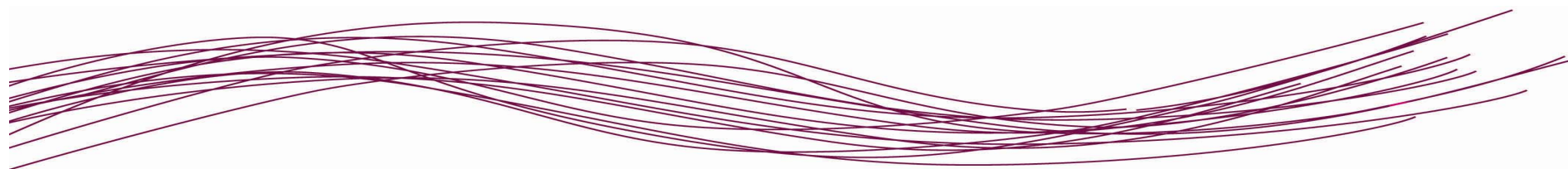




Project Reporting in Marie Curie projects



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Project Reporting

- Systematic monitoring of individual contracts
- Quantitative and qualitative analysis of the performance of the activities
- Bring to the attention of the co-ordinators when significant deviations to the objectives are observed





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Types of reporting

- Technical and Financial Reports
 - Periodic reports
 - Final report
- Mid-term Review procedure
 - Mid-term progress report
 - Mid-term assessment questionnaires
- Assessment questionnaires
 - Evaluation questionnaire (at the end of fellowship)
 - Follow-up questionnaire (2 years after fellowship)





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Project reporting

The submission of periodic report is covered by

- Annex II of the Contract / Grant Agreement
 - Periodicity and composition of reports
- Annex III of the Contract / Grant Agreement
 - Relationship with the fellows (evaluation & follow-up questionnaires)





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| | FP6 | FP7 |
|-------------------------|--|--|
| reporting every | 12 months | 24 months |
| Periodic Report | within 45 days Technical + Financial | within 60 days Technical + Financial |
| Progress Reports | no | every 12 months if no Periodic Report |
| Final Report | within 45 days | within 60 days |
| Mid-Term Report | yes | yes |
| Questionnaires | yes | yes |
| Audits | for each period fixed in the contract | CFS for each 375 000 € claim |
| Approval | 45+45 days | 105 days |





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Distribution Report

FP7

- Report on the distribution of the Community financial contribution shall be submitted within 30 days after reception of final payment

FP6

- Report on distribution shall be submitted 60 days after receipt of the final tranche of the Community financial contribution to the consortium.





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70% rule

Where less than 70% of a *pre-financing* has been used at the end of a reporting period, subsequent intermediate *pre-financing* may be paid only:

(i) if an audit certificate is provided for that reporting period;

or

(ii) on the basis of a complementary management report referred to in Article II.7.2 b) that shall be submitted to the *Commission* once the above-mentioned spending rate has been achieved.



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FP7 Reporting

| | Within 30 days after 12 months | At least 30 days before Mid- Term Review | Within 60 days after 24 months | Within 30 days after 36 months | Within 60 days after 48 months | Within 30 days after Final payment |
|--------------------------------|---|--|---|---|---|--|
| Progress report | X | X | | X | | |
| Periodic report | | | X | | X | |
| Final Report | | | | | X | |
| Distribution report | | | | | | X |

*Progress and Periodic Reports can be prefilled by data entered for the previous report





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FP7 Progress Report

- To be submitted within **30 days** after Reporting Period. NO financial report required. Coordinator only.
- “Contract deliverables update” – 2 tables pre-filled with GPFs data for recruitment & events
- Free text sections (to provide necessary explanations)
- Attachments (possibility to attach any useful information on project progress)





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FP7 Mid-term Review

- **2 months before** the date of Mid-Term Review
 - Agreement between EC and Coordinator on the date, place and agenda of MTR
- **1 month before** the date of Mid-Term Review
 - Updated Progress report covering period from beginning of the project till date of MTR must be submitted via SESAM by Coordinator
- **2 weeks before** Mid-Term Review meeting
 - Mid-Term Assessment questionnaires must be filled in SESAM by all recruited researchers





