



European Strategy Forum
on Research Infrastructures

ESFRI LANDMARK MONITORING

Template for Monitoring Reports

December 2022

This Template for a [MONITORING REPORT OF A PANEL](#) applies to the following twelve Landmarks to be monitored in the first batch: PRACE (DIGIT), ECCSEL ERIC (ENE), EURO-ARGO ERIC (ENV), ICOS ERIC (ENV), BBMRI ERIC (H&F), EATRIS ERIC (H&F), ECRIN ERIC (H&F), ELIXIR (H&F), ESRF EBS (PSE), SPIRAL2 (PSE), CLARIN ERIC (SCI), ESS ERIC (SCI).

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 described in the [Roadmap 2021 Public Guide](#).

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).¹
- [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.

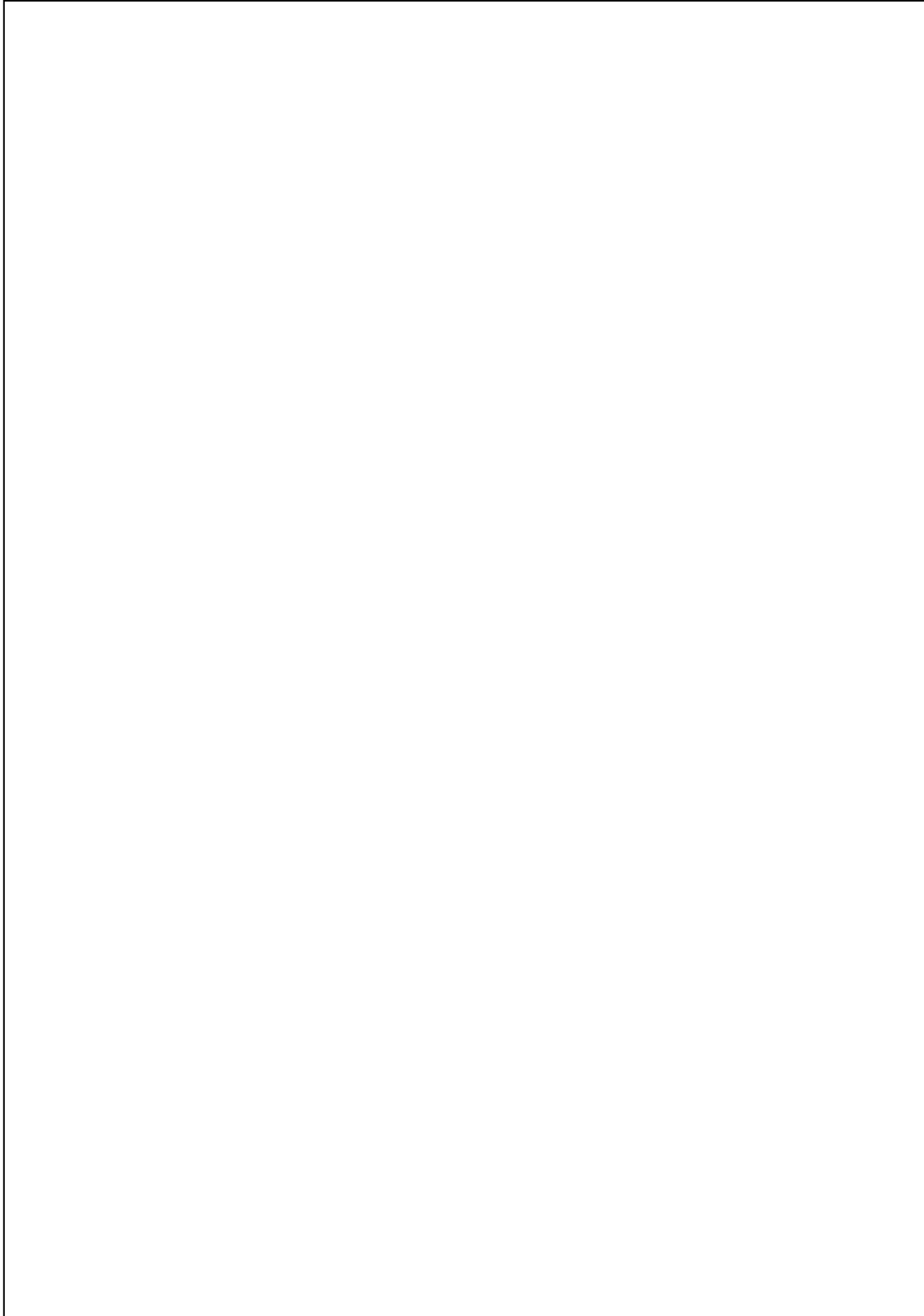
The Monitoring Report takes into account the information uploaded by the Landmark via the MOS questionnaire, including KPIs and relevant documents as agreed between Monitoring Panel and Landmark, plus potential hearings and on-site visits.

