



# Guidance for reporting

This document guides **lead partners (LP)** through the reporting carried out on the eMS as foreseen in the subsidy contract and described in the factsheet 4.7 Project reporting. Please study carefully these documents, in particular with regard to reporting deadlines, the differences between the status report and the progress report, the main principles for reporting and how the individual reports from project partners become part of the (joint) project report, which is compiled by the LP. Technical guidance is also available on the programme website for both the LP and the partners (PP) on the reporting functions of the eMS.

## Good to know before starting reporting

- Partner reports are the basis for the project report; the LP should use the partner reports as source of information to fill in the project report. The partners' financial data can be integrated by the LP and are then automatically assimilated by the eMS in the financial sections while the content data (outputs, deliverables and target groups as well as all texts fields) has to be taken over into the project report and reworked by the LP.
- Whenever outputs, deliverables, activities and/or target groups are developed/reached jointly by project partners, the LP must pay attention not to duplicate data in the project report (e.g. if PP2 and PP3 organise jointly a workshop and reach 100 participants, they may report this result in their individual partner report; however the LP has to make sure that this is counted only once in the project report and not added up).
- Status report and progress report are based on the same template in the eMS but different levels of details are expected to be provided (see factsheet 4.7). At project level, guidance is provided here on how to fill in these reports (see also colour code below). We however recommend that at partner level (i.e. in the partner reports) all reporting sections are always filled in (including for instance details on activities and target groups). This is for two reasons: 1) to provide sufficient information to



- the FLC to perform its checks and confirm the link between the reported activities and expenditure;
- 2) to make it easier for the LP to retrieve information which will have to be included in the progress report later on (be reminded that detailed information on project activities, target groups, etc. will only be provided in the progress report; this means in some cases that they will date back to one year earlier).
- Deadlines for the submission of the project report to the JS are pre-set. To have sufficient time to compile all the necessary information in the project report, we strongly recommend the LP to agree within its partnership internal deadlines by when the partner reports should be submitted to the LP and, beforehand, to the relevant FLC. These intermediate deadlines have to take into account the average time needed for FLC checks for each partner.
  - Before submitting the project report to the JS, the LP should make sure that information in section “Supplementary information” is filled in and up to date (see table below).

Please fill in the following information in the first project progress report.	
<b>Bank details of Lead Partner</b>	Bank name and address, account number, IBAN, SWIFT, account holder
<b>Project manager</b>	Contact details (name, e-mail address, telephone)
<b>Project finance manager</b>	Contact details (name, e-mail address, telephone)
<b>Project communication manager</b>	Contact details (name, e-mail address, telephone)



## Filling in the status report and the progress report

The text boxes below are marked with the following colour code:

- Violet:** pre-set information (titles of boxes, guidance information, data entered automatically, etc.)
- Red:** information that is always required for reporting, both for the status report and the progress report
- White:** information that has to be entered only in the progress report

### Project report identification (only in the pdf)

Project title		Pre-filled from AF	
Project acronym		Pre-filled from AF	
Project number		Pre-filled	
Project duration	Start date	Pre-filled from AF	Nr of months
	End date	Pre-filled from AF	Pre-filled from AF
Programme priority		Pre-filled from AF	
Programme priority specific objective		Pre-filled from AF	
Name of the lead partner organisation in English		Pre-filled from AF	
Reporting period		Pre-filled from AF	

## PART A –REPORT

### A.1 Highlights of main achievements

<p>Please describe the project progress from the project's start up to now (including specific objectives reached and main outputs delivered). The summary should highlight main achievements, and be interesting and understandable for non-specialists. Please write it in the style of press release. [maximum 2000 characters]</p>
<p>Please be reminded that this summary will be used for communication purposes, therefore make sure the text will be understandable by a non-expert public and will be both informative and appealing.</p> <p>It is recommended to write or adapt the highlights in the end, once all project report sections have been filled in.</p>

