

# Horizon Europe Annotated Periodic Report Template



**Colour code:** Grey is the official instruction/text of the European Commission; Orange is written by Europa Media experts.



## What is the Periodic Report?

The Periodic Report/Final Report is the pre-condition for receiving payments; it must be submitted through the EU Funding & Tenders Portal Grant Management System by the Coordinator within 60 days after the end of the reporting period.

The Report is divided into a technical and financial report.

The Technical Report consists of 2 parts:

- Part A contains structured tables with project information
- Part B is a narrative description of the work carried out during the reporting period.

Part A is generated by the IT system. It is based on the information which you enter into the Portal Continuous and Periodic Reporting modules.

Part B needs to be uploaded as PDF on the Technical Report (Part B) screen. The template to use is available there.

The Financial Report normally consists of:

- the individual financial statements (Annex 4 to the GA) for each Beneficiary
- a summary financial statement
- a certificate on the financial statements (CFS) (if threshold reached).

The Financial Report is generated by the IT system on the basis of the financial information entered into the Periodic Reporting module (and any other documents uploaded, e.g. CFS).



## How to prepare and submit it?

The Periodic Report must be prepared by the Consortium in the Continuous and Periodic Reporting modules and then be submitted by the Coordinator.

The Continuous Reporting module is always open and can be updated at any moment during the project (submit deliverables, report on milestones, etc.). It automatically feeds Part A of the Periodic Report.

The Periodic Reporting module is opened after the end of the reporting period. It allows you to:

- download and upload the Part B of the Technical Report (upload only by the Coordinator)
- complete their financial statements on-line (each Beneficiary for themselves and their Affiliated Entities)
- consolidate the individual financial statements into a summary financial statement (Coordinator)
- submit the Periodic Report (Coordinator).

Make sure that all the information in the Continuous Reporting module is updated before 'locking the periodic report for review'. Updates entered after this step will be included in the Periodic Report of the following period (if any).

## Definitions

<b>Background</b>	Any data, know-how or information whatever its form or nature, tangible or intangible, including any rights such as intellectual property rights, that is (i) held by beneficiaries prior to their accession to the action; and (ii) identified by the beneficiaries in a written agreement as needed for implementing the action or for exploiting its results.
<b>Communication</b>	Communication on projects is a strategically planned process that starts at the outset of the action and continues throughout its entire lifetime, aimed at promoting the action and its results. It requires strategic and targeted measures for communicating about (i) the action and (ii) its results to a multitude of audiences, including the media and the public and possibly engaging in a two-way exchange.
<b>Critical risk</b>	A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives. Level of likelihood to occur: Low/medium/high The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.
<b>Clustering activities</b>	The project has participated in joint activities with other research projects (funded either by the EU or not, such as the D&E Booster, etc) to promote its research results as part of a portfolio of projects.
<b>Deliverable</b>	A report that is sent to the granting authority, providing information to ensure effective monitoring of the project. There are different types of deliverables (e.g. a report on specific activities or results, data management plans, ethics or security requirements).
<b>Dissemination activities</b>	The public disclosure of the results by any appropriate means (other than resulting from protecting or exploiting the results), including by scientific publications in any medium.

<b>Exploitation</b>	The utilisation of results in further research activities other than those covered by the action concerned, or in developing, creating and marketing a product or process, or in creating and providing a service, or in standardisation activities, or feeding back into policy making activities.
<b>Impacts</b>	Wider effects on society (including the environment), the economy or science, enabled by the outcomes of R&I investments in the long term. Example: "Airports increase their maximum passenger capacity by 15 % and the passenger average throughput by 10 %, leading to a 28% reduction in infrastructure expansion costs. This is achieved thanks to the use of an advanced forecasting system developed in the project."
<b>Key results (KER)</b>	A Key result (KER) is a main result which has been prioritised due to its high potential for exploitation and further scientific, societal or policy use.
<b>Milestone</b>	Control points in the project that help to chart progress. Milestones may correspond to the achievement of a key result, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development.
<b>Objectives</b>	The goals of the work performed within the project, in terms of its research and innovation content. This will be translated into the project's results. These may range from tackling specific research questions, demonstrating the feasibility of an innovation, sharing knowledge among stakeholders on specific issues. The nature of the objectives will depend on the type of action, and the scope of the topic.
<b>Outcomes</b>	The expected effects, over the medium term, of projects supported under a given topic. The results of a project should contribute to these outcomes, fostered in particular by the dissemination and exploitation measures. This may include the uptake, diffusion, deployment, and/or use of the project's results by direct target groups.

<b>Owner</b>	The person/entity which has generated the results.
<b>Pathway to impact</b>	Logical steps towards the achievement of the expected impacts of the project over time, in particular beyond the duration of the project. A pathway begins with the projects' results, to their dissemination, exploitation and communication, contributing to the expected outcomes in the work programme topic/ JU work programme, and ultimately to the wider scientific, economic and societal impacts of the work programme destination/JU work programme.
<b>Results</b>	What is generated during the project implementation. This may include, for example, know-how, innovative solutions, algorithms, proof of feasibility, new business models, policy recommendations, guidelines, prototypes, demonstrators, databases, trained researchers, new infrastructures, networks, etc.
<b>SDGs</b>	Sustainable Development Goals
<b>Technology Readiness Level</b>	See HE Work programme General Annexes section B

## TECHNICAL REPORT (PART A)

### → COVER PAGE

Part A of the Technical Report must be completed directly on the Portal Continuous Reporting screens.

To fill in this part, you must log into the Funding & Tenders Portal – My Projects – Manage Project – and access the Continuous reporting module from there on. Then you will fill in each tab online as described in this part.

PROJECT	
Project number:	[project number]
Project acronym:	[acronym]
Project name:	[project title]
Call:	[call ID]
Topic:	[topic ID]
Type of action:	[ToA ID]
Responsible service:	[responsible unit, e.g. JUST/04]
Project starting date:	[dd/mm/yyyy]
Project duration:	[number of months]

REPORTING PERIOD	
Period covered:	from [dd/mm/yyyy] to [dd/mm/yyyy]
Reporting period number:	[1] [2] [3] [4] [...] [Final]
Periodic report date and version:	[dd/mm/yyyy], [version No]

### → TABLE OF CONTENTS

- Project summary
- List of participants
- List of deliverables
- List of milestones (outputs/outcomes)
- List of critical risks
- Project pathway to impact (HE, RFCS)

Dissemination and communication activities  
 Financial support to third parties  
 Research infrastructure (HE)  
 Mobility declaration (HE MSCA, ERASMUS, ESC)

## → PROJECT SUMMARY

### Project summary (for publication)

This section consists of several sub-sections that will be published through **CORDIS** and possibly other communication channels. Your text should be easy to read, that is, written in an understandable and accessible way for a broader public. Its purpose should aim to promote the dissemination and support the exploitation of EU funded results. Altogether, your text should not exceed 7480 characters. You should refer only to publicly available information and must not include any confidential or personal data (e.g. names and addresses).

The project summary (for publication) must be drafted as a "stand-alone" text. No references should be made to other parts of the report.

You may also wish to provide diagrams or photographs illustrating and promoting the work of your project (only as images)<sup>1</sup>.

### Context and overall objectives

Describe the context and overall objectives and the expected impact of your project. The idea is to give to the reader key background information needed to understand the motivation behind the project and the problems and needs it aims to address.

The description should be seen as "setting a scene for the story" of the project. After reading this section the reader should be able to understand how the results of the project are expected to contribute to tackling the identified problems and needs. If possible, you may wish to include an indication of the significance of your project's expected impacts.

If applicable, for projects tagged as indicating the need for the integration of social sciences and humanities, please show the role of these disciplines in the project

Insert text

### Work performed and main achievements

Please describe the activities performed and the main achievements, focusing only on technical and scientific aspects (communication and exploitation activities will be mentioned in another section). At the end of your project, please include the outcomes of the action.

Insert text

### Results beyond the state of the art

Please describe results potential impacts and indicatively - if applicable- identify the key needs to ensure further uptake and success (e.g. further research, demonstration, access to markets and finance, commercialisation, IPR support, internationalisation, supportive regulatory and standardisation framework, etc.). At the end of your project, please include an overview of the results.

