**Project[[1]](#footnote-1) Number:** [insert project reference number]

**Project Acronym:** [insert acronym]

**Project title:** [insert project title]

**Periodic Technical Report**

**Part B**

**Period covered by the report**: from [insert dd/mm/yyyy] to [insert dd/mm/yyyy]

**Periodic report:** *[*1st*]* *[*2nd*]* *[*3rd*]* *[*4rd*]*

# 1. Explanation of the work carried out by the beneficiaries and Overview of the progress

* Explain the work carried out during the reporting period in line with the Annex 1 to the Grant Agreement.
* 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, and a summary of exploitable results and an explanation about how they can/will be exploited[[2]](#footnote-2).

(No page limit per workpackage but report shall be concise and readable. Any duplication should be avoided).

# 1.1 Objectives

List the specific objectives for the project as described in section 1.1 of the DoA and described the work carried out during the reporting period towards the achievement of each listed objective. Provide clear and measurable details.

**1.2 Explanation of the work carried per WP**

# 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/linked third party involved.

# 1.2.2 Work package 2

# Etc.

**1.3 Impact**

Include in this section whether the information on section 2.1 of the DoA (how your project will contribute to the expected impacts) is still relevant or needs to be updated. Include further details in the latter case.

*[Option for Projects on Access to Research Infrastructures*

**1.4. Access provisions to Research Infrastructures**

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

**Trans-national Access Activities (TA)**

Provide for the set of TA Work Packages, 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 research teams 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 users: organisation of the Selection Panel, any additional selection criteria[[3]](#footnote-3) employed by the Selection Panel, 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 update when necessary in order to prove that the panel is composed following the conditions indicated in Article 16.1 of the GA[[4]](#footnote-4). The Commission 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 projects and on the scientific output of supported users. In particular indicate the number of eligible User projects 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 projects, started and supported in the reporting period, which have a majority of users not working in an EU or associated country

Description of the Trans-national Access activity

Give an overview of the user-projects[[5]](#footnote-5) 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 the user-projects for which costs have been incurred in the reporting period. A user-project can run over more than one reporting period. In this case it should be inserted in the list of each concerned reporting period.

The list of user-projects must include, for each user-project, the acronym, objectives, as well as the amount of access granted to it on each installation used by the user-project in the reporting period. When the user-project is completed in the reporting period the list should also include a short description of the work carried out. The Commission 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):

* List of users: Researchers who have access to research infrastructures/installations (one or more) through Union support under the grant either in person (through visit) or through remote access;
* Research infrastructures made accessible to all researchers in Europe and beyond through EU support and summary of trans-national access provision per installation per reporting period 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).

Scientific output of the users at the facilities

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

You should maintain a list of publications that have appeared in journals (or conference proceedings) during the reporting period and are resulting from work carried out under the Trans-national Access activity. List only publications that acknowledge the support of the European Community. For each publication indicate: the acronyms of the user-projects 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 Commission reserves the right to request this list at any time.

User meetings

If any user meetings have been organised in the reporting period, indicate for each of them the date, the venue, the number of users attending the meeting and the overall number of attendees.

**Virtual Access Activities (VA)**

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

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.

As indicated in Art. 16.2, 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 beneficiaries. 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.

**1.5 Resources used to provide access to Research Infrastructures**

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 linked to the financial statements have been used to provide access and explain for which task (e.g. scientific support to users, …).

|  |  |  |  |
| --- | --- | --- | --- |
| **Beneficiary/Linked Third Party short name** | **Installation(s)** | **PM** | **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 in the use of resources linked to the financial statements in the IT tool, even if they do not exceed 15% of personnel costs.

*]*

**2. Update of the plan for exploitation and dissemination of result (if applicable)**

Include in this section whether the plan for exploitation and dissemination of results as described in the DoA needs to be updated and give details.

**3. Update of the data management plan (if applicable)**

Include in this section whether the data management plan as described in the DoA needs to be updated and give details.

**4. Follow-up of recommendations and comments from previous review(s) (if applicable)**

Include in this section the list of recommendations and comments from previous reviews and give information on how they have been followed up.

**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.

# 5.1 Tasks

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.

# 5.2 Use of resources (not applicable for MSCA)

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) (not applicable for MSCA)**

Specify in this section:

1. the work (the tasks) performed by a subcontractor which may cover only a limited part of the project;
2. explanation of the circumstances which caused the need for a subcontract, taking into account the specific characteristics of the project;
3. 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.

**5.2.2 Unforeseen use of in kind contribution from third party against payment or free of charges (if applicable) (not applicable for MSCA)**

Specify in this section:

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

|  |  |  |
| --- | --- | --- |
| HISTORY OF CHANGES | | |
| VERSION | PUBLICATION DATE | CHANGE |
| 1.0 | 15.07.2015 | Initial version |
| 1.1 | 08.08.2016 | Corrections for MSCA. |
| 1.2 | 27.03.2017 | Modification of Part B for Research Infrastructures (RI) actions to include a table with the resources used to provide access to RI. |
| 2.1 (version of full template) | 19.12.2017 | Update of part B of the template to include explanations on adjustments to financial statements declared on previous periods. |

1. The term ‘project’ used in this template equates to an ‘action’ in certain other Horizon 2020 documentation [↑](#footnote-ref-1)
2. Beneficiaries that have received Union funding, and that plan to exploit the results generated with such funding primarily in third countries not associated with Horizon 2020, should indicate how the Union funding will benefit Europe's overall competitiveness (reciprocity principle), as set out in the grant agreement. [↑](#footnote-ref-2)
3. See article 16.1 of the Grant Agreement. [↑](#footnote-ref-3)
4. The selection panel must be composed of international experts in the field, at least half of them independent from the beneficiaries, unless otherwise specified in Annex 1. [↑](#footnote-ref-4)
5. A user-project is a proposal for access submitted by a user group to the consortium to be evaluated by the Selection Panel. [↑](#footnote-ref-5)