

UKRI Infrastructure Fund Completion Reports

Introduction

This paper provides an update on the completion of five Preliminary Activities (PAs) funded through the UKRI Infrastructure Fund and introduces a newly developed Project Completion Form, one tailored for PAs and one for Full projects. This marks the first time the Infrastructure Fund has implemented a formal mechanism to capture end-of-project reflections and outcomes.

The paper outlines the rationale behind the development of the form, summarises five completed PAs (with individual submissions included in [REDACTED]), and seeks IAC's input on the template to ensure it is proportionate, fit for purpose and provides appropriate assurance that the projects within the Portfolio have delivered the intended outcomes and benefits as planned. The paper also sets out a proposed process for the ongoing use of the Project Completion Form and invites the IAC to note this approach.

UKRI Infrastructure Advisory Committee (IAC)

The IAC are asked to:

- **Note** the summary of completed Preliminary Activities (PAs) included in this paper and annexes
- **Review and provide feedback to improve** the Project Completion Form template for Infrastructure Fund Projects
- **Note** the proposed process for ongoing use and engagement with Project Completion Form as part of standard Infrastructure Fund governance.

Background

In response to the need for a more consistent and structured approach to capturing project outcomes, benefits, and recommendations for future delivery (Annex 1), the UKRI Infrastructure Portfolio Pillar developed a Project Completion Form template (Annex 2). This form is designed to record key achievements and deliverables, evaluate success against initial plans, identify lessons learned and areas for improvement, and provide recommendations to inform future project delivery. It also serves as the final record for the Infrastructure Fund Portfolio and support future programme planning and assurance activities.

The Project Completion Form has been developed to align with best practices in Benefits Management and the UKRI Benefit Management Framework. As our approach to portfolio benefits reporting, monitoring and evaluation matures, this template will reflect those improvements.

The template is high-level and intentionally designed to be straightforward and not overly burdensome for project teams. Completion of the form is mandatory for all Infrastructure Fund PAs and Full projects. It may be used either as a standalone report or alongside existing documentation required by Councils or Project Boards. As such, we recognise that not all sections will be relevant to every project, and optional sections are clearly marked to allow flexibility. Where used as a summary, supporting documents can be attached; where used as the sole report, more detailed responses are expected.

Process for ongoing use and engagement with Project Completion Forms

We propose an annual review of all Project Completion Forms submitted to align with the IAC meeting schedule. A summary of key insights, supported by selected impact case studies and the original completion forms, will be compiled and included in the Autumn meeting IAC paper pack. These materials are intended for background reading and will not be formally discussed during the meeting unless specifically requested.

Lessons learned will be reviewed regularly and ahead of each Infrastructure Fund wave to identify insights that could benefit future applicants. Where appropriate, these will be flagged and incorporated into updated guidance materials and communicated with the Infrastructure Working Group (IWG).

