

# ESFRI LANDMARK MONITORING

## Template for Monitoring Reports of Panels

December 2023

Landmark monitoring by ESFRI has the following objectives (see the [Monitoring Guide](#)):

- enabling regular exchange between ESFRI and Landmarks on their long-term development;
- assessing the quality of each Landmark;
- identification of possible problems and supporting the Landmarks to take appropriate actions;
- gathering information on the performance, outputs and impacts of the Landmarks.

The monitoring addresses both the [SCIENTIFIC PART](#) and the [IMPLEMENTATION PART](#), in agreement with the established Minimal Key Requirements (in the following text “ESFRI Requirements”) mentioned in the [2<sup>nd</sup> Batch Questionnaire](#) or the [3<sup>rd</sup> Batch Questionnaire](#).

The Monitoring Reports of panels on Landmarks consist of the following parts:

- [PART A: SUMMARY](#) is a one-page conclusion of the monitoring analysis detailed in parts B - E.
- [PART B: SCIENTIFIC PART](#) is the summary of the analysis by the Monitoring Panel of all information provided by the Landmark regarding its scientific performance.
- [PART C: IMPLEMENTATION PART](#) is the summary of the analysis by the Monitoring Panel of all information provided by the Landmark regarding its operational state (e.g. human resources, finances, governance, risk management, legal affairs).
- [PART D: KPIs](#) is the summary of the analysis by the Monitoring Panel of the Key Performance Indicators (KPIs).<sup>1</sup>
- [PART E: ADDITIONAL INFORMATION](#) is the summary of the analysis by the Monitoring Panel of additional information provided by additional documents, the hearings, possible on-site visits etc.

The Monitoring Report takes into account the information uploaded by the Landmark via the provided questionnaire and the additional documents uploaded through ESFRI MoS, including KPIs and relevant documents as agreed between Monitoring Panel and Landmark, plus hearings and potential on-site visits.

The focus of the Monitoring Report is on the current situation of the specific Landmark and its performance with a view to the **ESFRI requirements as well as the goals and objectives the Landmark has set itself**. The Monitoring Report may identify both risks and opportunities and can provide Landmarks with helpful comments.

Deadline for the submission of the Panel’s Monitoring Report is given in the time table of Landmark Monitoring Public Guide for the respective batch, [Batch 2](#) or [Batch 3](#)

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<sup>1</sup> KPIs should be agreed on between Landmark and Monitoring Panel, they should be aligned with the ESFRI requirements and the objectives of the Landmark and fulfil RACER criteria (Relevant, Accepted, Credible, Easy to monitor, Robust). Remember that KPIs are not suitable for a comparison of the performance of different RIs. The general ESFRI KPI framework is described in: [https://www.esfri.eu/sites/default/files/ESFRI\\_WG\\_Monitoring\\_Report.pdf](https://www.esfri.eu/sites/default/files/ESFRI_WG_Monitoring_Report.pdf)

## Instructions to Monitoring Panels for filling the Monitoring Report

Part A is meant to be a one-page executive summary of Parts B to E. The summary should clearly indicate if the performance of the Landmark with respect to the ESFRI requirements as well as its own objectives is fully satisfactory, or if there are critical recommendations on deficiencies that have to be considered by the Landmark before the next Monitoring round.

In Part B and C, please, point out in the respective summaries of your analysis which aspects you found most convincing for demonstrating the performance of the Landmark in fulfilling the ESFRI requirements as well as the objectives the Landmark has set itself. You may highlight specific strengths, best-practice examples, or mention remarkable success stories. It might be worth mentioning, when KPIs substantiate the performance in a given monitoring dimension since Landmarks are encouraged to refer to their KPIs in parts B and C of the questionnaire. Share advice on additional opportunities for the Landmark. Comment on risks that the Landmark might want to keep an eye on. The analysis / summaries should not only consider the replies to the questionnaire, but all information the Monitoring Panel has analysed regarding a given monitoring dimension, including additional documents, the hearings, and potential on-site visits.

Generally, summaries in part B and C should not exceed one page per monitoring dimension. For the scientific part B a slightly longer description may sometimes be required (a length between half a page and one page for each aspect is ideal), for the implementation part C some summaries might be just a few sentences confirming that the implementation is successful.

The summaries should clearly indicate, if the minimal key requirements are met by the Landmark. If this should not be the case for one of the monitoring dimensions, please give a clear recommendation of what needs to be amended by the Landmark to meet the respective MKR.

In Part B and C, you may use and comment on the KPIs and additional documents submitted as appropriate for the respective monitoring dimension.

