REPORTING IN EU PROJECTS

Requirements and best practices



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Educational Material Identity

Subject: Reporting in EU Projects - Requirements and best practices

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Explanation of buttons and icons

Contents

- Structure
- Main Goal
- Expected Learning Outcomes
- Keywords
- Educational Material
- Activities
- Literature references

Structure

Main Goal
Learning Outcomes
Keywords

Educational Material

Activities

Literature References

Main Goal

The aim of this course is to provide learners with the comprehensive understanding and practical ability to plan, implement and submit reports for EU-funded projects, ensuring conformity with technical, financial, and administrative requirements set by the European Commission, EACEA, or National Agencies.

This course specifically applies to Erasmus+ and Horizon Europe actions and requirements.

Expected Learning Outcomes 1/3

Knowledge level

Learners will be able to understand:

- The types of reporting in EU-funded projects
- The differences between decentralised (Erasmus+ National Agencies) and centralised (EACEA/EU Commission) reporting processes
- The structure and components of technical/scientific and financial reports (narrative sections, KPIs, deliverables, budget consumption)
- The roles of platforms like the Beneficiary Module (for decentralised projects) and SyGMa/Grant Management Portal (for centralised projects)
- Key compliance requirements, including eligibility rules, deadlines, and documentation.
- Evaluation criteria for reports

Expected Learning Outcomes 2/3

Skills level

Learners will be able to:

- Navigate reporting platforms (Beneficiary Module, SyGMa, Funding & Tenders Portal) to submit reports and deliverables
- Draft technical and financial reports using provided templates
- Monitor project progress continuously by tracking deliverables, milestones, risks, and deviations
- Collect and organise evidence (data, surveys, analytics) to support claims in reports
- Apply best practices for successful reporting

Expected Learning Outcomes 3/3

Attitudes level

Learners will be able to develop:

- A proactive approach to reporting, avoiding last-minute rushes by updating information regularly and maintaining organised documentation
- A collaborative mindset within project consortia, fostering open communication, feedback culture, and shared responsibility for reporting tasks
- Attention to detail in compliance with EU rules, including accuracy in financial declarations and transparency in technical descriptions
- A results-oriented focus, prioritising impact and evidence over mere formal compliance
- Adaptability to handle delays or changes (contacting Project Officers to adjust deliverable due dates)

Keywords

- EU-funded projects
- Reporting
- Grant Agreement
- Technical reports
- Financial reports
- Beneficiary Module / SyGMa (Grant Management Portal)
- Deliverables
- Evaluation

Introduction

Reporting actions in EU funded projects **vary** according to the programmes and types of calls.

The reporting obligations and their deadlines are set out in the **Grant Agreement** signed between the coordinator and the project's funding body (Erasmus+ National Agencies or EU Commission).



Project reporting usually consists of:

- **Technical/scientific** reports
- **Financial** reports **(not for all project types)**

These types of reports are due at different interim periods.

Types of reporting

Depending on calls and project duration, beneficiaries may have to submit:

- **Continuous reporting** during project implementation
- **Periodic reports – technical or financial** (linked to payments)
- **Interim reports** (progess reports for some actions/projects) due on a specific date
- **Final reports** at project closure (usually within 60 days of the project's completion date)
- **Additional pre-financing requests** (if applicable)