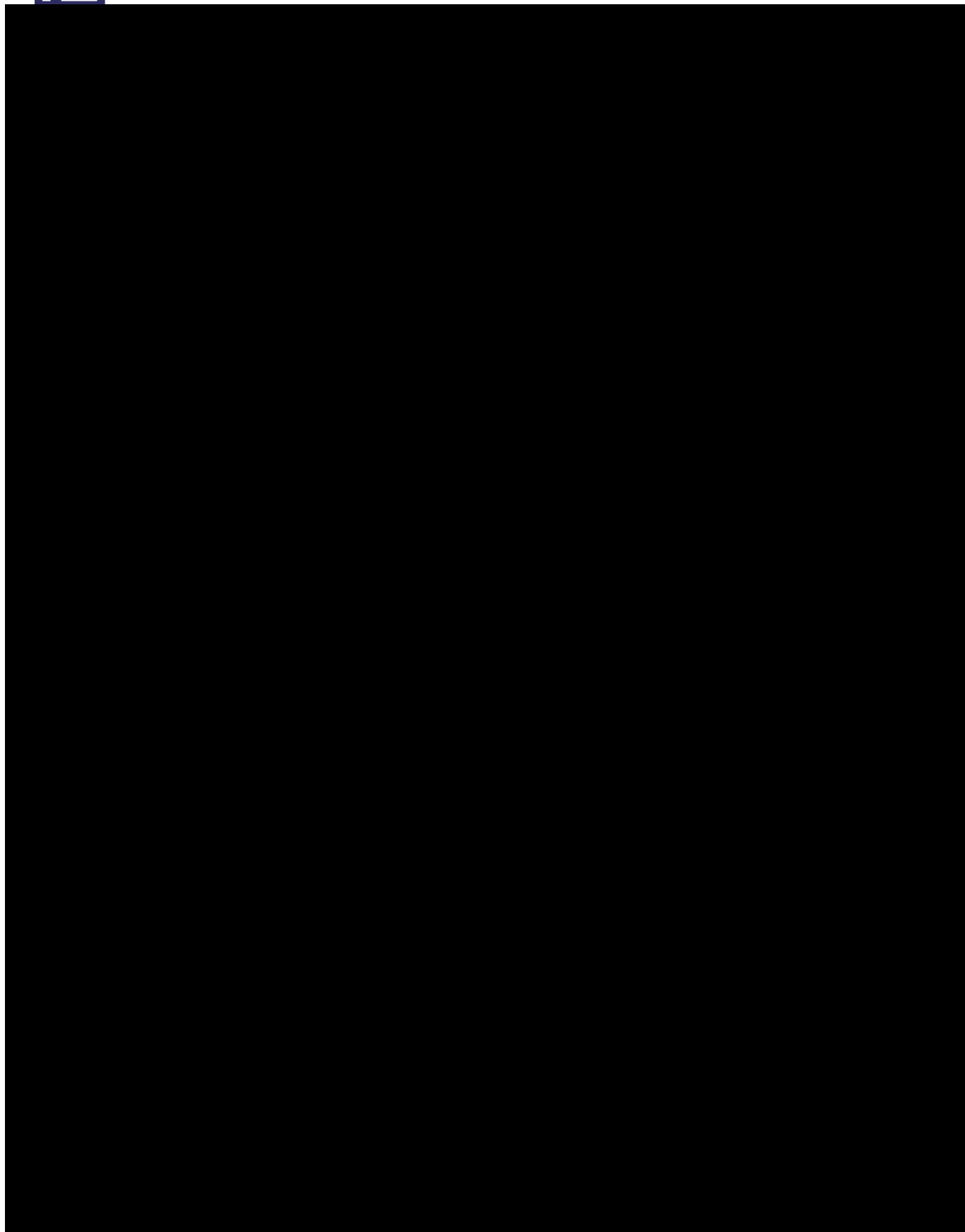
Summary of completed PAs

■■■■ PAs have now ended and submitted their completion forms. These are: ■■■■

■■■■ ■■■■ ■■■■ ■■■■

■■■■ The summaries below outline how each project delivered against key success criteria, time, cost, and scope, highlighting notable outputs and outcomes, as well as any challenges encountered during delivery.

Information from the project completion forms has informed the drafting and development of impact case studies (Annex 1), ensuring a clear line of sight from project delivery to demonstrated outcomes.



Common lessons learned and recommendations for future Infrastructure Fund projects

Each of the [REDACTED] PAs has provided valuable insights into the delivery of infrastructure scoping studies. The lessons learned below highlight common themes and recommendations for future Infrastructure Fund projects.

Lessons for Projects:

- **Stakeholder Engagement:** Engage key stakeholders early and at the right seniority level to build understanding, secure buy-in, and avoid delays.
- **Governance:** Establish robust governance structures with clear roles and decision-making authority to maintain momentum and ensure accountability.
- **Ramp Up and Phasing:** Allow for a realistic start-up period in project plans to accommodate recruitment and mobilisation, reducing risk of cascading delays. A phased approach, such as an initial technical de-risking stage followed by a construction phase, can improve feasibility and reduce risk.
- **Sustainability:** Incorporate whole-life costing from the outset to support financial sustainability and informed decision-making.
- **Funding Alignment:** Teams should work proactively with UKRI to map out transition routes between Preliminary Activities, Full Infrastructure bids, and operational delivery, securing early agreement on timelines and expectations. This ensures continuity, avoids delays, and strengthens the case for future investment.
- **Project Management:** Adopt strong project management practices, including:
 - Shared systems for storing documents
 - Regular communication between delivery partners and UKRI
 - Clear documentation of decisions
 - Aligning messaging with project milestones, and
 - Recognition of collaborative successes

These practices improve access to information, reduce confusion, support smoother project delivery and build trust for long-term delivery.

