Research Executive Agency

SEVENTH FRAMEWORK PROGRAMME

Guidance Notes on Project Management and Reporting

for

International Research Staff Exchange Scheme

(IRSES)

Supporting documents can be downloaded from:
http://cordis.europa.eu/fp7/find-doc_en.html

MARIE CURIE ACTIONS

April 2010

CONTENTS

1. INTRODUCTION

The Marie Curie International Staff Exchange Scheme is a new type of action first implemented in 2008. For each project there are scientific and financial reporting obligations. This document aims at providing guidance on the reporting process. As most of the reporting can now be done electronically, the document also provides information on the IT tools to be used.

This document is addressed to the persons in charge of the project, who are also responsible for reporting:

– For mono-beneficiary projects from the 2008 call, it is the authorised representative of the beneficiary;

– For multi-beneficiary projects from the 2009 call and following calls, it is the authorised representative of the project coordinator.

These guidance notes only apply to the Marie Curie International Research Staff Exchange Scheme under the People Programme and they do not supersede the rules and conditions laid out, in particular, in Council and Parliament decisions on the Seventh Framework Programme and the People Specific Programme, the FP7 rules for participation, the Financial Regulation applicable to the general budget of the EU and its implementing rules or the grant agreement and its annexes.[1]

Please note that since 15 June 2009 the People Programme is managed by the Research Executive Agency (REA). If your grant agreement was signed before 15 June 2009, the Commission has already informed you about this change.

This document is the guidance note to help the beneficiaries/coordinators to prepare the mid-term review and the periodic and final reports requested in Article II.4[2] and Article III.4 of the grant agreement. The REA evaluates the reports in accordance with Article II.4[3] of the grant agreement. It may be assisted in this task by independent experts through technical project reviews (see Article II.22[4] of the grant agreement). Payments will be made after the REA's approval of reports.

2. GENERAL ADVICE

For an efficient and smooth running of the project, you should do the following:

– Check the management pages for Individual Fellowship projects on the Marie Curie website: http://cordis.europa.eu/fp7/mariecurieactions/irses-manage_en.html;

– Read carefully the grant agreement and all its annexes before starting to implement the project (http://cordis.europa.eu/fp7/calls-grant-agreement_en.html#people_ga);

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1 All relevant documents are available on CORDIS under http://cordis.europa.eu/fp7/find-doc_en.html
2 Article II.3 for the 2008 call
3 Article II.3 for the 2008 call
4 Article II.21 for the 2008 call

– Inform the finance office in your organisation about the financial rules governing your grant agreement;

– Stay in regular contact with your Project Officer at the REA and inform him/her about any potential problems at an early stage;

– In case of any uncertainty on how to implement your grant agreement within the national, regional or local legislation, contact your Mobility National Contact Point (http://cordis.europa.eu/fp7/ncp_en.html – please select "Mobility" as the NCP function), or your Project Officer at the REA;

– Concerning the possibility of some changes in the content of Annexes II and III of the grant agreement, please refer to the table below and the following link: http://cordis.europa.eu/fp7/calls-grant-agreement_en.html#people_ga

Call deadline in	Action
2008	See Annex II **Version 2, 2008-10-02** (General Conditions Marie Curie Actions **mono-beneficiary**)
	See Annex III (Specific Provisions for Marie Curie International Staff Exchange Scheme
2009	See Annex II (General Conditions Marie Curie Actions **multi-beneficiary**)
	See Annex III (Specific Provisions for Marie Curie International Staff Exchange Scheme)

Table: update on Grant agreement Annexes

3. REPORTING

3.1. When to report

The following section describes timing, content and means of submission of the reports that must be submitted during the implementation of grant agreement with different durations. The duration of an IRSES project is from 24 to 48 months. According to the grant agreement, the beneficiary/coordinator must submit the following reports:

– A Mid-term Report on the first half of the reporting period[5] without a financial statement;

– A Periodic Report including a financial statement within 60 days after the end of each reporting period;

– A Final Report on the whole project duration (to be submitted within 60 days of the end of the project);

[5] For reporting periods of less than 18 months no mid-term report is necessary. Please refer to Article I.10 in Annex I of the *grant agreement*

Please refer to Article I.10 in Annex I of the *grant agreement* to identify which reports are requested and when they must be submitted.

