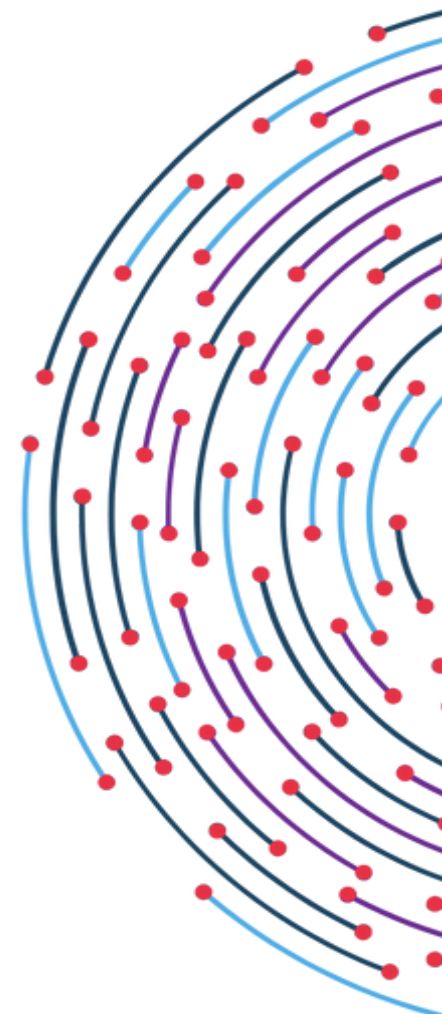


TWINRELECT

Twinning for excellence in reliable electronics



D3.2

DELIVERABLE REPORT

D3.2 1st Research Management Handbook

WP3: Enhancement of Management and Administration
Capacity



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Executive Summary

This Research Management Handbook serves as a practical user manual for members of the International Projects Office at the University of Thessaly (UTH), as well as for UTH researchers and administrative personnel involved in research activities. It provides broadly applicable guidance on European research programmes and the fundamental principles of preparing, coordinating, and managing collaborative research projects.

The Handbook introduces major European research funding programmes relevant to UTH, outlines common funding mechanisms, and explains the typical lifecycle of a proposal from call identification to implementation. It further presents key project management elements, including core contractual documents, work planning, management structures, monitoring and reporting practices, and the role of financial coordination at consortium level. In addition, it summarises essential principles of administrative and financial management, documentation requirements, and project risk management. Finally, it highlights commonly used research management tools and general best practices in dissemination, exploitation, and communication to support project visibility and impact.

This first Handbook provides a general framework applicable across project types, while a second Handbook will focus specifically on EU-funded projects and the detailed steps required for their implementation.

1. Introduction

1.1 Purpose of the Handbook

The purpose of the **Research Management Handbook** is to serve as a practical user manual for members of the International Projects Office at UTH as well as for all researchers involved in research activities at UTH. This Handbook is designed to support UTH staff in preparing, coordinating, and managing collaborative research projects by presenting the core principles and procedures for effective research management and administration that apply across a wide range of project types. This **first Handbook** provides broadly applicable guidance on European projects and key research management principles, while the **second Handbook** will focus specifically on EU-funded projects and the detailed steps required to manage them.

1.2 Objectives and target audience

The contents of this Handbook are intended to:

- Provide a high-level introduction to European research programmes, funding mechanisms, and the general lifecycle of research calls
- Introduce the fundamental concepts and steps involved in research project preparation
- Offer guidelines for the effective management and administration of collaborative research projects
- Present essential principles of financial and administrative management, as well as general approaches to project risk management
- Outline commonly used research management and administration tools
- Describe general approaches to dissemination, exploitation, and communication in research projects

This Handbook is designed for:

- Staff of the International Projects Office at UTH
- UTH researchers and administrative personnel involved in preparing or managing research projects
- Early-stage researchers engaged in collaborative research activities who need an introduction to basic research management concepts
- Individuals outside UTH seeking guidance on project management and administration

2. Introduction to European research project calls

European research project calls offer funding opportunities within a structured framework aiming at supporting collaborative research and promoting technological innovation across the EU, while addressing global challenges. To effectively exploit such opportunities, it is essential to understand the landscape of European programmes, their funding mechanisms, and the lifecycle of a project call. This section provides a high-level overview to familiarize UTH staff and researchers with the most common European research programmes and how calls for proposals typically function.

2.1 Overview of European research programmes

In a rich and diverse European funding landscape that continuously evolves, researchers often face the challenge of identifying the most appropriate call for a given research idea. European research programmes differentiate according to their scope, objectives, target audience, covering a range of actions from research and innovation activities to capacity building and policy support initiatives [1]. Attempting to monitor all possible funding opportunities may be impractical and inefficient. To this end, the following subsection highlights some of the most common European research programmes in which UTH researchers, as well as researchers from other institutions, are likely to submit proposals, serving as a starting point for call identification and project planning.

2.1.1 Horizon Europe

Horizon Europe is the EU’s fundamental funding programme for research and innovation [2]. It supports scientific excellence, innovation, and collaborative research addressing societal challenges, while boosting EU competitiveness, contributing to EU policy priorities and strengthening the European Research Area (ERA). The programme covers the full research and innovation spectrum and is structured around three main pillars, complemented by dedicated work programmes (see Figure 1).

