

SFI INDUSTRY RD&I FELLOWSHIP – REPORTING GUIDELINES

November 2021

REPORTING TEMPLATE

Industry RD&I Fellowship Award holders are required to submit an Annual Report by the 31st of January of each active year of the award, in order to report on progress during the previous calendar year period (January – December). Award holders are also required to submit a final report at the end of the award. The Industry RD&I Fellowship reporting template is available on SESAME and is used to gather outcomes and impacts from awards made under the Industry RD&I Fellowship programme. The Industry RD&I Fellowship reporting template has been created so that SFI's key goal of enabling strategic partnerships to develop between academia and industry can be measured against the objectives defined for the Industry RD&I Fellowship programme. There are a number of sections in the report template, some of which are self-explanatory, and some which require some guidance:

Research Category Alignment: The SFI Industry RD&I Fellowship Programme is subject to the EU Commission General Block Exemption Regulation (GBER)¹ under Article 25 in which different categories of research, development and demonstration projects can be supported. Please describe progress on the award and how the research continues to be aligned with the Research category (Industrial Research or Experimental Development) selected at time of application.

Scientific Information: In this section of the report, awardees are asked to provide a summary of the work activities performed over the past year. This can include a brief overview of tasks undertaken and their outcomes.

Training: In this section of the report, awardees are asked to provide a summary of any training that took place, for example, training or guidance in aspects of best business practice or operational expertise gained on the use of relevant infrastructures.

Mentorship: In this section of the report, awardees are asked to provide an update on the mentoring arrangements provided by their mentor during the Fellowship.

Career Impact: In this section of the report, awardees are asked to assess how they think the Fellowship will impact on their future career.

For explanation on any of the other standard sections, please refer to the guidelines for the programmes that use the standard template.

ADDITIONAL DOCUMENTATION REQUIRED FOR THE ANNUAL REPORT

In addition to submitting the annual report, Industry RD&I Fellowship award holders must submit a statement of support from the relevant industry partner which comments on progress on the award.

This letter must be on company headed notepaper and signed by the relevant industry mentor and uploaded directly to SESAME using the 'Additional Documentation' upload button.

ADDITIONAL DOCUMENTATION REQUIRED FOR THE FINAL REPORT

In addition to submitting the final report, Industry RD&I Fellowship award holders must submit two documents from the relevant industry partner:

1) Statement (or letter) from the relevant industry partner. The letter should refer to the following where possible:

- The scientific deliverables that have been of benefit to the industry partner
- The success of the Industry RD&I Fellowship to the partner

¹ [EU Commission Regulation \(EC\) No. 651/2014](#)

- The impact of the award on the research agenda/business practices of the industry partner
- Details of plans for future collaborations with the fellow/academic group

This letter must be on company headed notepaper and signed by the relevant industry mentor and uploaded directly to SESAME using the ‘Additional Documentation’ upload button.

2) Confirmation of Industry Partner Costs. The industry partner must provide a statement confirming remitted monies in support of their contribution to the total eligible costs of the Fellowship. This must be broken down by cost category as per the below table and be signed by the industry partner’s accountant or equivalent.

Industry Partner Contribution to Fellowship	Description	Year1	Year 2	Total
Staff Costs				
Equipment / Instruments				
Contract Research, Licences and Patents etc				
Other Operating Expenses				
Total Industry Partner Contribution to Fellowship				

This letter must be on company headed notepaper and signed by the industry partner’s accountant or equivalent and uploaded directly to SESAME using the ‘Additional Documentation’ upload button.

ADDITIONAL INFORMATION:

Definitions of Categories of Research

Under the Industry RD&I Fellowship Programme, proposals must align with SFI’s legal remit **and** fall under one of the following categories of research* as defined by the EU

Industrial Research:

- planned research or critical investigation aimed at the acquisition of new knowledge and skills for developing new products, processes or services or for bringing about a significant improvement in existing products, processes or services.
- it comprises the creation of component parts of complex systems and may include the construction of prototypes in a laboratory environment or in an environment with simulated interfaces to existing systems as well as of pilot lines, when necessary for the industrial research and notably for generic technology validation.

Experimental Development:

- means acquiring, combining, shaping and using existing scientific, technological, business and other relevant knowledge and skills with the aim of developing new or improved products, processes or services.
- this may also include, for example, activities aimed at the conceptual definition, planning and documentation of new products, processes or services.
- experimental development may comprise prototyping, demonstrating, piloting, testing and validation of new or improved products, processes or services in environments representative of real-life operating conditions, where the primary objective is to make further technical improvements on products, processes or services that are not substantially set.
- this may include the development of a commercially usable prototype or pilot which is necessarily the final commercial product, and which is too expensive to produce for it to be used only for demonstration and validation purposes.
- experimental development does not include routine or periodic changes made to existing products, production lines, manufacturing processes, services and other operations in progress, even if those changes may represent improvements.