### A.2 List of Partner FLC certificates

Overview table on FLC certificates (Filled in automatically)										
Partner Abbreviation	Number of FLC Certificate	Date of FLC Certificate	Total Expenditure Certified By FLC	Include in Project Finance Report	Total Partner Expenditure Included	Co-financing Source	Co-financing Rate (%)	Total Partner ERDF included	Total Partner Non-ERDF Included	FLC Report
				Box to be ticked to include a						



				PP certificate						
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Please tick the certificate which will be integrated in the project report. They will then appear in the section “Certificates” of the eMS (part C of this document). LP can decide to integrate or not FLC certificates considering its plausibility check. If the LP does not integrate a certificate, LP should ask the partners for clarifications and the certificate will be on hold until the next project report.

### A.3 Objectives reached and main project outputs delivered

#### A.3.1 Project specific objectives

What is the progress towards the specific objectives as defined in the application form? The information provided should be cumulative (i.e covering the entire progress since project’s start).		
Project specific objectives	Level of achievement	Explanations [maximum 2000 characters]
Specific objective 1 (pre-filled from AF)	Drop down list: Fully achieved To a large degree To a minor degree Not achieved	Describe here shortly what has been done to reach the objective (which activities).
Specific objective n (pre-filled from AF)	Drop down list: Fully achieved To a large degree To a minor degree Not achieved	

#### A.3.2 Project main outputs achievement

Programme output indicators	Sum of output indicator targets	Sum of achieved output indicators reported so far	Project main output number	Project main output (title)	Project main output quantification (target)	Planned delivery	Achieved so far (cumulative for the entire project including current period)	Level of achievement (cumulative for the entire project including current period)
Programme output indicator 1 Pre-filled from AF	Pre-filled from AF	Automatically calculated	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Automatically calculated from data in WPs	Automatically inserted from WPs
			Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Automatically calculated from data in WPs	Automatically inserted from WPs
Programme output indicator n	Pre-filled from AF	Automatically calculated	Pre-filled from	Pre-filled from	Pre-filled from AF	Pre-filled from	Automatically calculated from data in	Automatically inserted from WPs



Pre-filled from AF			AF	AF		AF	WPs	
			Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Automatically calculated from data in WPs	Automatically inserted from WPs
			Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Automatically calculated from data in WPs	Automatically inserted from WPs

The information for this table has to be filled in in the WP sections. It will be the only information to be entered in the WP sections for the status report.

#### A.4 Target groups reached (only for the progress report once per year)

Target groups	Target value	Target groups reached in previous reporting periods	Target groups reached in this reporting period	Source of verification [maximum 2000 characters]	Description of the target group involvement [maximum 2000 characters]	Target groups reached so far percentage
Target group type 1 (automatically inserted from AF)	Automatically inserted from AF	Automatically inserted from previous reports	Please sum here all the figures of all the partners and all the relevant WPs (the same target group may be involved in different WPs). Please do not forget to also include the figures from the previous period (status report).	Please specify here by which means you calculated the number indicated (e.g. list of attendance, registrations, manually counting, etc.)	Describe here in which kind of activities the target group has been involved. How does the target group use the output? Did you reach new entity you did not expect? Why? Or how?	Automatically calculated
Target group type n	Automatically inserted from	Automatically inserted from				Automatically calculated



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(automatically inserted from AF)	AF	previous reports				
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### A.5 Problems encountered and solutions found /Deviations

Please describe (if applicable) problems encountered and solutions found during this reporting period as regards:

- objectives, outputs, results
- partnership development and cooperation dynamics
- expenditure
- other

Deviation from original plan should also be mentioned here and the reasons for it (only for status report; for progress report, it is sufficient to report deviations in the relevant activity box).  
[max. 2000 characters]

Please mention here the difficulties that the project faced and which solutions were found. Please refer also to the factsheet 4.6 project changes for deviations.

NB: please do not fill in the section “horizontal principles” – it is only relevant for the final report.