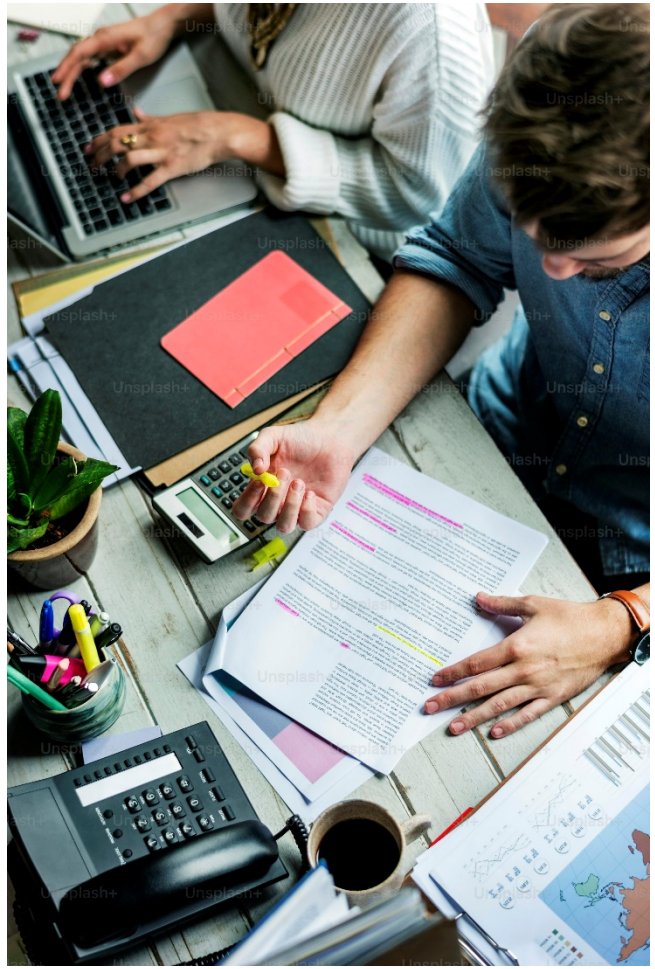
Types of reporting

Example

For Erasmus + KA2 lump-sum actions, reporting includes:

- **Narrative or technical section**, including:
  - Description of implemented activities and results (deliverables, outputs)
  - Indicators of achievement (KPIs- Key Performance Indicators)
  - Quality assurance
  - Dissemination and exploitation
  - Impact
  - Sustainability measures, etc.

- **Financial statement** of the executed budget (lump-sum budgets for each WP)



Types of reporting processes

The reporting process is different for each project, but we can distinguish between two main types:

- **Decentralized Erasmus+ projects** managed by Erasmus+ National Agencies: interim and final reporting are completed through the **Beneficiary Module platform**

- **Centralized projects (Erasmus+ and Horizon Europe)** managed by the **EACEA** (European Education and Culture Executive Agency) or the EU Commission: continuous reporting through the **Grant Management Portal SyGMa** integrated in the Funding and Tenders Portal



Decentralized projects

Reporting focuses on **technical implementation, quality of results and deliverables as well impacts**

Accordingly, reporting:

- Serves to display the achievement on Work Packages ☾ Activities ☾ results ☾ impacts and outcomes
- Stands for a precondition for receiving subsequent payments from the EU



For these actions, reporting consists of:

1) Interim report (for 36 months projects only)

- Progress update and state of budget consumption
- Request for additional pre-financing payments (optional)

Decentralized projects

2) Final report (end of project)

- Technical description of: activities and results achievement of objectives, impact and dissemination, financial implementation
- Obligation to upload results and deliverables to the Erasmus+ Projects Results Platform
- Request for final financing payment

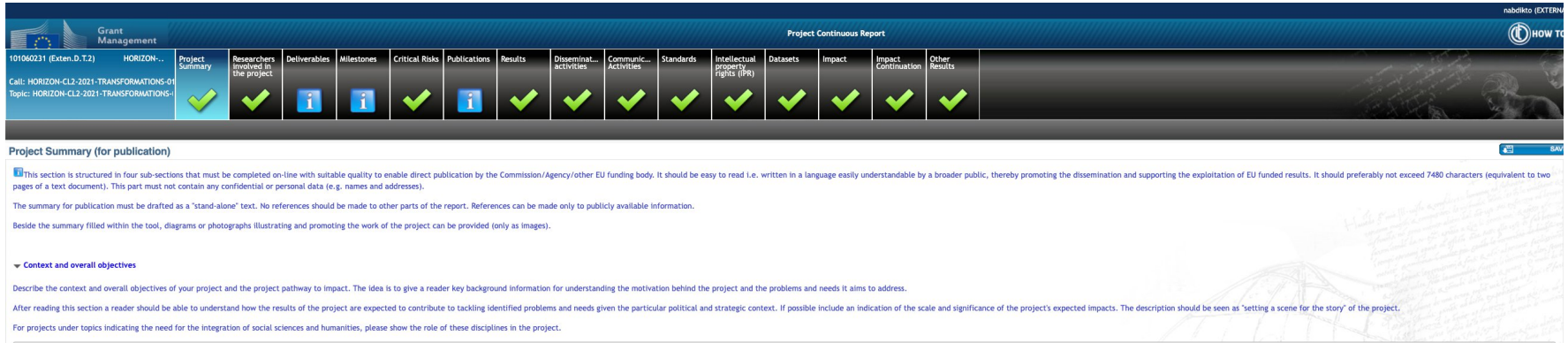
For lump-sum budget projects, there is no detailed feedback on the financial implementation of the project grant. The beneficiary only confirms that the lump-sum grant has been used.



