

Project reports and reviews in FP7

***4th ICT Coordinators Day
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Reporting requirements

- **Periodic report** (within 60 days after end of each reporting period)
- **Final report** (within 60 days after end of project)
- **Report on the distribution of the Community financial contribution** (within 30 days after receipt of final payment)
- **Certificates on financial statements or on methodology** (if needed)
- **Deliverables** (as foreseen in Annex I)

Layout and content

- **FP7 Guidance notes on project reporting**

http://cordis.europa.eu/fp7/find-doc_en.html

- **Person-month status table for INFSO**

Not yet on Cordis: should get it from Project Officer

Differences from FP6 - Simplification (1)

- Periodic activity report and periodic management report are merged to one periodic report – no repetition needed
- No periodic report on the distribution of the Community contribution – only final
- No updated plan for the use and dissemination of the foreground – only final
- No draft detailed planning for next 18 months for IPs and NoEs
- No interim questionnaires – only final

Differences from FP6 - Simplification (2)

- No final management report
- Final questionnaires streamlined, shortened and merged to one
- Simplified cost budget follow-up table
- Reduced frequency of certificates
- All reports are due 60 days after end of relevant period
- Only electronic submission

Periodic report

Periodic report, due 60 days after end of reporting period (*incl. last reporting period*), comprises :

- Self declaration by the coordinator
- Publishable summary
- Project objectives
- Progress of work and achievements
- Deliverables and milestones tables
- Project management
- Explanation of the use of the resources
- Financial statements (Form C) and Summary financial report
- Certificates, if needed

Submission of periodic report

- Electronic submission
- Submitted online via NEF in separate parts :
 - Self declaration
 - Publishable summary
 - Objectives, work progress, deliverables/milestones
 - Project management, explanation of resources
 - Forms C, Certificates
- Signed originals by post

Signed pages are:

Forms C, Certificates and Self declaration of coordinator

Final report

Final report, due 60 days after end of project (*in addition to the periodic report for the last reporting period*), comprises :

- Final publishable summary report
- Report on wider societal implications (incl. ethics, gender, awareness spreading)

and

Plan for the use and dissemination of foreground

Certificates

Certificate on the financial statements or on the methodology

- Auditor will prepare a detailed Report of Factual Findings (no opinion)
- Compulsory report format (Form D or Form E – Annex VII)
- Language: same as for all project reports and deliverables (Article 4 of Grant Agreement)

Approval of reports and deliverables

- At end of each reporting period the Commission has 105 days of their receipt to evaluate reports and deliverables and make the corresponding payment
 - No tacit approval of reports
 - EC will pay interest on late payment
- Payment is made after approval of reports and deliverables
- After reception of the reports the Commission may:
 - Approve the reports and deliverables
 - Reject the reports and deliverables
 - Suspend the time limit for approval
 - Suspend the payment in whole or in part

Project technical reviews

- **General principles**
 - Aim is to assess the work carried out under the project over a certain period
 - The Commission may initiate a technical review at any time during and up to 5 years after the end of the project
 - It may be assisted by external experts (reviewers) who give recommendations to the Commission.
 - The final decision is taken only by the Commission. The consolidated experts' review report is communicated to the project.

Review objectives

- Degree of fulfilment of the project work plan
- Continued relevance of the objectives
- Resources planned and utilised in relation to the achieved progress
- Management procedures
- Beneficiaries' contributions and integration within the project
- Expected potential impact and plans for the use and dissemination of results



Review modalities

- The identity of the appointed experts is communicated to the project in advance
- Reviews may be carried out remotely or involve sessions at the premises of the Commission or of the beneficiaries

Guidance notes

- **Guidance notes on project technical review**

http://cordis.europa.eu/fp7/find-doc_en.html

- **INFSO template for the experts' review report**

Not on Cordis yet : should get it from Project Officer

Review material

- Annex I (contractual Description of Work)
- Progress report for the period under review
- Deliverables necessary for the assessment of the work, due in this period, according to the deliverable table in Annex I,
- For a final technical review, the following additional documents should also be part of the material to review:
 - The final publishable summary report
 - Report on wider societal implications (incl. ethics, gender, awareness spreading) as well as the plan for the use and dissemination of foreground

Review outcome

- Accept or reject the deliverables
- Allow the project to continue without modification of Annex I or with minor modifications
- Consider that the project can only continue with major modifications
- Initiate the termination of the grant agreement or of the participation of any beneficiary
- Issue a recovery order regarding all or part of the payments already made and apply any applicable sanction.

***Thank you
for your attention***



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