Lessons for the Fund / UKRI:

- **Funding Alignment:** Work with project teams to map transition routes between Preliminary Activities, Full Infrastructure bids, and operational delivery, securing early agreement on timelines and expectations.

Annexes

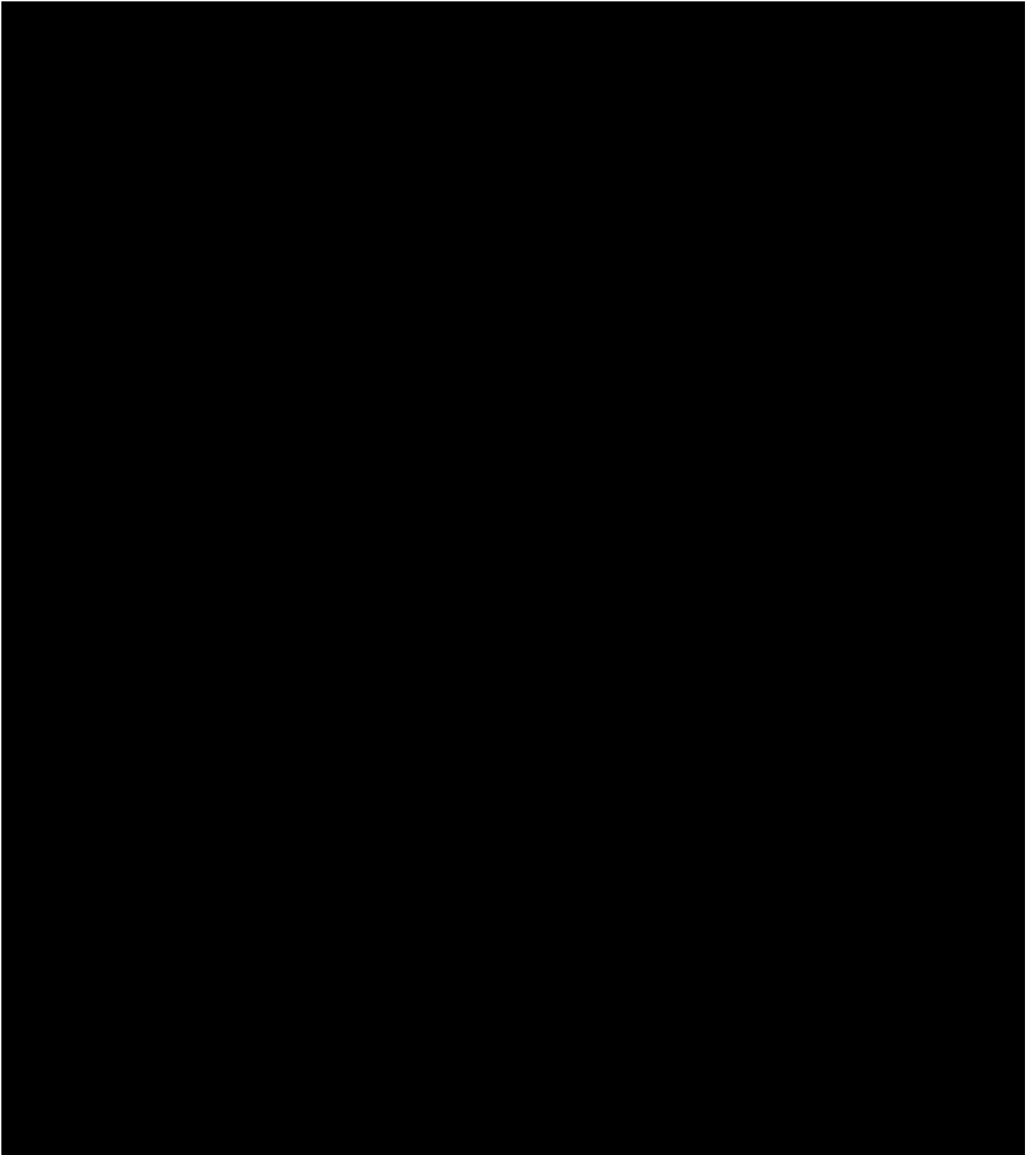
- Annex 1: Impact Case Studies