3.2. What to report

(1) Mid-term report:

The mid-term report is mentioned in Article III.4 (submission of project deliverables) and in Article I.10 in Annex I (grant agreement deliverables) of the grant agreement. The mid-term report must include:

– A cover page (see template annexed to these guidelines);

– An Activity Report (see template annexed to these guidelines) including a project management report and a description of the progress of exchange activities/transfer of knowledge activities and an overview of the work progress compared to the original work programme (ideally using a Gantt chart) described in Annex I to the grant agreement (to highlight differences, if any, between planned work according to Annex I and the work actually carried out);

(2) Periodic report:

According to Article II.4.1[6] of the grant agreement, this report must include:

– A cover page (see template annexed to these guidelines);

– An Activity Report, including a publishable summary, giving an overview of the progress of work towards the objectives of the project, including achievements and accomplishment of any milestones and deliverables identified in Annex I to the grant agreement. The report should include an overview of the work progress compared to the original work programme described in Annex I (for highlighting, if any, differences between planned work and the work actually carried out) The management report should outline problems encountered and corrective action taken;

– A Financial Statement ("Form C" – Annex VI of the grant agreement) from each beneficiary[7] and each third party, if applicable.

(3) Final Report:

The Final report is complementary to the periodic report(s). According to Article II.4.2[8] of the grant agreement, this report must include (see template annexed to these guidelines):

– A final publishable summary report covering results, conclusions and socio-economic impact of the project;

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6 Article II.3.1 for the 2008 call

7 Beneficiary means a EU MS/AC project participant – Article 1 of the grant agreement (Calls 2009 and following)

8 Article II.3.2 for the 2008 call

– A report covering the wider societal implications of the project, including gender equality actions, ethical issues, efforts to involve other actors and spread awareness as well as a plan for the use and dissemination of the project results.

3.3. How to report[9]

(1) <u>The reporting tools SESAM and FORCE</u>

The REA uses SESAM, the European Commission online reporting tool for Research and Technological projects. SESAM allows for submission of all necessary documents related to the grant agreement except the financial statements ("Form C") that accompany the periodic reports. The latter are submitted via the Commission's online system FORCE.

To access the two applications – SESAM and FORCE -, a registration by the European Commission Authentication Service (ECAS) is necessary. Further instructions for this can be found under http://ec.europa.eu/research/participants/portal/appmanager/participants/portal.[10] The registration for both systems should be done only once by the person authorised to manage the project.

The user should register for the project(s) s/he wishes to work for by following the steps above. The registration will be validated by the REA. The list of projects related to the beneficiary/user for which s/he has registered will appear in SESAM (accessible through ECAS). The user can choose the project s/he wishes to work with.

To access the FORCE system for Form C, please connect to the following address: https://webgate.ec.europa.eu/FormC.

(2) <u>Electronic submission and submission on paper</u>

The REA aims at making reporting for the beneficiaries and coordinators as easy as possible and is exploring whether reporting can be made paperless in the future. However, legal provisions require that, in addition to electronic submission, a paper copy of each report must also be submitted to the REA by mail.

(a) Mid-term Review Report

The report must be submitted via SESAM, printed out, signed by the legal representative of the beneficiary/coordinator[11] and sent to the REA.

(b) Periodic Report(s)

The report(s) must be submitted via SESAM, printed out, signed by the Legal Representative of the beneficiary/coordinator and sent to the REA.

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[9] Please refer to Annex 4 for detailed guidelines.

