



# Preparation for MuCol P1 reporting to the EU

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# Definition and objectives of a periodic reporting

# Objectives of a periodic reporting

## What is a periodic reporting?

A **report** submitted by the Coordinator on behalf of the Consortium **to the Funding Agency** (the REA: European Research Executive Agency) for review at the **end of a reporting period** including both **technical & financial** information about the activities performed during the period and leading to a payment release

## Objectives for the Funding Agency

- To monitor the project implementation (progress towards the achievement of the project objectives, deliverables, milestones, ...)
- To identify possible deviations, delays, issues or shortcomings
- To support the Consortium concerning future work (until the end of the project)

## Objectives for the Consortium

- To receive payment for the costs incurred during the reporting period
- To acknowledge the main achievements and raise attention on possible issues and mitigation solutions

# Composition of a periodic report

**Periodic report = Technical Part A + Technical Part B + Financial Part**

## Technical Parts

The Technical Report consists of 2 parts:

- **Technical Part A** contains **structured tables** with project information
  - Part A is generated by the IT system. It is based on the information which are entered (mostly by the Coordinator) into the EC Portal, through the Continuous Reporting module, and the Periodic Reporting module.
- **Technical Part B** is a **narrative description** of the work carried out during the reporting period
  - Part B needs to be uploaded as PDF on the EC Portal.
  - No page limit for this narrative description, but it should be concise and readable.
  - Any duplication should be avoided (e.g.: no copy-paste from deliverable report in the Part B, since Deliverables are in Part A).

## Financial Part

The Financial Report is generated by the IT system on the basis of the financial information entered into the Periodic Reporting module (mostly the individual **Financial Statements** (Annex 4 to the GA) for each Beneficiary).

# MuCol P1 reporting timeline: overview

# Background information

MuCol is 48 months duration: from M1 (March 2023) to M48 (February 2027)

## MuCol is divided into 2 reporting periods

- P1 (M1-M24) from the start date to the end of February 2025
- P2 (M25-M48) from March 2025 to the end date

## Grant Agreement inputs about periodic reporting

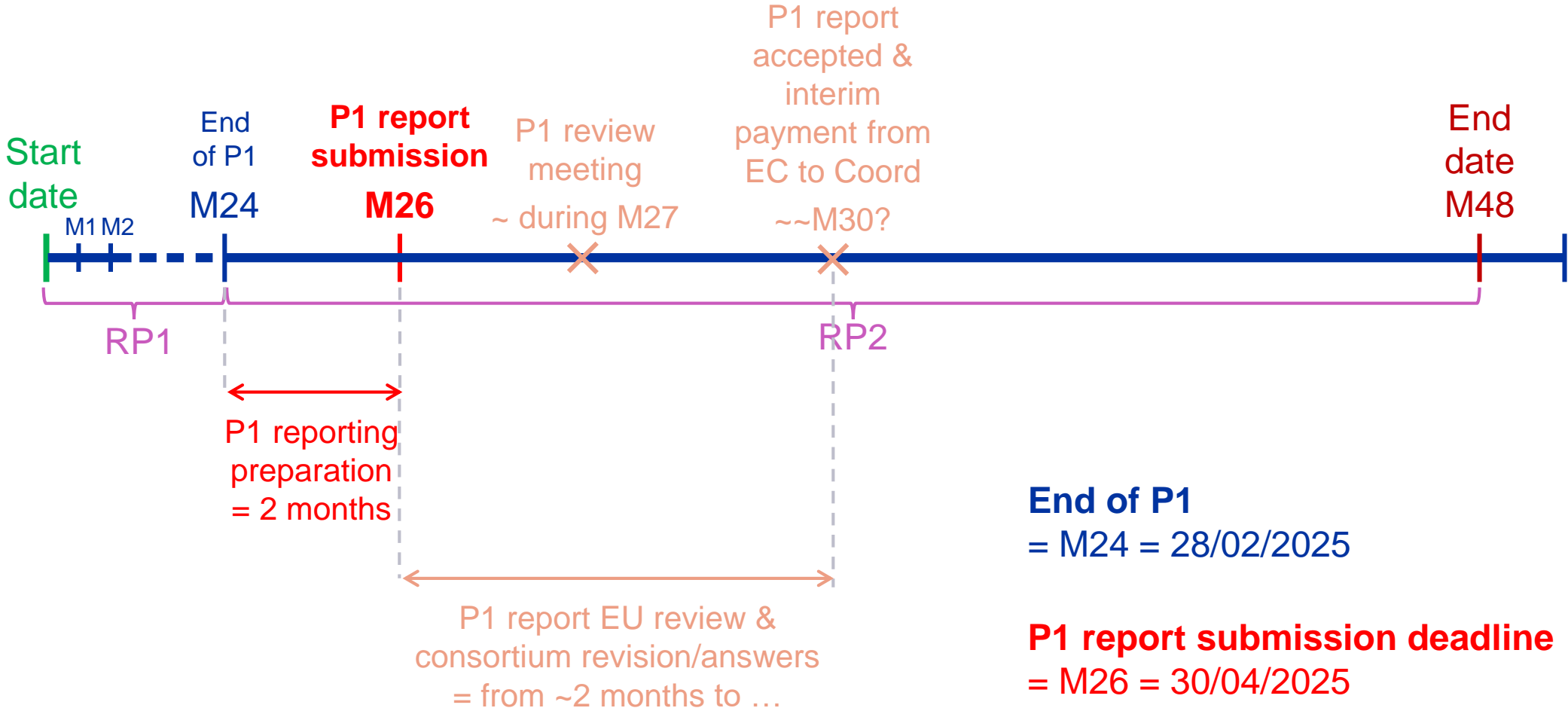
See the GA Data Sheet, and article 21 (& Art. 22 for payments)

