THE EU
RESEARCH & INNOVATION
PROGRAMME
2021 – 2027

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Research Programme Administrator
REA B2- Farm to fork, Communities
Development and Climate Action

Cluster 6 Coordinators’ Day - 22/09/2022
Implementation & reporting
PROJECT IMPLEMENTATION – best practices

✓ Keep the REA Project Officer informed about the implementation issues (agree with him/her on frequency/form of updates)

✓ Discuss problems/changes well in advance and do not wait until the end of project

✓ When there are doubts, ask questions and provide details to REA Project Officer

✓ As Coordinator, request regular updates from consortium on implementation aspects (e.g. reporting period of 18 months = regular updates in months 6, 12, 18)

✓ Your project is part of a bigger picture - establish links and collaborations with other projects and initiatives at all levels (global, European, national, regional, local)

✓ Act as an Ambassador for EU Research and Innovation

✓ Value your project results - if the results are not used, the expected impacts cannot be achieved

✓ Identify key exploitable results or outputs which can be used and create impact, either by project partners or other stakeholders
PROJECT IMPLEMENTATION - Gender Equality in your project

Examples:
- Project management and decision bodies having representatives women and men.
- Project presentations done by women and men

What does gender dimension in R&I mean?

Integrating the gender dimension in research content means taking into account the biological characteristics of both females and males (sex) and the evolving social and cultural features of women and men, girls and boys (gender).

<table>
<thead>
<tr>
<th>Definitions</th>
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<tr>
<td><strong>Sex</strong></td>
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<td><strong>Gender</strong></td>
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=> will be checked at the end of each reporting period
PROJECT IMPLEMENTATION - EU Green priorities

**SUSTAINABLE PROJECT MANAGEMENT**
- Promote & Agree measures with consortium / staff for minimizing the environmental impact of your project
- Exchange good practices with other projects

**TRAVELS AND MEETINGS**
- Assess the need of travel and optimize / minimize impact (travel only if necessary, use sustainable means of transport, limit the number of travelers)
- Promote hybrid meetings / events (whenever feasible and valuable)

**COMMUNICATION AND DISSEMINATION**
- Promote online communication and dissemination tools
- Minimise the use of printed information materials
Ensure **quality control mechanisms** of deliverables and results

Deliverables must be written as **self-explanatory documents** – read by external people

Deliverables with **dissemination level “Public” = available for public in EU portal after approval:** include a good executive summary and a clear message. Consult in advance the target audiences about the conclusions of deliverables to make sure these are relevant for them. Make these deliverables attractive and use infographics/images

Do **not overload the Periodic Report** with information from Deliverables or which is not specifically requested (e.g. such information can be included in Annexes)

**Address the challenges** you phased and explain if/how these were solved (e.g. mention this in Periodic Report - section Deviations from Grant Agreement)

**Provide the details** in the Financial Statements in order to link the costs with the work done (e.g. tasks, period, etc.)
REPORTING TO EU – two specific modules in EU Portal

1. CONTINUOUS REPORTING

Open *all along project implementation to upload information whenever needed*:
- Specific information (e.g. Project summary, Publications, Critical Risks, Open Data etc.)
- Deliverables

2. PERIODIC REPORTING

Automatically open *at the end of each reporting period*:
- Reporting periods are defined in the Grant Agreement (e.g. 12 or 18 months)
- Online templates for Periodic Report are available in EU portal
- Periodic and Final Reports are the same, no additional task for reporting
REPORTING TO EU – Continuous and Periodic Reporting

**CONTINUOUS REPORTING** (Deliverables+Milestones+Other Info+Publications)

- Information can be updated regularly

**PERIODIC REPORTING 1**: Max 60 days to report to EU

**PERIODIC REPORTING 2**: Max 60 days to report to EU

**PERIODIC REPORTING 3**: Max 60 days to report to EU

Project starts → Project duration → Project Ends

90 Days to pay
PERIODIC REPORTING – key aspects

WHEN ?
60 days
After end of reporting period

WHAT ?
Periodic Report
(technical & financial template document)