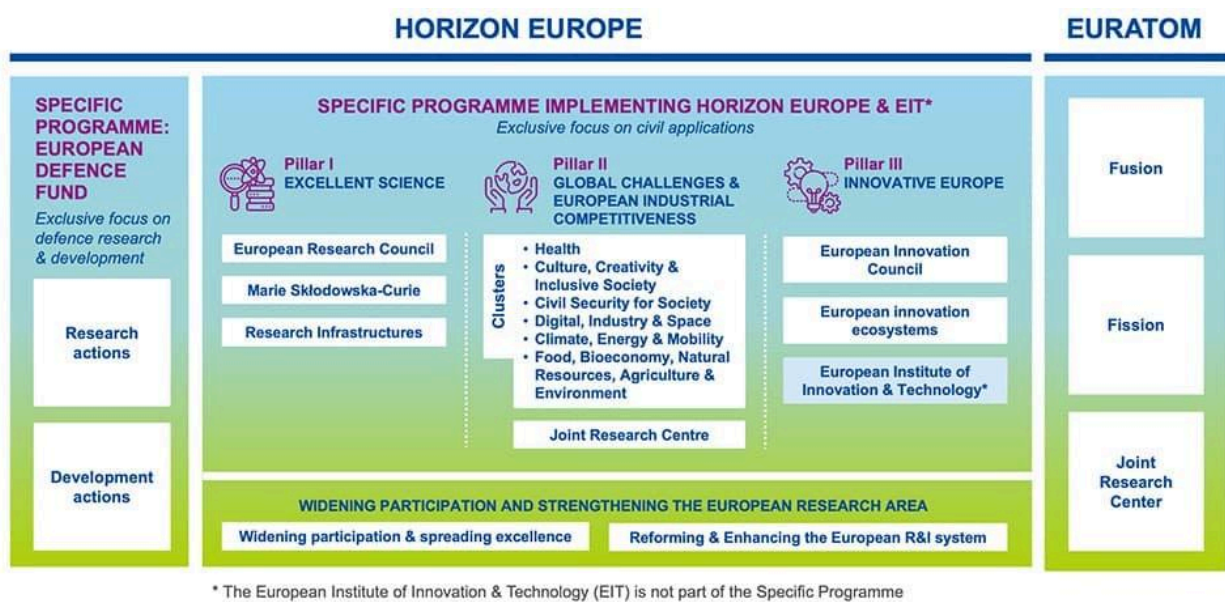


Figure 1: Horizon Europe Programme (2021-2027) structure

- **Pillar I - Excellent Science**

It aims to promote scientific excellence and enhance the EU’s position in global research. More specifically, the **European Research Council (ERC)** provides funding enabling frontier research and pioneering scientific ideas powered by highly-skilled researchers across all fields. The **Marie Skłodowska-Curie Actions (MSCA)** support researchers at all career stages providing training and mobility opportunities, therefore contributing to the development of an innovative workforce capable of addressing current and future societal challenges. Finally, **Research Infrastructures** provide top-tier resources and services to facilitate research across the EU, supporting scientific advancement and innovation.

- **Pillar II - Global Challenges & European Industrial Competitiveness**

It supports collaborative research addressing major societal challenges and EU policy objectives while strengthening the EU's industrial and technological capacity. The actions in this pillar are organised into **6 clusters** (i.e., Health; Culture, Creativity & Inclusive Society; Civil Security for Society; Digital, Industry & Space; Climate, Energy & Mobility; Food, Bioeconomy, Natural Resources, Agriculture & Environment) and a **separate cluster** for non-nuclear direct actions of the Joint Research Centre (JRC), therefore boosting innovation in key sectors and contributing to the EU's sustainability objectives.

- **Pillar III - Innovative Europe**

This pillar aims to promote breakthrough and market-creating innovation with global impact, primarily through the **European Innovation Council (EIC)**, offering multiple types of funding. It also includes actions to reinforce **European Innovation Ecosystems (EIE)** by fostering collaboration among innovation actors at local, regional, and national level, as well as the **European Institute of Innovation and Technology (EIT)**, which contributes to sustainable innovation ecosystems and supports entrepreneurial skills development through lifelong learning, university engagement, and the transformation of solutions to global challenges into societal and economic value.

- **Widening participation and strengthening the European Research Area**

- **Widening participation and spreading excellence**

This programme aims to reduce disparities in research and innovation performance across Europe and to foster a more balanced and inclusive ERA. It focuses on strengthening the research capacity of widening countries and is implemented through targeted instruments such as Teaming for Excellence, Twinning, ERA Chairs, ERA talents, and Hop-on Facility, which facilitate access to excellence, integration into European research networks, and increased participation in collaborative research and innovation activities.

- **Reforming and enhancing the European Research and Innovation system**

This programme seeks to strengthen the European Research and Innovation (R&I) system by aligning national reforms with EU-level initiatives under the ERA. It promotes evidence-based policymaking, foresight, open science, and stronger links between research, innovation, and higher education. Ultimately, it aims to build interconnected knowledge ecosystems and attractive research careers that support Europe's long-term competitiveness and societal impact.

- **Specific Programme - European Defence Fund**

The European Defence Fund (EDF) is the European Commission's main initiative to boost collaborative research, development and innovation in the field of defence across the EU. It provides funding and support to consortia of companies, research organisations and institutions from different Member States to develop innovative, interoperable defence technologies and equipment addressing identified security and defense priorities. Through multi-thematic annual work programmes, the EDF is implemented directly by the European Commission to strengthen

cooperation in defence R&D, enhance the EU’s technological edge and strategic autonomy, and support a more competitive and integrated European defence industrial base under the 2021–2027 framework.

- **Euratom**

The Euratom Research and Training Programme is a complementary EU funding programme to Horizon Europe focused on nuclear research, innovation and training. It supports direct actions by the Commission’s Joint Research Centre as well as collaborative research activities by multi-partner consortia to advance nuclear safety, security, radiation protection, radiation waste management, fusion energy and related fields. The programme uses the same rules and instruments as Horizon Europe, promotes skills development and researcher mobility in the nuclear domain, and aims to strengthen Europe’s technological leadership and expertise in nuclear science and technology.

2.1.2 Eurostars

Eurostars is an international funding programme supporting collaborative Research and Development (R&D) projects led by innovative small- and medium-sized enterprises (SMEs) [3]. It focuses on R&D projects, promoting cooperation with research organisations and partners from different countries and facilitating access to international markets providing targeted commercialisation services. Supported by the Eureka Network and being part of the European Partnership on Innovative SMEs, it is co-funded by the EU through Horizon Europe as well as national funding agencies in participating countries or regions.

The R&D project consortium must include at least two independent partners from different Eurostars countries, while the lead SME or startup must also be established in a participating Eurostars country. Additionally, the consortium may include other SMEs, universities, research organisations, or larger companies, depending on the project’s objectives. Typical consortium compositions of Eurostars projects are presented in Figure 2. As illustrated, Eurostars projects are predominantly SME-driven, either as SME-only consortia or in collaboration with research organisations and other partners.

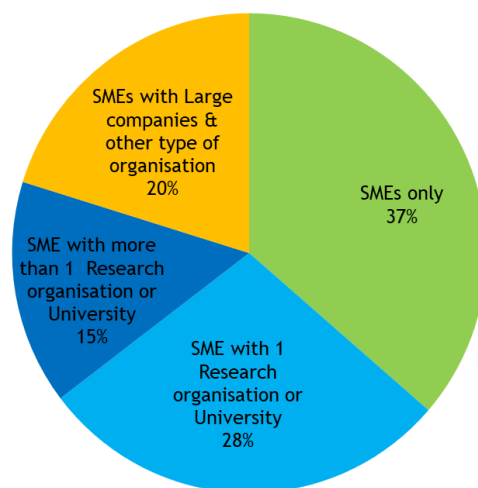


Figure 2: Distribution of consortium types in Eurostars projects. (Source: Andjelkovic, M. (2026). *An overview of European Calls for Collaborative Research Projects*, 3rd TWIN-RELECT Research Management and Administration Workshop)

The focus of the project must be on civil applications, and the project duration is limited to a maximum of 36 months. Participation is subject to eligibility criteria defined at both programme and national levels, including requirements related to consortium composition and project scope, while research topics are defined by the applicants, and calls are typically organised biannually.

2.1.3 CORNET

CORNET (Collective Research Networking) is a transnational network of ministries and funding agencies that coordinate their existing research funding schemes to support pre-competitive international research projects in favour of SMEs [4]. To jointly tackle common technological challenges, SMEs from multiple countries that lack research capacity form a consortium that receives funding to assign specialised research organisations to implement a research project. After project completion, SMEs gain access to the research results, thereby increasing their competitiveness through this collective research. Rather than funding projects directly, CORNET aligns national and regional funding mechanisms to enable cross-border collaboration and promote the wide dissemination of research outcomes. Participation is based on cross-border collaboration and is governed by national and regional eligibility rules, while research topics emerge from the shared needs of the participating SMEs.