[10] Should you have any problem related to this, please contact the Central Helpdesk at ec-fp7-it-helpdesk@ec.europa.eu

[11] Person in charge of the project as identified in GPF A2.4 form, i.e. the legal representative of the beneficiary for mono-beneficiary projects (2008 call) and the legal representative of the coordinator for multi-partner projects

(c) Financial statement (Form C) accompanying the Periodic Report(s)

For the mono-beneficiary projects of the 2008 call, the Legal Representative of the beneficiary must submit Form C to the REA via FORCE. In addition, the form must be printed out, signed by the Legal Representative, duly dated and stamped, and sent to the REA by regular mail.

For multi-beneficiary projects, each beneficiary must fill in the Form C and send it to the coordinator through FORCE. The coordinator must also receive a signed and stamped copy of the Forms. The coordinator is responsible for collecting the Forms and for sending them to the REA (the electronic copies through FORCE and the originals by mail).

(d) Final Report

The report must be submitted via SESAM, printed out, signed by the persons in charge of the project for the beneficiary/coordinator and sent to the REA.

The Final Report must be sent together with the periodic report for the last period only.

All formal mail must be sent to the following address in REA:

REA - Research Executive Agency
Marie Curie Actions – International Fellowships
COV 2, B-1049 Brussels, Belgium

4. SPECIFIC PROJECT MANAGEMENT ISSUES

4.1. Notification of the start date

In some cases, Article 2 of the grant agreement stipulates that the effective starting date is to be notified by the beneficiary. In this case – and only then – the beneficiary needs to notify the REA about the start date some weeks before the effective start of the project. The notification must be signed by the Legal Representative[12] of the beneficiary and sent to the REA by mail.

4.2. Requests for Amendments to the grant agreement

(1) General remarks

Amendments to the grant agreement[13] are exceptional measures to reflect severe changes in the conditions of the original grant agreement. Amendments such as change of banking details or legal data of the beneficiaries need to be implemented as soon as possible. Other

[12] Alternatively, the Legal Representative can be replaced by a person who has the authority to sign on behalf of the institution and has already been identified to the REA. If s/he is not yet identified to the REA, a power of attorney or letter of authorisation for this person must be attached

[13] see Article II.36 of the grant agreement (Article II.31 for the 2008 call)

requests will be accepted only in exceptional and duly justified cases. Any formal request for amendment should only be submitted to the REA after consultation with the Project Officer in the REA. In multi-partner projects, only the coordinator can submit a request for amendment.

More information on amendments is available in the Amendments Guide for FP7 Grant agreements on ftp://ftp.cordis.europa.eu/pub/fp7/docs/amendments-ga_en.pdf.

(2) Technical procedure

Requests for amendments must be submitted via SESAM. In the SESAM menu 'Amendment Requests' the coordinator selects the type of amendment to be submitted. Having completed the form the coordinator can save it, add attachments or submit.

Once the request for amendment is submitted via SESAM, it must be printed out, signed by the Legal Representative, stamped and sent duly signed to the REA by registered mail.

The Project Officer in the REA will be notified by email as soon as an amendment request is submitted in SESAM by the coordinator.

There are 4 possible statuses of the amendment request in SESAM:

– Submitted – when the coordinator has submitted the request in SESAM;

– Validated – when the REA has approved the amendment request;

– Rejected – when the REA has rejected the amendment request;

– Implemented – when the amendment has been implemented in the REA and Commission IT systems (e.g. a new partner will appear in SESAM for reporting).

– Replicated - when the REA has sent the request for amendment back for correction.

The coordinator will be notified by email whenever the status of the amendment is changed.

5. REPORTING TEMPLATES

The following section of the document provides guidance on how to complete the following documents:

ANNEX 1: MID-TERM REPORT

ANNEX 2: PERIODIC REPORT

ANNEX 3: FINAL REPORT

ANNEX 4: FORM C

ANNEX 5: HOW TO LOGIN IN SESAM USING THE EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)

Please follow the provided structure and complete all of the sections described below. Please make sure that all used acronyms are clearly explained.

Please note that these templates are given as explanatory examples ONLY and should NOT be used for the reporting purposes (reporting is made via SESAM only and you should download the templates there).

