JRP Reporting Guidelines

The EMRP is jointly funded by the EMRP participating countries
within EURAMET and the European Union

CONTENTS

If you require further help or guidance after reading this document, please contact the helpline

Email: emrpA169@npl.co.uk

Telephone: +44 20 8943 6666.

1 Introduction

These Reporting Guidelines form the reference document for reporting for JRPs and the EMRP Researcher Grants in accordance with the relevant clauses of the JRP-Contract and the EMRP Researcher Grant Contract.

These Reporting Guidelines identify the required reports and provide the JRP-Consortium with information on their purpose, give details of their timing, preparation and content, and define responsibilities for submission. In addition, Reporting Templates are provided to ensure that the reports are comprehensive and presented in a uniform manner.

Changes were introduced in version 2.5 of the Reporting Guidelines including:

- In section 4.2.2, the summary now includes a request for Good News Stories and removes the previous requirement to detail delays by deliverable.

- A minor rewrite of section 4.2.3 on the Output and Impact Report, including a change in terminology from "intermediate impact" to "early impact".

- In sections 4.4.1 and 4.4.2, refinements to the requirements for the Final Publishable JRP Summary and Report based on experience of the first of those documents to be submitted and reviewed.

2 Background

Reporting serves a number of functions, specifically:

- Providing the JRP-Coordinator with the information necessary to manage the project.

- Enabling the JRP-Coordinator to make a formal declaration regarding JRP progress.

- Allowing EURAMET to monitor progress of the JRP and EMRP Researcher Grants against their stated objectives.

- Providing specific information related to dissemination, knowledge transfer, impact and exploitation of the research to EURAMET for promotion of the EMRP as a whole.

- Providing the information needed to establish the appropriateness of the claimed resources for each individual JRP-Partner.

- Allowing for the collection of statistics required by the European Commission.

- Enabling EURAMET to meet its programme level reporting obligations.

Following the first periodic report (at month 18) a mid-term review meeting is held to supplement the previous documentary based reviews. This replaces the TP-Guardian Reporting process that was in use before January 2014. For each TP, all of the JRPs will be reviewed at a high level by a group of external experts who will be selected by the TP-Guardians / TP-Coordinators and by the members of the EMRP Committee. They will evaluate the potential outcomes of the projects and their uptake by stakeholders by addressing the following questions: Is the project going to meet the needs of the stakeholders? How have their needs changed in the 3 years since the PRTs were submitted? Should changes be made to a project to ensure impact is maximised? The review can then be aggregated at TP level to make a judgement on how well the portfolio of projects will meet the intentions in the scope for the call. Please note that the mid-term TP reviews will not be about individual project progress against the plan as this is already assessed by the EMRP-MSU during the reporting process. In order to facilitate the mid-term TP review process JRP-Representatives will need to complete Reporting Template 18 - JRP Self-Assessment Report and a presentation template (to be provided by the EMRP-MSU). These reports will be requested by the EMRP-MSU as and when required. **Note that it is particularly important that the JRP website is updated before the mid-term review.**

JRP-Representatives will be informed about the date, location and format of the mid-term TP review meeting by the EMRP-MSU. The one day meeting will likely be held at an NMI/DI. Attendees will include the external experts (~5), JRP-Representatives, the TP-Guardian, the TP-Coordinator, and the EMRP-MSU. Attendees will be provided with each JRP's Publishable JRP Summary, with the Summary from Section 1 of the 18 month report i.e. the project's view of their achievements and with each JRP Self-Assessment Report. Guests from the senior management of nearby NMI/DIs will also be encouraged to attend the initial presentations to get a

wider view of the projects beyond the involvement of their own staff. The mid-term TP review meeting will include presentations by each JRP-Representative and a joint Q&A session for all participants. A template outlining the structure of the presentations will be provided by the EMRP-MSU. JRP-Representatives are requested to follow this structure as closely as possible in their presentations. The external experts will express their opinion about these achievements and will make recommendations on the improvements that should be made in their final written report. The EMRP-MSU will follow-up on progress against these recommendations through the normal reporting process.

At other times during the project, the TP-Guardians / TP-Coordinators will still have the opportunity to identify any serious issues with the JRPs and to propose solutions to the issues. The TP-Guardians / TP-Coordinators can pursue such issues directly with the respective JRP-Coordinator or they can raise the issue at the next EMRP Committee meeting. The EMRP Committee can also propose a suitable solution and can delegate the TP-Guardians / TP-Coordinators to take action if required. When a suitable solution is agreed (eg stop a Work Package, redefine deliverables, removal/addition of a JRP-Partner) the JRP-Coordinator may need to liaise with EURAMET in order to implement a contract amendment. It is also possible that the EMRP Committee will raise other issues during the EMRP Committee meetings. Any such matters arising will also be addressed by the TP-Guardians / TP-Coordinators. The TP-Guardians will ensure that the JRPs achieve their high level objectives.

	TP-Guardian	TP-Coordinator	Year
ENG	Albert Dalhuijsen	Klaus-Dieter Sommer	2009
ENV	Jörn Stenger	Beatrice Lalere	2010
IND	Jiri Tesar	Roman Schwartz	2010
HEALTH	Beat Jeckelmann	Hans Koch	2011
SI	Hans Arne Frøystein	Ian Severn	2011
NT	Jörn Stenger	Massimo Pasquale	2011
IND2	Robin Hart	Roman Schwartz	2012
SI2	Beat Jeckelmann	Paul-Andre Meury	2012
OE	Maguelonne Chambon	JT Janssen	2012
ENG2	Albert Dalhuijsen	Klaus-Dieter Sommer	2013
ENV2	Jörn Stenger	Beatrice Lalere	2013

The **approval** of the reports by EURAMET is a prerequisite **for the periodic and final payments** to the JRP-Partners and EMRP Researcher Grant Beneficiaries by EURAMET. Payments will only be made after EURAMET's approval of contract reports. Delays in submission of acceptable reports by individual JRP-Partners or organisations will result in delays in payment for all funded JRP-Partners and EMRP Researcher Grant Beneficiaries.

JRP-Coordinators can only meet their obligations if the other JRP-Partners and the EMRP Grant Researchers fully discharge their reporting responsibilities.

3 Reporting Requirements

3.1 Joint Research Projects (JRPs)

The JRP Reporting requirement (Clause 6 of the JRP-Contract) falls into four groups:

- **First Publishable JRP Summary** - this provides a brief overview of the JRP and shall initially be provided to EURAMET 30 days after signature of the JRP-Contract.

- **Interim reporting** - this summarises progress in the periods 1 - 6 months, 7 - 12 months, 19 - 24 months and 25 - 30 months. Each Interim Report shall be provided to EURAMET within 45 days of the end of the period.

- **Periodic reporting** - this reports progress, achievements, issues and impact and justifies the funding covering each successive formal period (Period 1 and Period 2). Each Periodic Report shall be provided to EURAMET within 60 days of the end of the period.

- **Final reporting** – is additional to the Period 2 Periodic Reports. The Final Reports summarise the JRP's activities, achievements and impact over the full duration of the JRP. Final Reports shall be provided to EURAMET within 60 days of the end of the project.

These reports shall summarise the performance of the JRP and/or EMRP Researcher Grant (see Section 3.2) during the period in the context of the original research plan and the schedule of deliverables defined in the JRP-Protocol (JRP) and Research Schedule (EMRP Researcher Grant), covering the main deliverables produced, discussing issues encountered, and the solutions found. If any deviations from the research plan and schedule of deliverables have occurred or are expected to occur in the next period, these shall be explained in the relevant report. The EMRP Grant Researcher contributes to each required report by providing the necessary information on the progress of his/her Research Activities to the JRP-Coordinator through EMRP Researcher Grant Short-Term and Final Reports (see Section 5).

The JRP-Coordinator is responsible for compiling these reports in cooperation with the JRP-Partners and the EMRP Grant Researchers, making a high-level amendment of progress towards the goals of the project, and the delivery of the reports to EURAMET.

EURAMET recommends that the JRP-Coordinator informs the JRP-Partners and EMRP Grant Researchers at an early stage about the contents and deadlines of the required reports and sets clear assignments and responsibilities within the JRP-Consortium and others taking account of:

- What information has to be passed within the JRP-Consortium for each JRP-Partner and EMRP Grant Researcher to fulfil his/her obligations.

- The overall timescale for the generation of the various reports.

- The time taken to obtain a Financial Audit Report.

3.2 EMRP Researcher Grants

EMRP Researcher Grant related reporting falls into two streams:

- **EMRP Grant Researcher** – report via the JRP-Coordinator to EURAMET describing the progress on the Research Activities, and on training and knowledge transfer activities undertaken. This will be aligned with the JRP reporting.

- The **Home Organisation** (for a REG) and **Employing Organisation / Guestworking Organisation** (for a RMG or ESRMG) will also complete a Payment Request Form which will be sent to the Home / Employing / Guestworking Organisations by the EMRP-MSU.

3.3 General Guidance

The JRP-Partners, the Work Package Leaders and/or Task Leaders as well as the EMRP Grant Researchers as appropriate, shall provide all required information to the JRP-Coordinator, and support the JRP-Coordinator in drafting/writing the reports. Please ensure that any acronyms used in reports are clearly explained.

Every report submitted to EURAMET shall indicate the confidentiality status on the front cover, using the EC classification below:

PU = Public

PP = Restricted to other FP7 Cooperation Programme participants (including EURAMET and the European Commission Services)

RE = Restricted to a group specified by the JRP-Consortium (including EURAMET and the European Commission Services)

CO = Confidential, only for members of the JRP-Consortium (including EURAMET and the European Commission Services)

Interim and periodic progress reports and EMRP Researcher Grant Short-Term and Final Reports shall bear the classification 'Confidential', financial reports will automatically be assumed to be 'Confidential'.

All reports submitted shall be in English and shall be of sufficient quality to enable a meaningful review. Additionally reports intended for publication shall be of suitable quality to enable direct publication without additional editing. By submitting the publishable reports to EURAMET, the JRP-Partners (and EMRP Grant Researcher(s) as appropriate) are also certifying that they include no confidential material.

Please ensure that all pdfs of scanned documents are of adequate but not too high resolution to avoid transmitting large electronic files (black and white is adequate for documents such as Financial Audit Reports etc). All pdfs should be 'unsecured' and not password protected so that documents may be collated by EURAMET.

A summary of the reports to be provided in each period, and the period covered by each report, is detailed in Section 7 and Section 8 of these guidelines.

Electronic copies of reports/documents should be emailed to EURAMET at emrpA169@npl.co.uk, whilst hard copies of documents (where requested – see Section 7) should be sent to the relevant EMRP-MSU Project Officer, EURAMET EMRP-MSU, National Physical Laboratory, Hampton Road, Teddington, Middlesex, UK, TW11 0LW.

If you wish to submit a report confidentially (eg encrypted) to EURAMET EMRP-MSU then please telephone the EMRP helpline, or your EMRP-MSU Project Officer, on +44 20 8943 6666 to discuss an appropriate method.

Submission by the JRP-Consortium

Except where identified below, the JRP-Consortium shall transmit the reports through the JRP-Coordinator to EURAMET electronically as excel or word files (where indicated).

Submission by the participating organisations

All inputs to reporting from participating organisations should be submitted to the JRP-Coordinator using the format agreed with the JRP-Coordinator.

