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ERC SCIENTIFIC REPORTING GUIDELINES

HE AND H2020

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European Research Council
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INTRODUCTION

The current guidelines cover both Framework Programmes, **Horizon Europe** and **Horizon 2020**, and aim to provide a clear understanding about the ERC scientific reporting duties.

Points for your attention...

- follow the instructions applicable to your programme, these will be highlighted in a different colour (**Horizon Europe** and **Horizon 2020**).
- the **Horizon Europe** scientific report includes a web-based part and a narrative part using a downloadable Word template (see the **"Scientific Report" part B** tab).
- the **Horizon 2020** scientific report needs to be produced entirely online.
- you need to submit the scientific report through the EU Funding & Tenders Portal.
- update the "Continuous Reporting" module regularly, especially when your project produces important outcomes (publications, IPR, dissemination activities, etc).
- acknowledge ERC funding in the work linked to your grant.

OBJECTIVES

As the grantee of a **Horizon Europe (HE)** or **Horizon 2020 (H2020)** ERC-funded project, you are required to submit scientific and financial reports as set out in your Grant Agreement (see **Article 21 HE** or **Article 20 H2020**). The ERC Executive Agency's Scientific Officers will assess your scientific reports and may contact you to request additional information if they believe something is missing or not clear enough.

The ERC scientific reports are due at different interim periods and at the end of your project and must be submitted within 60 days after each period ends:

- *In the **interim scientific report**, you summarise the progress of the scientific work as compared to the initial "Description of Action" (part B2 of your project proposal).*

- *In the **final report**, you summarise the overall scientific work, achievements, and results of the project over the whole duration of your grant, as well as their scientific impact. The final scientific and financial reports are submitted together at the end of the project. These guidelines explain how to complete the scientific report.*

For **Synergy** and **ERC Plus Grants**, the scientific reporting structure is similar to main grants, while you need to submit two interim and one final scientific report. **Proof of Concept Grant** specificities are outlined below.

WHERE TO REPORT

At the end of each scientific reporting period, you will receive a notification via the Funding & Tenders Portal inviting you to complete and submit your scientific report, for which you have 60 days. You are required to complete your report in the "Scientific Reporting" module.

To complete the (interim or final) scientific report, go to the Funding & Tenders Portal, and access the link to the "Scientific Reporting" module. You will note that part of the information is pre-filled with data that you have previously entered in the "Continuous Reporting" module, such as Publications or Summary for publication. You may need to update this information to cover the whole reporting period of your scientific report.

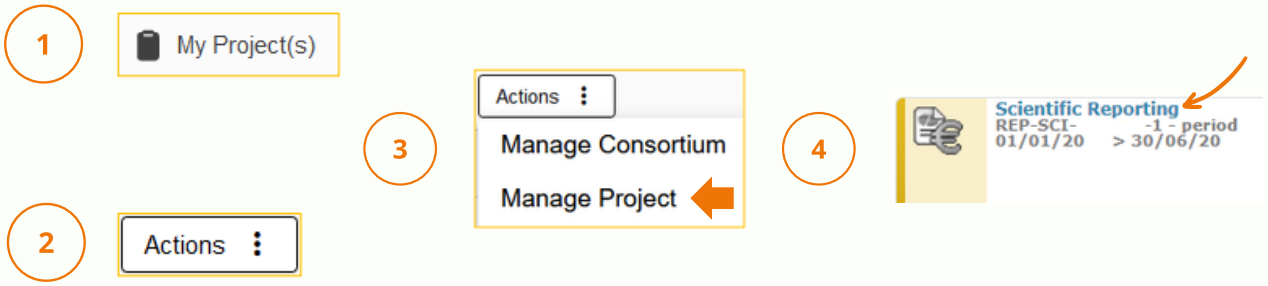
Note that the "Continuous Reporting" module is activated when your project starts and remains active for some time even after the end of the project, allowing you to add additional project results. You are invited to update the "Continuous Reporting" regularly, especially when your project produces important outcomes.

To open the "Scientific Reporting" module, proceed with the following steps:

Step 1 Go to:
https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/myarea/projects

Step 2 Use your EU login credentials to log in.