### A.6 Fully Implemented

<b>Implemented</b>	Please tick once the project has been fully implemented (normally it should be ticked within the last report).
<b>Implemented On</b>	Please specify the date when the project has been fully implemented.

### A.7 Reporting per workpackage overview (Automatically filled)

<b>Id</b>	<b>Start</b>	<b>End</b>	<b>Type</b>	<b>Title</b>
<b>Number</b>	<b>date</b>	<b>date</b>	<b>Type of WP: preparation / management / implementation</b>	<b>Title of the WP</b>

## PART B – REPORTING PER WORK PACKAGE

This section describes the activities that have been implemented by the project during the previous



period (last 6 months). Apart from the work package preparation, the project should report on all ongoing WPs.

Outputs and main deliverables (e.g. studies, analyses) should be published on project website where the JS will check them. Therefore, please do not send or attach any documentation to the reports.

NB! In the status report, only the WP status should be indicated as well as information on outputs' achievement if relevant.

### B.1 Preparation

WP nr.	WP title	WP start month	WP end month	WP Status
0	<b>Project preparation (only within the 1st project report)</b>	Pre-filled from AF	Pre-filled from AF	Drop down list: Not started, completed, proceeding according to work plan, behind schedule, ahead of schedule
<b>Partners' involvement</b>				
<b>Involved partners</b>	Automatically inserted from AF			
<b>Summary activities carried out and contribution of each partner.</b>				
In the project report, please do only insert the following: <ul style="list-style-type: none"> <li>- Preparation of the EoI and the AF.</li> <li>- Submission of the EoI and the AF.</li> </ul>				

### B.2 Management

WP nr.	WP title	WP start month	WP end month	WP status	WP expenditure - current report	% of WP expenditure reported so far
1	<b>Project management</b>	Pre-filled from AF	Pre-filled from AF	Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule	<b>Automatically filled in from Part B</b>	<b>Automatically filled in from Part B</b>
<b>Partners' involvement</b>						
<b>WP responsible partner</b>	Pre-filled from AF					



<b>Involved partners</b>	<b>Pre-filled from AF</b>			
<b>Please describe the progress in this reporting period and explain how the partners were involved (who did what). [max. 2000 characters]</b>				
Please describe here the activities marked below as “proceeding according to work plan”, “behind schedule” or “ahead of schedule”. Do not only present facts and figures, but also the achievements/change and effects achieved or initiated by the partnership if relevant.				
<b>If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found. [max. 2000 characters]</b>				
Please refer here to the activities marked below as “behind schedule” or “ahead of schedule”. If the partnership faced some problems in the implementation of activities, specify the solutions found and the measures taken to avoid or minimise any delays in the project delivery (if relevant). Please refer also to the factsheet 4.6 project changes for deviations.				
<b>Please describe progress achieved in this reporting period.</b>				
<b>Activity 1.1</b>	<b>Activity title (pre-filled from AF)</b>	<b>Start month (pre-filled from AF)</b>	<b>End month (pre-filled from AF)</b>	<b>Activity Status</b> Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule
<b>D 1.1.1</b>	<b>Deliverable title (pre-filled from AF)</b>	<b>Deliverable description (pre-filled from AF)</b>	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned	
<b>Activity 1.n</b>	<b>Activity title (pre-filled from AF)</b>	<b>Start month (pre-filled from AF)</b>	<b>End month (pre-filled from AF)</b>	<b>Activity Status</b> Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule
<b>D 1.n.1</b>	<b>Deliverable title (pre-filled from AF)</b>	<b>Deliverable description (pre-filled from AF)</b>	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned	

### B.3-7 Implementation

WP nr.	WP title	WP start month	WP end month	WP status	WP expenditure - current report	% of WP expenditure reported so far
3 - 7	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule	Automatically filled in from Part B	Automatically filled in from Part B