**2 months** after end of the period to submit the report

For P1 report, the deadline is end of M26 = April 2025

Reporting					Payments	
Reporting periods			Type	Deadline	Type	Deadline (time to pay)
RP No	Month from	Month to				
1	1	24	Periodic report	60 days after end of reporting period	Interim payment	90 days from receiving periodic report
2	25	48	Periodic report	60 days after end of reporting period	Final payment	90 days from receiving periodic report

# P1 reporting timeline





# How to prepare for the technical reporting

# General template for Part A (1/2)

The template & instructions are accessible on the EC Portal, in the “Reference Documents”: [Periodic report \(HE\)](#)

**Pages 6 to 28** are focused on Part A and relevant for MuCol. Pages 27 to 32 are not applicable for MuCol.

The following items are part of Part A:

- **Project summary**

!! Will be published through CORDIS and possibly other communication channels: do not include confidential information

- **Researchers involved** in the project

!! No need to fill if the corresponding tab in the Continuous reporting have been updated recently

- List of **critical risks** (foreseen and unforeseen)

- **Results**

!! e.g: Scientific discovery, model, theory // Method, material, technology, design (new or improved) // Event (conference, seminar, workshop) // Learning and training (learning modules, curricula) // New or improved infrastructures or facilities  
// ...

- Results **ownership list** (optional at P1 reporting, mandatory for the final reporting)

# General template for Part A (2/2)

- **Publications** (more efficient if Zenodo is up-to-date)
- Datasets
- Intellectual Property Rights (e.g : Patent / Trademark / Registered design / Utility model / Other)
- Standards
- Other results (e.g: Software / Workflow / Protocol / Prototype / Other)
- **Dissemination and communication activities**
- **Impact**

*Specific and targeted instructions/templates and timeline for Part A are yet to be announced*

# The Continuous Reporting as preparation for Part A

## The module is accessible during the whole project duration

CERN (as Coordinator) is responsible to enter the data in the IT system for all tabs

**CERN will collect inputs from relevant WPs, Task leaders & consortium bodies.**

!! Exceptions:

- the “**Researchers involved in the project**” tab can be filled **by each Beneficiary**
- The **Publications** can be uploaded on [Zenodo](#) by **CERN Muon Secretariat** (the EC Portal IT system is synchronised with Zenodo) → keep in mind to inform when a new publication is to be uploaded!

Grant Management Project Continuous Report

101094300 (MuCol) HORIZON-...  
Call: HORIZON-INFRA-2022-DEV-01  
Topic: HORIZON-INFRA-2022-DEV-01-01

Project Summary	Researchers involved in the project	Deliverables	Milestones	Critical Risks	Publications	Results	Dissemination activities	Communication Activities	Standards	Intellectual property rights (IPR)	Datasets	Impact	Impact Continuation	Other Results

Researchers involved in the project

There is no researcher involved in the project yet

Beneficiary	First Name	Surname	Gender	Nationality	Email	Career Stage	Role of researcher	Personal Identifier	Contract duration	Latest degree before entering project Degree   Year Awarded   Country	Last professional position (if any) before entering project Career Stage   Country	Professional position for staff members leaving the project Career Stage   Country
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# General template for Part B

*Based on the general template for Technical Part B, it is recommended to follow this structure for MuCol P1 Technical Part B:*

## 1. Explanation of the work carried out and overview of the progress

- i. Overview of the project results
- ii. Objectives
- iii. Explanation of the work carried out per WP
  - 1) WP1
  - 2) WP2
  - 3) ...
- iv. Impact
- v. Update of the plan for exploitation and dissemination of results (if applicable)