2.1.4 IraSME

IraSME (International research activities by SMEs) is a network of national and regional funding agencies that coordinates collaborative R&D activities among SMEs across participating countries and regions with the aim of supporting their growth in competitive global markets by bridging the gap between research and market-ready solutions [5]. Market-oriented research topics are defined by the participating SMEs and focus on the development of innovative products, processes or services. IraSME acts as an umbrella, providing information and administrative support to both applicants and agencies, whereas the funding is provided through the respective national or regional programmes. Participation is subject to eligibility criteria defined at both network and national level, including requirements related to consortium composition and cross-border collaboration. The coordination of the network is financed by the German Federal Ministry for Economic Affairs and Energy (BMWE).

2.1.5 ESA programmes

The **European Space Agency (ESA)** is an intergovernmental organisation responsible for Europe's space activities that focus on the peaceful exploration and use of space [6]. ESA programmes support research, technology development and innovation across the full space value chain, from scientific research and technology maturation to demonstration and operational applications. Funding is mainly provided through competitive calls and thematic tenders that are open to universities, research organisations, industry (including SMEs and start-ups) and public authorities, and typically requiring multinational consortia involving partners from ESA Member States.

Indicative funding examples include technology maturation programmes (e.g. GSTP - General Support Technology Programme), application-oriented funding schemes supporting satellite-enabled services (e.g. ARTES), and open innovation funding instruments such as OSIP - Open Space Innovation Platform, which provides bottom-up funding for novel ideas, feasibility studies and early-stage research aligned with ESA priorities. ESA's co-funded research programme dedicated to PhD students and PostDocs is also managed by OSIP. These actions aim to increase interaction between ESA and European universities. Additional ESA funding opportunities specifically target SMEs and new entrants, aiming to strengthen

European industrial competitiveness and facilitate the transition from research results to operational space systems and services.

2.2 Funding mechanisms

European research programmes apply different funding mechanisms to support research and innovation activities, reflecting policy priorities, target groups, and the expected maturity of project outcomes. Understanding these mechanisms is essential for applicants in order to identify the most appropriate funding opportunity and align their project idea with the requirements of a given call.

The basic distinction among funding mechanisms is between top-down and bottom-up approaches. In top-down schemes, research topics and expected impact are defined by the funding authority. Applicants must ensure their proposed project is fully compatible with the specific topic and contributes to the required policy objectives. This top-down approach is commonly adopted in large thematic programmes, such as the calls under the Horizon Europe Pillar II, where projects are expected to address major societal challenges and specific EU policy goals. In contrast, in bottom-up schemes, the applicants define the research topic while ensuring that their proposal aligns with the general objectives of the programme. Such schemes, used for example by Eurostars or CORNET calls, are typically driven by scientific excellence, innovation, and market needs identified by the applicants.

Funding mechanisms also differ in terms of the expected level of technological maturity of project outcomes. Technology Readiness Levels (TRLs) are a scale used to describe the maturity level of a specific technology, ranging from the basic conceptual stage to the final stage where the technology is commercialised. Many EU funding programmes require projects to target a specific TRL range in order to be eligible for funding. Therefore, applicants must ensure that their proposal meets the TRL eligibility criteria defined in the call.

Another important characteristic is the type of action used to structure funding support. In EU programmes, different instruments are applied to reflect varying objectives and risk profiles, such as Research and Innovation Actions (RIA), Innovation Actions (IA), Coordination and Support Actions (CSA), or Programme Co-Fund Actions (COFUND). Each action type defines the nature of supported activities, the expected outputs, and the role of participating organisations within the project.

Funding mechanisms further vary with respect to reimbursement models as well as co-funding approaches. Depending on the programme and call, funding may be provided through reimbursement of eligible actual costs, flat rate contributions for indirect costs, or lump sum approaches. In several international programmes, funding is coordinated at transnational level but implemented through national or regional funding agencies, with each partner financed according to the rules of its respective funding authority.

In conclusion, understanding the different types of funding mechanisms lays the foundation for successful proposal preparation. To this end, careful consideration of the project's objectives, expected impact, maturity level, and consortium composition is paramount in selecting the appropriate funding mechanism.

2.3 Understanding calls and proposal lifecycle

Understanding the basic processes and lifecycle of research proposals is essential for potential applicants to secure funding for their idea and ensure successful project implementation. In general, research

projects funded through competitive calls, such as EU-funded projects, follow a structured lifecycle that can be divided into four fundamental phases: preparation, submission, evaluation, and implementation. While each phase comprises several sub-phases as shown in Figure 3, this structure provides a clear and practical framework for understanding the typical progression of such projects through to completion.

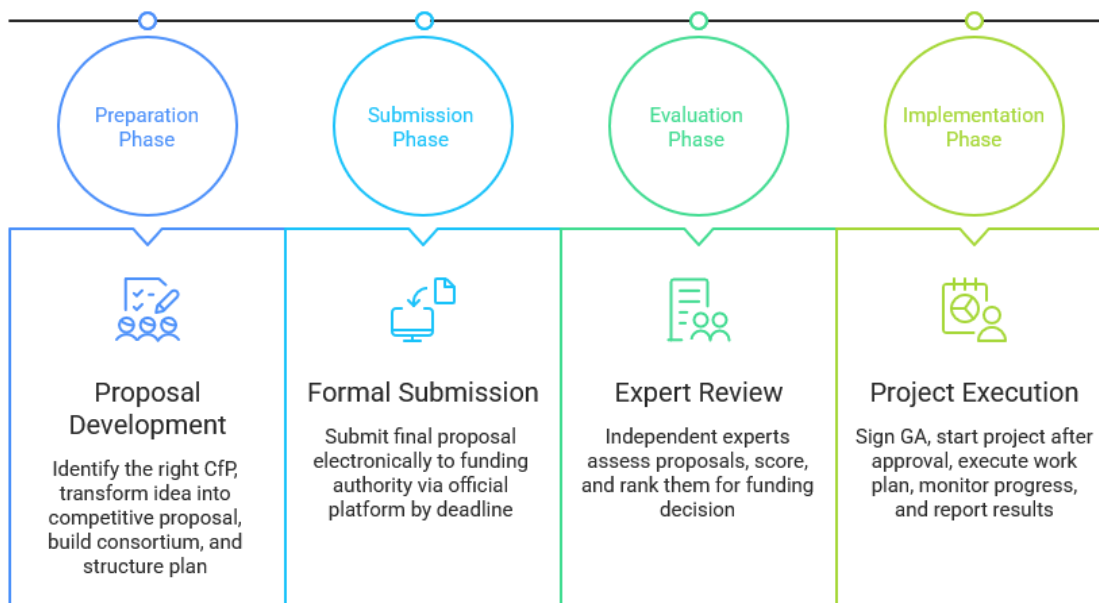


Figure 3: Project proposal lifecycle

- **Preparation phase**

The starting point of the project lifecycle that is critical in shaping the quality of a proposal is the preparation phase. This is the phase where the initial project idea is progressively transformed into a robust and competitive proposal. The first step includes the identification of the appropriate **Call for Proposals (CfP)**. A CfP is a mechanism established by an organisation to award research grants. Each CfP defines specific objectives that proposals are expected to address and may target particular research areas, technological innovations, societal challenges, etc. The applicants review the relevant CfPs in order to align the project idea with the unique requirements dictated by the funding organisation. These requirements typically include the objectives and expected outcomes, scope, funding scheme, consortium composition, eligibility criteria, budget constraints, evaluation criteria, etc. Identifying the most appropriate call is strategic, as it frames all subsequent proposal development efforts.

