

# ***Project reports and reviews in FP7***

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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)  
*Project website highly recommended*



# Layout and content

- **FP7 Guidance notes on project reporting\***  
and
  - Template for periodic report
  - Template for final report
  - Templates for security research

*can be found at*

*[http://cordis.europa.eu/fp7/find-doc\\_en.html](http://cordis.europa.eu/fp7/find-doc_en.html)*

*\* Do not apply to the IDEAS Programme (ERC)*



# 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
- No person-month status table
- 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
- Progress of work towards objectives  
Deliverables and milestones tables  
Project management
- Explanation of the use of the resources
- Financial statements (Form C)  
Summary financial report  
Certificates, if needed



# Submission of periodic report

- Only electronically
- Submitted online via NEF in 3 parts :
  - Overview of progress of work
  - Explanation of resources
  - Forms C and Certificates
- Signed originals also 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



# Submission of final report

- Only electronically
- Submitted online via NEF in 3 parts :
  - Final publishable summary
  - Societal implications in the form of a questionnaire
  - 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, within 105 days of their receipt the Commission shall 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 the Commission's 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
  - The Commission 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 Commission shall communicate to the project the identity of the appointed experts in advance
- Reviews may be carried out remotely or involve sessions at the premises of the Commission or of the beneficiaries
- **Guidance notes on project technical review and Template for the experts' review report**

*can be found at*

*[http://cordis.europa.eu/fp7/find-doc\\_en.html](http://cordis.europa.eu/fp7/find-doc_en.html)*



# 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.





***Many thanks  
for your attention***