## 2. Open science

## 3. Deviations from Annex 1 and Annex 2

- i. Tasks/objectives
- ii. Use of resources

# General instructions for Part B

All instructions are included in the template, accessible on the EC Portal, in the “Reference Documents”: [Periodic report \(HE\)](#)

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

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

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

### 1.1 Objectives

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

#@WRK-PLA-WP@#

### 1.2 Explanation of the work carried out per WP

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

#### 1.2.1 Work Package 1

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

### 1.3 Impact

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

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

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

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

## 4. OPEN SCIENCE

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

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

#§CON-MET-CM§# #@WRK-PLA-WP@#

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

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

### 5.1 Tasks/objectives

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

# Tentative timeline for Technical reporting Part B

The March 2025 month will be busy with EUSPP strategy document submission, leading to limited availabilities of Management team and WP & Task leaders for the drafting of the Technical report

The Technical report should be approved by MuCol Governing Board before submission

The Technical report submission deadline is end of April 2025 (so is the Easter... ~20<sup>th</sup> of April)

**Consequently, MuCol consortium should anticipate as much as possible the preparation of mandatory documents.**

*The table in the next slides includes the following acronyms:*

*GB: Governing Board*

*MC: Management Committee (includes a CERN representative, the SL, the Deputy SL, the TL, all the WP leaders)*

*SL: Study Leader → Daniel Schulte*

*TL: Technical Leader → Roberto Losito*

*WP: Work Package*

*AC: Advisory Committee*

*FO: CERN Financial Officer*

*MCS: Muon Collider Secretariat*

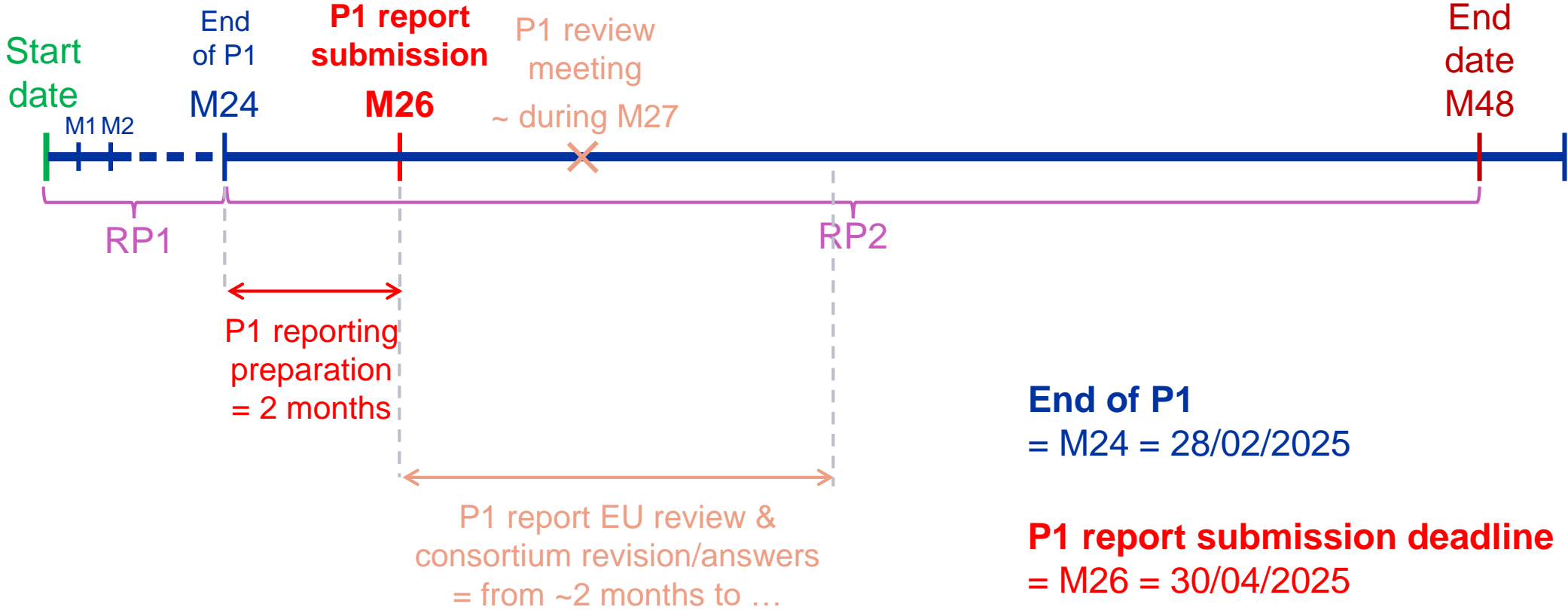
# Tentative timeline for Technical reporting Part B