Another key element in the preparation phase includes the selection of the project consortium. As most of the EU-funded projects are collaborative, selecting partners that complementary provide the scientific, technical, and organisational expertise to address the project challenges is significant. Therefore, early coordination among partners lays the foundation for effective collaboration throughout the project lifecycle.

The preparation phase often includes the development of a concept note that briefly describes the core ideas of the proposed project, including the objectives, the expected outcomes, and the overall approach. Based on this outline, a detailed proposal structure is developed, including the implementation plan, the organisation of the work packages, the indicative timeline, the budget

allocation, etc. This stage typically requires close cooperation and multiple iterations among consortium members to ensure the proposal is consistent with the requirements and expectations of the selected call.

Once the preparation phase is completed, the consortium should have a well-defined project concept, aligned with the CfP constraints, and be ready to advance to the submission phase.

- **Submission phase**

The next phase includes the formal submission of the project proposal to the funding authority for evaluation. The finalised proposal must be submitted electronically in accordance with the procedures defined in the call. Typically, the project coordinator is responsible for submitting the proposal and ensuring that all administrative information is correctly completed as well as that all required documents are uploaded in the appropriate format.

The submission mechanism may differ depending on the programme. For EU-funded programmes, proposals are submitted through dedicated online platforms, such as the EU Funding and Tenders Portal [7]. In Horizon Europe, for example, the proposal consists of two main elements. The first concerns the administrative information completed by the applicants through the online submission system (commonly referred to as **Part A** in EU-funded projects). The second element is the narrative document, uploaded in PDF format, that describes, except for administrative information, the project's objectives, methodology, planned activities, expected impact, work plan, and indicative budget allocation (**Part B** for EU-funded projects). In addition to technical content, the proposal must include dissemination and exploitation plans. All submitted materials must be complete, legible, accessible, and printable.

During the submission phase, applicants must pay attention to the procedural requirements of the call. Proposals must strictly follow the official templates and formatting rules, comply with page limits, while ensuring the accurate completion of all mandatory sections in all parts of the application. Since the deadlines are strict and the submission process requires significant effort in completing administrative information within the online platform, the applicants must ensure that all required inputs are provided in a timely and consistent manner. Late submissions are generally not accepted, while incomplete or incorrectly submitted proposals are regarded as ineligible and excluded from evaluation.

Once the proposal is successfully submitted, no further modifications are possible. The proposal afterwards formally enters the evaluation phase.

- **Evaluation phase**

A critical step in the lifecycle of research projects is the evaluation phase. During the evaluation process, the submitted proposals are assessed by independent reviewers appointed by the funding organisation, with strong expertise relevant to the call topic. These experts confidentially review proposals according to predefined evaluation criteria, including the relevance, scientific excellence, expected impact, feasibility of the proposed implementation, realistic timelines and budget allocation.

Based on the evaluation results, the proposals are scored and ranked within the same call topic or funding scheme. Then, the funding decisions are taken considering the available budget for the specific call.

After the completion of the evaluation process, applicants are officially notified about the outcome. Evaluation results and feedback are communicated through the relevant submission online platform and by e-mails. Proposals accepted for funding are invited to proceed to the next phase, while the unsuccessful applicants may use the feedback regarding the strengths and weaknesses of the proposal to support future re-submissions.

The duration of the evaluation phase varies depending on the programme and call, but it typically extends over several months before final results are announced.

- **Implementation phase**

The implementation phase starts immediately after the proposal has been formally approved for funding and the contractualisation process has been completed. This process establishes all obligations and responsibilities of the involved parties, as well as the funding framework governing project execution, through the signing of the **Grant Agreement (GA)** between the funding authority and the project coordinator. The GA preparation requires close interaction among the project coordinator, the participating beneficiaries, and the Project Officer (PO). During this stage, only minor corrections or clarifications can be introduced, subject to agreement with the PO. Usually, along with the GA, the project beneficiaries proceed to the **Consortium Agreement**, which is a formal binding contract defining their internal rights and obligations with respect to the implementation and organisation of the action, in accordance with the GA.

Following the signing of the contracts, the project is officially funded, and its activities according to the approved proposal start, typically with the kick-off meeting. During this meeting, consortium members align on project objectives, roles and responsibilities, timelines, and coordination procedures. Throughout the implementation phase, the partners execute the work plan, perform the scheduled activities, produce deliverables, and work towards achieving the defined milestones and objectives. Continuous monitoring of the progress is essential to ensure alignment with the agreed scope and schedule. To this end, the beneficiaries are required to submit periodic technical and financial reports to the funding authority.

The implementation phase concludes with the successful completion of the project activities and the submission of the final reports, including a final technical report summarising the results achieved and the final financial statements, together with any required supporting documentation. These steps formally mark the closure of the project.

3. Introduction to management of collaborative research and development projects

3.1 Key documents and agreements

The implementation of collaborative research projects is regulated by a set of formal documents that establish the legal and operational framework. These documents define the responsibilities, obligations, and procedures that are applicable to all partners, ensuring coordinated implementation in accordance with agreed objectives and timelines. Although the documentation requirements may vary depending on

the funding programme, most collaborative projects rely on a typical set of documents as described below.

- **Grant Agreement**

The **Grant Agreement (GA)** is the formal contract signed between the funding authority and the project coordinator, acting on behalf of the consortium. The GA defines all aspects of the project, including the scope and objectives, duration, budget, reporting obligations and funding rules that set the conditions under which the grant is awarded. It also includes provisions related to eligible costs, amendments, audits, intellectual property issues, and compliance with ethical and legal requirements. In EU-funded projects, the GA typically includes the **Description of Action (DoA)**, which contains the approved work plan detailing the work packages, deliverables, milestones, timeline, and resource allocation per beneficiary. The DoA serves as the reference document for the project implementation and reporting throughout its lifecycle.

- **Consortium Agreement**

The **Consortium Agreement (CA)** is a contract signed between all project partners that defines the internal mode of operation. In contrast to the GA that governs the relationship with the funding authority, the CA regulates the organisation and cooperation among the partners. More specifically, it includes partners' roles and responsibilities, decision-making procedures, intellectual property rights, publication rules, and other provisions necessary for the smooth implementation of the project.