Except where identified below, the JRP-Consortium shall transmit the reports through the JRP-Coordinator to EURAMET electronically as excel or word files (where indicated), or in some cases as hard copies (see Section 7).

4 JRP Reporting

4.1 *Publishable JRP Summary*

Reporting Template 1 – Publishable JRP Summary should be downloaded for the completion of this report.

The first Publishable JRP Summary shall initially be provided to EURAMET 30 days after signature of the JRP-Contract. The Publishable JRP Summary shall be updated every six months at the end of each period (Interim, Periodic and Final). JRP-Consortia may, in addition, choose to update their Publishable JRP Summary at other times, for example when a major outcome has been reached or prior to a workshop or conference. EURAMET reserves the right to request an updated Publishable JRP Summary at other times if necessary to meet European Commission or other external requirements.

The Publishable JRP Summary shall be of suitable quality to enable direct publication by EURAMET. The document will be made available on the EURAMET website and should be freely used by the JRP-Partners to promote the activities and achievements of the JRP, in particular with groups outside the core research community such as policy makers, standards bodies, regulators etc.

The document is "cumulative", ie it is intended to capture the entire lifetime of the JRP, not just the activities of the prior six months. Please ensure that it is set out and formatted so that it can be printed as a stand-alone paper document of initially, approximately two pages. As the JRP progresses the document may expand, but to no more than approximately four pages in total.

The <u>recommended</u> font is Arial 10 for the main body, with headings in bold.

The Publishable JRP Summary should include all the elements described below:

Background

- Please describe the background to the JRP and how it will progress beyond the state of the art (this should be at a high level). It can be based on the text from Section B1.c of the JRP-Protocol. Also, if your JRP directly continues the work undertaken in a previous JRP please summarise the conclusions from that JRP. (approx. 150-300 words)

Need for the project

- Please describe the need for the JRP (this should be at a high level and should set the scene for why the JRP is being undertaken and what it aims to achieve). It can be based on the text from Section B1.b of the JRP-Protocol. Also, if your JRP continues the work undertaken in a previous JRP please summarise why the work needs to be continued in this JRP. (approx. 150-300 words)

Scientific and technical objectives

- Please describe the scientific and technical objectives for the JRP. This can be done as in Section B1.d of the JRP-Protocol, but WPs should not be mentioned. (approx. 150-300 words)

Expected results and potential impact

- Please describe the expected final results and their potential or actual impact and use (including the socio-economic impact, engagement with external bodies, such as input to standards bodies, policies and directives, and stakeholders and the wider societal implications of the JRP so far). It can be based on the text from Section B3 of the JRP-Protocol. (for the first Publishable JRP Summary: approx. 150-300 words)

- In updated versions of the Publishable JRP Summary, the results part of this section will be expanded to include progress towards the objectives. This should be written on an objective by objective basis (e.g. use each objective as a subheading) highlighting the main results achieved so far (this should be aimed at a non-specialist audience). The Publishable JRP Summary should make minimal use of EMRP terminology (such as 'JRP' or 'Researcher Grants', 'REGs' etc.) in the descriptive text. Also, it should not refer to Work Packages, tasks, management activities etc and should not be written in 'project management' terms or in very technical language). (for subsequent Publishable JRP Summaries there is no word limit for this section, but the entire Publishable JRP Summary should not be more than four pages)

Note: at the beginning and during the early life of the JRP, the focus of the Publishable JRP Summary will be on the work planned and its expected impact rather than on the work performed and its actual impact.

Diagrams or photographs illustrating and promoting the work of the project may be included, however there is a limit on the overall file size.

The Publishable JRP Summary should be submitted as a word file.

4.2   JRP Interim Reporting (months 6, 12, 24 & 30)

The JRP-Consortium shall provide Interim Reports summarising progress in the periods 1 - 6 months, 7 - 12 months, 19 - 24 months and 25 - 30 months. **Each Interim Report shall be provided to EURAMET within 45 days of the end of the period.** Interim reporting gives the JRP-Consortium the opportunity for a brief review of progress specifically indicating whether the JRP is on target, identifying any issues, consequences and remedial actions and updates the Publishable JRP Summary (see Section 4.1). It also includes a brief progress report from the EMRP Grant Researcher(s).

Interim reporting comprises:

- Updated Publishable JRP Summary,

- Interim Progress Report,

- JRP Output and Impact Report.

4.2.1 Updated Publishable JRP Summary

The Publishable JRP Summary (See Section 4.1) shall be updated as part of the Interim Reporting following the format given in Reporting Template 1 - Publishable JRP Summary. The updated Publishable JRP Summary shall be rewritten every 6 months (ie it is "cumulative" and is intended to capture the entire lifetime of the JRP, not just the activities of the prior six months). As the JRP progresses the document may expand, but to no more than approximately four pages in total. (NB If separate sections on "Progress to date" have been used in the past, this procedure should be discontinued, and such information should be integrated into the text of the Publishable JRP Summary.)

4.2.2 Interim Progress Report

Reporting Template 3 - JRP Interim / Periodic Progress Report should be downloaded for the completion of this report.

4.2.2.1 Section 1: Summary

The summary section should be a maximum of **2-3 pages** in length. **This section is provided to the mid-term reviewers and should be understandable without reference to other sections in the report or the JRP-protocol.**

Section 1.1 Highlights and Issues

Section 1.1.1 Highlights
Describe the key achievements of the project in the last 6 months. (You should be able to copy the relevant text from your updated Publishable JRP Summary to complete this section) (approx. 150-250 words)

Section 1.1.2 Good News Stories
EURAMET regularly updates its website homepage with good news stories from the current EMRP JRPs. Please detail in this section any items that you think constitute good news stories, which can be used to promote the work of your project and the programme. Examples of past good news stories include; prototypes being tested in industry, best paper awards and publications in prestigious journals. This list of examples is not exhaustive so if you are in doubt about including a potential good news story please do include it.

Section 1.1.3 Issues
Please provide an overall statement describing any delays or problems with the project and how these will be addressed (i.e. explain why the delays or problems are an issue and if there are any knock-on effects on the rest of the project). You should include any relevant information from Section 4 'Changes requested'. (approx. 10-100 words)

Section 1.1.4 Financial issues
Please provide an overall statement describing whether the project has any financial issues that need to be resolved. If there are no financial issues please say so. If financial issues are included, please ensure that these match Section 2 and Section 4 (if changes are requested). (approx. 10-500 words)

Section 1.2 Effective cooperation

Section 1.2.1 Cooperation between the JRP-Partners
Please provide an overall statement describing whether the cooperation between the JRP-Participants is effective and up to the standards required for a successful project. Please highlight any JRP-Participants whose contribution is not as required. Examples should be included. (approx. 50-200 words)

Section 1.2.2 Joint research
Please describe how the joint research is leading to results that individual NMI's could not achieve by themselves. Also describe how this is leading to added value for metrology and for the wider community. Examples should be included. (approx. 50-200 words)

Section 1.3 Scientific excellence

Section 1.3.1 Progress beyond the state of the art and stimulation of innovation
Provide a description, either for the JRP as a whole, or for each Work Package (1 paragraph per Work Package) describing WP progress beyond the state of the art and how innovation has been or will be stimulated by metrological developments in the project. (approx. 100-400 words)

Section 1.3.2 Publications, presentations and patents
Please complete the following sentence for your JRP (NB only include published papers, presentations given, and patents granted. This information should match that in the JRP Output and Impact report): The JRP output and impact report lists **nn** publications, **nn** presentations, and **nn** patents for the life of this project.

Section 1.4 Impact

Section 1.4.1 Stakeholder Engagement
Please describe how your JRP is engaging with stakeholders and the benefits that you expect them to get as a result of the engagement. Examples should be included and these should match those provided in the Output and Impact Report. (approx. 50-200 words)

Section 1.4.2 Dissemination:
Standards
Please describe how your JRP is actively engaging with standards-organisations and regulators and describe the expected results of this engagement. Examples should be included and these should match those provided in the Output and Impact Report. (approx. 50-200 words)

End users
Please describe how your JRP is ensuring the take up of results by end users. Examples should be included and these should match those provided in the Output and Impact Report. (approx. 50-200 words)

Section 1.4.3 Impact beyond the end of the JRP
Please describe how your JRP is ensuring that the planned wider indirect impacts (eg environmental, financial, social, etc.) are being developed. This should relate to the expected impact of the JRP as described in the Annex Ia. (approx. 50-200 words)

4.2.2.2 Section 2: Use of Resources and Financial Spend

This section should only be completed for Periodic Progress Reports.

4.2.2.3 Section 3: JRP 'deliverable status' table and progress

Use the JRP 'deliverable status' table to show deliverable status against the JRP-Protocol (Annex Ia of the JRP-Contract). This table should be set up by the JRP-Coordinator at the beginning of the JRP, and then maintained as each deliverable is delivered. Deliverables should be listed in numerical order and not in chronological order. Guidance for completing the JRP 'deliverable status' table is included in Annex A of these Guidelines.

For the column titled 'Status and activity in the last six months (one paragraph includes all JRP-Participants)' provide one paragraph (guidance: 250 words per deliverable) describing status and activity during the last six months for each active deliverable. Ensure that the contribution of each JRP-Participant is included and that this is in agreement with the JRP-Protocol. If not, explain the discrepancy (eg JRP-Participants X, Y and Z will not start work on this deliverable until the next reporting period). Do not include data, tables, histograms, or pictures in this column. A status statement should be included for each deliverable (eg *Work has not yet started on this deliverable., This deliverable is on schedule., This deliverable is delayed to* month year*., This deliverable is complete*.). Do not include a description, other than the status statement, for those deliverables that were completed in a previous reporting period.

If you need to include data, tables, histograms, or pictures to highlight the technical strength of the work please include an annex as a separate document containing this information. Inclusion of such an annex is optional.

4.2.2.4 Section 4: Changes requested

Where any changes are required (eg deliverable content, scheduling, finance, JRP-Partners, activities etc) give full details of the requested changes and the reasons for the changes in this section. If the changes are to deliverables then they should be listed by deliverable in deliverable number order. Please also comment on the impact of the changes to the critical path of the JRP and its deliverables and to the overall impact. Any changes to Annex Ib and to the Researcher Grants should also be described. Ensure that the changes requested match any described in Section 1.1.3, the delays stated in Section 3 and the delays in the Researcher Grant reports. NB the whole JRP-Consortium should agree to the proposed changes. (approx. 10-150 words)

4.2.2.5 Section 5: Commentary on EMRP Grant Researcher's input

The 1000 character summary(ies) from Section 1 of the EMRP Grant Researcher('s)' Short-Term, or Final, Report(s) will be pasted into this Section by the JRP-Coordinator. The JRP-Coordinator should also provide further comments on the work of the EMRP Grant Researcher(s).

4.2.2.6 Section 6: Management summary

The management declaration table shown below and included in Reporting Template 3 - JRP Interim / Periodic Progress Report should be completed for each Interim Progress Report, deleting those statements that do not apply. This will provide EURAMET with a statement about the project, about the financial progress of the JRP, about contract and consortium performance, about the acknowledgement of the funding source at the top level, about the JRP website and about the submission of publications to the EURAMET Publication Repository. Financial reporting is not required as part of the interim reporting process.