ANNEX 1: MID-TERM REPORT

Marie Curie Actions – International Fellowships

Project n°: ____________

Project Acronym: ____________

Project Full Name: ____________

Marie Curie Actions

IRSES Mid-term Report

Period covered: from ____________ to ____________

Period number: ____________

Start date of project: ____________

Project coordinator name: ____________

Project coordinator organisation name: ____________

Date of preparation: ____________

Date of submission (SESAM): ____________

Duration: ____________

Version: ____________

1. GENERAL PROGRESS OF THE PROJECT

Please indicate if the project:

a) has fully achieved its objectives and technical goals for the period;
b) has achieved most of its objectives and technical goals for the period with relatively minor deviations;
c) has failed to achieve critical objectives and/or is not at all on schedule.

If you answered b) or c) please include a detailed description of the modifications in the report

Qualitative indicators of progress and success in line with workplan and milestones (description of progress towards the milestones and deliverables)

2. PROJECT ACHIEVEMENTS

Scientific highlights and research achievements

Transfer of knowledge and Training activities (workshops…)

Dissemination of results (conferences, publications…)

3. PROJECT MANAGEMENT

Overview of the activities carried out by the partnership, identification of problems encountered and corrective action taken.

4. ADDITIONAL INFORMATION

Please indicate any additional information, which may be considered useful to assess the work done during the reporting period. The socio-economic aspects of the project may be addressed in this section.

Attachments:

Person in charge of the project for the beneficiary/consortium

Name

Date

Signature

ANNEX 2: PERIODIC REPORT

Marie Curie Actions – International Fellowships

Project n°: ____________

Project Acronym: ____________

Project Full Name: ____________

Marie Curie Actions

IRSES Periodic Report

Period covered: from ____________ to ____________

Period number: ____________

Start date of project: ____________

Project coordinator name: ____________

Project coordinator organisation name: ____________

Date of preparation: ____________

Date of submission (SESAM): ____________

Duration: ____________

Version: ____________

Declaration by the project coordinator

I (name), as co-ordinator of the project (*Grant agreement* number, Acronym), hereby confirm that:

- The attached periodic report represents an accurate description of the work carried out in this project for this reporting period;
- The project (tick as appropriate)[14]:
  - ☐ has fully achieved its objectives and technical goals for the period;
  - ☐ has achieved most of its objectives and technical goals for the period with relatively minor deviations;
  - ☐ has failed to achieve critical objectives and/or is not at all on schedule.

- The project Website (if applicable) is up to date.
- To my best knowledge, the financial statements which are being submitted as part of this report are in line with the actual work carried out and are consistent with the report on the resources used for the project and if applicable with the certificate on financial statement.
- The *beneficiary*, in particular non-profit public bodies, secondary and higher education establishments, research organisations, have declared to have verified their legal status. Any changes have been reported under section 3 (Project Management) in accordance with Article II.2.f of the *Grant agreement*.

Name of Project coordinator: ____________

Date: ____/____/____

Signature of Project coordinator: ____________

[14] If any of these boxes is ticked, the report should reflect these and any remedial actions taken.

SUMMARY OF THE SECONDMENT OF RESEARCHERS DURING THE REPORTING PERIOD

Beneficiary: CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE

Name of the Researcher	Type (EST<4years, ER-4-10years >, TeCH, MNGT)	Gender	Seconded to Partner:	Start date of secondment	End date of secondment	N°. of full-time equivalent months covered by this secondment during the reporting period
Total						sum

Beneficiary: CONSIGLIO NAZIONALE DELLE RICERCHE

Name of the Researcher	Type (EST<4years, ER-4-10years >, TeCH, MNGT)	Gender	Seconded to Partner:	Start date of secondment	End date of secondment	N°. of full-time equivalent months covered by this secondment during the reporting period
Total						sum

Partner: INSTITUTE OF APPLIED PHYSICS, RUSSIAN ACADEMY OF SCIENCES

Name of the Researcher	Type (EST<4years, ER-4-10years >, TeCH, MNGT)	Gender	Seconded to Partner:	Start date of secondment	End date of secondment	N°. of full-time equivalent months covered by this secondment during the reporting period
Total						sum

1. GENERAL PROGRESS OF THE PROJECT

Please indicate if the project:

a) has fully achieved its objectives and technical goals for the period;
b) has achieved most of its objectives and technical goals for the period with relatively minor deviations;
c) has failed to achieve critical objectives and/or is not at all on schedule.