- **Other documents**

Documentation typically includes not only the GA and the CA, but several other formal or informal documents. Although the proposal is submitted before the project is funded, it serves as a reference throughout the project duration, since most of its parts, if not all, are incorporated into the GA. During the preparation phase, it is common that the potential consortium members sign a Non-Disclosure Agreement (NDA), which protects confidential information, such as preliminary research ideas or strategic business plans. At early stages of consortium formation, a Memorandum of Understanding (MoU) or a Letter of Intent (LoI) may be signed by the partners to express a shared intention for collaboration. Depending on the funding programme, a Letter of Support from relevant stakeholders (e.g., public authorities, research institutions, businesses, or associations) may also be required to endorse project's credibility and potential impact. Last but not least, during project implementation, several internal documents are commonly used to facilitate management and coordination, and to ensure consistency in project execution.

3.2 Project work plan

A well-defined project structure facilitates its implementation and is essential in monitoring its progress. The structure of collaborative research projects is described in the DoA and includes the following components:

- **Work Packages**

The Work Packages (WPs) are the basic building blocks of the project work plan. Each WP typically includes the activities that are related to a specific objective. More specifically, a WP

contains a title and objectives, a defined scope and expected outcomes, a set of tasks and related deliverables, the estimated effort in person months, as well as the responsible partner leader. It is common that some WPs are dedicated to specific objectives. For example, most of the projects, especially EU-funded ones, dedicate a WP to Dissemination, Exploitation, and Communication in accordance with open science requirements. The tasks within each WP describe the activities that will be implemented by specific partners and need to be clearly described, realistic, and feasible within the defined timeframe.

- **Deliverables**

Deliverables are the formal outputs of the project that are submitted to the funding authority through the online platform as part of the continuous monitoring process. Typically, deliverables are characterised by a number and name, the related WP, the type, and the dissemination level. Deliverables may include implementation plans and strategies, reports on specific activities or results, prototypes, software or tools, dissemination material, etc. The dissemination level defines who can access the project results and can be Public (PU) if they are fully open, Sensitive (SEN) if they are limited under GA conditions, or EU-Classified (i.e., Restricted, Confidential or Secret) in the case of EU-funded projects. Deliverables must be submitted on time, according to the GA, to avoid delays and ensure the efficient implementation of the project.

- **Milestones**

Milestones are key control points in the project that are related to a deliverable and indicate significant achievements, allowing for the next phase of the work to begin. A milestone may also be a decision point that the consortium needs to take for the continuation of the project. Even though milestones are not always officially documented, they are considered essential to validate the project progress or identify potential corrective measures that may be needed and, thus, must be verifiable.

- **Timelines**

The project management timeline, usually expressed visually as a Gantt chart, is a roadmap that distributes and synchronizes all individual WP tasks, activities, milestones and reporting periods from the beginning to the end of the project. A realistic timeline facilitates the implementation and monitoring of the project, supports coordination among the partners, and minimizes the risk of delays that could potentially put the project in jeopardy.

3.3 General project management structure

Collaborative research projects rely on the effective collaboration of partners that commonly come from different regions, institutions or organisations, disciplines, while their experience in such projects may also vary. To successfully meet the objectives of a project, it is essential that the partners clearly comprehend their role and responsibilities from the beginning of the project. The roles and obligations are commonly described in GA and further clarified in CA as well as during project's internal coordination procedures.

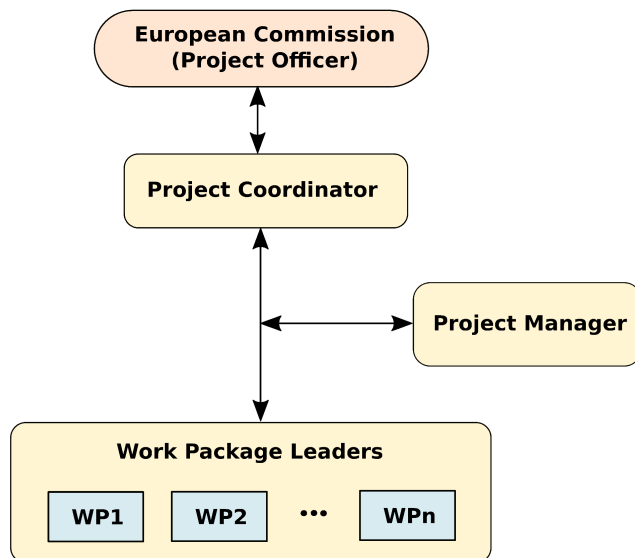


Figure 4: General management structure

Although the funding and procedural framework may vary depending on the programme, most collaborative research projects include the following key roles, as shown in Figure 4:

- **Project Coordinator**

The principal role in the management of a research project is that of the project coordinator, who is the lead beneficiary and acts as the primary intermediary between the consortium and the funding authority. One of the main responsibilities of the project coordinator is to communicate with the PO, responding to requests, and addressing administrative and financial obligations as well as any related issues that may arise. Tracking the project’s progress while coordinating the preparation of periodic and final reports, and submitting the respective documents is also the coordinator’s responsibility. Finally, the coordinator’s role is to support the project manager and ensure that the consortium meets the project’s objectives.

- **Project Manager**

The project manager acts as link between the project coordinator and the work package leaders, ensuring efficient coordination and alignment across the consortium. The main role is to lead the project team towards achieving the defined project goals and coordinate the implementation of project activities. Other responsibilities include organising meetings, monitoring timelines, tracking deliverables and milestones, and supporting internal decision-making and communication procedures.

- **Work Package Leaders**

Tasks and activities within particular work packages are usually led and coordinated by a specific consortium partner. Work package leaders allocate and coordinate tasks among the consortium members and are responsible for ensuring that the work is implemented according to the DoA, deliverables are prepared on time, and the partners involved in the work package collaborate

effectively. Their role also is to identify any potential risks and report them to the project manager so that appropriate mitigation measures can be applied to address them.

3.4 Project monitoring and reporting

Monitoring and reporting facilitate the efficient management of collaborative research projects and acts as an additional safeguard for their successful implementation. Typically, the EU research project framework includes several reporting periods throughout the project lifecycle.

Project monitoring refers to the continuous process of tracking progress of the defined work plan, ensuring that all tasks are implemented as planned and project outputs, such as deliverables and milestones, are delivered on time. Monitoring is commonly performed on a regular basis through various coordination mechanisms, including technical or administrative meetings, internal work package coordination meetings, and consortium meetings. These meetings allow partners to review progress, confirm responsibilities and deadlines, and make decisions about corrective actions when any deviation is identified.

Project reporting is the formal mechanism that allows the consortium to provide updates on the progress of the project to the funding authority. This process includes both technical reporting describing the work carried out, the status of deliverables and milestones, dissemination and communication activities, and other research-related outcomes, and financial reporting for declaring the incurred eligible costs per beneficiary and cost category.

In many EU-funded projects, reporting typically consists of **continuous reporting**, which involves the submission of deliverables, publications, dissemination and communication activities, Key Performance Indicators (KPIs), etc. throughout the project duration, as well as **periodic reporting**, which is submitted at the end of each reporting period and includes both technical and financial parts. Since deadlines are strict, reporting requires timely preparation and close coordination among partners to avoid inconsistencies and delays in the review and payment process.

In conclusion, effective monitoring and reporting is essential to ensure smooth project implementation, clear coordination among the partners and the funding authority, and successful delivery of results.