Project progress against plan	This JRP is proceeding according to the plan described in the current version of the JRP-Protocol / This JRP is at variance with the plan described in the current version of the JRP-Protocol but the variance is recoverable / This JRP is at variance with the plan described in the current version of the JRP-Protocol and a change is requested in Section 4 of this report
Financial progress against plan	This JRP is proceeding according to the plan described in the current version of the JRP-Protocol / JRP Costing Worksheet / This JRP is at variance with the plan described in the current version of the JRP-Protocol / JRP Costing Worksheet but the variance is recoverable / This JRP is at variance with the plan described in the current version of the JRP-Protocol / JRP Costing Worksheet and a change is requested in Section 4 of this report
JRP-Consortium	The JRP-Participants* details are up-to-date and they match those in the current version of the JRP-Contract / The JRP-Participants* details are not up-to-date and the JRP-Contract needs to be updated
Contract and consortium performance	All JRP-Participants* are delivering to their contractual obligations / There are issues with one or more JRP-Participants* which are recoverable without change requests / There are issues with one or more JRP-Participants* and a change is requested in Section 4 of this report
Funding source acknowledged	All JRP-Participants* have fulfilled Clause 13 "Publication and Public Access" of the JRP-Contract. All published material includes the following statement to indicate the co-funding by the European Union: "The EMRP is jointly funded by the EMRP participating countries within EURAMET and the European Union."
JRP website	The JRP website** exists and its content is up-to-date / The JRP website** does not exist yet / The JRP website** exists but its content needs to be updated.
JRP publications submitted for inclusion in the EURAMET Publication Repository	The JRP-Coordinator has submitted all of the publications listed in the JRP Output and Impact Report for inclusion in the EURAMET Publication Repository / The JRP-Coordinator has not submitted all of the publications listed in the JRP Output and Impact Report for inclusion in the EURAMET Publication Repository *(if all of the publications have not been submitted for inclusion in the EURAMET Publication Repository please explain why)*

Note * 'Participants' includes: JRP-Partners (funded/unfunded), REG-Researcher(s), associated Home Organisations, Linked Third Parties.

Note **** The JRP website should be regularly updated. This is especially important before the mid-term review.

In the case of Interim Reporting, it is important that EURAMET knows that the JRP-Coordinator and the JRP-Consortium are monitoring the JRP and have an overview of JRP progress (technically and financially) against plan, as well as of the associated EMRP Researcher Grant if applicable.

Please include a free text commentary (approx. 10-150 words) on issues not covered elsewhere in the report, such as:

- Any changes to the legal status of any of the JRP-Partners (including confirmation that the JRP-Coordinator has informed EURAMET (via the EURAMET EMRP-MSU)).
- Any changes to the JRP-Consortium.

4.2.3 JRP Output and Impact Report (formerly the Impact Report and the JRP Publications, Dissemination and Foreground Report)

The JRP Output and Impact Report provides information on the outputs the JRP has delivered, including technical and dissemination outputs as well as information on how the outputs are being used by end-users and other stakeholders.

The data in the report is used to meet the Commission's requirements for evidence of the outputs and impact of the EMRP programme. It is used in two ways:

- To report the collective research outputs at programme level (i.e. the data on publications, conference presentations, etc. is collated across all EMRP projects and reported to the Commission).

- To provide essential inputs to the impact assessment methods (as specified in the EMRP Impact Assessment Framework) that are used to demonstrate evidence of the impact of EMRP. This evidence will be reported to the Commission and the programme evaluators.

The JRP Output and Impact Report is submitted in the form of an excel workbook and it comprises 11 worksheets:

1	STANDARDS & REGULATORY ACTIVITIES	All standards and regulatory activities relating to the JRP. This includes standardisation or regulatory bodies, working groups, technical or industrial (sub)committees that the JRP-Consortium has contributed to, as well as specific documentary standards and regulations the JRP has contributed to. Links with, and inputs to, policy makers, such as the European Commission's Directorate Generals (DGs) and Directives (development or implementation) should also be recorded. This section also includes contributions to metrology committees such as those of BIPM and EURAMET.
2	PUBLICATIONS	Formal publications including: articles in peer-reviewed journal; published proceedings; technical reports; good practice guides; books; contribution to books; Masters and PhD theses.
3	CONFERENCE PRESENTATIONS & POSTERS	All presentations & posters at conferences and congresses at which the JRP outputs / findings were presented to an audience.
4	TRAINING	All training activities of the JRP. This includes both 'internal' training for JRP-Participants (inc. REGs) and 'external' training for non-JRP-Participants. Training includes face-to-face training courses, published training guidance documents (paper or online), on-line training, one-to-one training, etc.
5	OTHER DISSEMINATION	All other dissemination activities of the JRP (not recorded elsewhere) that raise awareness of the JRP's activities and outputs among a broader audience. This includes newsletters, events, web sites, press releases, flyers, articles published in trade/professional press, articles in the popular press, videos, media briefings, exhibitions, interviews, films, TV clips, etc.
6	FOLLOW-ON COLLABORATIONS	Follow-on research collaborations and staff exchanges at the European or International level that have resulted from the JRP. This includes any collaborations that involve at least two of the JRP-

		Participants (they may also include new partners in addition to the JRP-Participants).
7	END USER UPTAKE & EXPLOITATION	Details of the uptake of the JRP's outputs by end-users in industry or public organisations - such as the uptake of procedures, methods, protocols, devices and use of the new/improved measurement capabilities generated by the project. This worksheet is primarily directed at capturing uptake among industry and public organisations. However uptake for important academic research can also be reported.
8	COLLABORATORS & STAKEHOLDERS	All JRP Collaborators and stakeholders. Collaborators are those organisatiosn that have signed an Exchange of Letters (or equivalent) with the JRP-Consortium. Stakeholders are a broader group of people who proactively engage with the JRP - these include, for example, advisory board/ committee members.
9	APPLICATIONS FOR PATENTS, TRADEMARKS, REGISTERED DESIGNS	List of all applications for patents, trademarks, registered designs, etc. The list should specify at least one unique identifier e.g. European Patent application reference. For patent applications, only if applicable, contributions to standards should be specified.
10	EXPLOITABLE FOREGROUND, ETC	List of all exploitable foreground generated by the JRP. This is technology, devices, software, procedures, methods, protocols developed by the project that has the potential to be exploited by external organisations. These outputs have either (i) not yet been protected by formal IP arrangements or (ii) may not be suitable for formal IP arrangements (but may be protected by other methods). If the foreground is already being used / exploited or there is significant interest this should ALSO be recorded in Worksheet 7 (End user uptake & exploitation).
11	*Future events*	Please record any planned future events (conferences, workshops, training, etc.). This information may be used by EURAMET for promotion on the events webpage and as news stories on the EURAMET website and in the EURAMET newsletter.

4.3 JRP Periodic Reporting (months 18 and 36)

The JRP-Consortium shall provide Periodic Reports covering progress in Period 1 and Period 2. Period 1 covers months 13 - 18 with the exception of the financial reports (Templates 9 - 14) and 'section 2 Use of Resources and Financial Spend' of the Periodic Progress Report (Template 3) which cover the full eighteen month period (months 1 - 18). For details of the periods covered in the Period 2 Final Reports see Section 4.4. **Each set of Periodic Reports shall be provided to EURAMET within 60 days of the end of the period.** Periodic reporting provides a review of progress, which can be passed to EURAMET, specifically indicating whether the JRP is on target, analysing financial activity to date, identifying any issues, consequences and remedial actions required. The Publishable JRP Summary will also be updated (see Section 4.1). It also includes a progress report from the EMRP Grant Researcher. Downloadable Reporting Templates are available for these reports.

Periodic reporting comprises:

- Updated Publishable JRP Summary *(months 13 - 18 and months 31 - 36)*,

- Periodic Progress Report *(months 13 - 18 and months 31 - 36: except section 2 Use of Resources and Financial Spend which covers months 1 - 18 or months 19 - 36)*,

- JRP Output and Impact Report *(cumulative)*,

- Financial Reporting *(months 1 - 18 and months 19 - 36)*.

4.3.1 Updated Publishable JRP Summary

Please complete the 'updated Publishable JRP Summary' for months 13 - 18 as described in Section 4.2.1. NB A Final Publishable JRP Summary, rather than an updated Publishable JRP Summary, will be required at the end of the JRP – see Section 4.4.1.

4.3.2 Periodic Progress Report

Reporting Template 3 - JRP Interim / Periodic Progress Report should be downloaded for the completion of this report.

4.3.2.1 Section 1: Summary

Please complete this section as described in Section 4.2.2.1.

4.3.2.2 Section 2: Use of Resources and Financial Spend

This section covers a full eighteen month period at period 1, and a full thirty six month period at period 2. (approx. 10-500 words)

The JRP Cost Budget Analysis Table from Reporting Template 9 (JRP-Coordinators Financial Workbook) should be pasted into this section. Explanations are required where an individual JRP-Partner's spend is significantly different to plan. Specifically:

a) if the cumulative costs to date vary by more than 10 % from the cumulative budget and the variance is more than 5 k€ then these variances should be explained,

b) if the cumulative resource (in months) to date varies by more than 20 % from the cumulative budget and the variance is more than 3 months then these variances should be explained.

Additionally for **period 1** only

The section should include an analysis of the future consequences of any deviations, for example if the % spend deviations are due to phasing this should be stated even though you expect it to be resolved in the next period.

For each JRP-Partner that has spent 10 % more than planned please either confirm that the JRP-Partner will still deliver the work planned, even if they spend more than originally budgeted, or describe what the JRP-Consortium will do to mitigate this risk.

For each JRP-Partner that has worked 20 % extra months than planned please either confirm that the JRP-Partner will still deliver the work planned, even if they spend more time than originally budgeted, or describe what the JRP-Consortium will do to mitigate this risk.

Example statements are given below:

XXX confirms that they will still be able to deliver the work planned even if they spend more than originally budgeted.

YYY confirms that they will still deliver the work planned even if they spend more time than originally budgeted.

ZZZ will not be able to deliver all of the planned work, but JRP-Partners AAA and BBB will be able to take on more of Task T so that all JRP deliverables will still be achieved.

4.3.2.3 Section 3: JRP 'deliverable status' table and progress

Please complete the 'JRP deliverable status' table and progress as described in Section 4.2.2.3.

4.3.2.4 Section 4: Changes requested

Please complete this section as described in Section 4.2.2.4. NB this section should not to be completed for Month 36 Periodic Reports.

4.3.2.5 Section 5: Commentary on EMRP Grant Researcher's input

Please complete this section as described in Section 4.2.2.5.

Please complete this section as described in Section 4.2.2.6.

In the Month 36 Periodic Report please provide details about the legacy arrangements for your JRP website.

4.3.3   JRP Output and Impact Report

Please complete all Worksheets in the JRP Output and Impact Report as described in Section 4.2.3.

All tables are cumulative, which means that they should show information from the beginning until after the end of the JRP.

It is important to capture information on end-user uptake and exploitation, any exploitable foreground that has been created and any IP applications.

4.3.4   Financial Reporting Overview

Financial Reporting is part of the Periodic Reporting process. Period 1 Financial Reports cover months 1 - 18 of the JRP and Period 2 Financial Reports cover months 19 - 36 of the JRP. Costs incurred shall be recorded and reported in accordance with the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

All eligible costs should be reported, irrespective of the budget. EURAMET will consider costs even if they are reported in a category where there was no budget, or where the costs exceed budget. EURAMET wish to be aware of the total costs even if these are above the total budget. Reporting costs above budget will not automatically lead to a request for funding above the budgeted level.