If you answered b) or c) please include a detailed description of the modifications in the report

Qualitative indicators of progress and success in line with workplan (description of progress towards the milestones and deliverables)

2. PROJECT ACHIEVEMENTS

Scientific highlights and research achievements

Teaching and Training activities (workshops…)

Dissemination of results (conferences, publications…)

3. PROJECT MANAGEMENT

Overview of the activities carried out by the partnership, identification of problems encountered and corrective action taken.

4. ADDITIONAL INFORMATION

Please indicate any additional information, which may be considered useful to assess the work done during the reporting period. The socio-economic aspects of the project may be addressed in this section.

Attachments:

Person in charge of the project for the beneficiary/consortium

Name

Date

Signature

ANNEX 3: FINAL REPORT

MARIE CURIE ACTIONS

Marie Curie Actions – International Fellowships

SEVENTH FRAMEWORK PROGRAMME

Project n°: ____________

Project Acronym: ____________

Project Full Name: ____________

Marie Curie Actions

IRSES Final Report

Period covered: from ____________ to ____________

Period number: ____________

Start date of project: ____________

Project coordinator name: ____________

Project coordinator organisation name: ____________

Date of preparation: ____________

Date of submission (SESAM): ____________

Duration: ____________

Version: ____________

1. FINAL PUBLISHABLE SUMMARY REPORT

This section should normally not exceed 2 pages.

This is a comprehensive summary overview of results, conclusions and the socio-economic impacts of the overall project. The publishable report must be formatted to be printed as a stand alone paper document. This report should address a wide audience, including the general public.

Please ensure that it:

- *Is of suitable quality to enable direct publication by the REA.*
- *Is comprehensive, and describes the work carried out to achieve the project's objectives; the main results, conclusions and their potential impact and use and any socio-economic impact of the project. Please mention any target groups such as policy makers or civil society for whom the research could be relevant.*
- *Includes where appropriate, diagrams or photographs and the project logo, illustrating and promoting the work of the project.*
- *Provides the address of the project Website (if applicable) as well as relevant contact details.*

List of Keywords

Websites where additional information may be found

REPORT ON WORK PERFORMED AND RESULTS

Please report on the work performed and on the results of the exchanges and mobility, addressing the following points clearly and concisely:

a) Accomplishment of exchanges and mobility (including research) objectives as presented in the original proposal

b) New objectives established during the course of work and new lines of research

The following structure should be used in the description of points a) and b) for each objective separately.

- Objective of the exchanges and mobility;

- Work performed (mentioning also unsuccessful approaches and unforeseen developments);

- Results and degree to which the objectives were met;

- List specific training received on scientific and technical aspects;

- Relevance for basic and applied science and for applications, including industrial links.
Changes to original proposal: Note that the REA has to be informed in advance of any changes to the original proposal. For point a) it is important that any deviations from the original proposal are clearly indicated.
In order to help illustrate the work carried out during the fellowship, please enclose copies of the most relevant publications and reports as well as abstracts of other publications and manuscripts.
Note that this is in addition to the free-text report requested above.
Additional information such as Word documents, graphs, tables, etc. can be uploaded as attachments using the upload functionality (attachments button).

MANAGEMENT REPORT

Please describe the management activities relative to the initial planning of the project

2. USE AND DISSEMINATION OF FOREGROUND

Section A (public) – DISSEMINATION MEASURES

This section should describe the dissemination measures, including any scientific publications relating to foreground and specify any applications for patents etc. <u>Its content will be made available in the public domain</u> thus demonstrating the added-value and positive impact of the project on the European Community.

- **Dissemination activities**

Maximum 2 pages

This section must include a list of planned dissemination activities (publications, conferences, workshops, web, press releases, flyers, etc) in free text format. Where Articles have been published in the popular press, please provide a list as well.