Partners' involvement								
WP responsible partner		Pre-filled from AF						
Involved partners		Pre-filled from AF						
<p><b>Please describe the progress in this reporting period and explain how partners were involved (who did what). [max. 2000 characters]</b></p> <p>Please describe here the activities marked below as “proceeding according to work plan”, “behind schedule” or “ahead of schedule”. Do not only present facts and figures, but also the achievements/change and effects achieved or initiated in the stakeholders/target groups if relevant.</p> <p><b>If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found. [max. 2000 characters]</b></p> <p>Please refer here to the activities marked below as “behind schedule” or “ahead of schedule”. If the partnership faced some problems in the implementation of activities, specify the solutions found and the measures taken to avoid or minimise any delays in the project delivery (if relevant). Please refer also to the factsheet 4.6 project changes for deviations.</p>								
Programme output indicator	Project main outputs		Project main output description	Planned delivery month	Main output quantification (target)	Achieved so far (this reporting period included)	Achieved in this reporting period	Level of achievement <sup>1</sup> (cumulative for the entire project including current period)
Pre-filled from AF	Output 3.1	Main output 1 (Pre-filled from AF)	Pre-filled from AF	Pre-filled from AF	Pre-filled from AF	Automatically calculated	Please report the number of output achieved in the period.	Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned
<p><b>Please describe progress achieved in this reporting period.</b></p>								
Activity 3.1	Activity title (pre-filled from AF)			Start month (pre-filled)	End month (pre-filled)	Status Drop-down list: not started,		

<sup>1</sup> Level of achievement needs to be selected also in case no output has been achieved in this reporting period.



			from AF)	from AF)	completed, proceeding according to work plan, behind schedule, ahead of schedule
D 3.1.1	Deliverable title (pre-filled from AF)	Deliverable description (pre-filled from AF)	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned		
D 3.1.n	Deliverable title (pre-filled from AF)	Deliverable description (pre-filled from AF)	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned		
Activity 3.n	Activity title (pre-filled from AF)		Start month (pre-filled from AF)	End month (pre-filled from AF)	<b>Activity Status</b> Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule

## B.C Communication

WP nr.	WP title	WP start month	WP end month	WP status	WP expenditure - current report	% of WP expenditure reported so far
C	Communication activities	Pre-filled from AF	Pre-filled from AF	Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule	Automatically filled in from Part B	Automatically filled in from Part B
<b>Partners' involvement</b>						
<b>WP responsible partner</b>		Pre-filled from AF				
<b>Involved partners</b>		Pre-filled from AF				
<b>Please describe the progress in this reporting period and explain how partners were involved (who did what). [max. 2000 characters]</b>						
Please describe here the activities marked below as "proceeding according to work plan", "behind schedule" or "ahead of schedule". Do not only present facts and figures, but also the achievements/change and effects achieved or initiated in the stakeholders/target groups if relevant.						
<b>If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found. [max. 2000 characters]</b>						
Please refer here to the activities marked below as "behind schedule" or "ahead of schedule". If the partnership faced some problems in the implementation of activities, specify the solutions found and the measures taken to avoid or minimise any delays in the project delivery (if relevant). Please refer also to the factsheet 4.6 project changes for deviations.						
<b>Communication objectives – What is the progress towards the communication objectives as defined</b>						