Centralized projects

Centralised Erasmus+ projects (e.g. Erasmus Mundus, Forward Looking Projects, European Universities, Capacity Building, Alliances for Innovation, Jean Monnet, etc.) **as well as Horizon Europe projects** are managed directly by the European Commission through the European Education and Culture Executive Agency (EACEA) and administered via the [Funding & Tenders Portal].

The reporting process is carried out online through the **Grant Management System (GMS)** integrated in the portal.



Centralized projects

Reporting consists in:

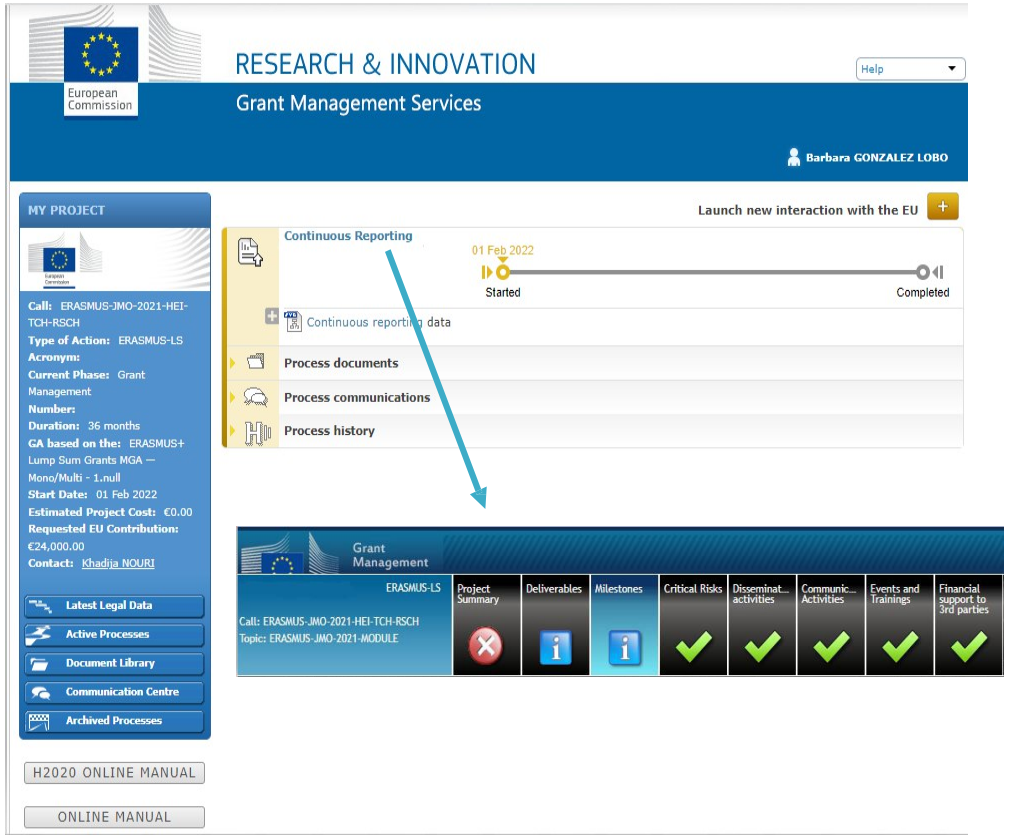
1) Continuous Reporting

- **Module** which is activated **from Day 1** of the project
- **Continuous update** of information in the portal, related to:
    - Deliverables (linked to a specific date)
    - Milestones
    - Dissemination activities,
    - Publications,
    - Communication outputs,
    - Risks and deviations

This information feeds automatically into later periodic reports.



Centralized projects



Uploading project deliverables

- Each deliverable is **assigned a due date** to be submitted via the portal
- Beneficiaries get a reminder 15 days before and, if not submitted 15 days after
- The list of deliverables is **similar to the deliverables inserted in the proposal**

#Best practice: in case of delays, contact the Project Officer before the due date to change it in the portal.



Centralized projects

2) Periodic Reporting

This type of reporting is linked to a payment requests.

At the end of each reporting period, the consortium must submit a **Periodic Report** within the deadline specified in the Grant Agreement (usually 60 days after the end of the reporting period).

This reporting contains two major components:

- **Technical Report**
- **Financial Report** (online only)



Centralized projects

Technical report is divided into:

- **Part A:**

Automatically generated by the portal based on structured data entered online, from the continuous reporting.