A summary of the financial reporting documents is given in the table below (and also in the summaries in Sections 7 and 8). Guidance on these documents is given in Sections 4.3.5 - 4.3.9.

Reporting Template	Report	To be completed by	Format required
10 – Funded JRP-Partner's Financial Workbook **or** 11 – Linked Third Party's Financial Workbook	Resource and Cost worksheet	Funded JRP-Partner / Linked Third Party	Electronic format (excel)
10 – Funded JRP-Partner's Financial Workbook **or** 11 – Linked Third Party's Financial Workbook	*Financial Statement[1]*	*Funded JRP-Partner / Linked Third Party*	*Original signed* **single page** *document*
10 – Funded JRP-Partner's Financial Workbook **or** 11 – Linked Third Party's Financial Workbook 12 – Terms of Reference 13 – Independent Report of Factual Findings 14 – Letter of Representation	EMRP Financial Audit Report: A) Financial Statement B) Terms of Reference C) Independent Report of Factual Findings D) Letter of Representation	Funded JRP-Partner / Linked Third Party Auditor and funded JRP-Partner / Auditor and Linked Third Party Auditor Funded JRP-Partner / Linked Third Party	Original signed **single page** document Original signed document Original signed document a copy is acceptable
9 – JRP-Coordinator's Financial Workbook	JRP Resource and Cost Summary	JRP-Coordinator	Electronic format (excel)
9 – JRP-Coordinator's Financial Workbook	JRP Cost Budget Analysis Table	JRP-Coordinator	Electronic format (excel) and within the Periodic Progress Report

---

[1] The Financial Statement is only required as a separate report when the option to delay the Financial Audit Report until Period 2 reporting is taken (see Section 4.3.8).

Downloadable Reporting Templates are available for each of these reports at www.emrponline.eu/downloads.html. A full list of all Reporting Templates is given in Annex B.

Before submitting the financial reporting the JRP-Coordinator should be satisfied that the reporting from each Partner is complete and correct (to the best of their knowledge). Some common errors that should be avoided are:-

- Different total costs reported in PART A than in the JRP-Coordinator's Financial Workbook

- Use of templates issued before November 2012 (PARTs B, C or D should begin with a table)

- Hard copy documents with signatures, version dates, or the name of the signatory missing

- PART A, B or C being a copy rather than an original.

Also it would be very much appreciated if you could keep the paperwork that you send to us to a minimum by:-

- Removing multiple copies of the same document (if the partner has sent two copies please keep one yourself)

- Only send a one page PART A (the signed page) the other pages are only required in excel format (within the summary workbook)

- Removing the document control pages if they have been sent (these are only to show when the template was approved and should not remain in the submitted reports)

4.3.5 Resource and Cost worksheet

The Resource and Cost worksheet provides information about the resources deployed by the JRP, eg hours worked by people on the JRP and information about the non-labour expenditure. It also provides an estimate of the percentage of the total effort that was employed on each Work Package.

Each funded JRP-Partner and each Linked Third Party will generate a Resource and Cost worksheet using either Reporting Template 10 - Funded JRP-Partner's Financial Workbook or Reporting Template 11 - Linked Third Party's Financial Workbook, and they will submit it electronically to the JRP-Coordinator.

All eligible costs recorded against the JRP in the JRP-Partners' and Linked Third Parties accounts should be reported in the Resource and Cost worksheet regardless of whether the costs over the lifetime of the JRP are different from the budgeted costs in the Annex Ib of the JRP-Contract.

Data should only be entered in the yellow cells. Some details of how the data is entered are given below. However for full details regarding eligibility of costs within each cost category please refer to the Financial Guidelines (http://www.emrponline.eu).

- Exchange rate

Costs shall be reported in Euro. JRP-Partners with accounts in currencies other than the Euro shall report costs by using, either

a) the conversion rate published by the European Central Bank applicable on the first day of the month following the end of the period (in this situation local currency costs and this conversion rate are entered into the worksheet) or

b) the conversion rate published by the European Central Bank that would have applied on the date that the actual costs were incurred (in this situation the costs converted into Euro and an exchange rate of "1" are entered into the worksheet)

JRP-Partners with accounts in Euro shall convert costs incurred in other currencies according to their usual accounting practice (as in JRP-Contract Clause 6.7 // Footnote 5).

The ECB rates are available on the ECB website:

http://www.ecb.int/stats/exchange/eurofxref/html/index.en.html

Costs incurred shall be recorded and reported in accordance with the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

- Labour

Guidance on the costs that should be reported within this category are found in Section 2, Part A, Clause II.15 a) of the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

Please note that although the hours worked by each person should be recorded in the worksheet, only the total labour cost is required (and not the labour cost per individual – where the cells have been greyed out).

The name of each person working on the JRP for whom costs are charged according to the time spent on the project should be included in the 'Labour' table, and the hours worked by each person should be declared. The total labour costs for the hours worked on the project (excluding overheads) should be entered in the yellow cell in the labour table. Under 'Category of staff' a description, eg senior researcher, Unit head, etc., should be given.

If reporting any paid overtime please enter this on a separate line and include 'Overtime' in the description.

Note that the 'Labour' table includes a conversion from actual recorded hours to months. This is an estimation based on 7.5 hours per day and 21.75 days per month and is provided so that an approximate cross check can be undertaken against the budgeted number of months in Annex Ia and where necessary across JRPs and organisations. It is an estimate only and it is accepted that for many organisations the actual number of months will vary slightly from this figure. This calculation does not affect the actual costs claimed.

- Travel and subsistence

Guidance on the costs that should be reported within this category are found in Section 2, Part A, Clause II.15 b) of the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

If more than one person attends a meeting then each person must be listed (they can all be listed on the same line), but the total costs for all the people attending that meeting may be added together and a single total given for the meeting. Ideally all the travel and subsistence for a person for a particular meeting should be grouped together.

If travel costs are included within your organisation's overhead, then the 'Travel and Subsistence' table should always be completed with either the details of the travel / costs for each meeting or 'no Travel and Subsistence incurred' as appropriate with zero cost entered in the appropriate cell.

- All other cost categories

Guidance on the costs that should be reported within these categories are found in Section 2, Part A, Clause II.15 c) to g) of the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

Under all the other direct cost category headings (Capital Equipment, Consumables, Other Costs, Subcontract and Linked Third Party), the costs claimed should be listed. Where there are only a few unique items, a description per item should be given. Where there are many similar items, or items that could be grouped, these items should be summarised into one or more lines.

The description should not simply repeat the category heading i.e. under 'consumables' the description should be more detailed than 'consumables'. (Examples of acceptable descriptions for consumables are electrical components, reagent chemicals, high purity gases, thermal insulation materials, radionuclide samples etc). Significant costs however require a more detailed description.

- Overheads

Guidance on the costs that should be reported within this category are found in Section 2, Part A, Clause II.15 h) of the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

Please select the appropriate overhead methodology from the drop down list and enter the overhead % for the labour and non-labour costs. If the overhead % has changed during the year please work out the total costs for the labour and non-labour overhead based on the combination of costs and overhead %s for the period. Calculate the overhead %s that should be entered in order to give the correct costs (a % correct to at least 2 decimal places will be required).

If it is the normal practice of the organisation to calculate the overheads as an absolute value rather than a % please calculate and enter the appropriate % that should be applied to labour costs in order to give the required absolute costs.

- Receipts to project

Guidance on the receipts that should be reported within this category are found in Section 2, Part A, Clause II.17 of the EMRP Contracts Financial Guidelines (www.emrponline.eu/downloads.html).

In this section any receipts to project (excluding EURAMET payment or revenue from the national programme) should be itemised (anticipate that only rarely will there be any such receipts)

- Work Package details

The Section 'Breakdown of effort by Work Package' is no longer required by EURAMET but it remains in the report as it is anticipated that JRP-Coordinators will wish to be aware of the labour months spent on each work package Please provide an estimate of the % of time spent on each WP during the period (ensuring that the total % effort adds up to 100%!).

- Reporting the costs of a Linked Third Party

Where the JRP-Partner has a 'Linked Third Party' (identified in the Special Clause 7.3 of the JRP-Contract) the JRP-Partner should include a single entry in their Resource and Cost worksheet in the 'Linked Third Party' section to cover the costs and the Linked Third Party should submit a separate Resource and Cost worksheet to give the details of these costs.

- 'Normal Overheads'

EURAMET is aware that many organisations have a slightly higher overhead rate (including all overhead costs whether or not they are eligible under FP7) and in order to gather information for the development of EMPIR would like to be aware of this rate.

This rate is reported for information only and has no effect on the costs reported here and is not subject to audit.

Amendments/Corrections

In the event that any corrections need to be made to the Period 1 Resource and Cost worksheet after EURAMET have approved the Period 1 costs then these should be submitted, in the form of a new version of the statement including all the costs (and not just the changes) and an explanation of the changes made alongside the Period 2 Resource and Cost worksheet. (A revised Financial Audit Report Part A, will also be required and the final Audit Report (Parts B,C and D) must cover the full 36 months (and two Financial Statements)

There will be no opportunity to amend the Period 2 costs after they have been approved by EURAMET.

4.3.6 Financial Statement

The Financial Statement is a document to confirm the total costs for each category that are reported in the Resource and Cost worksheet. However the Financial Statement does not include the category "Linked Third Party" and any costs reported in the category "Linked Third Party" in the Resource and Cost worksheet will automatically be excluded from the JRP-Partner's Financial Statement. These Linked Third Party costs shall be confirmed via the Linked Third Party's own Financial Statement.

Each funded JRP-Partner and Linked Third Party will prepare a Financial Statement, using either Reporting Template 10 - Funded JRP-Partner's Financial Workbook or Template 11 - Linked Third Party's Financial Workbook, and submit the statement as a signed single page document to the auditor in hard copy with an original signature (photocopies are not acceptable), in order to be included in their report. The resource and Cost summary sheet should not be included in the report (however if may be given to the Auditor as a supporting document). Authority to sign is according to the organisations normal procedures. (There is no requirement for EURAMET to be advised of those authorised to sign. EURAMET can accept any signature so long as the name of the person that signs is clearly stated).

In the event that a Financial Audit Report is not required (see Section 4.3.7) the Financial Statement should be submitted with an original signature (photocopies are not acceptable) directly to the JRP-Coordinator.

Amendments/corrections

In the event that at Period 2 reporting there are changes being reported to Period 1 then an updated Period 1 Financial Statement should also be submitted to the auditor and the PART C must cover the full 36 months (and two Financial Statements)

4.3.7 EMRP Financial Audit Report

The funded JRP-Partner / Linked Third Party should appoint an independent auditor and agree terms using Reporting Template 12 - Terms of Reference.

The funded JRP-Partner / Linked Third Party should prepare a Financial Statement (see Section 4.3.6) and submit this to the auditor.

The auditor should report their findings using Reporting Template 13 - Independent Report of Factual Findings.

The funded JRP-Partner / Linked Third Party should use Reporting Template 14 - Letter of Representation, to confirm specific facts that their auditor has relied upon, and submit this to their auditor.

Once the audit process is complete the funded JRP-Partner / Linked Third Party shall submit to the JRP-Coordinator hard copies of the Financial Audit Report comprising:

Part A) Financial Statement(s) (*original signature(s), photocopies are not acceptable*),

Part B) Terms of Reference (*original signature(s), photocopies are not acceptable*),

Part C) Independent Report of Factual Findings (*original signature(s), photocopies are not acceptable*), and

Part D) Letter of Representation (*a copy is acceptable (the original is for the auditor)*).