Insert text

**Policy relevance of your project**

Please describe (if applicable) the policy relevance of your project. How the project outcomes can contribute to developing, strengthening or improving EU policy priorities. What are your main policy recommendations/ messages and or contributions to implementing policy priorities based on the project outcomes?

**Note:**

Policy relevant evidence and outcomes are any data, information, (scientific) advice generated by the project which could strengthen and support policy makers in developing their policies, policy measures and the implementation thereof.

Policy measures are diverse in nature, such as the development of new legislation, revision of existing legislation, developing new standards, new (financial and non-financial) support schemes , development of new strategies, drafting new Horizon Europe calls, developing new product or service that meet the needs of EU priorities, etc.

Insert text

**Notes on the Project Summary****About CORDIS**

CORDIS contains information on all R&D projects the EU has funded since the 1980s under its dedicated research framework programmes. You can read more about the EU's activities in research and innovation.

On CORDIS, you can find information on specific topics or projects, or just browse thousands of related articles and publications, in many different languages. CORDIS complements the European Commission's Funding and tender opportunities website where you can find calls for proposals, apply for funding and search for partners.

Designed as a tool for research professionals, CORDIS seeks to promote open science in Europe, helping innovators create new products and services and so stimulate growth across Europe.

**About excluding confidential data from your Project Summary**

All the information should be written as ready to be publicly available/published. All the fields below are mandatory to fill in.

**About including diagrams or photographs**

It is strongly recommended.



## → LIST OF PARTICIPANTS

PARTICIPANTS							
<i>Latest Legal Data Beneficiaries screens — Overview of the Consortium changes.</i>							
Partner No	Role	Short Name	Legal Name	Country	PIC	Entry date	Exit date
1	COO						
2	BEN						
2.1	AE						
3	BEN						
4	AP						

## → PROJECT MANAGEMENT AND IMPLEMENTATION

### Researchers involved in the project

If you involved researchers in your project, you need to declare them here. This table contains only people who work on research tasks (not support personnel). Definition of researcher comes from the Frascati manual (<https://www.oecd.org/innovation/frascati-manual-2015-9789264239012-en.htm>)

If there are not researchers involved, the online tool will have a box to tick called "There is no researcher involved in the project yet".

### RESEARCHERS INVOLVED IN THE PROJECT (all HE ToAs except MSCA) [NOT PRINTED]

[Beneficiary No]																
First Name	Surname	Gender	Nationality	Email	Career stage	Role of researcher	Personal identifier (optional)	Contract Duration	Latest degree before entering the project			Last professional position (if any) before entering the project		Professional position for staff members leaving the project		
									Degree	Year awarded	Country	Career stage	Country	Career stage	Country	
[name]	[name]	[M]/[F]/[Non-binary]	[nationality]	[email]	[Category A — Top grade researcher (Full professor/Director of research)] [Category B — Senior-Researcher (Senior Researcher/ Associate professor)] [Category C1 — Recognised researcher (Researcher/ Assistant professor)] [Category C2 — Recognised researcher (Post Doctoral researcher)] [Category D1 — First stage researcher (PhD student)] [Category D2 — Other First stage researcher]	[Leading/Team member]	[identifier]	[Temporary<2years] [Temporary>=2years/ [Permanent]	[Habilitation] [Doctorate] [Master] [Bachelor] [Highschool Diploma] [Professional Degree] [Other]			[Category A — Top grade researcher (Full professor/Director of research)] [Category B — Senior-Researcher (Senior Researcher/ Associate professor)] [Category C1 — Recognised researcher (Researcher/ Assistant professor)] [Category C2 — Recognised researcher (Post Doctoral researcher)] [Category D1 — First stage researcher (PhD student)] [Category D2 — Other First stage researcher]			[Category A — Top grade researcher (Full professor/Director of research)] [Category B — Senior-Researcher (Senior Researcher/ Associate professor)] [Category C1 — Recognised researcher (Researcher/ Assistant professor)] [Category C2 — Recognised researcher (Post Doctoral researcher)] [Category D1 — First stage researcher (PhD student)] [Category D2 — Other First stage researcher]	

## → LIST OF DELIVERABLES

In this tab of the online continuous reporting tool, you will see the list of deliverables you inputted at the Grant Agreement Preparation stage. You can also find them in our DoA\*, in your Grant Agreement.

You had already planned these deliverables when you were writing your proposal.

When the deliverable is ready for submission, either the partner in charge or the coordinator can upload it here.

Tip: All beneficiaries can upload deliverables, but only the coordinator can submit them.

*\*DoA = Description of Action, Annex 1 to your Grant Agreement, which is your evaluated proposal plus the changes that might have occurred during Grant Agreement Preparation (in the 3 months before your project starts).*

### **Dissemination level**

The dissemination level is pre-set from when you wrote your proposal. At Grant Agreement Preparation stage you can modify the dissemination level. However, once your project started, it would need an Amendment to change it.

### **Due date**

In your DoA you already planned deliverables due at a certain point in your project (usually indicated by the month number your project will be in).

Tip: The exact deadline is the last day of the month the deliverable is due (e.g. if M6 is June 2024 in your project, then the deliverable is due 30/06/2024).

### **New due date (if delay)**

If the deliverable's estimated delivery date falls in a given reporting period and the deliverable is not yet submitted, before the periodic report is 'Locked for review', you have to justify the delay in your Periodic Report, Part B.

Tip: Normally when you know the deliverable will be delayed it is recommended to already signal it to your Project Officer long before the deadline, together with an explanation as to WHY there is a delay. Once approved a New Due Date will appear here.

### **Delivery date (actual)**

Sometimes you might be submitting a deliverable earlier than the due date, so this will be the actual date when you submitted it.

Tip: Use all the time you need until the deadline to make sure you have a qualitative deliverable.

### **Status**

Pending = when a deliverable hasn't been uploaded yet.

Draft = when a deliverable has been uploaded.

Submitted = when a deliverable has been submitted.

Approved = when the EU officer has approved it.

Rejected = when the EU officer has rejected it.

### Comments

Here you include the explanation you gave to the Project Officer, after they approved, as to WHY the deliverable is delayed.

**LIST OF DELIVERABLES**

**Deliverables\***

*Continuous Reporting (Deliverables screen) — Add actual delivery dates (or new due date for late deliverables, together with an explanation for the delay). In the Comments, please indicate if the deliverable was achieved as planned or not.*

*The labels used mean:*

*Public — fully open (🔓 automatically posted online)*

*Sensitive — limited under the conditions of the Grant Agreement*

*EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444. For items classified under other rules (e.g. national or international organisation), please select the equivalent EU classification level.*

Deliverable No	Deliverable Name	Work package No	Lead Beneficiary	Type	Dissemination Level	Due Date	New Due Date (if delay)	Delivery Date (actual)	Status	Comments
[number]	[name]	[WP number]	[beneficiary short name]	[R — Document, report] / [DEM — Demonstrator, pilot, prototype] / [DEC — Websites, patent filings, videos, etc] / [DATA — data sets, microdata, etc] / [DMP — Data Management Plan] / [ETHICS] / [SECURITY] / [OTHER]	[PU — Public] / [SEN — Sensitive] / [R-UE/EU-R — EU Classified] / [C-UE/EU-C — EU Classified] / [S-UE/EU-S — EU Classified]	[month number]	[dd/mm/yyyy]	[dd/mm/yyyy]	[Pending] / [Draft] / [Submitted] / [Rejected] / [Approved] / [Removed]	[insert comments]

### → LIST OF MILESTONES

In this tab, you will see the milestones you inputted at the Grant Agreement Preparation stage. You can also find them in our DoA, in your Grant Agreement.

You had already set these milestones when you were writing your proposal.

When a milestone is achieved, you have to declare it here with the delivery date. As with deliverables, if you foresee the milestone won't be achieved by the due date, announce it to your Project Officer, explain WHY, and if approved, make sure you declare it here too.

**Milestones**

*Continuous Reporting (Milestones screen) — Update the status (and add new due date for late milestones). In the Comments, please indicate if the milestone was achieved as planned or add an explanation for the delay.*

Milestone No	Milestone Name	Work Package No	Lead Beneficiary	Means of Verification	Due Date	New Due Date (if delay)	Delivery Date (actual)	Achieved	Comments
[number]	[name]	[WP number]	[beneficiary short name]	[means of verification as in Annex 1 GA]	[dd/mm/yyyy]	[dd/mm/yyyy]	[dd/mm/yyyy]	[YES] / [NO]	[insert comment]

## → LIST OF CRITICAL RISKS

### Foreseen risks

In this tab, you will see the critical risks you inputted at the Grant Agreement Preparation stage. You can also find them in our DoA, in your Grant Agreement.