Step 3 Navigate to **"My Project(s)"** via the left-hand bar (1), click on **"Actions"** next to your project (2), and then select **"Manage project"** (3), then click on **"Scientific Reporting"** (4).



Note that...

- the **Horizon Europe** scientific report includes a web-based part and a narrative part using a downloadable Word template (see the **"Scientific Report" part B** tab).
- the **Horizon 2020** scientific report needs to be produced entirely online.
- you need to submit the scientific report through the EU Funding & Tenders Portal.

PROJECT SUMMARY

The Project Summary consisting of three sections will be published on the CORDIS website, together with general information about your project (e.g., acronym/title, grant amount, abstract, publications). This summary is accessible via web search engines such as Google, and should be drafted for a wider audience. It should not make reference to confidential or personal information.

The different sections of the summary are meant to give an overview of the overall objectives of your project, progress and work performed and main results achieved. The summary is a "stand-alone" text that is not linked to other parts of the report. To finalise the submission, you need to upload a suitable image related to your research project and if applicable, provide a link to the project's website (or otherwise to your host institution).

***The summary will be public**, should be **informative**, and **should not include any confidential information**.*

*Confirm that the version of your summary is **final** in the report you submit through the Funding & Tenders Portal. Note that any changes you make to the summary for publication may only become public after a periodic or scientific report is approved.*

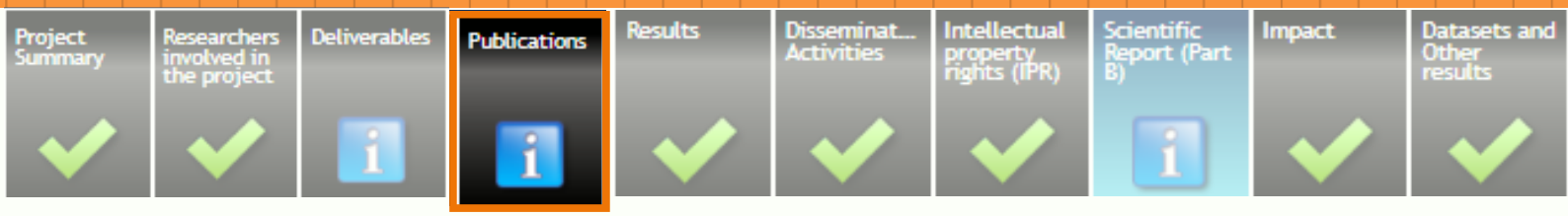
*The three subsections should contain **no more than 3,000 characters each, including spaces**, i.e. in total no more than 9,000 characters, including spaces.*

RESEARCHERS INVOLVED IN THE PROJECT (HE)

List all the research team members who have worked or currently work in the ERC project, and contribute to the scientific work (even if their salaries are not funded from the ERC grant). You need to complete all the mandatory fields or import the researcher's personal data using the information provided in the My Profile section of the F&T Portal. As for the personal identifier, it could be the ORCID number for instance. This section should be filled in during the course of the project in the Continuous Reporting module and updated during each reporting period. [IT How-to]

DELIVERABLES (DMP, ETHICS, OTHER REPORTS)

The "Deliverables" section serves to submit the Data Management Plan (DMP) or documents for the ethics monitoring (if applicable). The DMP is due six months after the start of the project (for **Horizon Europe** projects). For more information about the DMP, see page 10 below.
Neither of these need to be reported in the context of your scientific report. This section will not block the submission of your scientific report.