For further guidance on Financial Audit Reporting please refer to the Financial Audit Guidelines (http://www.emrponline.eu). The Financial Audit Guidelines should be provided to the auditor along with Reporting Templates 13 and 14.

The JRP-Coordinator should check that all parts of the Financial Audit Report, as listed above, are correctly signed, dated and stamped, where appropriate, and send all to EURAMET EMRP-MSU, National Physical Laboratory, Hampton Road, Teddington, Middlesex, UK, TW11 0LW along with all other hard copy documents required (see Sections 7 and 8).

Exemptions

No costs are exempt from audit. However, in some cases the option to delay audit until Period 2 reporting is available. Any JRP-Partner with a lifetime budgeted EURAMET financial contribution of less than EUR 50 000 may opt not to supply a full Financial Audit Report at Period 1. They may however opt to submit a Financial Audit Report voluntarily at Period 1 and the costs of this report will be considered eligible. Any Linked Third Party must take the same option as the JRP-Partner that they are linked to (irrespective of the budget of the Linked Third Party).

The Financial Statement (Financial Audit Report part A) is **always** required at Period 1, even if the option to delay the full audit (parts B, C and D) is taken.

In the event that a JRP-Partner opts not to submit a Financial Audit Report at Period 1 then a Financial Audit Report covering the full 36 months (and two Financial Statements) should be submitted at Period 2. The same is required for any Linked Third Parties of the JRP-Partner.

In the event that a JRP-Partner opts not to submit a Financial Audit Report at Period 1 then a Financial Statement (see Section 4.3.7) should be submitted with an original signature (photocopies are not acceptable) directly to the JRP-Coordinator

Amendments/corrections

In the event changes to Period 1 costs are reported at Period 2 reporting then a Financial Audit Report covering the full 36 months (and two Financial Statements) should be submitted.

4.3.8 JRP Resource and Cost Summary

This report summarises the costs of all funded JRP-Partners.

The JRP-Coordinator should enter the data from the individual Resource and Cost worksheets into Reporting Template 9 - JRP-Coordinator's Financial Workbook, which is designed to enable the copy and pasting of whole Resource and Cost worksheets. The workbook automatically transfers the data to the 'Summary' worksheet and also to the JRP Cost Budget Analysis Table.

In the case of a Linked Third Party, the Resource and Cost worksheet details should be entered into the workbook in the specified worksheet, however the costs do not add into the summary (as they are already included in the JRP-Partner's Linked Third Party costs).

The JRP-Coordinator should enter budget data, from the latest issued version of the JRP Budget into the relevant cells as indicated in the worksheet.

Further guidance on the entry of data and version control are given in the notes sheet of the Workbook.

Resources of Unfunded Partners and Integral REGs

The JRP-Coordinator should enter an estimate of the total number of months worked by unfunded JRP-Partners and by Integral REGs. There is no requirement for the Integral REGs or unfunded JRP-Partners to provide a report, or statement or audit report, to substantiate this information. EURAMET accept that the values given are the best available to the knowledge of the JRP-Consortium.

Amendments/corrections

In the event that a JRP-Partner submits a revised Period 1 Resource and Cost Worksheet after EURAMET have approved the Period 1 costs then a revised version of the Period 1 JRP Resource and Cost Summary should be submitted by the JRP-Coordinator at the time of Period 2 reporting.

4.3.9 JRP Cost Budget Analysis Table

The JRP Cost Budget Analysis Table, which is generated within Reporting Template 9 - JRP-Coordinator's Financial Workbook, provides an overview of the cumulative costs and labour months of each funded JRP-Partner in comparison with the budget. This table should be included in the Periodic Progress Report and any significant variances (ie those automatically indicated in the table) should be explained (see Section 4.3.2.2).

4.4 JRP Final Reporting (month 36)

The JRP-Consortium shall provide a set of final reports covering all progress during the contract period. **The Final Reports shall be provided to EURAMET within 60 days of the end of the period.**

The final reports include a full set of Period 2 JRP Periodic Reports, as listed below, and described in Section 4.3 with the exception of the updated Publishable JRP Summary (as this is replaced by a Final Publishable JRP Summary). In addition, a Final Publishable JRP Summary, a Final Publishable JRP Report, and a JRP Reporting Questionnaire are required at month 36. These final reports will cover the full 36-month duration of the JRP. Downloadable Reporting Templates are available for these reports.

Period 2 (months 19 - 36) JRP Periodic Reports:

- Periodic Progress Report *(months 31 - 36: except section 2 Use of Resources and Financial Spend which covers months 19 - 36)* - Reporting Template 3,

- JRP Output and Impact Report *(cumulative: months 1 - 36)* - Reporting Template 7,

- Financial Reporting *(months 19 - 36)* - Reporting Templates 9-14.

Final JRP Reports (months 1 - 36):

- Final Publishable JRP Summary – Reporting Template 2,

- Final Publishable JRP Report - Reporting Template 5,

- JRP Reporting Questionnaire - Reporting Template 8.

4.4.1 Final Publishable JRP Summary

Reporting Template 2 – Final Publishable JRP Summary should be downloaded for the completion of this report.

Purpose

The purpose of the Final Publishable JRP Summary is to provide a public document that presents an **overview** of the whole project (its purpose, key results and impacts) to a **non-technical audience** (the EMRP funding bodies in particular). It should explain the high-level need and the specific technical problems addressed by the project, the key results delivered and the early economic and social impacts achieved. It should do so in a clear logical manner so that a non-technical audience can understand it.

This report is <u>not</u> a short technical report and should be written in a style and language appropriate for the target audience.

The main target audience is

- The EMRP funders at the European Commission and national funding bodies.

Other audiences include

- Senior / high-level policy-makers, regulators, officials at standards developing organisations.
- Senior industrialists and their representative bodies.

It should be a standalone / self-contained document that can be read and understood without reading any of the previous outputs or documentation from the project.

The submitted report must be of suitable quality to enable direct publication **by EURAMET and the Commission.**

Scope

- The report should include the work undertaken in the JRP and any EMRP Researcher Grants and it should cover the full 36 months of the project.

Report style / language

- The report should make minimal use of EMRP terminology (such as 'JRP' or 'Researcher Grants', 'REGs' etc.) in the descriptive text. For example it can refer to the research activity as 'the project' or the 'research project'. It should not refer to Work Packages, tasks, management activities etc. and should not be written in 'project management' terms or in very technical language.
- It should be written in language appropriate for the target audience. It should avoid acronyms but if they are necessary it should explain them the first time they are used.
- A project logo, diagrams or photographs illustrating and promoting the work of the project may be included.

Structure of the Final Publishable JRP Summary

- The whole report, excluding the list of publications, should be no more than 4 pages in length.
- Together the first three sections (Overview, Need for the project, Scientific and technical objectives) should be no more than 1.5 pages in total.

Section	Content	Length
Overview	This section should present a two or three sentence overview of the project and its achievements and how it made progress beyond the state of the art (this should be at a high level).	50-100 words
Need for the project	This section should explain why the project was undertaken. • It should explain the purpose of the project in terms of a logical flow from high-level aims (e.g. to contribute to mitigating climate change, improve productivity in sector X), through to the specific user needs (problems) that needed to be addressed via improved measurement capabilities.	150-300 words

	• This explanation **should lead clearly to the project's scientific and technical objectives** as presented in the following section. It is important that the report makes a clear link between the scientific and technical objectives, the specific problems addressed and the contribution to wider goals (Directives, global challenges, etc.).	
Scientific and technical objectives	This section should present the scientific and technical objectives for the project (this should be based on Section B3 of the JRP-Protocol). If necessary, to put the results in context, this section may need to briefly explain why the specific technical areas were investigated (e.g. if improving an uncertainty in X requires improvements in the ability to measure A, B and C).	150-300 words

Results	This section should summarise the project's **results and conclusions** against each of the project's objectives i.e. it should be structured on an objective by objective basis.
	
	It should focus on the key results and conclusions of the research undertaken, for example
	
	  o New measurement capabilities at NMIs and DIs (and other partners). Make clear that new parameters can now be measured, that measurement ranges have been extended or uncertainties reduced. Where relevant make clear if these new capabilities are 'first in the world' or 'first in Europe'
	
	  o New reference materials, reference methods, procedures developed. Make clear if these are intended for use by NMIs/DIs and/or for use in the calibration sector, wider industry (or other organisations such as hospitals or public agencies)
	
	  o Key technical insights gained i.e. important new knowledge developed
	
	For each scientific and technological objective, you should make clear that the objective has been achieved (or to what extent the objective has been achieved).
	
	There <u>should not</u> be detailed descriptions of the research activities. Research activities should be included only as necessary to explain the key results and conclusions presented.
		Up to 2 pages

Actual and potential impact	This section should describe how the project is making a tangible contribution to addressing the specific user needs identified in the 'Need for the project' section and how that will in turn contribute to the high-level aims: • It <u>should not</u> simply re-state that the project will contribute to or support the high-level objectives (global challenges, productivity, etc.). • It should provide a brief summary of the dissemination activities undertaken (no more than 0.5 page.) *However, please note that the 'Actual and potential impacts' section must not solely be a description of dissemination activities.* • It should provide details of the '**early impacts**', i.e. the uptake/use of the project's outputs, that have been achieved to date (see Figure 1 for examples of early impacts). • *The contents of the JRP Output and Impact Report will be useful for completing this section.* • If early impacts are confidential the impact should either be anonymised (e.*g. "a company is developing a new instrument*	1 page (minimum)

based on the methods developed in the project" or "a company has taken a calibration from the new facilities…") or left out. (If they are left out they should be reported in the Period 2 JRP Periodic Progress Report and recorded in the JRP Output and Impact Report.)

- The report should describe how the early impacts will contribute to wider and longer-term socio-economic and policy impacts.
- If any longer-term wider impacts (socio-economic, policy impacts) have already been achieved, these should also be reported e.g. if a new/improved standard or innovation has contributed to socio-economic effects.
- The early impacts reported should be described so that it is clear how they relate to the specific user needs (problems) and the high-level aims.

List of publications	• The list should only include publications in the public domain. *If appropriate the list can refer to the publications list in the Final Publishable JRP Report.*	unlimited

4.4.2   Final Publishable JRP Report

Reporting Template 5 – Final Publishable JRP Report should be downloaded for the completion of this report.

Purpose

The purpose of the Final Publishable JRP Report is to provide a public document that explains the purpose and the results of the project to a non-technical audience. It is very similar in structure to the Final Publishable JRP Summary, the main difference is that there is a much longer section to describe the scientific and technical activities and outputs/conclusions. The Final Publishable JRP Report is targeted at a more technically literate audience within the business, policy-making and standards communities than the Final Publishable JRP Summary. It is for people who seek to understand the project in greater depth, understand its relevance to their work and who might as a result go on to read the project's other publications and outputs. These might include:

- Members of relevant standards committees (not already communicated with).
- Scientific experts not directly involved in the project.
- Accredited (or potentially accredited) calibration or testing laboratories (not already communicated with).
- Policy-makers – both as potential users of the project's outputs and the funding bodies to understand the use and impact of their funding.
- Other potential users / beneficiaries of the research outputs.

It should be a standalone / self-contained document that can be read without reading any of the previous outputs or documentation from the project.