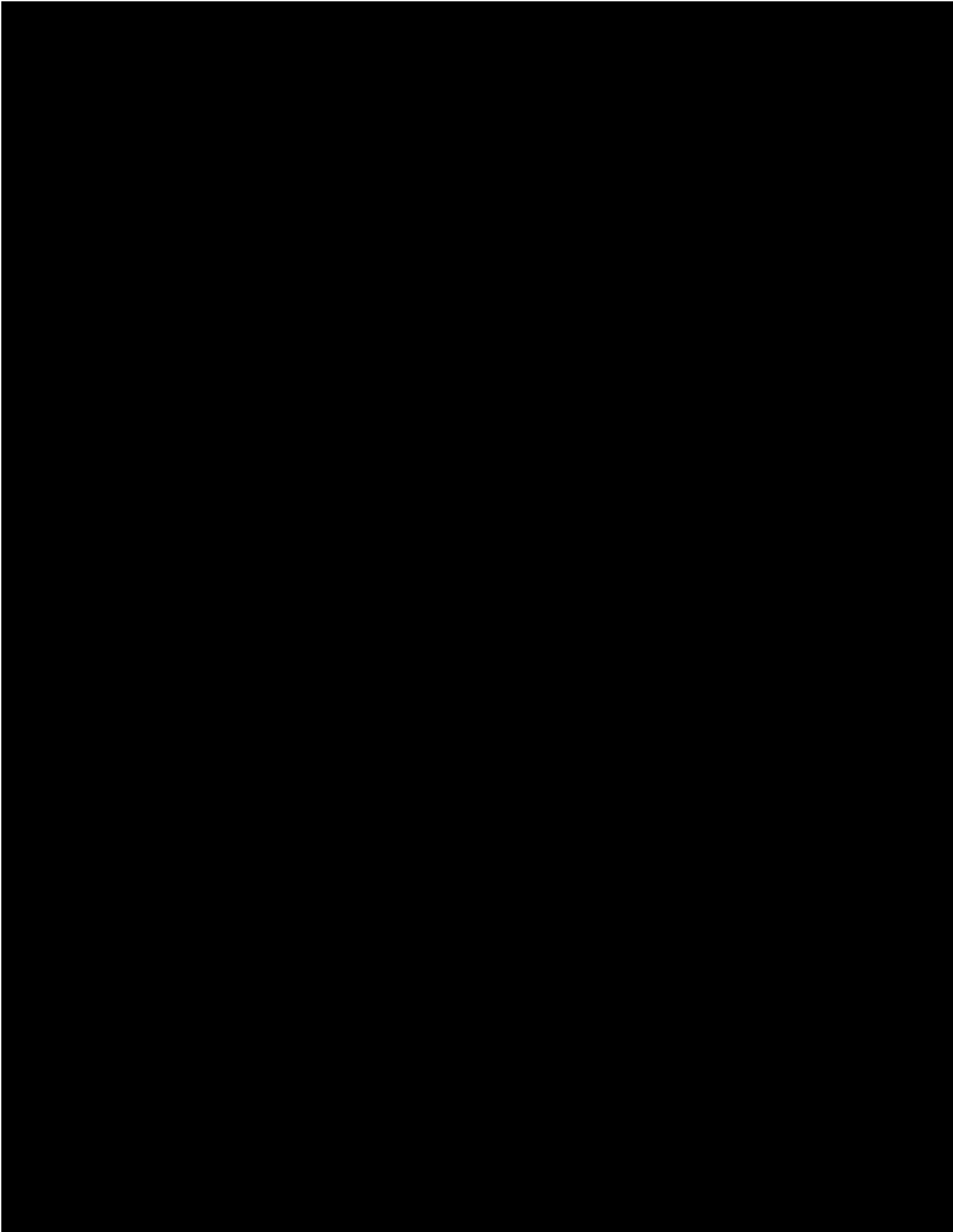


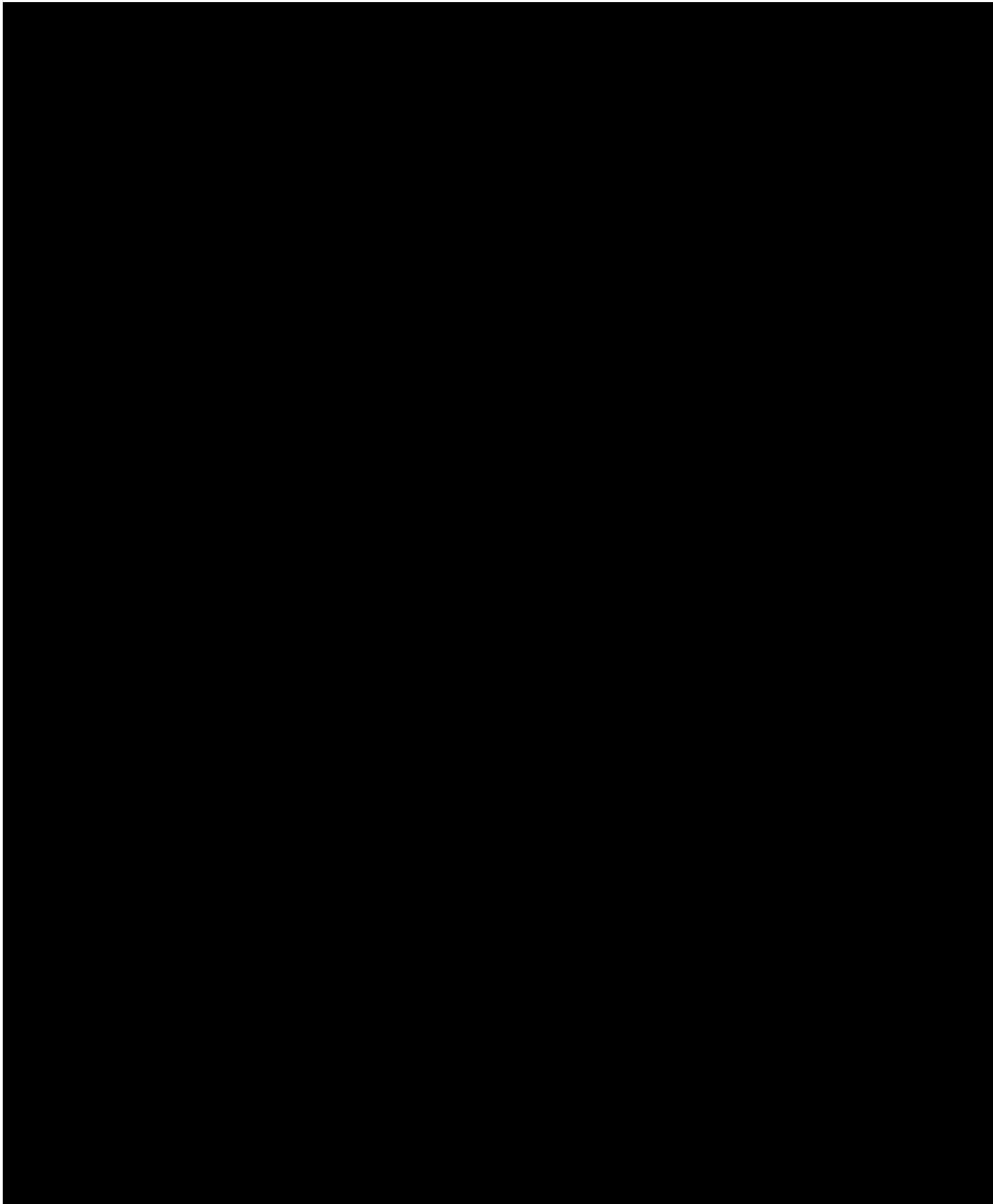
- Annex 2: Infrastructure Fund Project Completion Form template