You had already foreseen these risks when you were writing your proposal.

When reporting, you need to declare if the risk happened, and all information asked below in the State of play window.

Foreseen risks			
<i>The table shows the risks already listed in Annex 1 of the Grant Agreement (read-only).</i>			
Risk No	Description	Work Package No(s)	Proposed Mitigation Measures
[risk number as in Annex 1 GA]	[description as in Annex 1 GA]	[WP numbers]	[mitigation measure as in Annex 1 GA]

### Unforeseen risks

On the other hand, these are risks that might occur during the project implementation, which you haven't foreseen at proposal writing stage.

When reporting, you need to declare the risk that happened, the information asked in this window, and all information asked below in the State of play window.

Unforeseen risks			
Risk No	Description	Work Package No(s)	Proposed Mitigation Measures
[unforeseen risk number]	[insert description]	[insert WP numbers]	[insert mitigation measure]

### State of play

State of play				
<i>Continuous Reporting (Critical Risks screen) — Give the state of play of the risks that were identified in Annex 1 of the Grant Agreement (and new risks that materialised during project implementation) and add new mitigation measures, if needed.</i>				
Risk No	Reporting Period	Did you apply risk mitigation measures?	Did your risk materialise?	Comments
[risk number]	[RP number]	[YES] [NO]	[YES] [NO]	[insert comment (mandatory if no risk mitigation measures were applied or planned risk mitigation measures were not applied)]

## PROJECT PATHWAY TO IMPACT

### Results

#### Results

Continuous Reporting (Results screen) — Provide details about the project results.

Please focus on the content of the results, for example discoveries and theories, products, services, methods etc. Publications, intellectual property rights, datasets, software, algorithms, protocols etc.

**Examples:**

1. The project developed a new medical device, which is described in two publications and later patented. Instructions: List the medical device here (as 'PROD: Product') and add publications to this product in dedicated sections. When you have information about the patent application, add it in a dedicated section.
2. The project developed a new scientific theory which is described in several publications. Instructions: List the name and potential of the theory here (as 'SCI: Scientific discovery, model, theory') and add relevant publications later in dedicated sections.
3. The project develops a high potential industrial process and is currently at the stage of prototyping. Instructions: List the industrial process here (as 'PROC: Industrial process') and indicate the prototyping stage under 'Steps undertaken towards exploitation'. If there is a registered prototype, add the registered prototype in a dedicated section.
4. The project mainly focused on activities such as conferences, staff exchanges, or on investments in infrastructures. Instructions: List these as results and their potential here.

**Note:**

Questions with \* need to be filled in only for KER.

Questions with \*\* need to be filled in only for KER + if 'Result type' is: PROD, SERV, PROC, BUS, DSG, or METH.

Please do not forget that you are obliged under the Grant Agreement to use the Horizon Results Platform to find interested parties to exploit your KERs if you have not been able to exploit them within one year after the end of the project (unless the obligation has been waived by the granting authority). Exploitation efforts must be continued up to four 4 years after the end of the project, even when the Horizon Results platform is used.

Name	Result type	Key results (KER) <small>(does result have a high potential?)</small>	Description of high potential* <small>(max. 200 characters)</small>	Audience or target group*	Steps undertaken towards exploitation** <small>(multiple choice)</small>	Market maturity** <small>(state of the market targeted by this result)</small>
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[name]	/SCI — Scientific discovery, model, theory (...) /PROD — Product (new or improved) /SERV — Service (new or improved) /PROC — Industrial process (new or improved) /BUS — Business model (new or improved) /DSG — Design (new or improved) /METH — Method, material, technology, design (new or improved) /PO — Policy recommendation, guidance, awareness raising, advocacy /EVNT — Event (conference, seminar, workshop) /STAFF — (qualified personnel exchanges) /LEARN — learning and training (learning modules, curricula) /INFRA — new or improved infrastructures or facilities	/High scientific potential /High societal potential (other than climate or environmental) /High societal potential /High technologic, business or economic potential /High policy or regulatory potential /N/A	[insert description]	/Researchers /Industry, business partners /Investors EU Institutions and/or agencies /Policy makers and authorities, international /Policy makers and authorities, national /Policy makers and authorities, regional or local /Citizens /Standardization bodies /Innovators /End users (practitioners, farmers, etc.) /Education/training organization/ learners /Research Infrastructures /Business accelerator providers /Other /Applicable to all	/Prototyping in laboratory environment/ /Prototyping in production environment/ /Pilot, demonstration or testing /Intellectual property management/ /Complying with regulatory framework/ /Contribution to standards/ /Feasibility Study/ /Market Study/ /Business plan/ /Other	/Not yet existing and not clear if market can be created/ /Market creating: not existing but potential for the creation of a new market/ /Emerging: growing demand, scarce supply/ /Mature: the market is already supplied with similar products
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## RESULTS OWNERSHIP LIST

This tab has to be filled in your last reporting period (e.g. if your project has 3 reporting periods defined, then this will be relevant in the 3rd period).

**Results ownership list**  
 Continuous Reporting (Results ownership list screen) — Indicate the owner(s) of the results.  
 Note:  
 This is the 'results ownership list' required under the Grant Agreement.  
 The submission of your last Periodic Report will be blocked if this table is not filled in.

Single or joint ownership of results? <i>(Indicate the number of owners)</i>	Result owners	Owner country of establishment	Will the owners exploit the result?	In which form will the result be made available to other consortium members and/or third parties?	Does the exploitation of the results require access to background of one or several consortium members? <i>(If Yes a compulsory question opens below)</i>	Does the exploitation of the results require access to third party IPR? <i>(If Yes, a compulsory question opens below)</i>
[number of owners]	[insert owner name(s)] <i>[Entity or Individual]</i>  <i>Entity: Drop down option with project partners + 'Other'. 'Other' opens a field asking for name, address, country, and an identifier such as VAT number.</i>  <i>Individual: Drop down option with 'researchers in project'</i>	[country]	[YES] [NO]	[Sale of IP] [Licensing] [Open access] [Open source] [Free license] [Secret/non-disclosure agreement] [Other] [N/A]	[YES] [NO]	[YES] [NO] [NOT KNOWN]
Exploitation requires access to background of consortium members						
[insert measures taken /envisaged to give access to the background required for exploitation]						
Exploitation requires access to third party IPR						
[insert measures taken /envisaged to get access to the required IPR]						

➔ PUBLICATIONS

OpenAIRE is an infrastructure harvesting research output from connected data providers. Plus it offers a network of dedicated Open Science experts and training.


More at <https://www.openaire.eu/>

**Publications**  
 Continuous Reporting (Publications screen) — Enter the info on publications.  
 Publications accessible via OpenAIRE are displayed automatically. You only need to check if the publications are linked to the project. In case of publications not registered via OpenAIRE, you need to encode the Digital Object Identifier (DOI) and all the rest of information is completed automatically.  
 The labels used mean:  
 Open access means online access to research outputs, in particular scientific publications and research data, free of charge to the end-user.

Type of publication	Peer-review	Type of PID (repository)	PID of deposited publication	Link to publication (if no PID of publication)	Title of the publication (for book chapters; title of chapter not of book)	PID of publisher version of record	ISSN/eSSN (if book insert ISBN)	Authors	Title of the journal or equivalent	Number	Publisher	Month/Year of publication	PID of book (if book chapter)	Book title (if book chapter)	Was the publication available in open access through the repository at the time of publication	Type of publication charge Did you charge OA publishing fees to the project?	License type
[Article in journal] [Publication in conference proceeding] [Workshop] [Book/Mono graph] [Chapter in book] [Thesis/Dissertation] [Other]	[YES] [NO]	[DOI] [handle] [ARK] [JRI] [Other] [None]	[insert PID reference]	[insert link]	[insert title of publication]	[insert PID reference]	[insert ISSN/eSSN number]	[insert author names]	[insert title of journal]	[insert number of journal]	[insert name of publisher]	[insert month of publication]  [insert year of publication]	[insert PID reference]	[insert book title]	[YES] [NO]	[YES] [NO] → If yes amount (prefilled by OpenAIRE)  [Disclaimer to be shown: APCs/DCs paid to hybrid publishing venues are non-eligible costs under Horizon Europe].	[CC BY or equivalent] [CC BY NC or equivalent] [CC BY NC ND or equivalent] [Other licences]


## → DATASETS

In Horizon Europe, not only do you have to report on your scientific publications, but also on datasets that validate the research and publications you've done.