The report must be of suitable quality to enable direct publication by EURAMET and the Commission.

Scope

- The report should include the work undertaken in the JRP and any EMRP Researcher Grants and it should cover the full duration of the project.

Report length

- The whole report, excluding the list of publications, should be no more than 40 pages.

Report style / language

- The report should make minimal use of EMRP terminology (such as 'JRP' or 'Researcher Grants', 'REGs' etc.) in the descriptive text. For example, it can refer to the research activity as the 'project'

or the 'research project'. It should not refer to Work Packages, tasks, management activities etc. and should not be written in 'project management' terms or in very technical language.

- It should be written in language appropriate for the target audience. It should avoid acronyms but if necessary explain them the first time they are used.
- Sub-headings can be used as appropriate.
- A project logo, diagrams or photographs illustrating and promoting the work of the project may be included.

Structure of the Final Publishable JRP Report

Section	Content	Length
Executive summary	The Executive Summary should be clearly laid out and provide a succinct overview of the whole project in terms of the need it was addressing, the key research findings and its impact. This section (only) should be written in a language and style suitable for a non-technical audience. The structure is as follows: **Introduction** This should be a 2-3 sentence long paragraph that succinctly summarises the importance of your research. Keep it short and attention-grabbing, emphasising the <u>impact</u> of your research, not the scientific details. What has your research enabled that was not possible 3 years ago? Who is using this ability? How do they benefit from this? e.g.: 'This project has made a significant contribution to.......' 'Our research will save the EU millions of pounds. We have developed the regulatory framework for.......' **The Problem** This needs a paragraph or two to explain why the research project was undertaken. What specific problem(s) were you trying to solve? What framework/service/knowledge was missing that you are now providing? What were the difficulties that the lack of a sufficient metrology infrastructure caused and why did this problem need to be solved? e.g.: *Sentence 1:* 'The EU faces an urgent need to reduce its dependency on fossil fuels...' *Sentence 2:* 'The problem is that the pipeline system was designed for relatively uniform natural gas' **The Solution** Write a few sentences to explain what you set out to do and why. Do not focus on the niche intricacies of the science; just summarise the key research outputs and conclusions without going into too much detail. e.g. 'We set out to solve this problem by doing A, B and C.......' 'X, Y and Z (e.g. uncertainties, new measurement capabilities, methods etc) are now available' ' We found that….' **Impact** This section should be at least a third of a page because the impact of your research is very important. Please describe who is already	up to 1 page

	using your research outputs (early impacts) and what this will lead to in the longer term (i.e. longer-term impacts)? What is the relevance? Will it save money and for whom? Will it revolutionise the current system? Does it provide the basics that will enable others to progress/develop? e.g.: 'X and Y are utilising our research outputs to do Z' 'The accomplishment of Objective A will enable B to do C....'	
Project context, rationale and objectives	This section should explain why the project was undertaken. • It should explain the purpose of the project in terms of a logical flow from high-level aims (e.g. to contribute to mitigating climate change, improve productivity in sector X) through to the specific user needs (problems) that needed to be addressed via improved measurement capabilities. • This explanation **should lead clearly to the project's scientific and technical objectives**. It is important that the report makes clear and logical links between the scientific and technical objectives, the specific problems addressed and the contribution to wider goals (Directives, global challenges etc.).	up to 4 pages

Research results	This section should summarise the research undertaken and the results and conclusions of that research.
	
	This section should present the project's **results and conclusions** against each of the project's objectives i.e. it should be structured on an objective by objective basis.
	
	It should make clear that the objective has been achieved (or what extent the objective has been achieved).
	
	• There should be a sub-section for each objective. It should present a clear and logical account of how the research undertaken contributed to achieving the scientific and technical objective. It should
	
	   o Describe why that scientific/ technical area was being researched i.e. why that area is relevant to the project rationale and objectives (if this has not already been clearly described in the opening sections or if more detail is needed to aid the reader in understanding the relevance of the research).
	
	   o A description of the research undertaken.
	
	   o The scientific and technical progress beyond the state of the art should be made clear.
	
	   o A summary of the key research outputs and conclusions (these should be described in terms of the achievement of the project's scientific and technical objectives) and make clear what new measurement capabilities (and new knowledge) are available that were not available before the project.
	
	• This section of the report should also highlight:
	
	   o Collaborations between the JRP-Participants, how the collaborative approach produced added value that individual JRP-Participants could not achieve by themselves.
	
	• As this report will be in the public domain, any confidential results (e.g. that relate to patent applications) should not be included.
	
	The 'Research Results' section should end with a summary, in bullet-point form, of the key results and conclusions of the research undertaken (across all objectives), for example
		up to 25 pages

	o New measurement capabilities at NMIs and DIs (and other partners). Make clear that new parameters can now be measured, that measurement ranges have been extended or uncertainties reduced. Where relevant make clear if these are 'first in the world' or 'first in Europe' o New reference materials, reference methods, procedures developed. Make clear if these are intended for use by NMIs/DIs and/or for use in the calibration sector, wider industry (or other organisation such as hospitals or public agencies) o Key technical insights gained i.e. important new knowledge developed	
Actual and potential impact	This section should describe how the project is making a tangible contribution to addressing the specific user needs identified in the 'Need for the project' section and how that will in turn contribute to the high-level aims: • It should not simply re-state that the project will contribute to or support the high-level objectives (global challenges etc.). • It should provide a summary of the dissemination activities undertaken (no more than 2 pages.) *However, please note that the 'Actual and potential impacts' section must not solely be a description of dissemination activities.* • It should provide details of **'early impacts'**, that is uptake/use of the project's outputs, have been achieved to date (see Figure 1 for examples of early impacts). • *The contents of the JRP Output and Impact Report will be useful for completing this section.* • The report should describe how the early impacts will contribute to wider and longer-term socio-economic and policy impacts. • If any wider longer-term impacts (socio-economic, policy impacts) have already achieved, these should also be reported e.g. if a new/improved standard or innovation has contributed to socio-economic effects. • If early impacts are confidential the impact should either be anonymised (e.*g. "a company has tested their equipment on the facilities developed by the project…"*) or left out. (If they are left out they should be reported in the Period 2 JRP Periodic Progress Report and recorded in the JRP Output and Impact Report.) • The impacts reported should be described so that it is clear how they relate to the specific user needs (problems) and the high-level aims.	between 4 and 10 pages
Website address and contact details	Website address (where applicable) and contact details.	n/a
List of publications	• This list is not included in the 40 page report limit. • The list should only include publications in the public domain.	unlimited

Figure 2 presents a diagram illustrating how the project's public reports complement each other.

Early impacts

Early impacts are the effects of the project at a level that bridges the gap between project outputs (publications, inputs to standards committees, dissemination events, training, etc.) and longer-term impacts such as

implementation of EC Directives or improved economic performance. They generally relate to 'uptake' and/ or exploitation of research results by the direct beneficiaries of the project's outputs.

The table below provides examples of early impacts. This list is not comprehensive but aims to help JRP-Partners to recognise, capture and report such impacts. The examples fall into three categories:
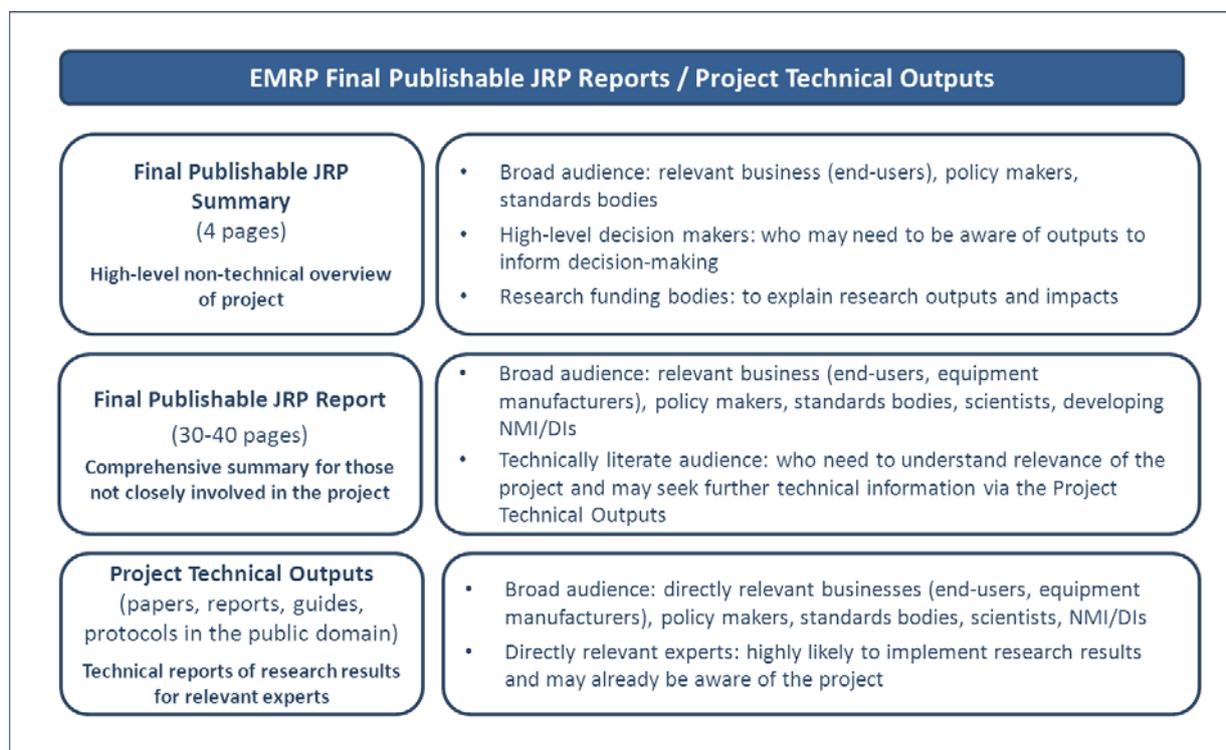
- Standards and regulation
- User uptake
- Scientific uptake and impact

Figure 1 Examples of early impacts

Category	Examples
Standards and regulation	<u>Tangible developments</u> in standards and regulations such as: • A new or updated standard (or regulation) published with clear inputs from the project. • A draft of a new or updated standard (or regulation) with clear inputs from the project (planned publication dates should be provided). • Significant (and tangible) progression in the development of standards (or regulations) such as a key piece of validation work being undertaken as a result of the project's outputs or a new Working Group established as a result of the project's outputs, or invitations to contribute inputs to policy-making.
User uptake	<u>Uptake of project outputs / findings</u> by organisations in the private and public sectors, such as: • Companies (or other organisations) implementing new devices, procedures, methods, protocols developed by the project in support (or to support) the development or implementation of new and / or improved products, processes or services. • Companies (or other organisations) using the new measurement capabilities at NMI/DIs to test/ validate instruments, processes, methods, etc. These might be accessed via consultancy or calibration work based on the new measurement capabilities available at NMIs/DIs as a result of the project. • Invitations to present the findings of the project (privately) to companies (or other potential user organisations). • New accredited calibration / test services available (or soon to be available if the accreditation process is still in progress) at NMI/DIs or other organisations (e.g. calibration / test labs) based on the new measurement capabilities resulting from the project. • Further joint research projects undertaken in collaboration with potential users (industry / public sector agencies). This is not intended to simply refer to a follow-on EMPIR project but any other collaborative activities undertaken by any EMRP JRP-Participant with users (not necessarily the entire JRP-Consortium) that builds on the project's outputs. • Exploitation of IP generated by the project (patents and other form of IP) e.g. licensing (or significant interest in exploiting IP). • *If there has been significant interest in uptake by potential users in any of the above categories (but uptake has not yet happened) this should also be reported.*
Scientific uptake and impact	<u>Uptake and impact among</u> the wider scientific community and among the NMI/DI community.

