researchers, strengthen institutional capacity, and ultimately increase the competitiveness and success rate of applications in European and international funding programmes.

# 1 Current Situation

The Jožef Stefan Institute (JSI) engages in a wide-ranging international collaboration, encompassing various research areas and types. While the primary geographical focus is within European countries, JSI has established a diverse range of collaborations globally.

The Jožef Stefan Institute places significant emphasis on the European Union's multi year Framework Programmes. Currently, JSI is involved in projects under Horizon 2020 (2014–2020), Horizon Europe (2021–2027) and the Euratom Research and Training Programme. Moreover, the scientific research extends to numerous sector specific programs of the European Commission, such as the Digital Europe Programme and the LIFE programme and in programs beyond European Union, such as programmes of the European Space Agency, NATO, and the International Atomic Energy Agency.

Thus, JSI offers its researchers and other employees support services based on the needs and opportunities presented by the above-mentioned programmes.

First of all, a comprehensive web access point for international collaboration is set-up at <https://ijs.si/ijsw/MednarodnoSodelovanje>. The internal section is specifically for researchers from JSI. There, researchers can find a search tool to find open calls; events and workshops are listed; information for project applicants is provided; JSI support services are listed; ERC, EIC and EIT support is detailed; and other useful links, including to the Gender Equality Plan, other templates, Governmental instruction etc are listed.

Coordination, new design and implementation of support services is in the domain of the above-mentioned Director's office (U1), specifically by the Assistant Director for EU Affairs dr. Romana Jordan. Assistant Director for European affairs is responsible for strategical approach, analyses, action plans, coordination and organisation of tasks within the Institute and communication with the external partners in the following areas: Implementation of HEU, 1st Pillar of Horizon Europe Programme (HEU), European Institute for Innovation and Technology (EIT), 10th Framework Programme, The European Strategy Forum on Research Infrastructures (ESFRI), European partnerships, EARTO, Bilateral cooperation, Slovenia's Smart Specialization Strategy (excluding SRIPs: Factories of the Future, Smart Cities and Communities, GoDigital), JSI web page International Cooperation, Science Business – Widening, Gender equality.

Administrative and financial support is provided by the International Project Office (U6), headed by dr. Maja Leber and assisted by Marja Mali, M.Sc. The International Project Office offers support and assistance to the research departments in administrative, technical and financial matter within the framework of international programs and other international commercial projects. They carry out tasks for controls, audits and financial reporting requirements, collect data for project and analysis needs and gather information via the Participant Portal and other comparable apps to research departments. They also provide organizational and strategic support to the JSI management.

The working of both offices are described in more detail in **ROMANDIC** Deliverable D2.1 (marked sensitive).

Besides these, support services at JSI include two more offices that deal with other aspects of project support: U7 - Office for Substantive Project Support, Technology Transfer and Innovation, headed by Robert Blatnik, M.Sc, and U9 - Office for Project Informatics, Organization of Thematic Events and Conferences, headed by Marjeta Trobec, M.A.

JSI's support services are thus set up for systematic support and progress over the complete spectrum of project types. The centralized services offer administrative and financial support, technology transfer support and representation at the EU level (e.g., EARTO, SIB), where they also participate with

position papers and active roles in preparation of open calls. Additionally, decentralized services are offered by specialized project officers at research departments.

Due to greater involvement of U7 and U9 in industrial projects, the following content deals exclusively with the Director's Office U1 and International Project Office U6.

## 1.1 Researcher's Perspective

It is fair to say that the above-mentioned offices, i.e. the Director's Office U1 and International Project Office U6 are active in their support of JSI researchers and help within the limits of their personnel and financial constraints, often going beyond what is needed and requested and going out of their way to help the researchers. The offices are also working on improving their services, as also described in **ROMANDIC** Deliverable D2.1. However, the realities of many funding programs make the environment extremely competitive and any and all assistance might be the key to bringing success in obtaining research funding. While excellent, state-of-the-art research is still at the center, additional support by institutional services can help researchers be more successful.

## 2 Examples of Practices with Project Partners

As part of **ROMANDIC**, project members project offices held a workshop in June 2025 to discuss the working within separate institutions, exchange ideas and best practices and also see the perspective of other institution project offices. The event is described in **ROMANDIC** deliverable D6.3.

Without breach of confidential information, it can be stated that there are considerable similarities between the offices of project partners JSI, KIT and CSIC, while there are also differences, often because of the size and scope of organizations. For example, CSIC *per se* serves research organizations in the whole of Spain, KIT has thousands of students, and JSI is a research institute.