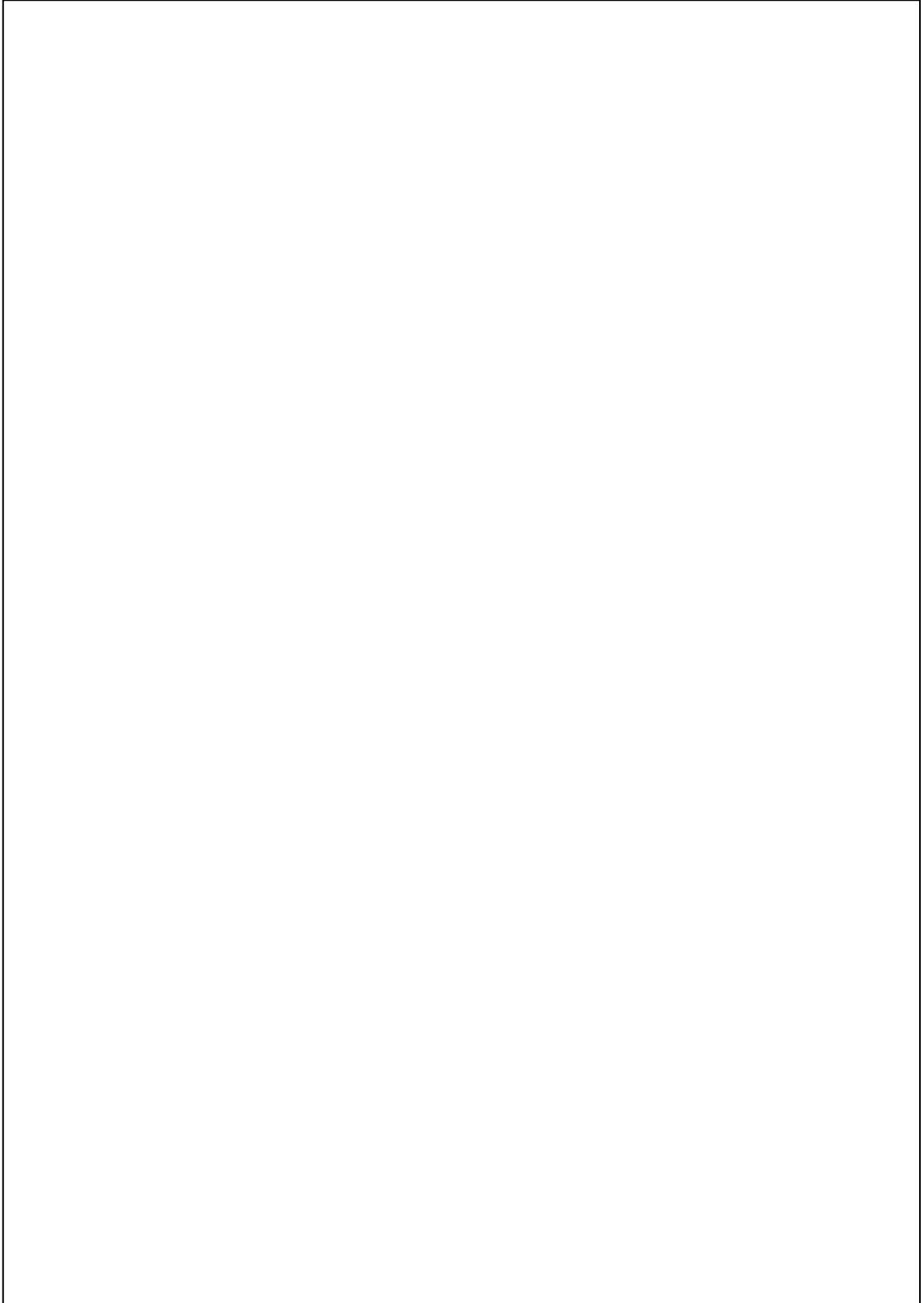
In Part D the set of KPIs should be commented on regarding their contribution to the monitoring analysis.

In Part E, further information obtained via additional documents uploaded by the Landmark, the hearings, and potential site visits can be commented on. Here is also a possibility to add any comments that do not seem to fit elsewhere.

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## PART A – SUMMARY AND RESULT OF THE ANALYSIS