 <b>Datasets</b> Continuous Reporting (Publications screen) — Enter the info on datasets. The labels used mean: <i>Open access means online access to research outputs, in particular scientific publications and research data, free of charge to the end-user.</i>							
Description of datasets	Type of PID	PID of deposited dataset	URL to repository <i>(if required by WP is the repository federated under EOSC?)</i>	Is this dataset available in open access through the repository?	If data is needed to validate conclusions of a scientific publication, describe the provisions whereby you intend to make it available  <i>(This question is not applicable to ERC projects)</i>	Is the metadata of deposited data accessible through open access?	What license is the data licensed under?
[insert description]	[DOI] [handle] [ARK] [URI] [Other]	[insert PID reference]	[insert URL]	[YES]/[NO]	[N/A] [open access given to data] [other: please describe]	[YES]/[NO]	[CCBY or equivalent] [CC0 or equivalent to CC0] [Other]

## → INTELLECTUAL PROPERTY RIGHTS (IPR)

Consider the results that come out of your project. How are they going to be protected? Are you going to launch applications to register a patent, trademark, design, etc.? In that case you can report it here. If the protection was awarded or not, you can also change this later on in your project, or even after your project ends.

 <b>Intellectual property rights (IPR)</b> Continuous Reporting (Patent screen) — List the IPRs that result from the project.						
Type of IP Rights	Application Title	Application Reference	Application Date	IPR Owner	IPR Status Has protection been awarded?	IPR Award Reference ID
[Patent] [Trademark] [Registered design] [Utility model] [Other]	[insert title of the application]	[OPTION for international applications of patents [insert IP international organisation code]	[insert dd/mm/yyyy]	[insert owner name(s)]	[YES] [NO] [N/A]	[insert reference]
		[insert serial number] [OPTION for national applications of patents [insert country code (two letters)] [insert serial number] [OPTION for other registered IPR: [insert application reference country code (two letters) or organisation code]] [insert alpha numeric identifier] [insert EPO/google patent format] [insert application ID]				

## STANDARDS

This will be relevant only if in your project you've foreseen such activities and you're implementing tasks towards these goals. There's many cases where projects don't create standards, and there's an option in this tab online to select "This project does not currently have any standards".

Standards				
Continuous Reporting (Standards screen) — List the standardization activities that result from the project.				
Standardization activities <i>(multiple choice)</i>	Description <i>(max 200 words)</i>	Types of standardization bodies involved <i>(multiple choice)</i>	Names of standardization bodies involved	Standard references (if any)
[Revision of an existing standard] [Elaboration of a new standard] [Participation in a technical committee] [Participation in a technical group] [Elaboration of a workshop agreement] [Others]	[insert short description of activities and reference to the relevant group]	[International] [European] [National] [Other]	[insert name]	[insert reference]

## OTHER RESULTS

Compared to the other tab above called "Results", where you have to fill in with types like scientific discoveries, products, services, processes, methods, policy recommendations; here you add the other results from your projects that are software, workflow, protocol, prototype.

### About what license to choose for your result

The EC recommends Creative Commons (CC) licenses or equivalent. Here is a source for more about CC licenses and which one to choose: <https://creativecommons.org/choose/>

Other results						
Continuous Reporting (Other Results screen) — List the other results for the project.						
The labels used mean: Open access means online access to research outputs, in particular scientific publications and research data, free of charge to the end-user.						
Type of result	Description	If the result is needed to validate the conclusions of a publication, describe the provisions whereby you intend to make your output available, either in digital or physical form? <i>(This question is not applicable to ERC projects)</i>	Type of PID (if available)	PID (if available)	URL to repository landing page for the result service/webpage hosting the result (if available)	What license is the result under
[Software] [Workflow] [Protocol] [Prototype] [Other]	[insert description]	[N/A] [open access given to data] [other: please describe]	[DOI] [handle] [ARK] [URN] [Other]	[insert PID reference]	[insert URL]	[CCBY or equivalent] [CC0 or equivalent to CC0] [Other]



## → DISSEMINATION AND COMMUNICATION ACTIVITIES

Don't forget about the difference between dissemination and communication.

Dissemination is related to your project results that you're trying to convey to specific target audiences the results were meant for.

Communication is more about letting all your audiences, including the general public, know about what your project is doing.

### Dissemination activities

#### About the status of your dissemination activities – Ongoing

This can happen if your dissemination activity(ies) take longer time or are planned as series/iterations of the same type of activity.

**Dissemination activities**

*Continuous Reporting (Dissemination screen) — List the dissemination activities carried out in the context of the project.*

*Include dissemination activities mentioned in the proposal and new ones.*

Dissemination Activity Name	What? Type of dissemination activity	Who? Target audience <small>(Choose one or more items)</small>	Why? <small>(max 200 characters)</small>	Status
[insert activity name]	[Conferences] [Education and training events] [Meetings] [Clustering activities] [Collaboration with EU-funded projects] [Other scientific collaboration] [Other]	[Industry, business partners] [Investors] [EU institutions] [Policy-makers and authorities, international] [Policy-makers and authorities, national] [Policy-makers and authorities, regional or local] [Civil society, international] [Civil society, national, regional or local] [Public] [Standardization bodies] [Scientists] [Innovators] [Specific end-user communities] [Education/training organization/learners] [Other]	[insert description of the objective(s) with reference to a specific project output]	[Delivered] [Cancelled] [Postponed] [Ongoing]

### Communication activities

Make sure the activities have the same names and explanations as in your DEC plan/PEDR (Plan for Exploitation and Dissemination of Results, including Communication), if they were foreseen.

#### About KPIs

These are KPIs you've already set in your proposal for your communication activities, so make sure you refer back to that and mention their achievement here.

Communication activities					
Continuous Reporting (Communication screen) — List the communication activities carried out in the context of the project. <i>Use the same labels used in your DEC plan.</i>					
Communication Activity Name	Description	Who? Target audience <i>(Choose one or more items)</i>	How? Communication channel <i>(Choose one or more items)</i>	Outcome	Status
[insert communication name]	[insert description of implemented communication activity]	[Industry, business partners] [Innovators] [Investors] [EU institutions] [National authorities] [Regional authorities] [Local authorities] [Civil society] [Citizens] [Research communities] [Specific user communities (if applicable)] [International organization (UN body, OECD etc)]	[Website] [Social media] [Print materials (brochure, leaflet, posters, stickers, banners etc)] [Press release] [Media article] [Newsletter] [Interview] [Video] [TV/Radio campaign] [Event (conference, meeting, workshop, internet debate, round table, group discussion etc)] [Exhibition] [Other]	[insert key performance indicators]	[Delivered] [Cancelled] [Postponed] [Ongoing]

➔ **IMPACT**

**Technology readiness level (TRL)**

TRLs are a method for estimating the maturity of technologies during the acquisition phase of a program. The different level of maturity of the technology, and the consequent relative innovation risk, is normally linked to the funding instrument in Horizon Europe. Very low TRL are addressed normally by EIC Pathfinders, ERC and MSCA grants; low TRL are addressed by Research and Innovation Actions; higher TRL can be found in Innovation Actions and in the EIC Accelerator; and finally, the equity component of the EIC Accelerator is designed to support activities at the end of the TRL scale.

TRL is also something you already talked about in your proposal, here you just report where you started from and where you're at in your project TRL.

Technology readiness level of the project <i>(for ERC projects, the table must be filled in only at the end of the project)</i>	
At project start: [ an item ] Current status: an item.]	Expected by Project end: [TRL1- Basic principles observed ] [TRL2- Technology concept validated] [TRL3 - Experimental proof of concept] [TRL4 - Technology validated in lab] [TRL5- Technology validated in relevant environment] [TRL6 - Technology demonstrated in relevant environment] [TRL7 - System prototype demonstration in operational environment] [TRL8- System complete and qualified] [TRL9 - Actual system proven in operational environment] [Not applicable]

### Sustainable development goals (SDGs)

You most likely talked about the relation of your project to SDGs in your proposal, so compare the current status of your project and results to what you promised and report it here. In case you identify new SDGs to which your results contribute, then still report it here.