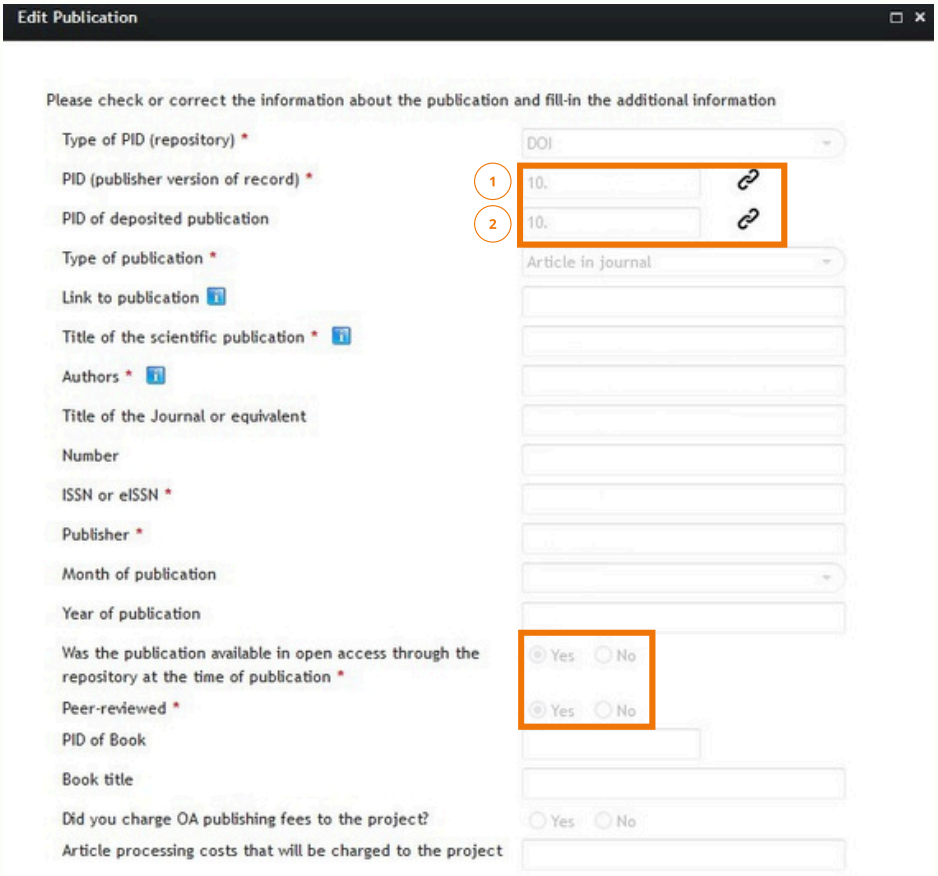


PUBLICATIONS

When you open the "Publications" section, you may see publications that were automatically linked to your ERC project through the OpenAIRE platform. You can accept or reject these suggestions.

You may also import publication through their DOI (digital object identifier), or manually:

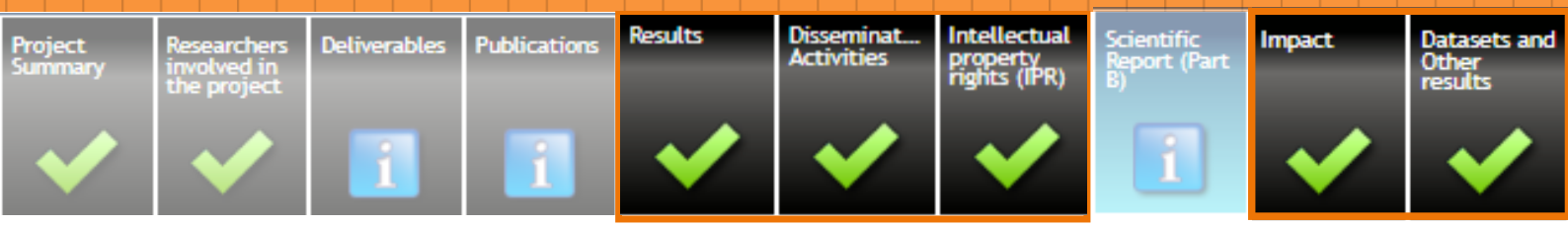
Report all publications resulting from your ERC project by encoding (1) the DOI of the publication (this should point to the version of record, i.e., the original publication) and (2) the DOI of the deposited version (i.e., the repository).



Ensure that:

- ERC funding is acknowledged;
- the final version of the manuscript ("author's accepted manuscript") or the published version ("version of record") is deposited in an institutional, discipline-specific or general-purpose open access **repository** -> Direct link to repository page;
- the "repository link" points to the deposited version in an Open Science repository. This link should not lead to the publisher's website, your own website, nor to platforms such as ResearchGate or Academia.edu.

Do you have manuscripts under review at the time you have to submit your scientific reports? Mention these in the "Major Achievements" section. However, abstracts, posters, slides, conference programmes, etc. should not be included in the publication list.