- **Publications (peer reviewed)**

The list of scientific publications (see article II.12 of the grant agreement) starting with the most important ones, should specify:

- *publication name,*
- *date and page in order to be able to identify it (see proposed template).*

LIST OF SCIENTIFIC (PEER REVIEWED) PUBLICATIONS, STARTING WITH THE MOST IMPORTANT ONES								
N°.	**Title**	**Main author**	**Title of the periodical or the series**	**Number, date or frequency**	**Publisher**	**Place of publication**	**Year of publication**	**Relevant pages**
1	‘							
2								
3								

With regard to scientific publications published before or after the final report, such details/references and an abstract of the publication must be provided to the REA at the latest two months following publication. Furthermore, an electronic copy of the published version or the final manuscript accepted for publication must also be provided to the REA at the same time for the purpose of publication by the REA if this does not infringe any rights of third parties.

Section B (confidential) - EXPLOITABLE FOREGROUND AND PLANS FOR EXPLOITATION

This section should specify the exploitable foreground and provide the plans for exploitation. It will be kept confidential and will be treated as such by the REA.

***The applications for patents, trademarks, registered designs**, etc. must be listed according to the template provided below.*

The list should specify at least one unique identifier e.g. European Patent application reference. If applicable, contributions to standards should be specified.

TABLE B1: **LIST OF APPLICATIONS FOR PATENTS, TRADEMARKS, REGISTERED DESIGNS, ETC.**

Type of IP Rights: Patents, Trademarks, Registered designs, Utility models, etc.	Application reference(s) (e.g. EP123456)	Subject or title of application	Applicant(s) (as on the application)

Please complete the table below:

TABLE B2: **OVERVIEW TABLE OF EXPLOITABLE FOREGROUND**					
Exploitable Foreground (description)	**Exploitable product(s) or measure(s)**	**Sector(s) of application**	**Timetable, commercial use**	**Patents or other IPR exploitation (licences)**	**Owner & Other Beneficiary(s) involved**

In addition to the table, please provide text to explain the exploitable foreground
[One text box per row in table B2]

Free text (2 pages maximum) composed as following:

- *Its purpose*
- *How the foreground might be exploited, when and by whom*
- *IPR exploitable measures taken or intended*
- *Further research necessary, if any*
- *Potential/expected impact (quantify where possible)*

3. PERSON IN CHARGE QUESTIONNAIRE

EXCHANGE MOBILITY ASSESSMENT:

What is the size of the hosting research group?	

How many researchers have you supervised, within the past 10 years? Of which funded by:	
EC/Marie Curie actions	
EC Other Funding (call ID & contract n°)	
University fellowships	
National public bodies	
Industry	
Other	
Other, please specify:	

How many researchers have you supervised within this project?	
Corresponding to how many person months?	

Number of publications resulting directly from the research project:	
Selected researcher(s) and yourself	
Selected researcher(s) alone	
Selected researcher(s) with authors other than yourself	

Participation of the selected researcher(s) in conferences (number):	
Passive	
Active	
How do you rate the overall success of the research training?	

General assessment:

RESEARCHER ASSESSMENT:

Rate the overall level of the selected researchers in the research team and the host organisation with regards to:	
participation in meetings/seminars	
discussions of results and project-related topics	
co-operation with other team members	
co-operation with other researchers of the host institution	
co-operation with other researchers of the partnership	

Rate the overall performance of the selected researchers with regard to:	
originality of researchers' approach towards research (initiative/independent thinking)	
capacity to develop new skills and to benefit from training	
productivity (research results/ publications/ international conference attendance)	
communication skills	

group leader skills (collaboration with other groups/project management)	
training and/or teaching skills	
Please comment:	

RESEARCH NETWORKING OUTCOMES:

Do you intend to continue the collaboration and networking activities after the end of the project?	
If No, please specify:	
Has this project provided additional links with other research groups or institutions?	
If yes, do you plan to submit a joint proposal?	
If yes, indicate the number of contacts in each case	
Universities	
Research Centres	
Industry/private companies	
Others	
If Other, please specify:	

Rate the importance of the following outcomes of the research networking:	
results of the research	
number of publications	
development of research	
establishment of international collaborations	
transfer of knowledge/technology	
training of students/researchers	
further academic qualifications (PhD, habilitation etc.) for fellows	
Please comment:	

YOUR OPINION ABOUT THE MARIE CURIE ACTIONS:

Do you have any other comments or suggestions of how to improve the Marie Curie actions concerned?