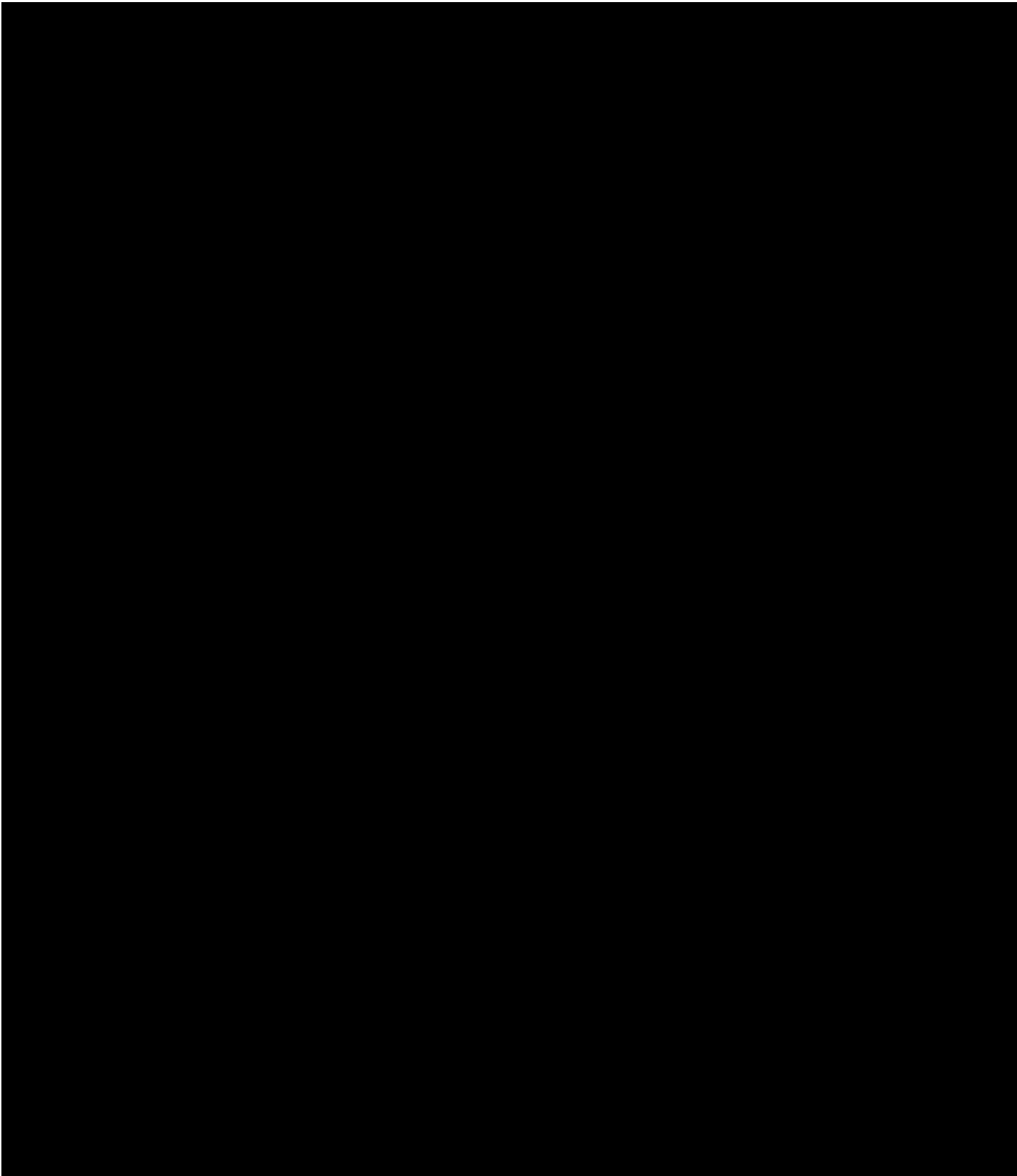


Annex 1: Impact Case Studies









Annex 2: Infrastructure Fund Project Completion Report Template

NB. Please note: The completion form for PAs follows the same structure as the Full project template, but requires a reduced level of detail, particularly in relation to benefits and the achievement summary.

UKRI Infrastructure Fund Full Project Completion Report Template

Purpose of this Template

This template provides a comprehensive report detailing the outputs and outcomes of a project. It evaluates the success of the project in comparison to initial plans, documents key lessons learned and provides recommendations for enhancing future project outcomes. It also serves as the final record for the Infrastructure Fund Portfolio.

This is a high-level document designed to be straightforward and not overly burdensome for the team completing it. We recognise that not all sections will be relevant to every project, nor are highly detailed responses required. Optional sections have been labelled throughout.

Completion of this form is mandatory for all UKRI Infrastructure Fund Full Projects. It may be:

- Completed alongside existing project completion reports and other documentation required by your Council or Project Board. In such cases, this form should be completed as a summary. Please attach any supporting documents when submitting this form.
- Used as the sole project completion report, in which case more detailed responses are expected.

How to Use This Template

This should be completed by someone suitable within the project team, such as the Project Manager. It should be completed within 3 months of your Infrastructure Fund funding ending and submitted, along with any supplementary materials, via email to:



This template is a living document that will continue to evolve. The UKRI Infrastructure Function will develop it further to align with best practices in Benefits Management and the UKRI Benefit Management Framework. As our approach to portfolio benefits reporting,

monitoring and evaluation matures, this template will reflect those improvements.