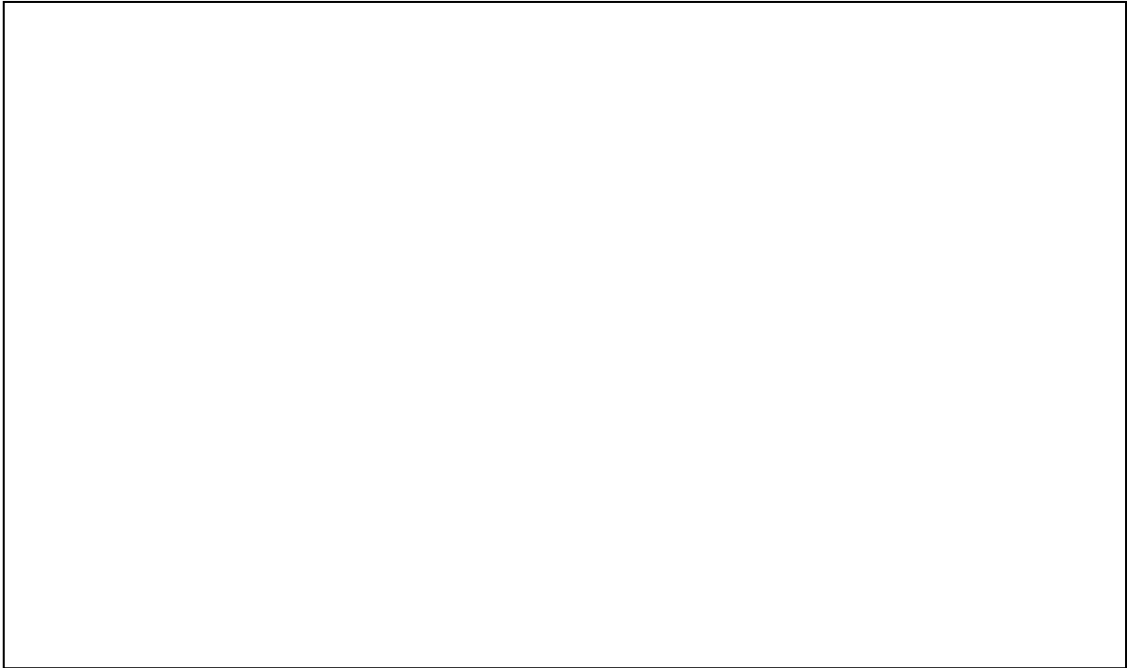
## PART B – SCIENTIFIC PART

### 1. SCIENTIFIC EXCELLENCE

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Keep scientific and technical leadership and impact visible at European and global level

**Summary of performance:**



## 2. PAN-EUROPEAN RELEVANCE

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Clear position in the EU RIs landscape and cooperation/synergies with other RIs

Geographical distribution consolidated/expanding (if relevant)

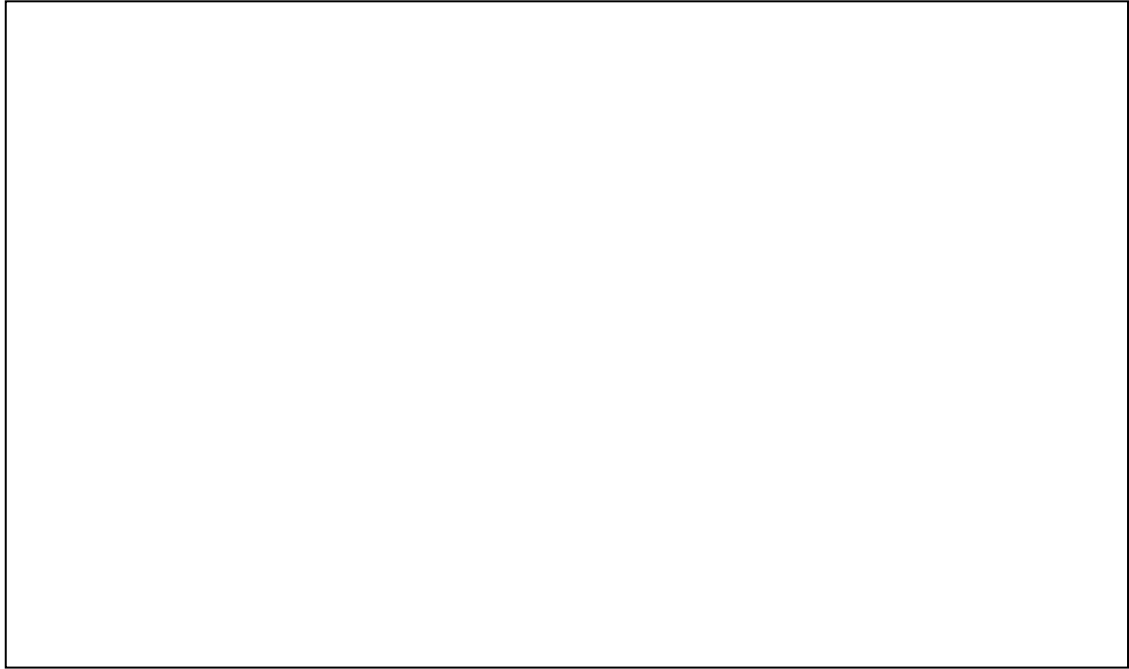
**Summary of performance:**

### 3. SOCIO-ECONOMIC IMPACT

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Social and/or economic impact and how this is measured

**Summary of performance:**





## 4. USER STRATEGY & ACCESS POLICY

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Solid access management system including:

- solid mechanism of exchange with users (e.g. operational single entry point for access, assistance to users; established catalogue of services for users),
- IPR policies fully established,
- dissemination programmes in place.