Did you have previous knowledge of the Marie Curie actions?	

If yes, what sort of image do you think that the Marie Curie actions have among the scientific community in your research area?	

Attachments:

Person in charge of the project for the beneficiary/consortium

Name

Date

Signature

ANNEX 4: Form C

FP7 - Grant Agreement - Annex VI – International Research Staff Exchange Scheme

Form C - Financial Statement (to be filled in by each beneficiary)

Project nr		**Funding scheme**	**IRSES**
Project Acronym			

Period from	dd/mm/aa	Is this an adjustment to a previous statement?	Yes/No
To	dd/mm/aa		

Legal Name		**Participant Identity Code**	
Organisation short Name		**Beneficiary nr**	

Funding % for RTD activities (A)		**If flat rate for indirect costs, specify %**	**%**

1- Declaration of eligible costs/lump sum/flate-rate/scale of unit (in €)

	Eligible expenses for the activities carried out by the researcher				**Eligible expenses related to the activities of the host organisations**				**Maximum EC contribution**
	A1	**B**	**C**	**D**	**E**	**F**	**G&H**	**I**	
	Monthly Living Allowance/Monthly Mobility Allowance	Travel Allowance	Career Exploratory Allowance	Contribution to the participation expenses of eligible researchers	Contribution to the research/training /transfer of knowledge programme expenses	Contribution to the organisation of international conferences, workshops and events	Management activities (including audit certification) and contribution to overheads	Other types of eligible expenses / specific conditions	
Direct costs									
Indirect costs									
Flat-rate									
Total									
Maximum EU contribution									
Requested EU contribution									

2- Declaration of receipts

Did you receive any financial transfers or contributions in kind, free of charge from third parties or did the project generate any income which could be considered a receipt according to Art.II.17 of the grant agreement? Yes/No

If yes, please mention the amount (in €)

3- Declaration of interest yielded by the pre-financing (to *be completed only by the coordinator*)

Did the pre-financing you received generate any interest according to Art. II.19 ? Yes/No

If yes, please mention the amount (in €)

4. Certificate on the methodology

Do you declare average personnel costs according to Art. II.14.1?	Yes/No
Is there a certificate on the methodology provided by an independent auditor and accepted by the Commission according to Art. II.4.4 ?	Yes/No

Name of the auditor		**Cost of the certificate (in €), if charged under this project**	

5- Certificate on the financial statements

Is there a certificate on the financial statements provided by an independent auditor attached to this financial statement according to Art.II.4.4?	Yes/No

Name of the auditor		**Cost of the certificate (in €)**	

6- Beneficiary's declaration on its honour

We declare on our honour that:

- the costs declared above are directly related to the resources used to attain the objectives of the project and fall within the definition of eligible costs specified in Articles II.14 and II.15 of the grant agreement, and, if relevant, Annex III and Article 7 (special clauses) of the grant agreement;
- the receipts declared above are the only financial transfers or contributions in kind, free of charge, from third parties and the only income generated by the project which could be considered as receipts according to Art. II.17 of the grant agreement;
- the interest declared above is the only interest yielded by the pre-financing which falls within the definition of Art. II.19 of the grant agreement ;
- there is full supporting documentation to justify the information hereby declared. It will be made available at the request of the Commission and in the event of an audit by the Commission and/or by the Court of Auditors and/or their authorised representatives.