How This Report Will Be Used

Completed reports will be stored on [REDACTED] where they will be accessible to UKRI Infrastructure Fund project SROs, project teams, councils and FBPs. The UKRI Infrastructure Function may reach out for clarification if needed and will share the finalised report with the Infrastructure Fund Programme Director and the UKRI Infrastructure Advisory Committee (IAC) for information. These reports provide a valuable resource for learning from past projects and may also be referenced in quarterly reporting processes or future analysis for the Infrastructure Fund Portfolio. Please keep this in mind when including sensitive information that may be visible to a wider audience.

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1. Infrastructure Fund Full Project Details

Project Name:	
FY Start Date:	
FY End Date:	

2. Form Completion Details

Prepared by: <i>[Name & Role on the project]</i>	
Approved by: <i>[Name & Role on the project]</i>	
Date: <i>[Date of approval]</i>	
Contact Details: <i>[In case any clarifications / follow up are needed]</i>	

3. Project Summary

Provide a brief overview of the project, including its background and its key aims and objectives.

4. Achievement Summary

Provide a concise summary covering:

- i. Achievement: What did the project accomplish?
- ii. Outcomes: What was the impact of the project? When will the full outcome will be realised?
- iii. Next Steps: What actions are planned moving forward?

5. Performance Assessment

Provide a brief overview of how the PA performed against key areas below (cost, schedule, scope, risk, benefits etc).

5.1 Key Performance Areas

Cost: Detailed financial information on the Infrastructure Fund budget versus actual spend will be sourced from existing reporting and UKRI Financial systems. However, please highlight whether the final project spend was over or under budget, by how much, and explain for any variance. Also include if there were any major events or circumstances that positively or negatively impacted the budget.

Schedule: Please state whether the project was completed on time, early or, late, and by how long. Please explain any major deviations from the original timeline.

Scope and Objectives: Did the project deliver its original scope and objectives as expected? If so, what factors enabled the PA to meet its objectives? If not, please explain why.

Risks and Issues: Were any unforeseen risks or issues encountered that were not included in the original risk management plan? If so, how were these addressed or mitigated (e.g. Did you develop a novel and effective methodology to reduce this risk?) Are there any risks or issues that remain open?



5.2 Benefits Realisation

Provide details of the **primary planned benefits** included in the original Business Case and/or Project Initiation Document or equivalent, include details of if they have been realised, how they have been measured and provide explanations for any discrepancies.

Benefit Description <i>[Where possible use the MEDIC acronym: Maintain, Eliminate, Decrease, Increase, Create]</i>	Benefit Category <i>[Societal, Economic, Environmental, Knowledge-Based*¹]</i>	Has the Benefit been realised? <i>[Yes, No or Not Yet. If Not Yet, when is it forecast to be?]</i>	How was/ will the Benefit be measured? <i>[For long-term benefits, how will you ensure they are still measured?]</i>	Actual/ Forecast Benefit <i>[Indicate if this is actual or forecast]</i>	Commentary <i>1. [Explain any gaps between planned and achieved/forecast benefits, provide explanations for any discrepancies. 2. What factors helped or hindered the realisation?]</i>
<i>[Example: Create direct economic benefits through scientific innovation and its application to industries.]</i>	<i>[Economic]</i>	<i>[Not Yet – Full realisation expected by 2027 as technologies move from prototype to commercial application.]</i>	<i>[Measuring the revenue created by calculating the total sales for any products or services commercialized from the technology and tracking the amount of external investment raised due to the technology's]</i>	<i>[Forecast revenue of £4 million by 2027, due to commercial application of 3 technologies.]</i>	<i>[Due to challenges in testing, the project scope was reduced, resulting in fewer technologies being developed than originally planned. This descope will likely lead to lower-than-expected revenue, as fewer technologies will be commercialized.]</i>

¹ **Societal** – Benefits that improve the well-being, quality of life, and overall social structure of communities. These can include enhanced public health, education, social equity, cultural enrichment, and stronger community engagement.

Economical – Benefits that contribute to financial growth, stability, and efficiency. These can include job creation, increased productivity, cost savings, market expansion, and overall economic development.

Environmental – Benefits that positively impact the natural world, including sustainability, conservation, pollution reduction, and climate change mitigation. This can include contributions to the UK's progress toward Net-Zero and broader environmental sustainability efforts.

Knowledge-Based – Benefits that enhance learning, innovation, research, and intellectual capital. These can include advancements in science and technology, improved education, data-driven decision-making, and the dissemination of expertise.