RESULTS (HE)

This tab is reserved for reporting key results of your ERC project in a structured form. For ERC projects, most results are expected to be of the type "scientific result" (such as a discovery, a new model, or theory), which you can refer to with a very brief description. There is no need to report a "result" for every individual scientific publication resulting from your project.
For other types of results (e.g. products or services), you will be asked to give further details, including on the result ownership, that aim at helping to exploit such results. [IT How-to]

DISSEMINATION ACTIVITIES

Provide an overview of the dissemination of your ERC project results, and list here the major conferences or events in which you presented results to academic and non-academic audiences [HE: IT How-to]. For **H2020** projects, you can list any other project output such as software, tools, or media [H2020: IT How-to]. You may also highlight them under the narrative part "Summary of Progress and Major Achievements".

INTELLECTUAL PROPERTY RIGHTS (PATENTS)

This tab is reserved for reporting the Patents and the Intellectual Property Rights (IPR).
[IT How-To]

IMPACT (HE)

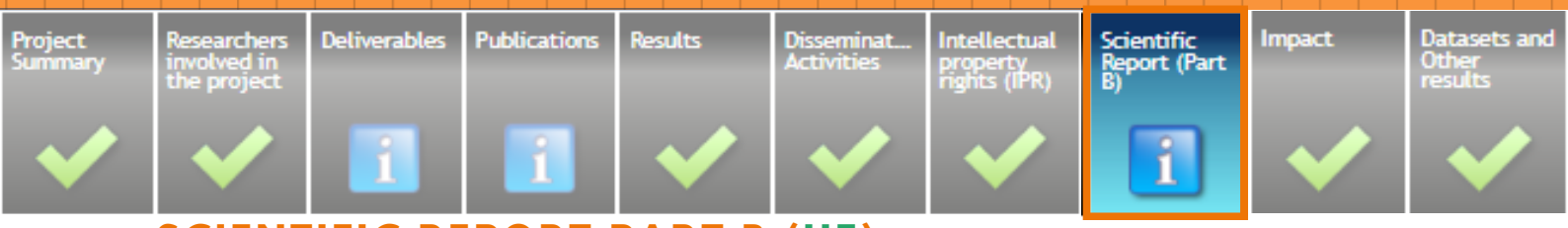
For ERC projects funded from the Horizon Europe Framework Programme, you will see a new tab with tick boxes to collect statistical information on the impact of the EU funding, which must be completed at project-end. These include the UN's Sustainable Development Goals (SDG), information on citizen engagement, and the Technology Readiness Level of the project. These indicators may or may not apply to your ERC project. Given the explorative bottom-up nature of ERC-funded research, you can select "not applicable" for some or all these indicators, whenever these are not relevant for your project. This data is collected to feed into the EU's overall budget expenditure tracking; it is not a part of the project monitoring of ERC grants.

DATASETS AND OTHER RESULTS (OPEN DATA)

In this section you are asked to list research data sets or other result resulting from your ERC project. For more information about research data, see page 10 below. [IT How-To]

EXPEDITIONS AND AWARDS (H2020)

List any major research expeditions you have undertaken in order to conduct your research project (i.e., not simply visits to other research groups). Also list any awards and recognitions that you or your team members have received for your research. [IT How-to]



SCIENTIFIC REPORT PART B (HE)

Download, complete and upload the **narrative part** of your scientific report (Word template).
Do not delete or modify the content of the template, report structured data directly in web the module "Scientific Reporting" and take into account the character limits for each section.
Upload the report as PDF via the dedicated button of the "Scientific Report (Part B)" section.
After the upload, submit your entire report to the ERC (see page 8).
In the **narrative part**, write a summary of project's implementation, report on notable achievements and point towards key challenges and deviations (**see all sections below**).

SUMMARY OF PROGRESS AND MAJOR ACHIEVEMENTS

You are asked to provide a concise overview of the progress of the scientific work, as compared to the Description of the Action in your grant agreement.
Describe the research conducted and progress made along the main objectives and activities, by making reference to relevant results (your key achievements, unforeseen or unexpected results, collaborations, or other significant developments). If applicable, you may also refer to the novel methodologies, interdisciplinary advances, technology transfer and commercialisation achieved in the course of your project, as well as any scientific breakthroughs beyond the current state of the art.