Beneficiary's Stamp	**Name of the Person(s) Authorised to sign this Financial Statement**
	Date & signature

ANNEX 5: How to login to SESAM using the European Commission Authentication Service (ECAS)

SCENARIO 1: I don't have a SESAM or an ECAS account

Navigate to the Internet Address: https://webgate.ec.europa.eu/aida/selfreg
– You can use any new username you want (do not use an e-mail address, the "@" character is not accepted) and complete all mandatory fields and click on "Submit"
– You will receive a link by e-mail and this link should be activated within 90 minutes after the e-mail was sent
– Type the new ECAS password and confirm the new ECAS password
– Click on "Submit"
– Click on "Logout"
– Close the Internet Browser
– Navigate to the Internet Address: https://webgate.ec.europa.eu/sesam
– In the menu on the left, click on "Login"
– Type your username and password
– Click submit

Now that you have a SESAM account, you should link your account to a project. To do so, you need to perform the procedure that can be found under "Scenario 3".

SCENARIO 2: **I Have a SESAM account, but no ECAS account, or I don't see my previously linked projects in SESAM**

Navigate to the Internet Address: https://webgate.ec.europa.eu/aida/selfreg

- In the field "Choose a username (optional)", type your old SESAM username
- In the field " E-mail ", type your **old SESAM e-mail address** (if you still remember)
- In the field " Re-enter your e-mail " type the same e-mail address
- Complete all mandatory fields and click on "Submit"
- You will receive a link by e-mail and this link should be activated within 90 minutes after the e-mail was sent
- Type the new ECAS password and confirm the new ECAS password
- Click on "Submit"
- Click on "Logout"
- Close the Internet Browser
- Navigate to the Internet Address: https://webgate.ec.europa.eu/sesam
- In the menu on the left, click on "Login"
- Type your username and password
- Click on "Submit"

If you need to link your account to an additional project, you need to perform the procedure that can be found under "Scenario 3".

SCENARIO 3: **I have an ECAS account but I have never used SESAM before, or I need to link my account to another project**

Navigate to the following address: https://webgate.ec.europa.eu/sesam

- On the left, click on "Login"
- Type your username and password and click on "Login"
- On the left, click on "Register to a Project"
- In the field "Instrument", select the Instrument
- In the field "Project Type, select the Project Type

- In the field "Project ID", type the Project ID
- Click on "Next"
- In the field "Project participant type":
- If you are working for Partner 1 (Coordinator, Fellow) then select "Project Coordinator".
- If you are working for another Partner then select "Project Participant". In the field "Participant", select your organisation.
- If you are a Reviewer, select "Project Reviewer". In the field "Reviewer Type" select "Consolidated Reviewer" or "Individual Reviewer".
- Click on "Register"
- If you register as a Coordinator or a Reviewer, then a message is sent to the Project Officer (in the European Commission). The Project Officer will activate your account.
- If you register as a Partner, then a message is sent to the Coordinator. The Coordinator will activate your account.
- If the Coordinator is not yet registered, the Project Officer can activate the Partner account, but you are encouraged to contact the Coordinator first.

When your account has been activated, you will receive an e-mail. From then on, you can create reports in SESAM.

In case of problems

Remember that communications from SESAM will be addressed to your e-mail mailbox. Please, check it is not full or that no anti-spam filter is applied to the SESAM messages.

We recommend that you contact us by e-mail. In case of an urgent request or an urgent call for assistance, we encourage you to call after sending the message.

You can contact us as follows:

Internal staff can reach us at: e-Mail: EC FP7 IT Helpdesk Phone: 87 288	External users can reach us at: e-Mail: ec-fp7-it-helpdesk@ec.europa.euPhone: +32 2 29 87 288

We prefer that you contact us by e-mail. Please include the following information:
- The Project Acronym;
- The Project Number (Contract Number);
- Are you a Coordinator, a Fellow, a Partner or a Reviewer?
- If you are a partner, what is your Partner Number?
- If you are not a Reviewer, what is the Official Name of your Organisation?
- Username;
- Who is your Contact Person in the European Commission/REA?
- Your International Phone Number;
- Error Message;
- What action or operation where you performing when the error occurred?

If you think it is useful, please send us a screenshot.