3.5 Financial management

Financial management is an essential part of collaborative research project governance and must remain strictly aligned with the GA, including its annexes. In EU-funded projects, the budget structure is defined in Annex 2 of the GA and is typically allocated per beneficiary and per cost category or work package. The distribution of financial resources reflects the technical design of the project, including its objectives, work packages, and allocated effort in person-months, as described in the DoA.

At consortium level, financial coordination ensures that the implementation of activities corresponds to the approved budget allocation and that expenditures remain within the limits and categories defined contractually. Although the project coordinator consolidates financial data and submits the consolidated financial statements where required, each beneficiary is solely responsible for the eligibility, accuracy, and traceability of its declared costs or contributions, depending on the applicable funding model. Therefore, during implementation, beneficiaries must continuously monitor the relationship between actual expenditure or implementation progress, in the case of lump sum actions, and planned activities in order to detect potential deviations at an early stage.

Depending on the funding scheme, different reimbursement mechanisms may apply, including actual costs, unit costs, lump sums, and flat-rate indirect costs. The applicable reimbursement model determines the type of financial evidence required and the level of verification during audits. However, regardless of the funding scheme, financial management should treat the budget as an operational instrument for implementing the work plan rather than merely as a reporting requirement.

The procedures related to budgeting, reporting, and documentation are addressed in Section 4.

3.6 Risk management in collaborative research projects

Risk management constitutes a fundamental dimension of research project management. In collaborative projects, the complexity of activities, the interdependence of work packages, and the contractual obligations defined in the GA create an environment in which uncertainties may directly affect implementation. To this end, risk management acts as a mechanism for maintaining stability and alignment between planned objectives and actual progress.

Rather than being treated as a separate procedure, risk management should be considered an integral element of project governance that functions as a preventive tool, reducing the likelihood that deviations escalate into significant technical, financial, or administrative issues. In this sense, risk management contributes to the overall quality assurance of the project, ensuring that the project is implemented as planned and in accordance with its contractual commitments.

By incorporating risk awareness within the project management process, the consortium enhances its capacity to address emerging challenges and protect the expected impact of the project, therefore supporting accountability and facilitating decision-making throughout the project lifecycle.

Further details on risk management, including the risk management process and typical risk scenarios with corresponding mitigation strategies, are provided in Section 5.

4. Essentials of financial and administrative management

4.1 Common administrative procedures at UTH

At UTH, the administrative and financial management of research projects funded by national and European programmes is carried out through the Special Account for Research Funds (ELKE) [8]. ELKE operates in accordance with Greek legislation governing university research accounts (Law 4485/2017, as amended by Law 4957/2022) and the internal regulations of UTH. The Research Committee acts as the central decision-making and oversight body, while ELKE and its administrative services support researchers throughout the project lifecycle, ensuring compliance with legal, financial, and funding-agency requirements.

4.1.1 Project initiation, acceptance, and ethics compliance

Before a research project can be implemented under ELKE, a formal project acceptance process must be completed. The Scientific Responsible for the project, also referred to as the **Principal Investigator (PI)**, submits the official Project Acceptance Form (commonly referred to as Form D1), which includes essential project information, the composition of the research team, and the allocation of the approved budget across cost categories (Form D18). The submitted information must be fully consistent with the

GA and the approved DoA. The project may commence once it has been formally approved by the Research Committee and received a unique identification code number.

In collaborative research projects, the PI acts as the institutional representative of the UTH beneficiary and is responsible for the administrative and financial management of the project at institutional level. This role typically corresponds to that of Project Coordinator and is carried out in close coordination with the Project Manager and the Work Package Leaders, as defined in the GA and further specified in the CA.

Projects that involve human participants, personal data, or other ethical considerations are subject to review by the Research Ethics Committee of UTH, which operates under national and European ethical research frameworks. Where required, ethics approval must be obtained prior to project implementation and documented in the ELKE administrative records.

For certain categories of contracts, such as research personnel or consultancy services, ELKE issues calls for expressions of interest that are published on the official UTH platforms and evaluated according to established institutional procedures.

4.1.2 Budgeting, financial oversight, and contract management

For each active project, investigators are required to submit an annual budget of expected revenues and expenditures to ELKE (e.g., Form D18). This ensures consistency between the approved project budget, the planned project activities described in the DoA, and the accounting records maintained by ELKE. Budget planning and execution must comply with the financial provisions in the GA, including rules on eligible costs, and audit requirements.

ELKE monitors project expenditures on an ongoing basis to ensure compliance with the approved budget, applicable national legislation, and funding-agency requirements. Budget reallocations or other financial changes typically require prior approval through established ELKE procedures.

All contracts related to project personnel or third-party services are processed through ELKE in accordance with institutional procurement rules and legal obligations. ELKE supports the administrative handling of recruitment procedures, contract issuance, payments, and related documentation, while scientific and technical supervision remains the responsibility of the project's management structure as defined in the GA and CA.

4.1.3 Reporting, project closure, and administrative support

During project implementation and at project completion, periodic and final financial reports must be submitted and reconciled with ELKE accounting records. Technical and financial reporting follow the reporting structure defined in the GA and are closely linked to the monitoring of work packages, deliverables, milestones, and overall project progress. Deliverables are submitted to the funding authority through the designated online platforms, with administrative coordination and verification supported by ELKE.

UTH provides electronic platforms that support the submission of project-related forms, ethics approvals, and administrative communication with ELKE services. Information on active projects, applicable regulations, and official documentation is available through the ELKE and Research Committee web pages [8].

Given the volume and complexity of administrative and financial procedures, the appointment of a dedicated financial or administrative assistant is considered essential for the effective management of research projects implemented through ELKE. These tasks require specialized knowledge of ELKE procedures, applicable legislation, and funding-body rules, as well as continuous coordination with ELKE services. Their systematic execution cannot be efficiently covered by the PI without adversely affecting core research activities.

4.2 Budget preparation and financial reporting

Budget preparation must be derived from the technical structure of the project as defined in the DoA. The allocation of resources across work packages and beneficiaries should reflect the planned distribution of tasks, the expected deliverables, and the estimated effort in person-months. The preparation of a coherent budget requires close interaction between researchers and administrative staff. Personnel effort must be estimated realistically, equipment and travel costs must be justified in relation to project objectives, and subcontracting activities must be clearly linked to specific tasks. Particular attention should be paid to the eligibility rules and reimbursement conditions defined in the GA, including the treatment of direct and indirect costs.

In lump sum projects, the breakdown of budget by work package and beneficiary becomes particularly significant, as payments are linked to the completion of activities rather than to declared individual costs. Once the project enters the implementation phase, there is no requirement to report incurred costs. Instead, beneficiaries must demonstrate the completion of the agreed work packages or activities as defined in the GA. The assessment focuses on the achievement of results and deliverables, rather than on cost verification.

For projects based on actual costs, eligible expenditure must comply with the fundamental principles established in the GA. Eligible costs must be incurred by the beneficiary and during the project duration, identifiable and verifiable in the accounting system, compliant with national legislation, and justified in relation to the project activities. Indirect costs are generally calculated on the basis of a flat rate applied to eligible direct costs, in accordance with the applicable funding rules.