	- Actual or planned changes to the NMI/DI CMC statements and projected timescales for the changes (actual changes if they exist but this is unlikely in the lifetime of a project). - Significant advances in the SI system. - Significant or widespread use of the project's outputs by the scientific research community (as indicated, for example, by highly cited publications, further collaborations with the scientific community). - Further collaborations within the NMI/DI community. *This is not intended to only refer to a follow-on EMPIR project but any other collaborative activities undertaken within the NMI/DI community*.

Figure 2 Summary of EMRP final publishable reports and project technical outputs

4.4.3 JRP Reporting Questionnaire

The JRP Reporting Questionnaire is an excel based questionnaire which will enable each JRP to provide additional statistical information required by the Commission on their JRP as part of the programme level reporting requirements. Reporting Template 8 - JRP Reporting Questionnaire should be downloaded for the completion of this report.

The JRP-Coordinator will prepare the JRP Reporting Questionnaire based upon input received from all of the JRP-Partners (include funded and unfunded JRP-Partners).

5 EMRP Researcher Grant Reporting (REG, RMG and ESRMG)

Each EMRP Researcher Grant is associated with a JRP. EMRP Researcher Grant Beneficiaries are required to provide two types of reporting:

Short-Term Reports: These reports are aligned to the JRP reporting requirements (see Section 4).

Final Report: This report is to be provided within **30 days of the end of the EMRP Researcher Grant**. Only when this has been received and approved by EURAMET will the final 10% payment be released.

The Home Organisation (for a REG) and the Employing Organisation / Guestworking Organisation (for a RMG/ESRMG) are also required to report directly to EURAMET.

5.1 Report by Home / Employing / Guestworking Organisation

The **Home Organisation** (for a REG) and **Employing Organisation / Guestworking Organisation** (for a RMG or ESRMG) will also complete a Payment Request Form which will be sent to the Home / Employing / Guestworking Organisations by the EMRP-MSU.

5.2 Short-Term Reporting (REG and RMG/ESRMG)

Reporting Template 15 – Researcher Grant Short-Term Report should be downloaded for the completion of this report.

The reporting from the EMRP Researcher Grants must feed into the JRP reporting. The actual reporting dates for the EMRP Researcher Grants must coincide with every relevant JRP Interim or Periodic Report during the lifetime of the grant – the JRP-Coordinator will advise Researchers of these dates.

Note that Short-Term Reports will in general cover a six-month period (excluding the first and last period, where alignment with the JRP reporting may require a report covering a lesser period).

EMRP-MSU will not review all Short-Term Reports as they are sent directly to JRP-Coordinators. However the MSU will perform spot check reviews on a randomly selected number of Short-Term Reports every six months by requesting copies of reports from JRP-Coordinators.

5.2.1 Short-Term Reports

5.2.1.1 Section 1: Summary of EMRP Grant Researcher's activities (Max. 1000 characters)

Please provide a summary (max. 1000 characters) of progress, on a deliverable by deliverable basis, illustrating achievements and issues during the last six months. Include a statement of whether the Researcher Grant is on target or not and mention the impact and uptake of the RG's results.

This 1000 character summary will be copied into Section 5 of the Interim/Periodic Report by the JRP-Coordinator.

5.2.1.2 Section 2: 'Deliverables Status' table and progress

Use the "deliverable status" table to show deliverable status against the agreed Research Schedule in Annex 1 of the EMRP Researcher Grant Contract. This table should be set up at the beginning of the EMRP Researcher Grant, and then maintained as each deliverable is delivered. Deliverables should be listed in numerical order and not in chronological order. Guidance for completing the "deliverable status" table is included in Annex A of these Guidelines.

For the column titled 'Progress during the last six months of the EMRP Researcher Grant (one paragraph includes all Participants)' provide one paragraph describing progress, achievements and issues during the last six months for each active deliverable. Ensure that the contribution of each Participant is included and that this is in agreement with the Research Schedule in Annex 1 of the EMRP Researcher Grant Contract. If not, explain the discrepancy (eg Participant X will not start work on this deliverable until the next reporting period).

A status statement should be included for each deliverable (eg *Work has not yet started on this deliverable., This deliverable is on schedule., This deliverable is delayed to* month year.*, This deliverable is complete.*). Do

not include a description, other than the status statement, for those deliverables that were completed in a previous reporting period.

5.2.1.3 Section 3: Changes requested

Where any changes are required (eg deliverable content, scheduling, finance, activities etc) give full details of the requested changes and reasons in this section, listed by deliverable in deliverable number order. Please also comment on the impact of changes to the critical path of the EMRP Researcher Grant and the JRP and the overall impact of the changes. Ensure that the changes requested match those stated in Section 2. NB the JRP-Coordinator should agree to the proposed changes (on behalf of the JRP-Consortium).

5.2.1.4 Section 4: EMRP Grant Researcher's Declaration

The EMRP Grant Researcher's Declaration shown below and included in Reporting Template 15 – Researcher Grant Short-Term Report should be completed for each Researcher Grant Short-Term Report, deleting those statements/answers that do not apply. This will provide EURAMET with a statement of the overall scientific and technical delivery and the integration progress of the EMRP Researcher Grant.

Scientific and Technical Delivery	I am on schedule for delivery of my contractual obligations.	Yes/No
Integration of Metrology	I am interfacing with the JRP-Consortium. I am learning from metrology organisations, and sharing information & best practice with them.	Yes/No
Funding source acknowledged	All published material includes the following statement to indicate the co-funding by the European Union: "The EMRP is jointly funded by the EMRP participating countries within EURAMET and the European Union."	Yes/No

5.2.2 Output and Impact Report

All impact activities to date for the EMRP Grant Researcher should be listed in the parent JRP's Reporting Template 7 – Output and Impact Report. Please contact your JRP-Coordinator for a copy of the JRP Output and Impact Report, which you should complete and return to the JRP-Coordinator (see Section 4.2.3 for further details).

5.3 EMRP Researcher Grant Final Reporting

5.3.1 Final Report

This is the reporting required at the end of the EMRP Researcher Grant associated with the JRP. The report should provide information against each section of the Research Schedule (Annex 1 of the EMRP Researcher Grant contract), showing clearly what was planned and what was achieved. Reporting Template 16 – Researcher Grant Final Report should be downloaded for the completion of this report. The report follows a similar format to the Researcher Grant Short-Term Report, but commentary will cover the complete project.

The EMRP-MSU will review all Final Reports. These should be sent directly to the EMRP-MSU by the JRP-Coordinators.

5.3.1.1 Section 1: Summary of EMRP Grant Researcher's activities (Max. 1000 characters)

Please provide a summary (max. 1000 characters) of progress, on a deliverable by deliverable basis, illustrating achievements and issues during the final months of the RG. Include a statement of whether the Researcher Grant met its targets or not and mention impact and uptake of the RG's results.

This 1000 character summary will be copied into Section 5 of the Periodic Report by the JRP-Coordinator.

5.3.1.2 Section 2: Deliverables Status' table and progress

Please complete this section as described in Section 5.2.1.2, but ensure that the description of progress covers the <u>full duration</u> of the EMRP Researcher Grant.

5.3.1.3 Section 3: EMRP Grant Researcher's Declaration

The EMRP Grant Researcher's Declaration shown below and included in Reporting Template 16 – Researcher Grant Final Report should be completed, deleting those statements/answers that do not apply. This will provide EURAMET with a statement of the overall scientific and technical delivery and the integration contribution of the EMRP Researcher Grant.

Scientific and Technical Delivery	I have completed delivery of my contractual obligations.	Yes/No
Integration of Metrology	I have interfaced with the JRP-Consortium. I have learnt from metrology organisations, and shared information & best practice with them.	Yes/No
Funding source acknowledged	All published material includes the following statement to indicate the co-funding by the European Union: "The EMRP is jointly funded by the EMRP participating countries within EURAMET and the European Union."	Yes/No

5.3.2 Output and Impact Report

Please complete the Output and Impact Report as described in Section 5.2.2. For the EMRP Researcher Grant Final Report, worksheet 10 'Applications for patents, trademarks, registered Designs' and worksheet 11 'Exploitable foreground, etc.' should also be completed.

Please update the same excel worksheet that you have been using throughout the EMRP Researcher Grant.

6 Requests for amendments or suspension arising outside the reporting activities

Requests for amendments to the JRP-Contract and/or suspension to the JRP (or to the EMRP Researcher Grant Contract / EMRP Researcher Grant) should be made in accordance with Clause 20 and Clause 18 of the JRP-Contract (Clause 14 and Clause 12 of the EMRP Researcher Grant Contract).

Requests for changes might include:
- Revised delivery dates, particularly those that change periods and/or require re-planning of labour and budgets or redistribution of activities between JRP-Partners in the case of the JRP.
- Optimising work plans and therefore redefining deliverables, whilst retaining JRP or EMRP Researcher Grant targets.
- Modifying the target of deliverables due to technical challenges or external factors.
- Modifications to the JRP-Consortium or EMRP Researcher Grant.

6.1 Changes in implementation

If any changes are needed to the implementation of the JRP and/or EMRP Researcher Grant (eg deliverables, research plan, JRP-Coordinator etc.), the changes must be approved by EURAMET in advance and in writing. Please contact EURAMET in writing as soon as possible once the need for change is identified to gain approval before implementation.

6.2 Changes in budget

If a significant change in the budget distribution between JRP-Partners is needed, the relevant JRP-Partner(s) should contact EURAMET through the JRP-Coordinator and submit a written and signed request in good time before the change is needed. Please note that it is rare for additional funding to be available for a JRP.

6.3 Change requests content

Any change request submitted to EURAMET should describe at least the following:
- change requested;
- reason and justification for the change;
- implications for achieving the promised results and deliverables;
- an indication of any changes to the budget distribution.

7 Reporting Responsibilities

WHO	WHAT	WHEN	HOW
By JRP-Coordinator:	Publishable JRP Summary / Final Publishable JRP Summary	Initial: Month 1 + 30 days from contract signature Interim: Month 6, 12, 24, 30 + 45 days after end of period Periodic/Final: Month 18, 36 + 60 days after end of period	Electronically (word)
	Interim Report (incorporating Short-Term or Final Report)	Month 6, 12, 24, 30; + 45 days after end of period	Electronically (word)
	Periodic Progress Report (incorporating Short-Term Report or EMRP Researcher Grant Final Report as appropriate)	Period 1: Month 13 - 18 (NB except section 2 Use of Resources and Financial Spend which covers months 1 - 18); + 60 days after end of period Period 2: Month 31 - 36 (NB except section 2 Use of Resources and Financial Spend which covers months 19 - 36) + 60 days after end of period	Electronically (word)
	Final Publishable Report (incorporating EMRP Researcher Grant Final Report)	+ 60 days after end of JRP	Electronically (word)
	JRP Resource and Cost Summary	Periodic Report 1: Month 1-18; Periodic Report 2: Month 19-36; + 60 days after end of period	Electronically (excel)
	JRP Cost Budget Analysis Table	Periodic Report 1: Month 1-18; Periodic Report 2: Month 19-36; + 60 days after end of period	Electronically (excel)
	JRP Output and Impact Report	Interim: Month 6, 12, 24, 30 + 45 days after end of period Periodic: Month 18, 36 + 60 days after end of period	Electronically (excel)
By each JRP-Partner, including JRP-Coordinator and by each Linked Third Party:	EMRP Financial Audit Report 　A) Financial Statement 　B) Terms of Reference 　C) Independent Report of Factual Findings 　D) Letter of Representation	Periodic: Month 18[2], 36 + 60 days after end of period	Signed hard copy
	Resource and Cost worksheet	Periodic: Month 18, 36 + 60 days after end of period	Submit to JRP-Coordinator
	JRP Reporting questionnaire	Periodic: Month 36 + 60 days after end of period	Electronically (excel)

---

[2] If the JRP-partner's budgeted lifetime EURAMET financial contribution is less than EUR 50,000 the JRP-Partner may opt not to submit at Month 18.