**Summary of performance:**

## 5. E-NEEDS

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Data Management Plan (DMP) implemented and security policy deployed

Operational application of FAIR principles

**Summary of performance:**



## PART C – IMPLEMENTATION PART

### 6. STAKEHOLDER COMMITMENT

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Sustainable budget, including the budget for national nodes

**Summary of implementation state:**

## 7. CURRENT STATUS AND PLANNING

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Core construction effectively completed or underway and any upgrade plans approved

Procedures for appropriate termination established

**Summary of implementation state:**

## 8. GOVERNANCE, MANAGEMENT & HUMAN RESOURCES POLICY

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Mechanisms in place for annual planning and reporting

All human resources policies and instruments established, including training

**Summary of implementation state:**

## 9. FINANCES

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Long-term financial plan and budget (including an estimation of decommissioning costs if relevant)

Auditing of accounting and budget systems in place

**Summary of implementation state:**

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## 10. RISKS MANAGEMENT

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Appropriate operational risk management and mitigation policies established

**Summary of implementation state:**

## 11. ENVIRONMENTAL / ENERGY POLICY

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Green Deal

**Summary of implementation state:**

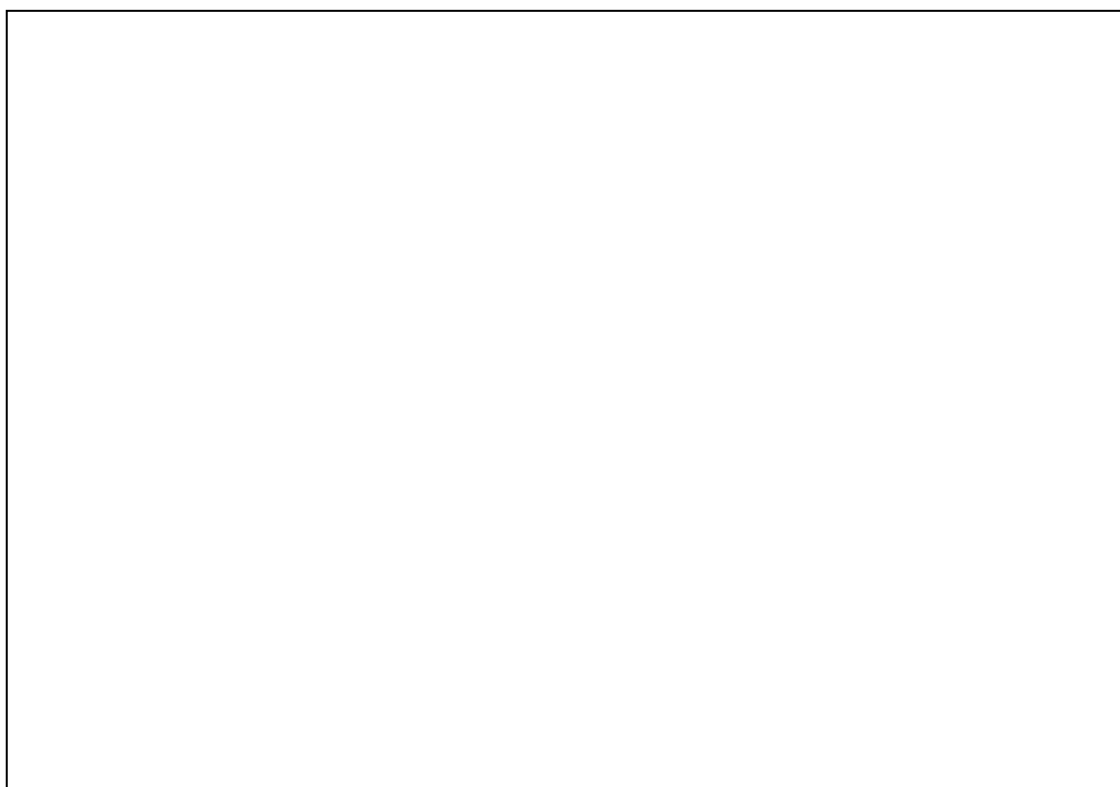


## PART D: KPI

### KEY PERFORMANCE INDICATORS (KPI)

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**Summary:**



## PART E: ADDITIONAL INFORMATION

### ADDITIONAL QUESTIONS, DOCUMENTS, HEARINGS, ON-SITE VISITS

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**Summary:**



## FURTHER COMMENTS

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**Additional comments on the monitoring process as such:**