	When	Who	What
#1	~Nov. 2024	TL, MCS	Customised template distribution to MC
#2	Nov. 2024 – Jan. 2025	MC, Task leaders, ...	Filling the template and sending it back to TL and MCS !! Note that all activities & achievements until 28/02/2025 should be also included → see #6 below
#3	Early Feb.	TL and SL	Distribution of the assembled document for review to MC and AC
#4	February	MC, AC	Reviewing and commenting of the document, raising questions or asking for clarifications, advising on improvements... and send the annotated document to TL and MCS
#5	Late Feb.	TL	Distribution of the annotated assembled document for review to MC
#6	March	WP/Task leaders, ...	Revision according to the comments, and inclusion of the latest activities performed until 28/02/2025 and sending back the document to TL and MCS
#7	Early April	MCS, TL and SL	Restricted distribution of the document for final editing
#8	Until ~Apr. 24 <sup>th</sup>	SL, DSL, TL, FO	Final review and edits, and inclusion of the justifications for financial deviations
#9	~Apr. 25 <sup>th</sup>	TL or SL or MCS	Distribution of the final Technical Report Part B for GB approval
#10	Until Apr. 29 <sup>th</sup>	GB	Approval of the final Technical Report Part B by the GB
#11	April the 30 <sup>th</sup>	TL, MCS	Submission of the approved final Technical Report Part B



# The EU review

# Reminder: P1 reporting timeline



# The P1 review (meeting)

A **mid-term review** (MTR) is announced in MuCol GA. Review is performed by the **Project Officer** and the **appointed external reviewer(s)**.

The name(s) of the appointed external reviewer(s) will be communicated on the EC Portal and CERN has ~7 days to react if needed to object to the expert(s) on the grounds of commercial confidentiality, and to explain the reasons why.

The PO and the ER will review:

- the **full P1 report** submitted, including
- all **Milestones** with a due date in P1,
- and all **Deliverables** with a due date in P1.

There will most probably be a **review meeting** in addition to the review process.

The review meeting can be **fully on-line**, or hybrid: CERN will discuss with the PO if the meeting is confirmed.

Usually **1-day meeting**, or a (packed) half-day meeting, with a **general overview** of the progress achieved during P1, followed by a **presentation for each WP**, and Q&A after each session for the PO & reviewer(s) can ask for any clarification, if needed.

Project: 101094300 — MuCol — HORIZON-INFRA-2022-DEV-01

## PROJECT REVIEWS

Project Reviews			
<i>Grant Preparation (Reviews screen) — Enter the info.</i>			
Review No	Timing (month)	Location	Comments
RV1	26	TBC	MTR
RV2	50	TBC	Final Project Review

# The outcome of P1 review

The PO & ER will prepare a **Review report** and either *accept or reject* the P1 report.

- If the P1 report is rejected, a **Suspension of Payment Deadline Letter** specifies the updates to be done, and the deadline for resubmission of the revised P1 report.
- If the P1 report is accepted, a **Payment Letter** specifies the interim payment amounts to be paid by the Funding Agency to the Coordinator
  - Then, it is the Coordinator responsibility to distribute the interim payment to the relevant Beneficiaries

The Review report is very instructive and includes **recommendations** from the expert(s) for the remaining time of the project.

For P2 technical report Part B (due in M50), an additional section will be needed compared to P1 one: “Follow up of recommendations and comments from previous review”.

# Concluding remarks

## Anticipate

Identify key players in the technical report preparation – Part A and Part B may require inputs from different persons!

The Financial part is specific and managed by Financial Officers / EU Offices in each institute (Beneficiaries only) however it is a long process as well.

Technical & Financial colleagues should study the templates beforehand and ask questions if something is not clear – Less experienced partners are encouraged to identify themselves to the Coordinator for benefiting from a specific support or guidance if needed.

## Be on time & play your part

The preparation of such periodic reporting includes a lot of persons

Minor delay by 1 person / entity may create major delay in the whole process

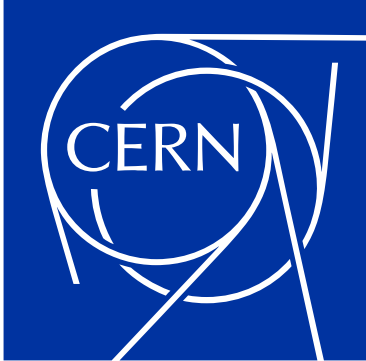
The deadline will come quicker than what you think

## Think of the bright side

Once the P1 reporting process will be over, you will receive a very instructive Review report ... and interim payment for costs incurred during P1!

# Thank you for your attention

**Any questions?**



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