Again, without breach of confidentiality, we can identify several specifics by each partner that can be used to improve the success rate of researchers at JSI when applying for funding. These are included in the next section as a part of the proposal for improvement of JSI's common services for general researcher assistance in project proposal preparation, without any specifics on the calls.

### 2.1 JSI

JSI has developed extensive training and preparation for application to ERC funding. Due to the specifics of this type of funding, addressing basic research, common approaches can be used over different research topics, and a unified approach can significantly contribute to the quality of applications. However, this is mainly due to the quality of service, which is showing enviable results.

Furthermore, JSI has considerably contributed to the development of Gender Equality plans for research institutions and has also won two awards on the topic: in 2026, JSI won the [Newcomer Gender Equality Champions](#) award on the EU level for addressing key areas through concrete actions and establishing a framework to prevent gender-based violence, sexual harassment, and bullying. In 2025 JSI has won HR&M project of the year 2025 award on the national level for the "Public Sector" category, see [here](#).

## 2.2 CSIC

Through the interaction with personnel from CSIC at the **ROMANDIC workshop for project offices**, we have learned that while CSIC deals with institutions in the whole of Spain, separate institutions also have separate project offices. Such is the case with The Institut de Robòtica i Informàtica Industrial (IRI), a Joint University Research Institute participated by the Spanish National Research Council (CSIC) and the Technical University of Catalonia (UPC) that conducts basic and applied research in human-centered robotics and automatic control. Partners in **ROMANDIC** are from IRI.

The IRI Strategic Office works in close coordination with CSIC central and regional structures, offering researchers two complementary levels of support: centralized CSIC services (policy analysis, Brussels representation, legal and financial management, and pre- and post-award assistance) and tailored support at the IRI level. This structure ensures that local research teams benefit both from institutional backing and from hands-on, personalized guidance adapted to their specific research lines.

At the local level, the Strategic Office provides comprehensive support across the full lifecycle of international research projects. First, it helps research teams identify relevant funding opportunities by systematically sharing information on open and upcoming calls and aligning them with IRI research priorities. Second, it actively supports the development of competitive EU proposals through idea evaluation meetings, partner search assistance, benchmarking, proposal review (internal, CSIC/UPC, or external), budget preparation using CSIC templates, impact section development, administrative form checks, and final submission support. This structured pre-award assistance reduces the administrative burden on researchers and increases proposal quality and success rates.

Beyond proposal preparation, the Office provides ongoing project management and capacity-building services. During implementation, it supports consortium and grant agreement processes, financial reporting and timesheet control, technical reporting, deliverable tracking, document storage, meeting organization, and communication and technology transfer activities. Overall, the IRI Strategic Office functions as a strategic enabler for local research teams, combining funding intelligence, proposal engineering, administrative management, networking, and talent attraction to improve IRI's participation and leadership in international research projects.

In short, the IRI Strategic Office provides tailored services to individual researchers, but with the full backing of the CSIC.

## 2.3 KIT

The KIT Research Office (Forschungsförderung – FOR) is the central unit responsible for research funding support and strategic research coordination at the Karlsruhe Institute of Technology. FOR is both a strategic think tank and an operational funding service hub within KIT.

Operationally, the Research Funding Service supports the entire project life cycle—from call identification to proposal submission and formal approval. It provides advice on identifying suitable funding opportunities, proposal development (including procedures, budgeting, and best practices), proofreading, seed funding, and internal preselection procedures.

FORscience offers a dedicated paid proposal and project management service without basic institutional funding. It offers hands-on operational management for large collaborative initiatives (EU, DFG CRCs, Clusters of Excellence, federal ministries, ESA), covering both proposal and project

phases. During proposal preparation, FORscience supports communication among applicants, coordination of contributions, budget setup, drafting of non-scientific sections, structural feedback, proofreading, and submission. During project implementation, it reduces the administrative burden on scientists by handling consortium coordination, financial administration and budget controlling, progress monitoring, reporting, event organization, dissemination, and website maintenance. Thus, while the core Research Office provides institutional funding advice and strategic coordination, FORscience operates as a fee-based, project-oriented management service designed to professionalize and externalize the administrative workload of complex research initiatives.

### 3 Proposed Model of Common Services Assistance in Project Proposal Writing and Project Implementation

As stated earlier, researchers at JSI appreciate and embrace the support offered by the dedicated services provided by JSI. In the following we provide some proposals which we think would strongly improve the overall success rate of applications for project funding.