Careful internal monitoring of progress and deliverables remains essential, as any partial implementation or failure to achieve the expected results may lead to a reduction or non-payment of the corresponding lump sum.

4.3 Documentation and record-keeping

Systematic documentation and record-keeping are essential to ensure and demonstrate compliance with the GA. Beneficiaries are required to maintain sufficient records to prove the proper implementation of the project. Supporting documentation must be verifiable, auditable, and available for inspection, and may include personnel records and timesheets, invoices, proof of payment, procurement and travel documentation, and internal accounting records. At UTH, official administrative and financial record-keeping is carried out through ELKE, which maintains the institutional project file and the corresponding supporting documentation processed through its procedures. However, internal project documentation related to day-to-day implementation (e.g., meeting minutes, internal monitoring records, evidence of task and deliverable completion) remains the responsibility of the project team.

Records must be retained for a specified period, typically for several years after the final balance payment, and must be accessible for potential audits conducted by the funding authorities. Structured

archiving procedures, whether digital or physical, facilitate internal monitoring, reporting preparation, and project closure, while reducing risks during implementation and the post-project phase.

5. Risk management

5.1 Purpose and objectives of risk management

The purpose of risk management is to proactively identify, assess, and address potential events or conditions that could negatively affect the project's objectives, timeline, budget, or quality.

By systematically analyzing risks, ranging from technical challenges to legal, ethical, or external factors, project teams can implement mitigation strategies and make decisions to minimize disruptions. Effective risk management enhances project resilience, ensures smoother execution, and increases the likelihood of achieving the planned impact, while also providing transparency and accountability to funding bodies and stakeholders.

5.2 Risk management process: identification, assessment, mitigation, monitoring and review

Risk management is a dynamic and continuous process that accompanies the project throughout its lifecycle, from proposal preparation to final reporting.

It typically begins during proposal preparation, where potential risks are explicitly identified. Such risks may affect the implementation of specific work packages, the achievement of milestones, or the timely submission of deliverables, and are usually identified considering technical, financial, administrative, and partnership-related aspects. They are incorporated into the DoA and should be revisited during implementation, particularly before the end of each reporting period.

Once identified, risks must be assessed in relation to their probability and potential impact on the project's objectives, timeline, or budget. This assessment allows the consortium to prioritise risks that require immediate attention and to allocate appropriate mitigation measures. The mitigation measures defined for each identified risk should be realistic and proportionate to the level of risk identified. Mitigation strategies may include adjustments in task allocation, reinforcement of coordination mechanisms, or modification of internal timelines.

During implementation, risk monitoring constitutes an ongoing activity within internal coordination mechanisms such as the consortium and work package meetings. The consortium may maintain a structured risk register that documents identified risks, their status, and the corrective actions undertaken. If significant deviations from the work plan occur that cannot be addressed through the agreed mitigation measures, communication with the PO may be required in order to determine whether a formal amendment to the GA is necessary.

Finally, as implementation progresses, the identified risks may evolve or new risks may emerge, requiring periodic review and adaptation of mitigation strategies to align with the evolving context of the project.

5.3 Typical project risks and mitigation strategies

Although each research project has distinct characteristics, several categories of risk are frequently encountered in collaborative actions implemented under EU funding programmes.

Common risks in collaborative research projects include technical underperformance and delays in the completion of specific WP tasks, delays in deliverable preparation and reporting, variations in partner contributions, or changes in key personnel. Also, financial risks may result from inadequate expenditure monitoring or non-compliance with eligibility rules and may include significant underspending or overspending, ineligible costs, or deviations from the approved budget allocation. Administrative risks may concern incomplete documentation or reporting inconsistencies that could lead to requests for clarification, payment delays, or financial corrections.

Mitigation measures depend on the nature and severity of the identified risk but generally include early detection through regular monitoring, systematic documentation of decisions and timely corrective action, transparent communication among beneficiaries, and strict alignment with the GA and CA provisions. The integration of risk management into regular coordination mechanisms ensures that potential issues are addressed in a timely manner and that the project’s objectives, timeline, and compliance obligations are not compromised.

Several common implementation risks and possible mitigation measures are listed in Table 1. Note that for a specific project, the list of risks may be longer, and should also include specific risks related to research work.

Table 1: Typical implementation risks and corresponding mitigation measures

Description of risk	Proposed risk-mitigation measures
Underestimated staff effort for research tasks	Research tasks will be based on existing partners’ projects. If necessary, the personnel from existing projects will be involved to certain extent.
Underestimated financial resources for organizing networking and training events.	If financial resources are insufficient, some events will be organized as online events.
Inability to conduct the planned live events due to unforeseen conditions (e.g. pandemic or other external risks)	Live events will be replaced with online events. All project partners have experience in organization of online events.
Resignation, unsatisfactory performance or misconduct of a key person involved in the project.	Selection of renowned partners ensures that the key persons could be replaced if one leaves. Besides the teams involved in the project, the partners have available wider research teams.
A partner leaves the consortium	The consortium would decide whether the uncovered project activities can be carried-out by one of the other partners. If this is not possible another partner would be recruited.

The project web site is not evolving at the same speed as the project tasks	The website will be managed by the project coordinating team, which has all relevant expertise. In case of inefficient website update, an external service will be contracted, and the funding for that purpose has been included in the proposed project budget.
Submitted journal or conference papers are rejected	All partners have great experience in writing high quality scientific papers. However, if a paper is rejected, it will be revised and submitted to another journal or conference with a similar quality.
Ineffective overall management	In case of unforeseen issues, other experienced personnel at the coordinating institution can take over the managing tasks.
Delay in deliverables and project activities	The realization of project activities will be constantly monitored, and corrective measures will be undertaken if necessary (e.g. involving more people for particular tasks).

6. Research management and administration tools

6.1 Introduction and brief description of various custom and commercial research management and administration tools

A wide range of software tools may be used to enhance the organization, planning, execution, and reporting of research activities. They help researchers, project managers, and institutions achieve better efficiency, transparency, and collaboration.

In Table 2, a preliminary list of research management tools that will be considered in the project is given. Partners will also analyze other commercial and open access tools for research management.

Table 2: Preliminary list of research management tools

Tool	Description
Pubman (Publication Manager)	Custom tool developed by IHP to store all publications authored/coauthored by IHP's researchers. All publications are sorted according to first author, department, publication year, etc.
HAL (Hyper Article on Line)	It is a national (France), multidisciplinary platform for depositing and consulting the writings, works and results of scientific research by researchers and university staff. It is used by CNRS and University of Montpellier.
Elab	A database of all experimental documentation and results.

LSF (Load Sharing Facility)	A resource management framework that takes your job requirements, finds the best resources to run the job, and monitors its progress.
YouTrack	YouTrack is a proprietary, commercial browser-based bug tracker, issue tracking system, and project management software developed by JetBrains.
Jenkins	Jenkins is an open source automation server which enables developers to reliably build, test, and deploy their software.
Confluence	Confluence is a digital workspace created by Atlassian. Research teams are able to create, organise, and collaborate on various types of content, including documents, meeting notes, project plans, and more.