HOW ?
EU Portal ➔ Manage Project
(single package of Periodic Report)

PERIODIC REPORT:

1. Technical report (Part A - structured tables, Part B - free text)
   • Activities and tasks implemented per Work Package
   • Problems encountered (if any) and explanations / justifications for deviations from GA provisions
   • Impact of the project (science, policy, society, economy, etc.)
   • Annexes: e.g. project logo, diagrams, photographs and videos illustrating the work (if available)

2. Financial report
   • Financial Statements of each beneficiary
   • Explanation of Use of Resources and information on subcontracting, in kind contribution
   • Summary of Financial Statements

Final Financial Report consolidates data from financial statements of all beneficiaries.
This report is used for the payment of the final balance for your project.
PERIODIC REPORTING – tasks for consortium

ALL PARTNERS – provide information to Coordinator

Financial Statement: insert data
Technical Report: insert data

COORDINATOR – prepares the reporting package

Financial Statements: check data
Technical Report: insert data

SIGN + SUBMIT to Coordinator

SIGN + SUBMIT to REA
REPORTING TO EU – coordinator’s role in EU Portal

**Project consortium:**
to manage roles and access rights in the project

**Manage project:**
to access the grant management tool (GA documents, communication with PO, amendments, continuous reporting, etc.)

This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Prepare and sign your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

If you are LEAR and want to see the full list of your organisation projects, please go to My Organisations and click on the action button MP. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the H2020 online manual.
PROJECT REVIEW – assessment of project progress (art. 25 of GA)

• Who?

REA Project Officer - responsible for the review

REA Financial Officer – assessment of financial aspects

Monitors - experts reviewers supporting REA officers

Project Consortium – represented by Coordinator and Work Package leaders

EC Policy Officers – EU staff involved in policy aspects

• When?

At the end of each reporting period, after submission of Periodic Report

This is an important step for Payment of the EU contribution
PROJECT REVIEW – assessment of project progress (art. 25 of GA)

• What?

An opportunity for exchanging information and getting feedback from REA and EC policy DGs

Assessment of project progress based on the provisions of the Grant Agreement and on information from Continuous Reporting (Deliverables, Milestones, Publications, etc.) and Periodic Reporting (technical and financial information from Periodic Report), including web sources

The Project Review can include:
- a Review Meeting: online / in situ meeting organized by Consortium and REA Project Officer: presentations of work and results; discussions and clarifications; conclusions, next steps in implementation
- a Project - Policy Session with participation of EC Policy Officers (if applicable) – this can be part of the review meeting or scheduled in a different date
- a Project Clustering Session - several projects in the same thematic area presenting their results
PROJECT REVIEW – documents for project assessment

REVIEW REPORT
✓ Document written by Monitors (experts) based on the analysis of all available information (Periodic Report, deliverables, milestones, publications, presentations, web sources, etc.)

✓ Document externalized to Consortium through EU Portal. The Consortium has 30 days to send comments to REA by using the EU Portal

PO ASSESSMENT REPORT
✓ Document done by REA Project Officer based on the Review Report and all other documents

✓ The document specifically mentions the acceptance/rejection of reports and costs and includes recommendations for the next implementation period / project finalization

✓ This document closes the process of Reporting to EU and triggers the Payment of EU contribution
Support and Guidance in EU Portal

- **HORIZON EUROPE - Reference Documents in EU Portal**
  - All updates of documents are available in EU Portal
  - Check regularly these reference documents

- **HORIZON EUROPE - Model Grant Agreement (MGA)**

- **HORIZON EUROPE - Online Manual**
  - Online guidance for grant management
  - Updated regularly by EC services
Thank you!

#HorizonEU @EUgreenresearch @REA_research

http://ec.europa.eu/horizon-europe