WHO	WHAT	WHEN	HOW
By EMRP Grant Researcher:	Short-Term Report	To support delivery of Project's Interim and Periodic reports	Electronically as required by JRP-Coordinator
	Final Report	At end of EMRP Researcher Grant	Electronically as required by JRP-Coordinator. Also a word copy to EMRP-MSU
Home Organisation	EMRP Grant REG reporting obligations (incorporated on the REG Payment Request form)	The REG Payment Request form will be sent to the Home Organisation by the EMRP-MSU. This should be completed by the Home Organisation and returned to the EMRP-MSU before the next 6-month advance payment is due	Electronically
Guestworking Organisation	EMRP Grant RMG reporting obligations (incorporated on the RMG Payment Request form)	The RMG Payment Request form will be sent to the Guestworking Organisation by the EMRP-MSU. This should be completed by the Guestworking Organisation and returned to the EMRP-MSU before the next 6-month advance payment is due	Electronically

EMRP Contracts
JRP Reporting Guidelines

33/38

Document: P-CON-GUI-001
Approved: EMRP Programme Manager

Version: 2.5
2015-07-10

8 Reporting Timetable

The 'Month' deadline refers to the JRP timeline months not the EMRP Researcher Grant timeline. The timeline below assumes a 36-month EMRP Researcher Grant, if an EMRP Researcher Grant is of shorter duration the dates of the first and last scheduled EMRP Researcher Grant reports will shift, but all Short-Term Reports will align with the JRP reporting. EMRP Grant Researcher (REG/RMG/ESRMG) Final Reports must be delivered 30-days after the end of the EMRP Researcher Grant Contract of each EMRP Researcher Grant, which may not be co-incident with when an interim/periodic report is due nor with the end of the JRP.

Month		Report	Prepared by	Submitted by/to
Month 1	+ 30 days	**Publishable JRP Summary**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 6	+ 45 days	**Interim Report (IR) 1, Updated Publishable JRP Summary, JRP Output and Impact Report**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 6		Short-Term Report 1	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 6		JRP-Partner input to IR1	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 12	+ 45 days	**Interim Report (IR) 2, Updated Publishable JRP Summary, Updated JRP Output and Impact Report**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 12		Short-Term Report 2	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 12		JRP-Partner input to IR2	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 18	+ 60 days	**Periodic Report (PR) 1, Updated Publishable JRP Summary, Updated JRP Output and Impact Report, JRP Cost Budget Analysis Table 1, JRP Resource and Cost Summary 1**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 18		Short-Term Report 3	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 18		JRP-Partner input to PR1	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 18		Individual JRP-Partner Resource and Cost Statement 1	Funded JRP-Partners and Linked Third Parties	Linked Third Parties to JRP-Partner/ JRP-Partners to JRP-Coordinator
Month 18	+ 60 days	EMRP Financial Audit Report 1 (as required) A) Financial Statement B) Terms of Reference C) Independent Report of Factual Findings D) Letter of Representation	Funded JRP-Partners and Linked Third Parties and their auditors	Linked Third Parties to funded JRP-Partner / Funded JRP-Partners to JRP-Coordinator / JRP-Coordinator to EURAMET

Month		Report	Prepared by	Submitted by/to
Month 24	+ 45 days	**Interim Report (IR) 3,** **Updated Publishable JRP Summary,** **Updated JRP Output and Impact Report**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 24		Short-Term Report 4	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 24		JRP-Partner input to IR3	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 30	+ 45 days	**Interim Report (IR) 4,** **Updated Publishable JRP Summary,** **Updated JRP Output and Impact Report**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 30		Short-Term Report 5	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 30		JRP-Partner input to IR4	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 36	+ 60 days	**Periodic Report (PR) 2,** **Updated Publishable JRP Summary,** **Updated JRP Output and Impact Report,** **JRP Cost Budget Analysis Table 2,** **JRP Resource and Cost Summary 2**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 36		Short-Term Report 6	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator
Month 36		JRP-Partner input to PR2	JRP-Partners	JRP-Partners to JRP-Coordinator
Month 36		Individual JRP-Partner Resource and Cost worksheet 2	Funded JRP-Partners and Linked Third Parties	Linked Third Parties to JRP-Partner/ JRP-Partners to JRP-Coordinator
Month 36	+ 60 days	EMRP Financial Audit Report 2 　A) Financial Statement 　B) Terms of Reference 　C) Independent Report of Factual Findings 　D) Letter of Representation	Funded JRP-Partners and Linked Third Parties and their auditors	Linked Third Parties to funded JRP-Partner / Funded JRP-Partners to JRP-Coordinator / JRP-Coordinator to EURAMET
Month 36	+ 60 days	**Final Publishable Report (JRP),** **JRP Output and Impact Report**	JRP-Coordinator	JRP-Coordinator to EURAMET
Month 36	+ 60 days	JRP Reporting questionnaire	JRP-Partners	JRP-Coordinator to EURAMET
Month 36		JRP-Partner input	JRP-Partners	JRP-Partners to JRP-Coordinator
End of Researcher Grant	+ 30 days	**EMRP Researcher Grant Final Report**	EMRP Grant Researcher (REG/RMG/ESRMG)	EMRP Grant Researcher to JRP-Coordinator

9 Annexes

9.1 Annex A: Completing the 'deliverable status' table

This guidance covers both the "JRP deliverable status" table and the "EMRP Researcher Grant deliverable status" table.

Deliverables table – deliverables should be listed in deliverable number order and not in chronological order. Dates should be given as Month Year eg April 2011. The headings of the columns should be amended as appropriate for a JRP or an EMRP Researcher Grant eg JRP-Protocol or Research Schedule.

Del. no	Deliverable description	Lead Partner	Other Participants	Delivery date as per *Annex Ia or Research Schedule*	Actual Delivery date	Status and activity (one paragraph includes all Participants)

Colour code 'Delivery date as per Annex Ia or Research Schedule' column as follows:

Green – on time, no technical issues

Yellow – delivered late (by more than one month), or at moderate risk of late delivery, or technical difficulties

Red – overdue, or at high risk of late delivery, or major technical problems

Pink – deliverables on the critical path that are not yet started which will be affected by issues arising within this or earlier periods

No colour – those deliverables not yet started

Maintaining the "Deliverable status" table:

- During the life of the JRP or EMRP Researcher Grant as each deliverable is delivered note the date (Month and year eg – Aug 2011) in the "Actual delivery date " column.

- If a deliverable has changed (added, amended, deleted) including a change to the delivery date, and the amendment has been accepted by EURAMET but the approved Annex Ia (JRP-Protocol) or Annex 1 (Researcher Schedule) has not yet been updated, amend the table accordingly and include a footnote to advise that the change was accepted, stating when this change was requested (if appropriate) and the date of acceptance. Only changes to deliverables so authorised may be included.

Reporting using the "Deliverable status" table:

- Ensure the "Deliverable status" table is up to date to the end of the period.

- For any deliverable overdue at the end of the period add "overdue" in bold in the "Actual delivery date" column.

- Colour code all deliverables that you have started to work on by highlighting the delivery dates in the "Delivery date as per Annex Ia or Research Schedule" column as described above and reporting the JRP status at the end of the period.

- For the column titled 'Status and activity in the last six months (one paragraph includes all JRP-Participants)' provide one paragraph (guidance: 250 words per deliverable) describing status and activity during the last six months for each active deliverable. Ensure that the contribution of each JRP-Participant is included and that this is in agreement with the JRP-Protocol. If not, explain the discrepancy (eg JRP-Participants X, Y and Z will not start work on this deliverable until the next reporting period). Do not include data, tables, histograms, or pictures in this column. A status

statement should be included for each deliverable (eg *Work has not yet started on this deliverable.*, *This deliverable is on schedule.*, *This deliverable is delayed to month year.*, *This deliverable is complete.*). Do not include a description, other than the status statement, for those deliverables that were completed in a previous reporting period.

- If you need to include data, tables, histograms, or pictures to highlight the technical strength of the work please include an annex as a separate document containing this information. Inclusion of such an annex is optional.

Please note that for the JRP Periodic, Interim and Final reporting the allowed delivery time for the reports (eg 45 days for Interim reporting and 60 days for Periodic and Final reporting) should be taken into account when colour coding the deliverables associated with the reporting required under the JRP-Contract / EMRP Researcher Grant Contract.

9.2 Annex B: List of EMRP Contracts Reporting Templates

The following Reporting Templates should be downloaded from: www.emrponline.eu/downloads.html.

9.2.1 JRP Reporting Templates

Template 1   Publishable JRP Summary

Template 2   Final Publishable JRP Summary

Template 3   JRP Interim / Periodic Progress Report

Template 4   [discontinued]

Template 5   Final Publishable JRP Report

Template 6   [discontinued]

Template 7   JRP Output and Impact Report

Template 8   JRP Reporting Questionnaire

Template 9   JRP-Coordinator's Financial Workbook

              (Generates the JRP Resource and Cost Summary and the JRP Cost Budget Analysis Table)

Template 10   Funded JRP-Partner's Financial Workbook

              (Generates the Resource and Cost worksheet and the Financial Statement (which forms the Financial Audit Report part A))

Template 11   Linked Third Party's Financial Workbook

              (Generates the Resource and Cost worksheet and the Financial Statement (which forms the *Financial Audit Report part A*))

Template 12   *Financial Audit Report part B*: Terms of Reference

Template 13   *Financial Audit Report part C*: Independent Report of Factual Findings

              (including a table of the Procedures performed by the Auditor)

Template 14   *Financial Audit Report part D*: Letter of Representation

9.2.2 EMRP Researcher Grant Reporting Templates

Template 15   Researcher Grant Short-Term Report

Template 16   Researcher Grant Final Report

Template 17   [discontinued]

9.2.3 JRP Mid-Term TP Review Template

Template 18   JRP Self-Assessment

EURAMET does not provide a Template for deliverables.

9.3 Annex C – Submission of documents to the EURAMET Publications Repository

At present JRP-Coordinators do not have direct access to the EURAMET Publications Repository. Therefore, all public documents published by JRP-Partners for addition to the Repository should be sent to: repository@euramet.org. Website: http://www.euramet.org

EMRP Contracts
JRP Reporting Guidelines   **38/38**   Document: P-CON-GUI-001   Version: 2.5

Approved: EMRP Programme Manager   2015-07-10