**Sustainable development goals** (for ERC projects, the table must be filled in only at the end of the project)

Is your project likely to deliver results relevant for the following Sustainable Development Goals?

Climate neutrality	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Clean Water and Sanitation	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Life Below Water	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Life on Land	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
No Poverty	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Zero Hunger	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Good Health and Well-being	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Gender Equality	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Decent Work and Economic Growth	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Affordable and Clean Energy	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Industry, Innovation and Infrastructure	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Reduced Inequality	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Sustainable Cities and Communities	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Responsible Consumption and Production	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Quality Education	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Peace and Justice Strong Institutions	[Not relevant] [Partially relevant] [Full relevant]
	[Don't know (if nothing selected)]
International cooperation	[Not relevant] [Partially relevant] [Full relevant] [Don't know (if nothing selected)]
Please explain your choice:	[insert text]

### Citizen engagement

This part is very important to show how you involved citizen and end-user entities in co-designing or co-creating your results and solutions answering their needs. In your proposal you most likely promised such activities under the "Open Science" sub-section of your Methodology. Here in reporting you have to give feedback on what you have done concretely.

 <b>Citizen engagement</b> (for ERC projects, the table must be filled in only at the end of the project) Regarding co-design and co-creation through the engagement of citizens, and/or end-user entities, how have citizen and end-user entities contributed to the co-creation of R&I content so far?			
	Citizen	End-user entities	
Co-creating R&I visions, agendas, policies or frameworks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co-creating R&I action plans or technology roadmaps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collecting data for the project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analysing data for the project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing resources, e.g. computational, space/locations, practical support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring and/or evaluating R&I results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testing & experimenting with innovative R&I solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributing to scientific publications or patent applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Debating R&I findings and implications for them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify):	[insert text]		
What mechanisms for citizen and/or end-user entity engagement have you set up and plan to maintain beyond the end of your project, or are planning to set up and maintain beyond the end of your project (per beneficiary)? (not blocking submission)	Beneficiary 1	Beneficiary 2	Beneficiary 3
Department, centre, lab, network, testbeds or other structure or space set up, internally or externally, to support citizen/end-user engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Institutional websites, web-pages or portals set up to support citizen/end-user engagement (excluding project website)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff appointed with responsibility to initiate, monitor, evaluate or advise on citizen/end-user engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff appointed with responsibility for training, mutual learning and sharing of tools and good practice on citizen/end-user engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rules, standards, guidelines or other frameworks established to ensure that citizen/end-user engagement is taken into account in institutional R&I processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Systematic or regular dialogues, meetings, workshops or other events set up for citizen/end-user engagement (excl.one-off events)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (free text, word limit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, how many individual citizens have been involved in co-creating R&I content for all activities listed? (please provide your best estimate, which should be traceable in one or more deliverables)	[insert text]	[insert text]	[insert text]

### Progress towards objectives and impacts of the project

This is related to your Key Impact Pathways that you set in the proposal. In here you have to show the progress towards achieving the impact you promised.

<p><b>Progress towards objectives and impacts of the project</b></p> <p>Please describe the progress of the project so far towards delivering scientific impact, based on its objectives, including quantification to the extent possible.</p> <p>[insert text]</p> <p>Please describe the progress of the project so far towards delivering economic impact, based on its objectives (e.g. to what extent will the project increase cost-effectiveness of industrial production or processes) including quantification to the extent possible.</p> <p>[insert text]</p> <p>Please describe the progress of the project so far towards delivering impact for society, including environmental impact, based on its objectives, including quantification to the extent possible.</p> <p>[insert text]</p>
--

**Further employment to exploit or scale-up project results**

In your last reporting period, you will also have this aspect of the impact your project has achieved, as part of your exploitation efforts.

<p><b>Further employment to exploit or scale-up project results (only for last reporting period)</b></p>				
Full-time equivalents expected to remain or be newly employed based on project's results and their dissemination/exploitation:	Involve existing team/people <input type="checkbox"/>	Hire new team/people <input type="checkbox"/>	Not sure yet <input type="checkbox"/>	No <input type="checkbox"/>
Short term contracts (incl. PhD):	Technicians <input type="checkbox"/>	Researchers <input type="checkbox"/>	Administrative support & project management <input type="checkbox"/>	Other <input type="checkbox"/>
Long term contracts:	Technicians <input type="checkbox"/>	Researchers <input type="checkbox"/>	Administrative support & project management <input type="checkbox"/>	Other <input type="checkbox"/>
Please explain:				
[insert text]				

**Further investment mobilised to exploit or scale-up project results**

Similarly to the section above, here you report how your exploitable project results will continue to live on. For example, maybe you won another project that will allow you to continue developing or building on what you already developed in your current one.

<p><b>Further investment mobilised to exploit or scale-up project results (only for last reporting period)</b></p>				
Further investment expected:	Private capital/investment <input type="checkbox"/>	Public investment <input type="checkbox"/>	Own funds <input type="checkbox"/>	No <input type="checkbox"/>
Investment 1 (for each investment)				
Geography:	Non-EU <input type="checkbox"/>	Non-EU <input type="checkbox"/>		
	Local <input type="checkbox"/>	Regional <input type="checkbox"/>	National <input type="checkbox"/>	
State:	Planned <input type="checkbox"/>	In process <input type="checkbox"/>	Obtained <input type="checkbox"/>	
Amount: EUR (thousands)	[insert number]			
Please explain:				
[insert text]				
URL link(s) to announcement(s) about the planned/obtained investment:	[insert URL]			

### Launch of a dedicated company during (or after end of) the project

Similarly as the sections before, in case your exploitation plans are to launch a new company out of your project.

Launch of a dedicated company during (or after end of) the project (only for last reporting period)					
Launch of dedicated company:	Spin-off <input type="checkbox"/>	Spin-out <input type="checkbox"/>	Joint venture <input type="checkbox"/>	Not sure yet <input type="checkbox"/>	No <input type="checkbox"/>
Company 1					
Status:	Planned <input type="checkbox"/>	In progress <input type="checkbox"/>	Done <input type="checkbox"/>		
Company identification:	VAT [insert number]	[insert country]	[insert name]	[insert address]	Not applicable <input type="checkbox"/>

### Identified further needs on the project's pathway to impact

This is for the EC to assess your feedback on what would still be needed for your project to continue delivering on the impact you promised in the long run.

Identified further needs on the project's pathway to impact	
<i>Please tick if applicable.</i>	
Follow-up research	<input type="checkbox"/>
Testing with end-users	<input type="checkbox"/>
Demonstration in real-life environment	<input type="checkbox"/>
Business plan development	<input type="checkbox"/>
Access to risk capital & Scale-up funding	<input type="checkbox"/>
Support for internationalisation and access to markets	<input type="checkbox"/>
Legal advice (IPR or other)	<input type="checkbox"/>
Partnership with other company (technology or other)	<input type="checkbox"/>
Startup accelerator	<input type="checkbox"/>
Supportive regulatory framework	<input type="checkbox"/>
Standardisation	<input type="checkbox"/>
Human resources & skills	<input type="checkbox"/>
Procurement policies of the end users	<input type="checkbox"/>
Other (specify):	[insert text]
Please explain your choices if needed:	[insert text]

### Key factors fostering and impeding the progress to impact

This also a feedback to the EC about what made your progress to impact successful or what hindered it.