#### 3.1 Career Guidance and obligatory Soft-Skill Education

This is based on the results of the SWAT analysis conducted with JSI researchers, described in **RO-MANDIC** Deliverable D2.1. The results showed that researchers are often expected to do some things, but are not fully informed on what is expected, how it is done and what services are there at disposal.

Thus, to improve funding success rates, structured education and career guidance must begin early among PhD candidates and postdoctoral researchers, and must be embedded institutionally rather than offered ad hoc. Researchers should receive systematic training in grant landscape navigation (EU, national, foundations), proposal design, impact writing, budgeting, and consortium building, combined with clear internal communication channels for call dissemination. Targeted information sharing is essential: curated funding alerts aligned with research profiles, internal matchmaking events, and transparent calendars of strategic calls can reduce fragmentation and duplication of effort. Equally important is the establishment of formal mentorship structures, where senior researchers and trained research development professionals provide individualized career roadmaps—clarifying when to apply for mobility grants, fellowships, ERC-type schemes, or coordinated projects. Empowerment should be reinforced through internal seed funding, structured peer-review panels, and constructive evaluation methodologies that provide written feedback, mock interviews, and iterative improvement cycles rather than one-off assessments. Note that internal funding schemes for early-career stage researchers are already provided by JSI. Also note that work in this direction is already underway at the JSI's aforementioned U1 and U6 offices, as well as in the human resources office U2.

Beyond technical proposal skills, career development support must be institutionalized through obligatory training programs that ensure equal access to knowledge and opportunities. Mandatory modules on career planning, project preparation, research leadership, and funding strategy should be complemented by structured education on gender equality, unconscious bias, inclusive leadership, and the integration of the gender dimension in research content. Such training helps researchers understand both eligibility requirements and evaluation criteria increasingly applied in European and

international funding schemes. Institutions should establish transparent incentive systems that recognize collaborative proposal development, mentoring contributions, and interdisciplinary engagement, while discouraging silo behavior and internal competition. Clear communication of institutional goals, shared strategic priorities, and inclusive decision-making processes can reduce fragmentation and foster collective ownership of funding success. Embedding gender-sensitive mentoring, monitoring participation rates by gender and career stage, and ensuring fair access to internal seed funding and pre-selection processes further strengthens equity and competitiveness. When career guidance, project development skills, and gender equality training are compulsory and systematically implemented, early-career researchers are better equipped, more confident, and more competitive in securing research funding.

In short, this can be summarized by:

- Structured and obligatory training in grant writing, project preparation, and funding strategy
- Clear career guidance frameworks with formal mentorship and individualized roadmaps
- Transparent communication systems and targeted funding information sharing
- Gender equality education, including unconscious bias, inclusive leadership, and integration of the gender dimension in research
- Incentive structures and institutional culture that promote collaboration, empowerment, and shared strategic goals

### 3.2 Internal "Mini Project Offices" on top of a Common Service

Providing targeted information to researchers requires the creation of “mini project offices” / cross-departmental coordinators embedded directly within research groups rather than operating as distant administrative units. While large central research support structures are essential for handling institutional policies, legal frameworks, and high-level coordination, local project offices can translate this broader intelligence into tailored, research-line-specific guidance. Being close to the scientific teams allows project officers to understand individual strengths, ongoing work, long-term ambitions, and internal dynamics. Instead of distributing generic funding alerts, they can proactively match calls to concrete project ideas, identify suitable partners, and align opportunities with strategic priorities. This proximity fosters trust, encourages early idea-sharing, and ensures a two-way flow of information between researchers and institutional leadership. This does not mean a completely decentralized structure, but an extension of the common services Project office with cross-departmental coordinators embedded into several departments at once, fostering collaboration and synergies among them.

Such embedded coordinators should function as strategic partners, not administrative gatekeepers. By participating in group meetings and engaging in informal exchanges, they become part of the research ecosystem, helping to shape proposal concepts from the earliest stages. They can support the full project lifecycle—from opportunity scanning and proposal structuring to budgeting, submission, and project implementation—while coordinating with central services for compliance and formal procedures. This integrated model reduces fragmentation, strengthens common goals, and minimizes duplicated efforts. When researchers perceive the project office as an integral part of their team, collaboration improves, communication barriers diminish, and the overall success rate in competitive funding applications increases.