*commercial
potential.]*

Provide details of any **emergent benefits** (benefits that were not initially planned, anticipated, or included in the original objectives of the project but which have emerged over the project lifecycle). Include details of if they have been realised and how they have been measured.

Emergent Benefits Description <i>[Where possible use the MEDIC acronym: Maintain, Eliminate, Decrease, Increase, Create]</i>	Benefits Category <i>[Societal, Economic, Environmental, Knowledge-Based]</i>	Has the Benefit been realised? <i>[Yes, No or Not Yet. If Not Yet, when is it forecast to be?]</i>	How was/will the Benefit be measured?	Forecast/ Actual Benefit <i>[Indicate if this is actual or forecast]</i>
<i>[Example: Increased adoption of sustainable construction practices and a decrease in the environmental impact of construction].</i>	<i>[Environmental]</i>	<i>[Yes]</i>	<i>[By measuring changes in carbon emissions and energy consumption associated with the implementation of these practices.]</i>	<i>[Actual benefit: Carbon footprint for the build reduced by 20%.]</i>

Provide details of any **disbenefits** (any negative impacts or unintended consequences resulting from the project). Include how they have been measured, if they were anticipated and what steps were taken to mitigate or manage them.

Disbenefit Description <i>[Where possible use the MEDIC acronym: Maintain, Eliminate, Decrease, Increase, Create]</i>	Disbenefit Category <i>[Societal, Economic, Environmental, Knowledge-Based]</i>	Was the Disbenefit anticipated or emergent? <i>[Anticipated: Identified early during project planning. Emergent: Arose during or after delivery as unforeseen negative impacts]</i>	Has the Disbenefit been realised? <i>[Yes, No - Avoided, Not Yet. If Not Yet, when is it forecast to be?]</i>	How was/will the Disbenefit be measured?	Forecast/ Actual Disbenefit <i>[Indicate if this is actual or forecast]</i>	Commentary <i>[What steps (if any) were taken to mitigate or manage the disbenefit? Were they effective? Could the disbenefit have been avoided with a different approach?]</i>
<i>[Example: Increased administrative burden on staff due to new data governance and reporting requirements introduced as part of the upgrade.]</i>	<i>[Knowledge-Based]</i>	<i>[Anticipated]</i>	<i>[Yes]</i>	<i>[Monitored through staff feedback surveys and time-logging data.]</i>	<i>[Actual: 10–15% increase in time spent on compliance-related tasks.]</i>	<i>[Templates and guidance were developed, and series of training session were held. While these measures helped alleviate some of the pressure, they only partially mitigated the impact. Earlier engagement with staff and co-design of reporting processes might</i>



*have prevented or
reduced the
disbenefit more
effectively.]*

5.3. Project Key Achievements and Highlights [optional]

Provide a brief summary of any additional significant accomplishments, milestones or in-kind contributions achieved during the project that you would like to highlight to us that are not captured elsewhere (e.g. new partnerships or linkages with industry). This can include qualitative examples such as case studies to demonstrate impact / success / value.

If highlights have already been covered in Section 3 and 4, feel free to leave this section blank.

6. Lessons Learnt

If the Project has an existing lessons learned log, please complete the table below with the three most important lessons and submit your full log to the UKRI Infrastructure Function alongside this form. If there is no existing log, please complete the table below by outlining the key lessons learned from the project and provide specific recommendations for future projects. An example of a positive outcome or a challenge faced has been included.

The Infrastructure team will use the information provided here to identify Portfolio-level lessons and upload them on your behalf to [REDACTED], a centralised internal platform for sharing insights from UKRI projects, programmes, and portfolios, to promote collaboration and enhance future delivery.

More general recommendations for future Infrastructure Fund projects can be included in section 6.

Learning Encountered	Analysis and Impact on Future Projects
<i>[Positive Example: Use of Agile Methodology]</i>	<i>[Improved flexibility and stakeholder collaboration; recommended for similar dynamic projects.]</i>
<i>[Challenge Example: Resource Constraints]</i>	<i>[Delays in delivery due to insufficient allocation; recommend better resource forecasting.]</i>

7. Recommendations for Future Projects [optional]

Provide recommendations for similar projects, or Infrastructure Fund projects in general, covering areas such as planning, budgeting, scope management, resource allocation, risk mitigation, stakeholder engagement and any other relevant aspects.