<p>in the application form? The level of achievement should be cumulative (i.e covering the entire progress since project's start).; however the explanation should describe achievements in this reporting period.</p>					
<b>Communication objectives</b>		<b>Level of achievement</b>		<b>Explanations [max. 2000 characters]</b>	
<b>Communication objective 1 (pre-filled from AF)</b>		Drop down list: Fully achieved, to a large degree, to a minor degree, not achieved			
<b>Communication objective 2 (pre-filled from AF)</b>		Drop down list: Fully achieved, to a large degree, to a minor degree, not achieved			
<b>Communication objective n (pre-filled from AF)</b>		Drop down list: Fully achieved, to a large degree, to a minor degree, not achieved			
<p>Please describe progress achieved in this reporting period.</p>					
<b>Activity 2.1</b>	<b>Activity title (pre-filled from AF)</b>		<b>Start month (pre-filled from AF)</b>	<b>End month (pre-filled from AF)</b>	<b>Activity Status</b> Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule
<b>D 2.1.1</b>	<b>Deliverable title (pre-filled from AF)</b>	<b>Deliverable description (pre-filled from AF)</b>	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned		
<b>D 2.2.n</b>	<b>Deliverable title (pre-filled from AF)</b>	<b>Deliverable description (pre-filled from AF)</b>	<b>Deliverable Status</b> Drop-down list: not started, proceeding according to work plan, behind schedule, ahead of schedule, completed and achieved as planned, completed and achieved more than planned, completed and achieved less than planned		
<b>Activity 2.n</b>	<b>Activity title (pre-filled from AF)</b>		<b>Start month (pre-filled from AF)</b>	<b>End month (pre-filled from AF)</b>	<b>Activity Status</b> Drop-down list: not started, completed, proceeding according to work plan, behind schedule, ahead of schedule

**PART C – CERTIFICATES** (automatically filled in)

Each certificate that has been included by a tick in the part A – Report (A.2) can be found in this part.

The LP can verify each item, can comment it but cannot amend the amount declared. If the LP has a serious doubt on the eligibility of an item, he/she can decide not to include the certificate (by not ticking the certificate in the section A.2) in the project report and wait for the next report when an explanation has been provided.

**PART D - PROJECT REPORT TABLES** (automatically filled in)



This section is automatically filled in with the information contained in the certificates that have been included in the report.

Several tables, which can be exported in excel, are available:

D.1 Project report expenditure summary

D.2 Project expenditure per budget line

D.3 Project expenditure per WP

D.4 Funds: a. Invoices outside the programme area - b. Funds per partner

D.5 Project expenditure per partner: a. Partner overview – b: Partner funds – c: Partner budget line – d: Partner work package

D.6 Project expenditure spending profile

The LP can use those tables or their extraction to follow if the project is well on track and if there is no risk of financial deviations over the flexibility rules. It is LP responsibility to check the project's level of expenditure and that this level remains under the flexibility threshold. Please refer to the factsheet 4.6 project changes.

## **PART E - ATTACHMENTS**

Please do not upload any attachment.



## ANNEX 1

INTERACT classification of type of partners and target groups

Nr.	Main categories	Examples	Measurement unit
1	Local public authority	municipality, etc.	[number of organisations]
2	Regional public authority	regional council, etc.	[number of organisations]
3	National public authority	ministry, etc.	[number of organisations]
4	Sectoral agency	local or regional development agency, environmental agency, energy agency, employment agency, etc.	[number of organisations]
5	Infrastructure and (public) service provider	public transport, utility company (water supply, electricity supply, sewage, gas, waste collection, etc.), airport, port, railway, etc.	[number of organisations]
6	Interest groups including NGOs	international organisation, trade union, foundation, charity, voluntary association, club, etc.	[number of organisations]
7	Higher education and research	university faculty, college, research institution, RTD facility, research cluster, etc.	[number of organisations]
8	Education/training centre and school	primary, secondary, pre-school, vocational training, etc.	[number of organisations]
9	Enterprise		[number of enterprises]
10	SME	micro, small, medium	[number of SME]
11	Business support organisation	chamber of commerce, chamber of trade and crafts, business incubator or innovation centre, business clusters, etc.	[number of organisations]
12	EEIG, EGTC <sup>2</sup>		[number of organisations]
13	International organisation	under national law, under international law	[number of organisations]
14	General public <sup>3</sup>		[number of people]
15	Other <sup>4</sup>		

<sup>2</sup> Relevant only for type of partner classification

<sup>3</sup> Relevant only for target groups

<sup>4</sup> Relevant only for target groups