KEY CHALLENGES AND DEVIATIONS FROM THE PLAN

Due to the nature of frontier research, it is possible that different challenges and deviations occur in the ERC funded projects. Outline any significant scientific or technical challenges encountered to date or anticipated in the near future, and mention the applied or envisioned mitigation measures.
Where relevant, elaborate and justify changes of direction affecting the essential activities outlined in the Description of the Action. Describe the impact in terms of their implementation, indicating which essential activities could not be carried and, where appropriate, which equivalent activities were undertaken.
For **lump sum grants**, where applicable, **report any unforeseen subcontracting** undertaken.
In case your project needs significant scientific changes compared to the original plan, request an amendment. [Read more here]

OTHER ACHIEVEMENTS OF THE PROJECT

This section is dedicated to report further achievements, including how the ERC project has contributed to establishing and consolidating your research group. If applicable, you need to briefly detail if there were any broader impacts beyond scientific contributions or list important awards and recognitions.

DECLARATION ON THE PI TIME COMMITMENT

This section is **applicable only for ERC lump sum grants** (except PoC) and aims to capture whether you spent the minimum amount of your working time (see the ERC Work Programme and your Grant Agreement) on the action and in an EU Member State or Associated Country. If minimum requirements are not met, indicate the actual percentage and justify the reasons.
Ensure you obtain confirmation from the host institution before submitting this declaration.

SYNERGY GRANTS

Synergy projects are asked to submit two interim and one final scientific report at the end of the project. In addition to the above-mentioned sections of the **narrative part** (i.e. scientific report part B), you are asked to provide:

- an overview of **collaborative synergies** within your grant, such as joint working arrangements, researcher mobility, shared activities or methodological exchanges
- an account for **each Principal Investigator** of the project in relation to establishing their research group or to the career progression

Complete the **web-sections** of the "Scientific Reporting" module, following the instructions above. If some sections do not apply to your project, tick the "not applicable" box.

PROOF OF CONCEPT GRANTS

Proof of Concept projects are asked to submit a final report at the end of the project, which has a specific reporting template (download here).
In the **narrative part** of the report you are asked to provide:

- a summary of your **project's implementation**, outlining your scientific and technological progress (see the "Summary" section above)
- a description and justification of **significant deviations** (if any) affecting your essential activities outlined in the Description of Action (see the "Challenges and Deviations" section above)
- a summary of your **outreach efforts along the chosen valorisation route** (engagement with investors and/or industry, attraction of funds, or other notable achievements)

Complete the **web-sections** of the "Periodic Reporting and Payment" module, following the instructions above. If some sections do not apply to your project, tick the "not applicable" box.

You may also submit any additional material (e.g., business plan, feasibility study, etc.) as you see fit, which can serve the ERC for information purposes about your project.