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FP7 Periodic Report

P1 (1 month - 24 month)

P2 (25 months - end of the project)

- To be sent together with **Financial Statement for each participant (Form C) & Summary Financial Report** (generated automatically by Coordinator after submission of all Forms C)
- Report includes:
 - *Publishable summary (automatically published on Cordis website)*
 - *Overview of work progress*
 - *Project management with justification on incurred costs*





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FP7 Final Report

- Report covers **whole project period**
- To be submitted together with **Periodic report for last period, Financial reports** and **Certificate** on financial statement (if applicable)
- To be submitted within **60 days** after end of project
- Report includes:
 - *Final publishable summary report*
 - *Public part (dissemination activities, publications)*
 - *Confidential part (list of patents, trademarks, exploitable foreground)*
 - *Scientist-in-charge questionnaire*





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Questionnaires

Three types of questionnaire to be submitted by MCA-fellows at three different stages of their fellowships:

- **Mid-term assessment questionnaire** (at Mid-term review)
- **Evaluation questionnaire** (at the end of fellowship)
- **Follow-up questionnaire** (2 years after fellowship)

Contractual obligation of each beneficiary to ensure that each researcher completes ALL questionnaires, provided by the Commission





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Declaration on Conformity

- To be submitted via SESAM by each beneficiary for each recruited researcher to Coordinator
- Coordinator sends the Declaration on Conformity to the Commission
- Declaration on Conformity is required ASAP after appointment of researcher
- Print-out copy of Declaration on Conformity must be duly signed by both researcher & host institution and sent per post to the Commission





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SESAM

<http://webgate.ec.europa.eu/sesam/index.do>

All reports and questionnaires must be:

- [Submitted via SESAM](#)
- [Printed out & duly signed](#)
- [Sent by post to the Commission](#)





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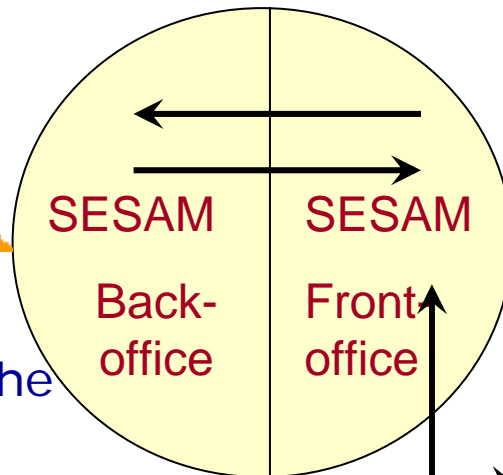
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SESAM demo



EC:

- PO evaluates the reports and if necessary replicates them to the Coordinator
- Replicated Report becomes available for the Scientist-in-charge

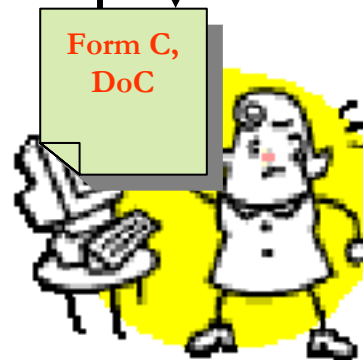


2nd step:

- Coordinator creates Periodic Reports, collects all Financial Statements and submits them to the Commission

1st step:

- Scientist-in-charge creates Financial Statement in SESAM and submits it to the Coordinator





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HELP & ASSISTANCE

Marie-Curie Website -> "How to manage project"

<http://ec.europa.eu/research/mariecurieactions/index.htm>

"Quest User Manual" available on SESAM home page

<http://webgate.ec.europa.eu/sesam/index.do>

For any technical problems:

- Sesam helpdesk: ec-fp7-it-helpdesk@ec.europa.eu

For any clarifications: contact EC Project officer