<b>Key factors fostering and impeding the progress to impact (optional question)</b>	
<b>Key factors fostering progress to impact</b>	
<i>To what extent are the key factors identified below fostering the progress of the project so far. Please tick if highly relevant.</i>	
Scientific excellence of the consortium	<input type="checkbox"/>
Geographic breadth of the consortium	<input type="checkbox"/>
Previous collaborations between partners	<input type="checkbox"/>
Interdisciplinarity and cross-sectoral approach of project	<input type="checkbox"/>
Integration of gender dimension in research content	<input type="checkbox"/>
Involvement of social sciences and humanities in the project	<input type="checkbox"/>
Strategic impact orientation of the project aligned to emerging needs	<input type="checkbox"/>
Involvement of users from project design	<input type="checkbox"/>
Validation of prototype by potential buyer/end-user	<input type="checkbox"/>
Management of intellectual & industrial property rights	<input type="checkbox"/>
Knowledge Triangle Integration	<input type="checkbox"/>
Collaboration with wider ecosystem beyond the project (e.g. financial intermediaries, public authorities, standardisation, regulatory bodies)	<input type="checkbox"/>
Further funding secured to exploit project's results	<input type="checkbox"/>
Other (specify)	[insert text]
Highlight any good practice' learning from the project for improved implementation that might be transferable to other projects:	[insert text]
<b>Key factors impeding progress to impact</b>	
<i>To what extent are the key factors identified below impeding to progress as initially planned. Please tick if highly relevant.</i>	
Difficulties in project implementation and management, including access to human resources, securing additional funding, IPR management, cooperation between partners	<input type="checkbox"/>
Difficulties in engaging with wider environment, including potential end-users, citizen and policy makers	<input type="checkbox"/>
Competitive pressures are evolving differently than planned	<input type="checkbox"/>
Scientific and technological contexts are evolving differently than planned	<input type="checkbox"/>
Socio-economic and policy context are evolving differently than planned	<input type="checkbox"/>
Other factors external to the project impede to progress as expected	<input type="checkbox"/>
Explain key difficulties faced for the implementation of the project and the problem-solving practices adopted or planned:	[insert text]

## → FINANCIAL SUPPORT TO THIRD PARTIES

These are specific calls for proposals in the work programmes, where a big amount of the funding granted is used to support third parties. It only applies if your project was funded under such a call.



Sub-calls							
Continuous Reporting (Financial Support to Third Parties screen) — List the FSTP calls launched under the project.							
Call Reference	Call Budget	Budget Awarded	Call Publication Date	URL to F&T Portal (if applicable)	Call Status	Number of Received Proposals	Number of Awarded Proposals
[insert call reference number]	[insert amount]	[insert amount]	[insert dd/mm/yyyy]	[insert URL]	[Planned] [Open] [Awarding on-going] [Awarding done]	[insert number]	[insert number]

Awarded recipients							
Continuous Reporting (Financial Support to Third Parties screen) — List the recipients of financial support to third parties.							
Call Reference	PIC	Legal Name	Organisation Type	Country	Funding Awarded	Funding Paid	Comment
[insert call reference number]	[insert recipient PIC (if any)]	[insert recipient name]	[public]/[private]	[insert country]	[insert amount]	[insert amount]	[insert comments]

➔ **RESEARCH INFRASTRUCTURE**

Only if applicable, if such infrastructure was declared at proposal stage.

Transnational/virtual access to research infrastructure										
Continuous Reporting (Research Infrastructure screen) — Enter the info.										
The labels used mean:										
Access provider short name — Short name of the beneficiary, affiliated entity or associated partner. It can be the infrastructure owner or, if the owner of the infrastructure is another third party contributing resources, the beneficiary/affiliated entity who they are provided to (and who coordinates access to them).										
Installation number — Number progressively the installations of a same infrastructure. An installation is a part or a service of an infrastructure that can be used independently from the rest.										
Access Provider Short Name	Infrastructure Short Name	Installation		Unit of Access	Estimated Quantity of Access <i>(from Annex 1)</i>	Access Provided <i>(RP1)</i>	Access Provided <i>(RP2)</i>	Access Provided <i>(RP3)</i>	Access Provided <i>(RP4)</i>	Total access provided <i>(all RPs)</i>
		Number	Short Name							
1 - shortname	[insert infrastructure short name as in Annex 1]	[insert installation number as in Annex 1]	[insert installation short name as in Annex 1]	[insert unit of access as in Annex 1]	[insert number as in Annex 1]	[insert number]	[insert number]	[insert number]	[insert number]	[insert number]

List of users (transnational access)										
Continuous Reporting (Research Infrastructure screen) — Enter the info.										
For the legal statuses, refer to the following definitions:										
UNI — university and other higher education organisations										
RES — public research organisations (including international research organisations, as well as private research organisations controlled by public authorities)										
SME — micro, small or medium-sized enterprise as defined in EU Recommendation <a href="#">2003/361</a>										
PRV — other industrial and/or profit private organisation										
Researcher			Employing Organisation/ Home Institution			Application Identifier	Activity Domain (Discipline)	Installations used		
Name	Gender	Nationality	Name	Legal Status	Country			Infrastructure Short Name	Installation ID	Installation Short Name
<i>(add as many rows as installations)</i>										



[name NAME]	[M] [F] [Non-binary]	[insert nationality]	[insert name of organisation]	[UNI] [RES] [SME] [PRV] [OTH]	[insert country]	[insert identifier]	[Physics] [Chemistry] [Life Sciences & Biotech] [Earth Sciences & Environment] [Engineering Technology] [Mathematics] [Information Communication Technologies] [Material Sciences] [Energy] [Social Sciences] [Humanities]	[insert short name of the infrastructure (as in Annex 1) to which the first installation used by the researcher belongs]	[insert ID of the first installation used by the researcher (as in Annex 1)]	[insert short name of the first installation used by the researcher (as in Annex 1)]
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List of users (virtual access)							
Continuous Reporting (Research Infrastructure screen) — Enter the info.							
Infrastructure Short Name	Installation Short Name	Activity Domain (Discipline)	Maximum possible number of users	Nr of actual users by max possible number in RP1 (%)	Nr of actual users by max possible number in RP2 (%)	Nr of actual users by max possible number in RP3 (%)	Nr of actual users by max possible number in RP4 (%)
[insert short name of the infrastructure (as in Annex 1)]	[insert short name of the installation (as in Annex 1)]	[Physics] [Chemistry] [Life Sciences & Biotech] [Earth Sciences & Environment] [Engineering Technology] & [Mathematics]	[insert number]	[insert percentage]	[insert percentage]	[insert percentage]	[insert percentage]
		[Information Communication Technologies] & [Material Sciences] [Energy] [Social Sciences] [Humanities]					

## TECHNICAL REPORT (PART B)

### → COVER PAGE

Part B of the Technical Report must be downloaded from the Portal Technical Report (Part B)/Termination Report screen, completed and then assembled and re-uploaded as PDF on that screen.

**Note:**

For EIC Accelerator actions: Please use this reporting template only for the final report. For additional prefinancing requests, this template should be replaced by the PPT used for the progress meeting (i.e. upload the PPT in place of the additional prefinancing report).

PROJECT	
Project number:	[project number]
Project name:	[project title]
Project acronym:	[acronym]

REPORTING PERIOD	
⚠ Please note that you must report on the entire reporting period.	
RP number:	[1] [2] [3] [4] [...] [Final]
Duration:	from [dd/mm/yyyy] to [dd/mm/yyyy]

#@PER-REP-HE@#

#@PRO-GRE-PG@# [This document is tagged. Do not delete the tags; they are needed for the processing.]

### → 1. EXPLANATION OF THE WORK CARRIED OUT AND OVERVIEW OF THE PROGRESS

Include an overview of the project results towards the objective of the action in line with the structure of the Annex 1 to the Grant Agreement including summary of deliverables and milestones. In the technical description below, please avoid repeating information that is already present in part A of the report (in continuous reporting). For projects under topics indicating the need for the integration of social sciences and humanities, explain the role of these disciplines in the project so far.

(No page limit per work-package but the report should be concise and readable. Any duplication should be avoided).

The Annex 1 to the Grant Agreement is known as your Description of Action (DoA).

You must not replicate all the information you have in your deliverables, or copy/paste such information.

## 1.1 Objectives

Please list the specific objectives for the project as described in section 1.1 of the DoA; Please provide a short summary of progress towards the achievement of each of the project objectives. Highlight significant activities in support of these achievements. Please provide clear and measurable details; report on objectives not fully achieved or not on schedule.

It's important here to keep it a highlight of activities that allowed you to make progress towards or achieve your specific objectives, as you will be detailing these activities in the next section 1.2.

In your proposal before you set objective related KPIs. So in this part of the report, you could add a table of those KPIs, with the related objectives, names, planned targets and the progress until the moment of reporting, together with some remarks if need be for additional explanations.

Depending on which reporting period you're reporting for at a given moment, some objectives might have not yet been achieved, because the related activities haven't started yet, or sometimes it can be that you've made some progress to achieving an objective but there's still activities to implement to achieve it fully.