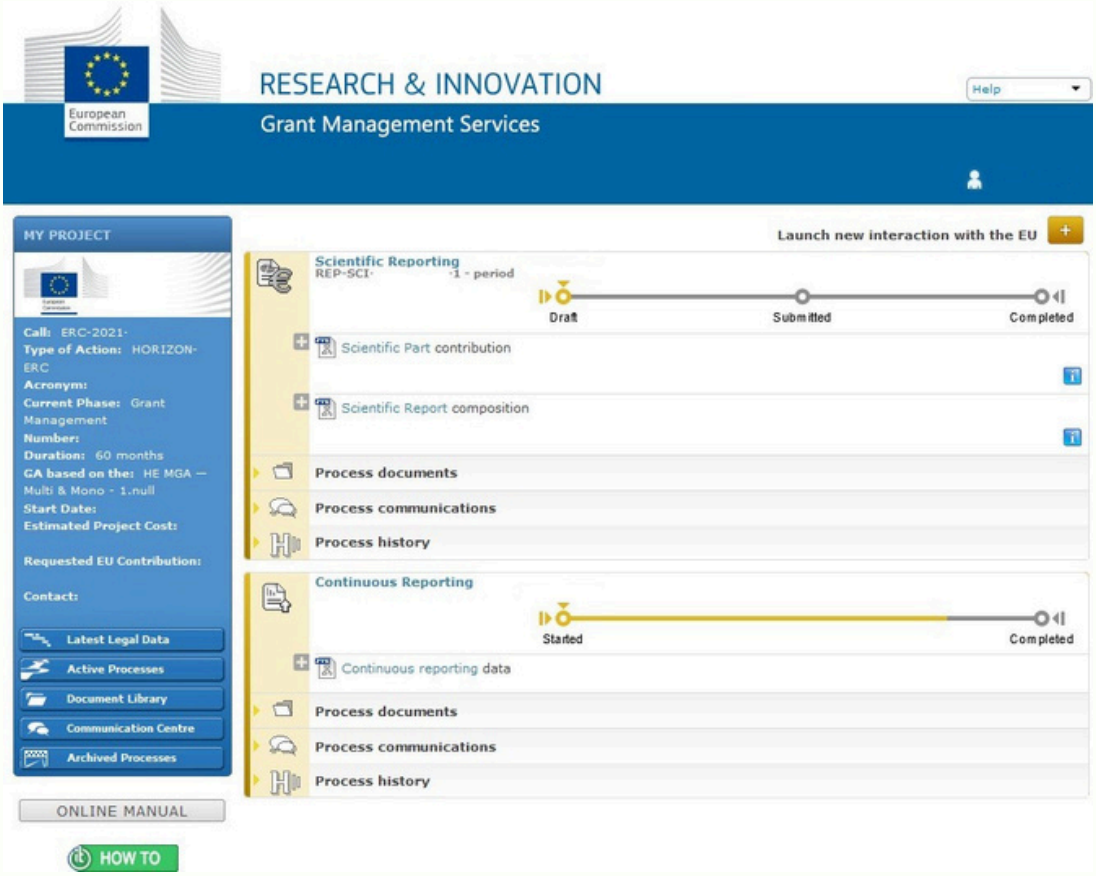
In the "Status of WP" section, add the **percentage of completion** of your grant based on the activities carried out (irrespective of the results obtained). The percentage of completion declared corresponds to the percentage of payment requested. Ensure that you justify the declared percentage in the narrative part of the report. [IT How-to]

Note that 100% completion can be declared if all essential activities have been completed, and/or equivalent activities have been carried out, and/or deviations have been duly justified.

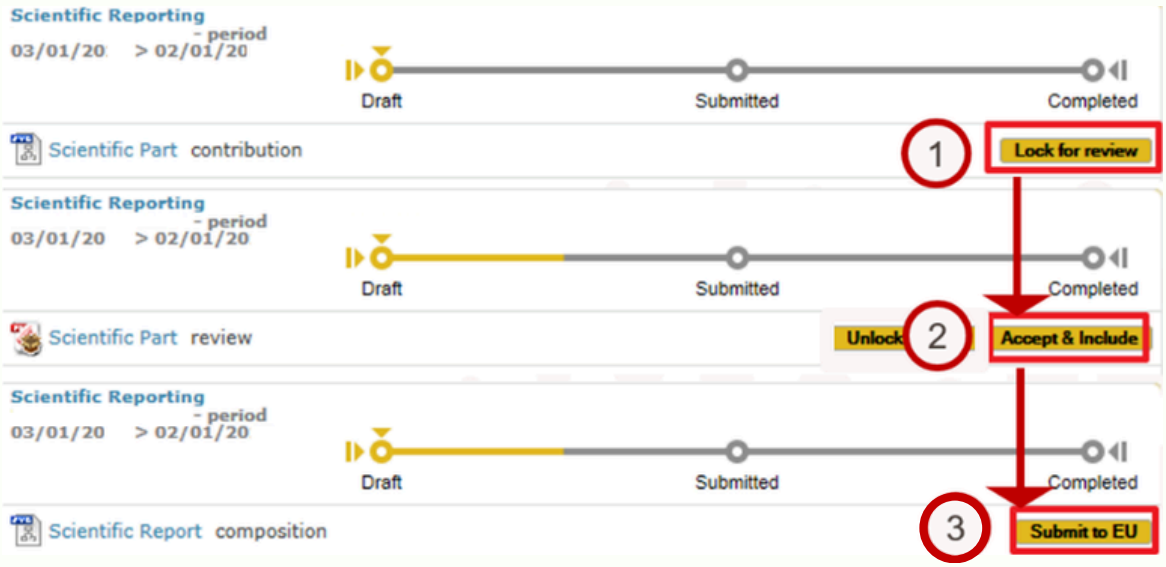
Essential activities refer to the necessary work required to achieve the project's objectives. These are central to the project and their possible deviations and/or equivalence can be justified without calling into question the award decision.