7. Best practices in Dissemination, Exploitation, and Communication

7.1 Purpose of Dissemination and Exploitation

Dissemination and exploitation ensure that the project’s results create real impact beyond the project consortium.

Dissemination focuses on spreading knowledge about the project’s objectives, activities, and outcomes to relevant audiences. This includes scientific communities, industry stakeholders, policymakers, and the general public. The goal is to raise awareness, enable knowledge transfer, and ensure that results are visible and accessible.

Exploitation ensures that the generated results are used in practice. This may involve integrating findings into industrial processes, developing new products or services, influencing standards, shaping policies, or enabling further research and innovation. The aim is to maximize the project’s long-term impact and ensure that outcomes lead to societal, economic, or technological benefits.

7.2 Dissemination methods

Disseminating scientific results and project outcomes to relevant audiences is a continuous process that can be performed through several methods.

The most established dissemination method is the publication of results in peer-reviewed journals and their presentation at international scientific conferences. Selecting high-impact venues aligned with the project’s thematic focus enhances both scientific credibility and visibility within the research community. Participation in leading conferences also facilitates networking, feedback from experts, and the identification of future collaboration opportunities.

In EU-funded collaborative projects, dissemination activities are not limited to the publication of results, but include a range of coordinated actions designed to maximize visibility, promote knowledge transfer, and strengthen the project's long-term impact. Such actions include the organisation of scientific workshops, special sessions, and training seminars, which constitute effective mechanisms for targeted knowledge transfer.

Digital dissemination tools also play a significant role. The development of structured online platforms or repositories facilitates open access to publications, educational materials, recorded presentations, and other non-confidential outputs. These platforms enhance accessibility, support long-term knowledge preservation, and align with open science principles.

Depending on the project scope, dissemination may also include the preparation of policy papers, technical reports, or contributions to standardisation activities.

Dissemination should be planned from the early stages of the project and continuously monitored throughout its duration. The identification of target audiences, the selection of appropriate dissemination channels, and the definition of measurable indicators (e.g., number of publications, events organized, or participants reached) support a systematic and impact-oriented approach. Effective dissemination ensures that project results are not confined within the consortium but contribute meaningfully to scientific advancement, education, industry uptake, and future research initiatives.

7.3 Communication channels and tools

While dissemination primarily focuses on sharing research results, communication activities aim to promote awareness of the project's objectives, progress, and societal relevance to broader audiences. In EU-funded projects, communication must be continuous, strategic, and aligned with the visibility requirements defined in the GA.

A project website typically constitutes the central communication hub. It provides structured information regarding project objectives, work packages, deliverables, partners, events, and publications. In addition to serving public audiences, integrated sections may support internal coordination and controlled access to project materials. Regular updates are essential to ensure transparency and maintain stakeholder engagement.

Social media platforms represent complementary communication tools that enhance outreach and visibility. Professional networks such as LinkedIn are particularly suitable for engaging with researchers, industry stakeholders, and other EU-funded initiatives, whereas platforms such as YouTube, Instagram, or X can be used to disseminate multimedia content, event highlights, and project milestones. The selection of platforms should reflect the identified target audiences and communication objectives.

Outreach events further strengthen communication efforts. Webinars, public lectures, business forums, participation in research nights, open days, and collaborations with schools or universities expand the project's societal reach. These activities are particularly important in demonstrating the broader impact of research beyond academia. Communication activities may also include press releases, newsletters, and engagement with media outlets to further enhance project visibility.

Visual identity also plays a key role in communication. The consistent use of logos, colour schemes, templates, and the EU emblem across all materials reinforces project recognition and ensures

compliance with funding requirements. Promotional materials such as flyers, banners, presentation templates, and digital content should follow a coherent branding strategy.

Finally, communication effectiveness depends on internal coordination among partners. Clear allocation of responsibilities, regular updates, and the use of collaborative tools for document sharing and virtual meetings support consistent messaging and timely dissemination of information. Through the combined use of diversified communication channels and consistent messaging strategies, research projects can ensure broad societal visibility and stakeholder engagement.

7.4 Exploitation strategy

An effective exploitation strategy in EU-funded projects ensures that project results generate lasting value beyond the project lifetime. A well-designed strategy identifies key results (knowledge, technologies, methodologies, datasets, software, or training materials), defines target users and stakeholders, and aligns exploitation pathways with their needs while respecting intellectual property (IP) and open science principles.

In general, 3 main exploitation models are considered: (i) educational exploitation, (ii) scientific exploitation, and (iii) commercial exploitation.

Educational exploitation focuses on transforming project outcomes into sustainable learning assets. This includes integrating new knowledge, methods, and tools into university curricula, doctoral and postdoctoral training, and lifelong learning programs. Educational exploitation can be achieved through the development of new courses, modules, summer schools, laboratory exercises, and training handbooks, as well as by supervising theses aligned with project results. Train-the-trainer approaches and close collaboration with academic networks ensure that educational materials are reused and adapted by institutions beyond the consortium, strengthening human capital and skills development.

Scientific exploitation aims to maximize the project's contribution to advancing the state of the art. This is achieved through peer-reviewed publications, conference presentations, workshops, and special sessions in leading scientific venues. Open access publishing, sharing of research data, models, and software via trusted repositories, and active participation in research communities enhance visibility, reproducibility, and reuse. Scientific exploitation also includes the use of project results as a foundation for follow-up research proposals, new collaborations, and long-term research agendas, thereby ensuring continuity and cumulative impact.

Commercial/industrial exploitation targets the translation of project results into marketable products, services, or processes. This may involve protecting foreground IP through patents or other IP instruments, developing prototypes and demonstrators, and validating technologies in relevant industrial environments. Engagement with industry stakeholders, standardization bodies, and innovation ecosystems supports market uptake and reduces time to impact. Exploitation routes can include licensing, spin-offs, joint ventures, or direct adoption by industrial partners, with clear exploitation plans and business models defined early and refined throughout the project.

Finally, an effective exploitation strategy is dynamic and integrated with dissemination, communication, and IP management activities. Regular monitoring of exploitable results, clear allocation of roles and responsibilities within the consortium, and alignment with EU priorities (such as green and digital transitions, skills development, and strategic autonomy) ensure coherence and sustainability. By

combining educational, scientific, and commercial exploitation in a balanced manner, EU projects can deliver long-term impact for academia, industry, and society.

8. Conclusions

Collaborative research projects require structured planning, clear coordination, and continuous attention to contractual and administrative obligations. This Handbook has outlined the European funding context, the proposal lifecycle, and the main elements of project governance that support effective implementation, including work planning, monitoring, reporting, financial coordination, documentation, and risk management. It also summarised key approaches to dissemination, exploitation, and communication that enhance project visibility and long-term impact.

Overall, the Handbook provides UTH staff and researchers with a coherent reference framework for consistent and compliant research management. Building on this foundation, a second Handbook will provide more detailed guidance focused on EU-funded projects and their implementation requirements.

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