

## **PERIODIC REPORT**

### **Introduction and Question/Answer**

#### **Introduction**

The objective of the periodic report is to describe the work carried out under the project and the achievements for the relevant period. It is a progress report which provides an update on the scientific and financial aspects including:

- the degree of fulfilment of the project work plan for the relevant period;
- the continued relevance of the objectives and breakthrough potential;
- the synergies between industry, academia, SMEs and other stakeholders;
- the management quality of the project; any deviations and risks
- major achievements; the use and dissemination of results

This report sets the basis for decision about the payment for the next period. It is not for public use. This report should be submitted together with the financial statement (Form C) and the summary financial report.

More information on the process available in the Question and Answers document.

#### **Questions/Answers on the periodic report**

##### **1) What is the periodic report?**

The periodic report is a progress report which reflects the collaboration within the IMI-JU consortium (EFPIA companies, IMI JU beneficiaries and other participants) to achieve the objectives of the project during the period referred to. This report sets the basis for decision about the payment for the next period.

##### **2) What is the objective of the periodic report?**

The objective of the periodic report is to summarise progress versus plan, the achievements of the work carried out under the project for the relevant period. It provides an update on the scientific and financial aspects, including the continued relevance of the objectives and breakthrough potential with respect to the scientific and industrial state of the art. The periodic report highlights any deviations to the Annex I of the Grant Agreement for the reporting period and flags risks and possible mitigations.

##### **3) When is the periodic report due?**

The reporting period is due yearly, according to the periods defined in the Grant Agreement. To facilitate the reporting for participants involved in several projects, IMI JU has streamlined the process by aligning the reporting cycle periods. All project participants will report at one of two fixed dates a year (31 July or 31 December, depending on the starting date of the project). Therefore the first and last periods may be longer or shorter than 12 months<sup>1</sup>. The periodic report should be submitted within 60 days of the end of each reporting period. The table below provides indication for the reporting cycle and submission dates.

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<sup>1</sup> this applies for projects from 2nd Call onwards

Project Start Date	End of First reporting period	Deadline (End + 60 days)	First reporting period (Months)	Last reporting period (Months)
1 January	31 December	28 February	12	12
1 February	31 December	28 February	11	13
1 March	31 December	28 February	10	14
1 April	31 December	28 February	9	15
1 May	31 July	30 September	15	9
1 June	31 July	30 September	14	10
1 July	31 July	30 September	13	11
1 August	31 July	30 September	12	12
1 September	31 July	30 September	11	13
1 October	31 July	30 September	10	14
1 November	31 December	28 February	14	10
1 December	31 December	28 February	13	11

#### 4) Which information is requested for the periodic report?

The periodic report covers both scientific and financial aspects of the project including achievements for the related period, deliverables and milestones<sup>2</sup>. It is submitted with the form C (financial statement) and the summary financial report. Information on content and the format of the report can be found in the Guidance document.

#### 5) Who prepares the report and how to submit it?

The EFPIA coordinator and the IMI JU managing entity will prepare the report with the help of the Work Package leaders. The coordinator is responsible to ensure that the report is submitted in a timely manner (within 60 days of the end of each reporting period).

It should be sent by the coordinator of the project to IMI JU (scientific manager) both electronically and via surface mail.

#### 6) Who is reviewing the report?

The IMI JU scientific manager and the financial manager in charge of the project review the report.

#### 7) What is the outcome of the review?

The IMI JU scientific manager in charge approves the report and sends an official letter of approval to the coordinator. The financial manager initiates the payment of the next period. In case clarifications are needed during the review, the scientific manager will liaise with the coordinator for additional information.

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<sup>2</sup> A milestone is a scheduled event signifying the completion of a major deliverable or a set of related deliverables. Usually a milestone is used as a project checkpoint to validate how the project is progressing and revalidate work.