SUBMIT YOUR REPORT

Save the report when all sections are completed, and go back to the Research & Innovation – Grant Management Service window:



You will need a "Coordinator" or "Primary Coordinator" user profile in the Grant Management Service Portal to submit the scientific report. Should you not have such a profile, please contact your host institution. [Read more about roles]
Then follow Steps 1-3 below to submit the report. [Technical instructions]



SCIENTIFIC PUBLICATIONS

The obligations of the grant agreement related to open access apply to all peer-reviewed scientific publications related to results from the project, including long-text publications such as monographs. When publishing results related to your **Horizon Europe** or **Horizon 2020** ERC-funded project, make sure that you:

Acknowledge ERC funding

To acknowledge funding in scientific publications, use the following statement, and where feasible, display the EU emblem and ERC logo:

- **Horizon Europe**: *"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Council Executive Agency. Neither the European Union nor the granting authority can be held responsible for them".*
- In addition to the funding statement, please include specific information on your ERC grant in your publication: "*This work is supported by ERC grant (**Acronym, Number, and/or Project DOI**)".*

- **Horizon 2020**: *"This project has received funding from the European Research Council (ERC) under the European Union's Horizon 2020 research and innovation programme (grant agreement Acronym and Number)".*

Ensure that the publication venue allows the sharing in Open Access

You must make the accepted manuscript (AAM) or the published version (VoR) available in Open Access. In most cases, there are less restrictions for sharing the accepted manuscript. You can check the manuscript sharing conditions on the websites of the journals or publishers, or by using community-maintained platforms such as the Open Policy Finder service.

- For **Horizon Europe** projects, you must share the accepted manuscripts immediately upon publication, with a CC-BY licence (or an equivalent licence).
- For **Horizon 2020** projects, you must share the accepted manuscript at the latest 6 months after the date of publication (12 months for Social Sciences and Humanities) in Open Access.

You may have to pay Open Access fees (APCs or BPCs) to be able to comply with the above requirements. Note that, for **Horizon Europe** projects, only publication fees for full open access publication venues can be reimbursed as direct costs from your ERC grant.

Deposit the accepted manuscript (or the published version) in an Open Access repository

You can use institutional repositories (e.g. those of universities or research organisations), discipline- or domain-specific ones (e.g. Europe PMC, OAPEN Library) or general-purposed ones (e.g. Zenodo). For **Horizon Europe** projects, the repositories must be "trusted", which means they must meet additional quality criteria and allow for detailed publication metadata.

RESEARCH DATA

You must manage the digital research data generated in the action responsibly, in line with the FAIR principles and by taking the following actions:

Submit a Data Management Plan (DMP)

The ERC proposes a DMP template here. You are welcome to adapt it or use a different template, as long as you cover the FAIR principles and outline the allocation of resources as well as data security. You need to submit the first version of the DMP after the first six months of your ERC project. In the DMP you specify what data your project generates or processes, how it is managed, and which parts of it (if any) will be shared in open access.

Deposit your research data in a trusted research data repository

For examples of repositories for research data, consult the information document "Open Research Data and Data Management Plans" produced by the ERC Scientific Council. You may also find the Registry of Research Data Repositories and the Directory of Open Access Repositories (OpenDOAR) useful resources.

Give open, free-of-charge access to the end-user to the digital research data generated during your project, as specified in your DMP

The opening and sharing of research data follows the principle "as open as possible, as closed as necessary." Acceptable reasons for not sharing research data include commercial exploitation, ethical, or security reasons. For **Horizon Europe** projects, the data sets need to be shared under a CC-BY or equivalent licence.