#@WRK-PLA-WP@#

## 1.2 Explanation of the work carried out per WP

Include a table or description of how the project has achieved each objective of the period.

### 1.2.1 Work Package 1

Explain the work carried out in WP1 during the reporting period giving details of the work carried out by each beneficiary/affiliated entity involved.

You can break down each of these work package (WP) sections, writing first about the objectives per WP and the extent to which they have been achieved thus far, then write about the progress of activities per each task within that WP. At the end of such a WP section, you can also summarize the involvement of all partners per task in a table.

Who writes? All partners involved contribute, whether they're task contributors, task leaders, work package leaders etc. It's important here the coordinator leaves comments and instructions on who should fill in what.

### 1.2.2 Work Package 2

Etc.

#§WRK-PLA-WP§# #@IMP-ACT-IA@#

### 1.3 Impact

Please describe the progress of the project so far towards delivering scientific impact, based on its objectives and towards delivering impact in any of the following fields (if applicable): scientific, economic, societal or industrial production or processes. Report on changes to the expected impacts presented in your DoA (if any) and the effects on the project/need for adaptations.

Where necessary, provide further details of your monitoring and evaluation strategy, including: references to baselines, benchmarks, assumptions used (with justification) as well as calculations performed to quantify the impacts. If necessary, provide this information in a separate deliverable / a dedicated section of a deliverable.

As the instruction also states, here it's important to narrate and explain how your project has progressed towards achieving the impacts promised before, highlighting your impact related KPIs, that were also defined in the proposal before.

### 1.4 Update of the plan for exploitation and dissemination of results (if applicable)

Include in this section any updates to the plan for exploitation and dissemination of results and give details.

Usually, the partner in charge will craft this plan as a deliverable, and at proposal stage you could plan a couple of iterations of this plan also as deliverables spread throughout the project. If that is not foreseen, then it's important you report those updates here.

#§IMP-ACT-IA§#

*OPTION for projects providing access to research infrastructure:*

### 1.X Access to research infrastructure

If access to research infrastructure has been provided under the grant, please include access provision activities.

*Trans-national access (TA) activities*

Provide for the set of TA activities, the integrated information described below.

#### Description of the publicity concerning the new opportunities for access

In the first periodic report, describe the measures taken to publicise to researchers throughout Europe the opportunities for access open to them under the Grant Agreement. In the following periodic reports, indicate only additional measures and changes.

#### Description of the selection procedure

In the first periodic report, describe the procedure used to select user groups: organisation of the selection panel(s), any additional selection criteria employed by the selection panel(s), measures to promote equal opportunities, etc. Specify if feedback is given to rejected applicants and in which form. In the following periodic reports, indicate only changes to the existing procedure.

The list of the selection panel members should be maintained and updated when necessary in order to prove that the panel is composed following the conditions indicated in Annex 5 to the GA. The granting authority reserves the right to request this list at any time.

Indicate number, date and venue (if not carried out remotely) of the meetings of the selection panel during the reporting period.

Provide integrated information on the selection of user groups and on the scientific output of supported users. In particular, indicate the number of eligible applications submitted in the reporting period and the number of the selected ones (taking into account only calls for which the selection has been completed in the reporting period). Indicate also the number of user groups, whose support started in the reporting period, which have a majority of users not working in an EU Member State or HE associated country.

### **Description of the trans-national access activity**

Give an overview of the applications and users supported in the reporting period, indicating their number, their scientific fields and other relevant information you may want to highlight.

You should maintain the list of selected applications/user groups for which costs have been incurred in the reporting period. The provision of access/service to a user group can run over more than one reporting period. In this case, the user group should be inserted in the list of each concerned reporting period. The list of applications must include, for each application, an identifier, the objectives, as well as the amount of granted access on each installation used by the user group in the reporting period. When the access provision to the user group is completed in the reporting period, the list should also include a short description of the work carried out. The granting authority reserves the right to request this list at any time.

In addition you must fill the following tables (in Part A to be filled in the IT tool):

- Transnational/virtual access to research infrastructure: indicate for each installation providing trans-national access under the project, the quantity of access actually provided in the reporting period (expressed in the unit of access defined in Annex 1 for that specific installation).
- List of users (transnational access): Researchers who have access to research infrastructure/installations (one or more) through EU support under the grant either in person (through visit) or through remote access.

### **Scientific output of the users at the facilities**

Give highlights of important research results from the user groups supported under the grant agreement. Indicate the number and the type of publications derived by the work of user groups supported under the grant, taking into account only publications that acknowledge the support of this EU grant.

You should maintain a list of articles that have been published in journals (or conference proceedings) during the reporting period and which are resulting from work carried out under the trans-national access activity. List only publications that acknowledge the EU support. For each publication, indicate the identifier of the application/user group that have led to the publication itself, the authors, the title, the year of publication, the type of publication (article in journal, publication in conference proceeding/workshop, book/monograph, chapters in book, thesis/dissertation, whether it has been peer-reviewed or not, the DOI (digital object identifier), the publication references, and whether the publication is available under Open Access or not. The granting authority reserves the right to request this list at any time.

#### *Virtual access (VA) activities*

Provide for the set of VA activities, the integrated information described below.

In the first periodic report, describe the measures taken to publicise to researchers throughout Europe the opportunities for access open to them under the Grant Agreement. In the following periodic reports, indicate only additional measures and changes.

Provide statistics on the virtual access in the period by each installation, including quantity, geographical distribution of users and, whenever possible, information/statistics on scientific outcomes (publications, patents, etc.) acknowledging the use of the infrastructure. Where the call conditions impose additional traceability obligations, information on the traceability of the users and the nature of access must be provided too.

In addition you must fill the following tables (in Part A to be filled in the IT tool):

- Transnational/virtual access to research infrastructure: indicate for each installation providing virtual access under the project, the quantity of access actually provided in the reporting period (expressed in the unit of access defined in Annex 1 for that specific installation).
- When virtual access users are traced, also the table List of users (virtual access)

As indicated in Annex 5 to the GA, the access providers must have the virtual access services assessed periodically by a board composed of international experts in the field, at least half of whom must be independent from the consortium. In the first periodic report, describe how the virtual access providers will comply with this obligation. In the following periodic reports, indicate only changes to the existing procedure.

When an assessment is scheduled under the reporting period, the assessment report must be submitted as deliverable.

### 1.X Resources used to provide access to research infrastructure

For virtual or trans-national access costs reported as actual costs, include for each access provider information on how many of the person-months (PM) reported in the use of resources have been used to provide access and explain for which task (e.g. scientific support to users, ...).

Access Provider Short Name	Installation(s)	Number of person-months	Explanations of tasks

Information on individual subcontracts must be reported in the use of resources linked to the financial statements in the IT tool. Please mention in the comments field of each subcontract whether it is related to virtual or trans-national access. In addition, all other direct costs items related to virtual or trans-national access must be detailed there, even if they do not exceed 15% of personnel costs. ]

*[OPTION for Co-funded Partnerships:*

## 1.X Co-funded partnerships

Please provide updated information and figures for indicators included in the monitoring and evaluation framework provided in the initial proposal.

European Partnership			Monitoring and evaluation framework date		
	Objectives	What is a measure of success? (Please use quantitative (Key Performance) and qualitative indicators and link them to a point in time)	Which is the data source and methodology used (project data, study, ...)	Who is responsible for monitoring and providing the data / information When will it be collected?	Baseline and target
General objectives (linked to impact indicators)	GO1				
	GO2				
	GO3				
Specific	SO1				
objectives* (linked to outcome/result indicators)	SO2				
	SO3				
	SO4				
Operational objectives* (linked to output indicators)	OO1				
	OO2				
	OO3				
	OO4				

\*add more lines, as needed.

Please use this section to provide explanations, in particular regarding the obtained results (e.g. achievements, targets that are "off track") and the process of monitoring (e.g. changes in the indicators or baselines). Please provide also hyperlinks to publicly available reports that provide more detailed information on the partnership performance. ]

#\$PRO-GRE-PG\$# #@FOL-UP-FU@#



## 2. FOLLOW-UP OF RECOMMENDATIONS AND COMMENTS FROM PREVIOUS REVIEW(S) (IF APPLICABLE)

Please include a table explaining if and how each recommendation from previous reviews and/or Project Officer assessment has been addressed.

You will fill this in starting your second periodic report.