- **Part B:**

A narrative document uploaded as PDF.
Templates are provided directly in the portal.
It usually includes: description of activities implemented, progress toward objectives, quality assurance, dissemination and exploitation, impact, deviations from the work plan, risk management, sustainability measures.

Centralized projects



Financial report

Depending on action type and budget model (actual costs, lump sums, unit costs), beneficiaries declare:

- Eligible costs,
- Personnel costs,
- Travel and subsistence,
- Subcontracting, equipment,
- Indirect costs.

The system generates:

- Individual Financial Statements,
- Consolidated Financial Statements,
- Use of Resources reports.

For some Horizon Europe grants, a **Certificate on Financial Statements (CFS)** may also be required.

Centralized projects – focus on Horizon Europe

The **Certificate on Financial Statements (CFS)** is a Horizon Europe mechanism that consists in a report on findings regarding the eligibility of costs declared.

The purpose of the CFS is to provide the EU granting authority with findings to be able to assess whether costs declared **comply with the conditions set out in the EU grant agreement**. More specifically to:

- Verify the eligibility of declared costs throughout the project's lifetime.
- Ensure accounting compliance with the Grant Agreement.
- Prevent financial irregularities.

Important information:

- Should be providing by a **qualified external auditor**
- Required for each project beneficiary or related third party whose grant exceeds a 430k € threshold
- Has to be submitted with the financial reporting for the last project period.

Centralized projects – focus on Horizon Europe

Financial audit is an official review of the expenditure incurred, carried out by the European Commission or a commissioned firm.

It may take place during or up to **2 years after** the end of the project. Unlike the CFS, the financial audit may:

- Cover several periods
- Include technical and legal compliance checks

The audit focuses on:

- Eligibility and calculation of costs: personnel, assignment, equipment, subcontracting
- Accounting traceability
- Compliance with internal, national and European rules



Evaluation of project reports

For both programmes, the evaluation of reports focuses on:

- Technical implementation
- Achievement of objectives
- Quality of outputs
- Budget consumption
- Compliance with eligibility rules
- Dissemination and impact



The funding authority may:

- Approve the report
- Request clarifications
- Request additional evidence or supporting documents
- Reduce the grant if the quality of the activities and results is insufficient

Successful Reporting in EU funded projects

Best practices #1

Establish a strong Monitoring System from the beginning

- Define clear internal monitoring procedures,
- Assign responsibilities per work package/task,
- Schedule regular follow-up meetings,
- Track progress continuously instead of collecting information at the last minute



Successful Reporting in EU funded projects

Best practices #2
Define Clear and Measurable Indicators

Projects should include indicators that are:

- Realistic,
- Measurable,
- Relevant to objectives
- Easy to monitor.



Avoid vague indicators such as “improved collaboration” “high impact”



Prefer concrete indicators such as:

- number of participants trained
- completion rates
- satisfaction levels
- policy uptake
- dissemination reach
- stakeholder engagement

Successful Reporting in EU funded projects

Best practices #3
Define Data Collection Methods Early

Do not wait until the reporting phase **to think about evidence**. From the start, define:

- what data will be collected
- who collects it
- how often
- and where it will be archived

Best practices #4
Keep deliverables realistic and useful

Too many deliverables create administrative burden, reporting complexity and even duplication.

- Focus on **fewer but higher-quality deliverables**
- Ensure every deliverable has a clear purpose
- avoid creating outputs only for formal compliance

Successful Reporting in EU funded projects

Best practices #5

Ensure continuous communication and a culture of feedback within the consortium



- Set internal deadlines before official deadlines
- Provide common reporting templates
- Organise regular reporting follow-ups

Best practices #6

Focus on impacts and evidence

Reports should not only describe activities, but also explain what was achieved, who benefited, what changed and how impact was measured. For this, use:

- indicators,
- data,
- concrete examples (surveys, analytics)
- and evidence-based results.

Successful Reporting in EU funded projects

Best practices #7
Do not leave reporting until the end of the project.

- Update information regularly
- Collect evidence continuously
- Maintain organised documentation
- Draft report sections progressively

✓ Continuous preparation **reduces errors** and improves **report quality**.



Literature References

Guidelines for impact, quality and reporting in the new Erasmus+ KA220 projects. Erasmus+ Romanian National Agency. https://www.erasmusplus.ro/library/Superior/2024/Ghiduri/Guidelines%20Impact%20Quality%20Reporting%20new%20KA220%20Erasmus%2B%20Projects.pdf

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