In short, this can be summarized by:

- Embed mini project offices/coordinators within research groups, but across several departments at once, to ensure proximity, trust, and deep understanding of research lines and individual career goals.
- Provide targeted and strategic funding intelligence by matching calls to concrete ideas rather than distributing generic information.
- Act as strategic partners, not administrative gatekeepers, contributing early to proposal shaping and long-term research planning.
- Support the full project lifecycle (from call identification to implementation) while coordinating with central institutional services for compliance.
- Strengthen internal communication and shared goals, reducing fragmentation.

### 3.3 Continuous Presence and Help in Adhering to the Call

This proposal comes from experience in preparing project proposals with partners from Bavaria, Germany, see <https://www.bayfor.org/en/eu-funding/our-services.html>.

In Bavaria, research support goes beyond simple funding calls lists — institutional structures provide hands-on administrative assistance throughout the project preparation process. The Bavarian Research and Innovation Agency and its EU funding arm (often operating through the Bayerische Forschungsallianz GmbH – BayFOR) offer expert advisors who actively support researchers by advising on suitable national, regional and European funding programmes and helping shape proposals from the earliest stages. These services can include attending coordination meetings with researchers and partners to answer immediate questions, helping interpret complex call requirements, facilitating partner searches, and actively supporting consortium building, not just providing written guidance or generic information. Such involvement ensures that researchers are not navigating the funding landscape alone but have expert administrative partners helping translate ideas into competitive proposals.

This model emphasizes proactive engagement: rather than waiting for researchers to come with fully formed plans, Bavarian support offices often participate directly in coordination activities, providing real-time clarification, strategic input, and procedural advice during meetings with project teams. Because at least one Bavarian partner must be involved for many of these services, this approach encourages local integration while still benefiting international consortia. Such embedded administrative support helps reduce the cognitive and organisational load on researchers, shortens feedback loops, and improves the overall quality and competitiveness of applications for complex programmes like Horizon Europe and other collaborative research initiatives.

This can be summarized with:

- Ensure continuous administrative presence during proposal preparation meetings, with a dedicated expert attending coordination sessions to provide real-time clarification on call requirements, eligibility rules, budgeting, and documentation.

### 3.4 Project Office as Project Partner

This is based on practice at KIT.

A strategic approach to strengthening research performance is to establish a project office model that not only advises on funding opportunities but also formally assumes responsibility for selected operational tasks within funded projects. Under this model, the project office would take over cross-cutting activities such as dissemination and promotion, communication management, elements of intellectual property (IPR) coordination, exploitation planning, consortium coordination, reporting, financial monitoring, and selected aspects of project management. By professionalizing these functions, the office would significantly reduce the administrative and managerial burden on principal investigators and research teams, allowing them to concentrate on scientific excellence and innovation. Embedding these competencies within a specialized unit ensures compliance with funder requirements, improves consistency in quality standards, and enhances the visibility and impact of project results.

To ensure sustainability and accountability, the project office's contribution should be directly funded through project budgets, with its services clearly defined in work packages or cost lines. Rather than relying solely on institutional base funding, this model establishes the office as an operational project partner whose role and responsibilities are formally recognized within each consortium. Such a structure aligns incentives, creates measurable added value, and supports long-term capacity building in professional project management. By integrating administrative, communication, and IPR expertise into the core implementation structure of funded projects, institutions can increase efficiency, improve compliance and reporting quality, and strengthen their competitiveness in complex national and international funding programmes.

This can be summarized with:

- Implementation of appropriate organizational infrastructure that includes the ability to assume defined operational roles (e.g., dissemination, communication, IPR coordination, reporting, financial monitoring, consortium management).
- This reduces administrative burden on researchers, enabling principal investigators to focus on scientific leadership and research excellence.
- It also professionalizes project implementation, ensuring compliance with funder requirements and consistent quality standards.
- Services are funded directly from project budgets, with clearly defined work packages or cost lines to ensure sustainability and accountability.
- This strengthens institutional competitiveness and capacity, improving efficiency, impact, and success in complex national and international funding programmes.

### 3.5 Conclusion

In summary, the inclusion of the four services described above is as follows:

- Career Guidance and obligatory Soft-Skill Education,

- Internal "Mini Project Offices" and/or cross-departmental coordinators on top of a Common Service,
- Continuous Presence and Help in Adhering to the Call,
- Project Office as Project Partner.

This would, in our opinion, greatly improve the success rate of application for project funding. Given the financial and overall resource-constraints, we are aware that the implementation of such a model is a long process.