#§FOL-UP-FU§# #@IMP-ACT-IA@#

### → 3. EXPLOITATION PRIMARILY IN NON-ASSOCIATED THIRD COUNTRIES (IF APPLICABLE)

Please provide a justification how this exploitation is still in the interest of the EU.

This is for projects where non-associated third countries are involved, because either the topic required such involvement or it was needed for the implementation of the project. However, involving these countries and the exploitation to be done by those specific organizations have to reflect how it is benefiting the EU landscape.

#§IMP-ACT-IA§# #@CON-MET-CM@#

### → 4. OPEN SCIENCE

Describe the Open Science practices related to early and open sharing of research (e.g. through pre-registration, registered reports, pre-prints or crowd-sourcing of solutions to a specific problem).

Describe the concrete measures that ensure the reproducibility of the results obtained during the action i.e., measures to ensure that the same results can be obtained by using the same data and/or methods, etc.

Besides the other elements to be reported in the continuous reporting module, here you have to describe those open science practices you haven't dealt with yet in the other part of reporting.

Open science is an umbrella term for many practices through which you make your project research more accessible to your target audiences, end-users and the general wider public.

If you've foreseen practices such as pre-registration, registered reports, pre-prints, crowd-sourcing, as described in the instructions, then here you will explain in this report how you've done so, what measures you've taken to also making your research and outputs reproducible.

#§CON-MET-CM§# #@WRK-PLA-WP@#

### → 5. DEVIATIONS FROM ANNEX 1 AND ANNEX 2 (IF APPLICABLE)

Explain the reasons for deviations from the DoA, the consequences and the proposed corrective actions.

Here it's very important to report any deviations from your Description of Action. These can be related to technical aspects like delays or changes in schedule for certain activities, that you've realized at implementation stage (5.1), or financial aspects, like more person months spent, or reallocated budget (5.2).

It is also very important to have described well enough the activities and efforts done in Section 2 on the activities per WP, in order to relate to the explanations and deviations written here.



## 5.1 Tasks/objectives

Include explanations for tasks not fully implemented, critical objectives not fully achieved and/or not being on schedule. Explain also the impact on other tasks on the available resources and the planning. Explain also the impact on other tasks and provide and provide details to allow assessing whether the project is on track.

## 5.2 Use of resources (n/a for MSCA and Lump Sums)

Include explanations on deviations of the use of resources between actual and planned use of resources in Annex 1, especially related to person-months per work package.

Include explanations on transfer of costs categories (if applicable).

Include explanations on adjustments to previous financial statements (if applicable).

### 5.2.1 Unforeseen subcontracting (if applicable) (n/a for MSCA)

Specify in this section:

- the work (the tasks) performed by a subcontractor which may cover only a limited part of the project
- explanation of the circumstances which caused the need for a subcontract, taking into account the specific characteristics of the project
- the confirmation that the subcontractor has been selected ensuring the best value for money or, if appropriate, the lowest price and avoiding any conflict of interests
- include also the name of subcontractor and amount.

### 5.2.2 Unforeseen use of in kind contributions (n/a for MSCA and Lump Sums)

Specify in this section:

- the identity of the third party
- the resources made available by the third party respectively against payment or free of charges
- explanation of the circumstances which caused the need for using these resources for carrying out the work.

## FINANCIAL REPORT

### → INDIVIDUAL FINANCIAL STATEMENT

The Financial Statement must be filled out directly on the Portal Financial Statements screen.

### → CONSOLIDATED FINANCIAL STATEMENT

The consolidated Financial Statement is generated automatically by the system.

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## ANNEXES

### → LIST OF ANNEXES

#### **Standard**

Use of Resources Report (annex 1 to Part B) (to be filled out directly on the Financial Statements screen — mandatory (n/a for Lump Sum Grants)

Certificate on the financial statements (CFS) (annex 2 to Part B) (template available on Portal Reference Documents) — mandatory if threshold reached (n/a for Lump Sum and Unit Grants)

#### **Special**

n/a

## REPORT ON THE USE OF RESOURCES — COST EXPLANATIONS

The report must be filled out directly on the Portal Financial Statements screen.

Here you will fill in on the Portal online and each partner reports their costs with explanations. As a process, the financial signatory should approve it and send it for review to the Coordinator. If accepted by the Coordinator, it will be sent for review to the EC.

GRANT	
Project number:	[project number]
Project name:	[project title]
Project acronym:	[acronym]

REPORTING PERIOD	
⚠ Please note that you must report on the entire reporting period.	
RP number:	[1] [2] [3] [4] [...] [Final]
Duration:	from [dd/mm/yyyy] to [dd/mm/yyyy]

PARTICIPANT	
Number:	[1] [2] [2a] [3] [4] [...]
Short name:	[name NAME]

Personnel costs	
<i>Financial Statement screen — When you enter the costs, pop-ups will appear to ask you for more details.</i>	
Personnel costs declared as actual costs (if applicable)	
Person-months	Work Package
[insert number person-months]	WP 1
[insert number person-months]	WP 2
[insert number person-months]	WP 3
	...
Personnel costs declared as unit costs (if applicable)	
Person months	Work Package
[insert number person-months]	WP 1
[insert number person-months]	WP 2
[insert number person-months]	WP 3

In-kind contributions provided by third parties (seconded personnel)			
<i>One line per third party (unless different types or differences regarding Annex 1 of the Grant Agreement). In-kind contribution free-of-charge only.</i>			
<i>Double-check consistency with the information on in-kind contributions in Technical Report (Part B) – activities &amp; work packages.</i>			
Third party name	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs for this RP (EUR)
[insert name]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>			[insert amount]
<i>[OPTION for adjustment to previous financial statements Explanations on adjustments</i>			
[insert comment] ]			

**Subcontracting costs**

*One line per subcontract.*

*Double-check consistency with the information on subcontracting in the Technical Report (Part B) – Activities and work packages.*

Subcontract name (subcontracted action tasks)	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs for this RP (EUR)
[insert name]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>			[insert amount]
<i>[OPTION for adjustment to previous financial statements Explanations on adjustments</i>			
[insert comment]			

**Purchase costs (travel and subsistence, equipment and other goods works and services)**

*Details for major cost items (needed if costs declared under 'purchase costs' are higher than 15% of the claimed personnel costs).*

*Start with the most expensive cost items, down to the 15% threshold.*

**Travel and subsistence**

Cost item name	Category	WP(s)	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs (EUR)

[insert name]	Travel and Subsistence	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>					[insert amount]
<b>Equipment</b>					
Cost item name	WP(s)	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs (EUR)	
[insert name]	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]	
<b>Total</b>					[insert amount]
<b>Other goods works and services</b>					
Cost item name	WP(s)	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs (EUR)	
[insert name]	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]	
<b>Total</b>					[insert amount]

#### In-kind contributions provided by third parties

One line per cost item. In-kind contribution free-of-charge only.

Double-check consistency with the information on in-kind contributions in Technical Report (Part B) – activities & work packages.

Third party name	Category	WP(s)	Foreseen in Annex 1?	Explanations (if not in Annex 1)	Costs for this RP (EUR)
[insert name]	[Travel and subsistence]/[Equipment]/[Other goods, works and services]	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>					[insert amount]
<i>[OPTION for adjustment to previous financial statements Explanations on adjustments</i>					
[insert comment] ]					

<b>Internally invoiced goods and services</b> (if applicable)				
<i>One line per cost item.</i>				
<b>Item name</b>	<b>WP(s)</b>	<b>Foreseen in Annex 1?</b>	<b>Explanations</b> (if not in Annex 1)	<b>Costs</b> (EUR)
[insert name]	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>				[insert amount]
<b>In-kind contributions provided by third parties</b>				
<i>One line per cost item. In-kind contribution free-of-charge only.</i>				
<i>Double-check consistency with the information on in-kind contributions in Technical Report (Part B) – activities &amp; work packages.</i>				
<b>Third party name</b>	<b>WP(s)</b>	<b>Foreseen in Annex 1?</b>	<b>Explanations</b> (if not in Annex 1)	<b>Costs for this RP</b> (EUR)
[insert name]	[insert WP numbers]	[YES] [NO]	[insert comment]	[insert amount]
<b>Total</b>				[insert amount]
<i>[OPTION for adjustment to previous financial statements Explanations on adjustments</i>				
[insert comment] ]				