¹ KPIs should be agreed on between Landmark and Monitoring Panel, they should be aligned with 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

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PART A – SUMMARY AND RESULT OF THE ANALYSIS



PART B – SCIENTIFIC PART

1. SCIENTIFIC EXCELLENCE

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

Summary of performance:

2. PAN-EUROPEAN RELEVANCE

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

Social and/or economic impact and how this is measured

Summary of performance:

4. USER STRATEGY & ACCESS POLICY

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.

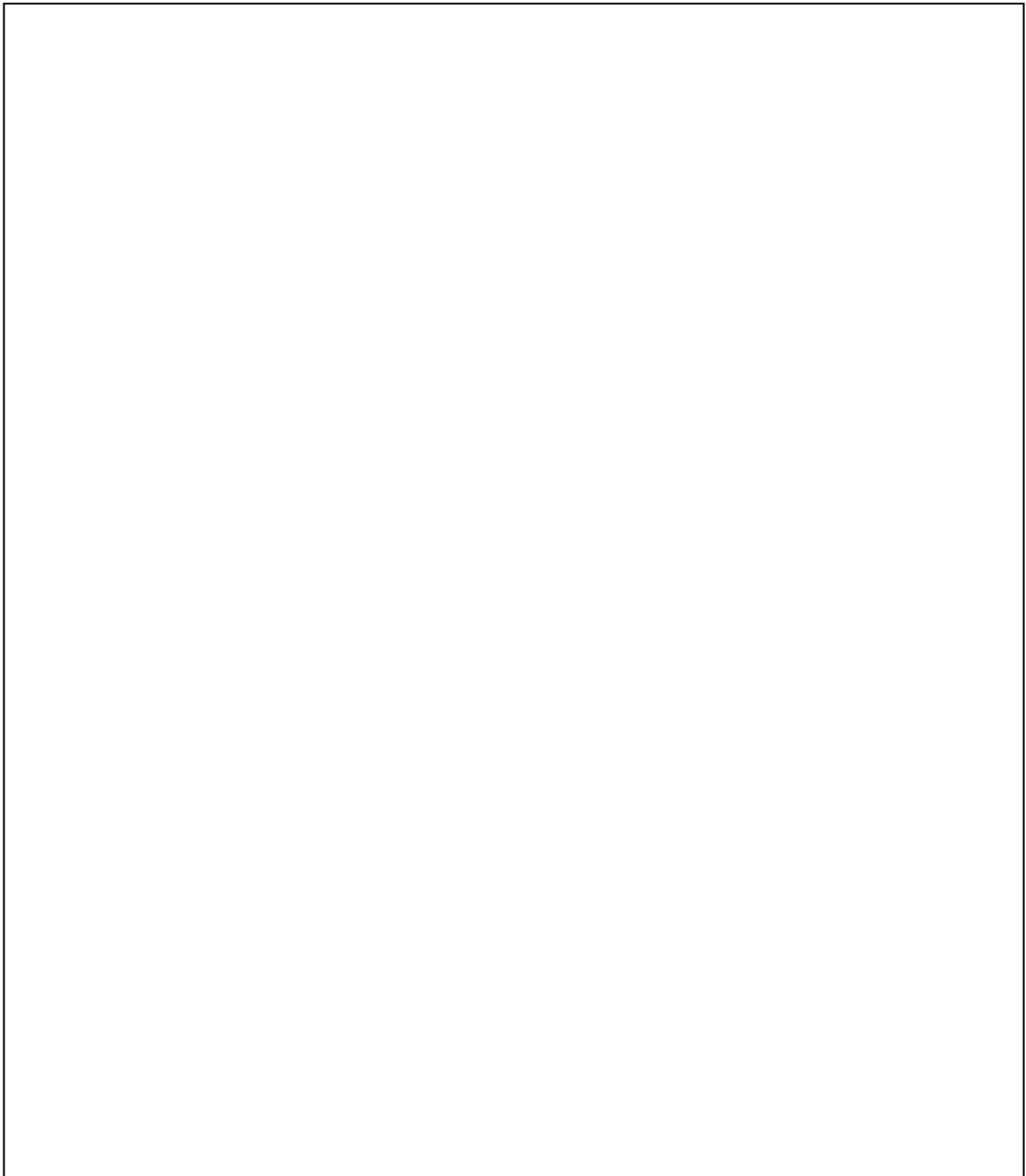
Summary of performance:

5. E-NEEDS

Data Management Plan (DMP) implemented and security policy deployed

Operational application of FAIR principles

Summary of performance:

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PART C – IMPLEMENTATION PART

6. STAKEHOLDER COMMITMENT

Sustainable budget, including the budget for national nodes

Summary of implementation state:

7. CURRENT STATUS AND PLANNING

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

Mechanisms in place for annual planning and reporting

All human resources policies and instruments established, including training

Summary of implementation state:

9. FINANCES

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:

10. RISKS MANAGEMENT

Appropriate operational risk management and mitigation policies established

Summary of implementation state:

11. ENVIRONMENTAL / ENERGY POLICY

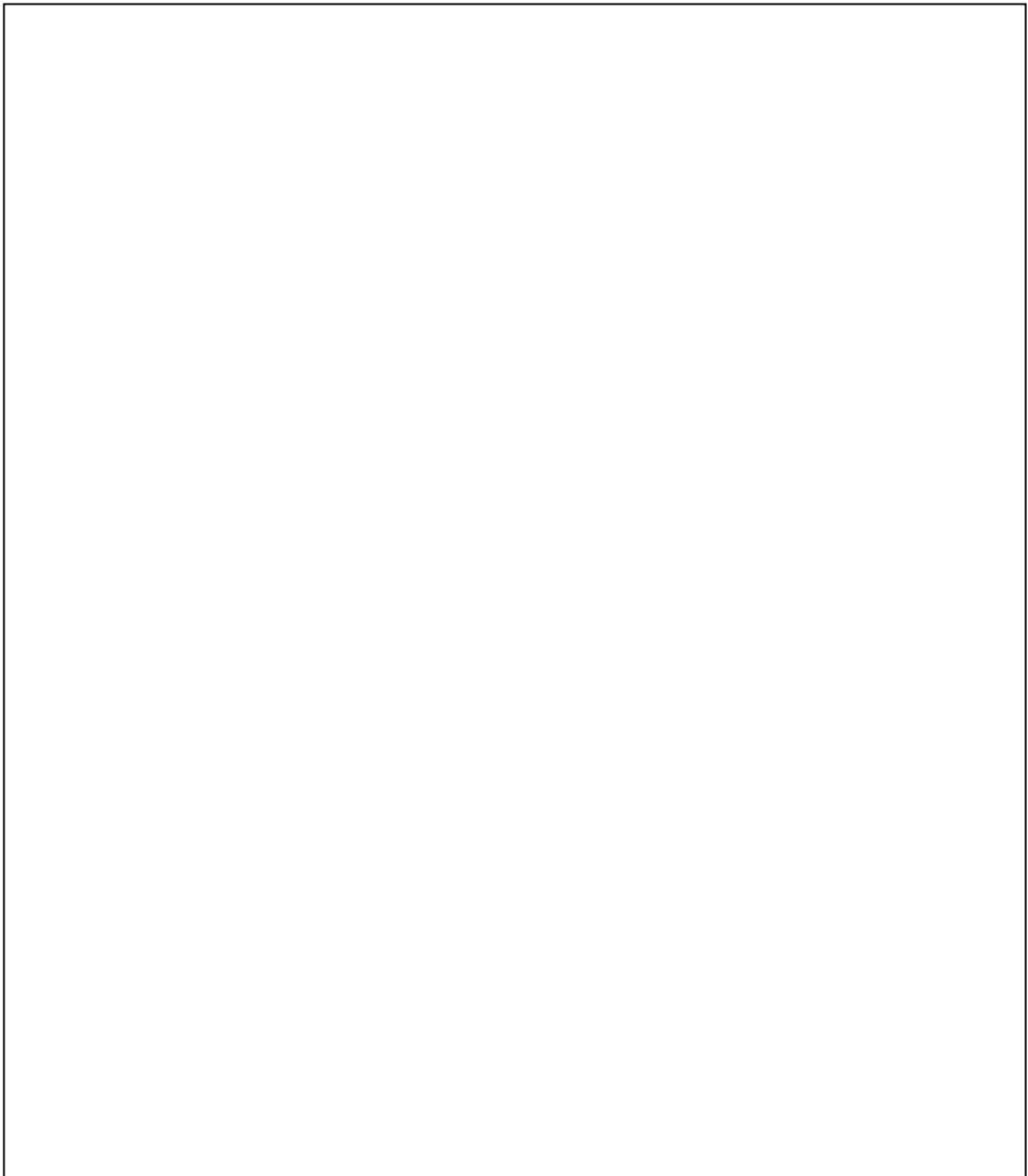
Green Deal

Summary of implementation state:

PART D: KPI

KEY PERFORMANCE INDICATORS (KPI)

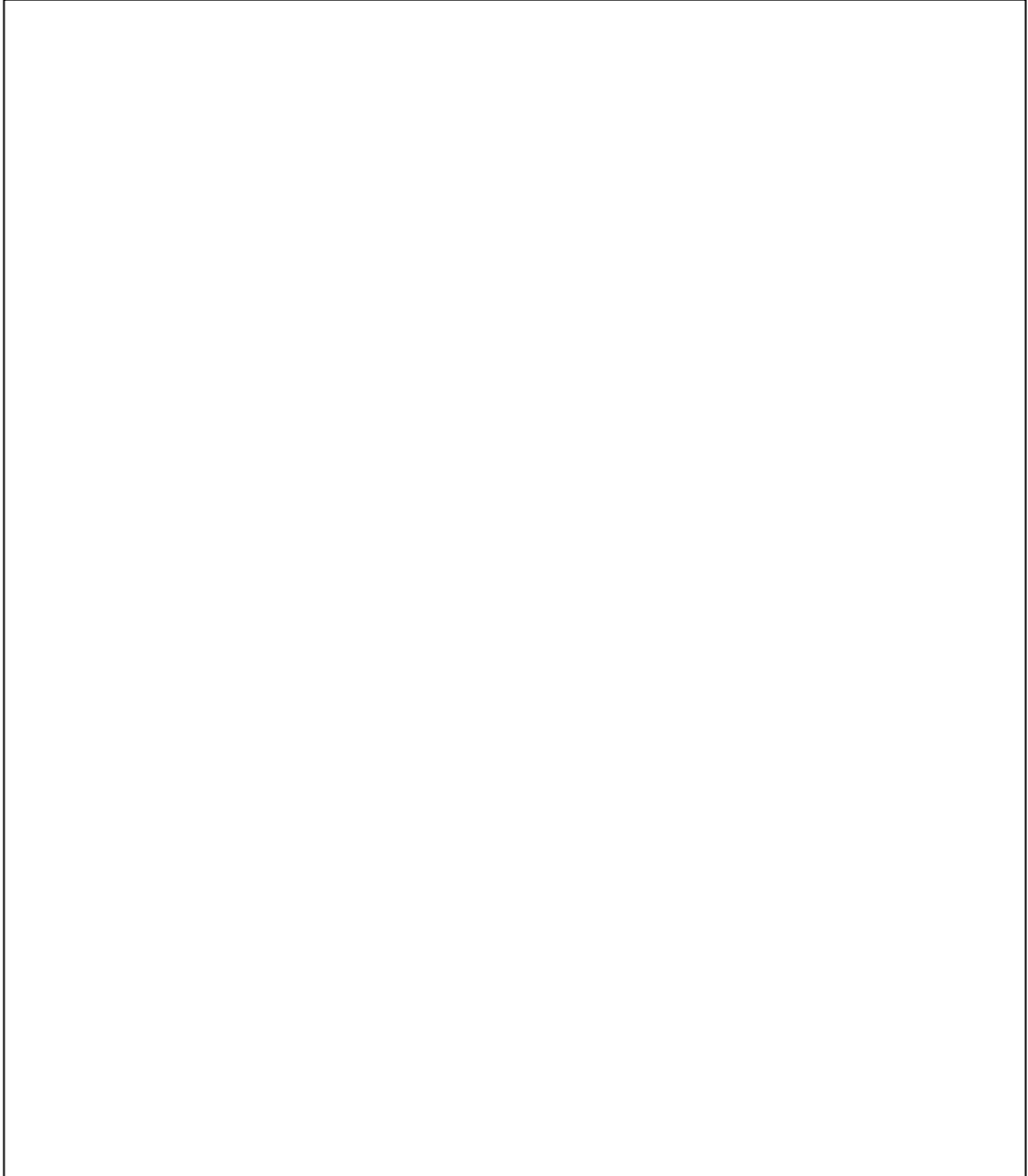
Summary:



PART E: ADDITIONAL INFORMATION

ADDITIONAL QUESTIONS, DOCUMENTS, HEARINGS, ON-SITE VISITS

Summary:

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FURTHER COMMENTS

Additional comments on the monitoring process as such: