Interreg Co-funded by the European Union

Central Baltic Programme

GUIDE FOR PROJECT IMPLEMENTATION

Version 6.0

Central Baltic Programme 2021–2027

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Contents

1. Introduction

The Guide for Project Implementation contains practical information related to project implementation. The Guide should be read together with the latest version of the Programme Manual. The Programme Manual defines the programme rules and procedures, whereas this guide explains how they are implemented in practice. It is advisable for all project partners to familiarise with the Guide even though some parts of it, like the project level reporting, reflect the duties of the lead partner.

In addition to the written guidance, the Joint Secretariat (JS) contact person of your project will support you during the whole project life cycle. Lead partners are encouraged to be regularly in contact with the JS contact person to discuss the project progress.

The Guide will be updated for example when the contents of the electronic monitoring system Jems is updated and possible amendments to Programme procedures are made. Any changes are recorded in Annex 4 "Changes made compared to the previous version of Guide for project implementation".

The latest version of the Guide for Project Implementation is available on the Programme website must always be used https://centralbaltic.eu/for-projects/documents/.

Data protection in the Central Baltic programme

The Central Baltic programme bodies, such as the Joint Secretariat and Managing Authority, National Controllers and Audit Authority, all carry out tasks that are defined in EU legislation. Thus, separate consent is not requested from a person submitting personal data to the programme.

Many of the legal tasks of the programme bodies spill over to the projects. The projects are required to submit certain information to the programme, wherefore they also have the obligation to collect that information (signature lists, contact information, etc).

The programme only collects information that is required and needed for the programme to function and reach its goals. For more specific information on our data protection policies, please visit our website at https://centralbaltic.eu/programme/data-protection-in-the-programme/.

2. Result orientation in project implementation

Result orientation lies at the heart of the Central Baltic Programme. Therefore, it is important that projects have the same result-oriented approach. The approach includes elements of understanding and proper reporting of output and result indicators, communicating with the programme (JS contact person) on the progress of project implementation, achieved results and lessons learned, as well as supporting external evaluation and impact assessment. The key for these is an effective communication between the projects and the Programme.

Every project will have a JS contact person in the Joint Secretariat. The JS contact person plays a key role in Programme's result-oriented approach. The JS contact person will support project implementation, staying in touch and following the project implementation as well as providing guidance and help when it is needed. Projects shall have the same approach towards the JS contact person, and the lead partners are expected to communicate with the JS contact person pro-actively, frequently, and in a transparent manner. The aim of the communication is that the programme and the project have about the same information about the project progress and what are the next steps to be taken. This approach will lead to a smoother project implementation and will facilitate the reporting process as well.

Result orientation in implementation and reporting

Result orientation starts with the programme objective specific result indicators. Each project contributes to the respective result indicator by implementing activities of the work plan which lead to planned deliverables, outputs (output indicators), and results (result indicators). All output and result indicators are described in Chapter 2 of the Programme Manual, "Suitability of the project idea to the Central Baltic programme", while more detailed indicator definitions are laid down in Annex 2 "Indicator Fiches" of the Programme Manual.

Projects are expected to report progress on the contribution towards outputs (output indicators) and results (result indicator) in Project reports. This is supported by the information given in the partner level reporting (Partner reports). Each project is expected to report the achievements towards output indicators after one full year from project start (i.e., reporting period 2). The first reporting of the result indicators is done after the 2nd full year from the project start (i.e., reporting period 4). Indicators are always reported in the last period Project report. Project reports are prepared and submitted in the electronic monitoring system Jems. The Programme has prepared templates which support the follow-up of the accumulation of output and result indicator contributions. The templates can be found from the Programme website at https://centralbaltic.eu/for-projects/documents/.

In addition to the Project reports, result indicator achievement must be reported one year after the project end date. This will be done by using the output and result indicator template designed for the Programme Objectives 1, 2 and 7. Result indicator achievement for Programme Objectives 3-5 will be asked through a separate questionnaire. Programme Objective 6 projects do not need to report result indicator achievement one year after the project end date.

Result orientation in communication and evaluation

Apart from the progress reporting, several other aspects can be linked to the result orientation of the Central Baltic programme. These, for example, include a need to ensure communication and evaluation done by the Programme. Effective communication between the programme and its projects is needed to be able to provide clear and concise information on what, for whom and when has been achieved by the projects.

The Joint Secretariat gathers information both related to project management and achievements of thematic performance – what has worked well and for whom. This will be done via regular e-surveys and organising thematic networking events for the projects. The projects are strongly encouraged to share and exchange their knowledge and experiences by answering the surveys and participating to the networking events. The valuable information from projects will be utilised when developing the Programme processes and support towards the implementing projects as well as potential applicants. In addition to these, the achievements, good practises, and knowledge are made available through different channels to the policy makers and practitioners of Central Baltic region, European Commission, as well as other relevant stakeholders, and the general public. It is encouraged that we share the results of project achievements together, thinking from the perspective of added value that we jointly create for our Central Baltic region!

The Project Webspace, which is offered by the Programme, is provided for projects to present the results which they achieve during project implementation. When the projects are finished, it is expected that the projects publish the achieved results and related outcomes in the Project Webspace. This enables to highlight the results and achievements for a wide audience and distribute them by the Programme as well. Guidance on how to present project results in the Project Webspace is given in “Project webspace user manual”, is available on the Programme website at https://centralbaltic.eu/for-projects/documents/.

Information gathered from the output and result indicator templates will complement the information which is used for evaluation and impact assessment purposes on achievements on the Programme level. The aim of the evaluation and impact assessment will be to assess the programme achievements externally (independently from the Programme) and to answer evaluation questions like:

- What has worked well and for whom
- What has not worked and why
- What kind of impact do the project results bring to the Central Baltic programme area

It is expected that output and result indicator templates contain contact information of beneficiaries (organisations and/or physical persons, depending on indicator targeted) which can be transmitted to external evaluators for the purpose of performing external evaluations. It is important that the evaluators can contact the beneficiaries and collect information from them about their participation experience, and the benefit gained from participating in the project. At least name, surname and e-mail address or phone number should be collected from all beneficiaries. Programme will ensure that GDPR (General Data Protection Regulation) is respected, and the contacts are only used for evaluation purposes. Project partners may be contacted by external evaluators for the purpose of gathering information about project implementation and sustainability of results.

3. Starting up the project

The Programme Monitoring Committee selects projects for funding (Figure 1). Projects that are selected for funding may be approved under conditions.

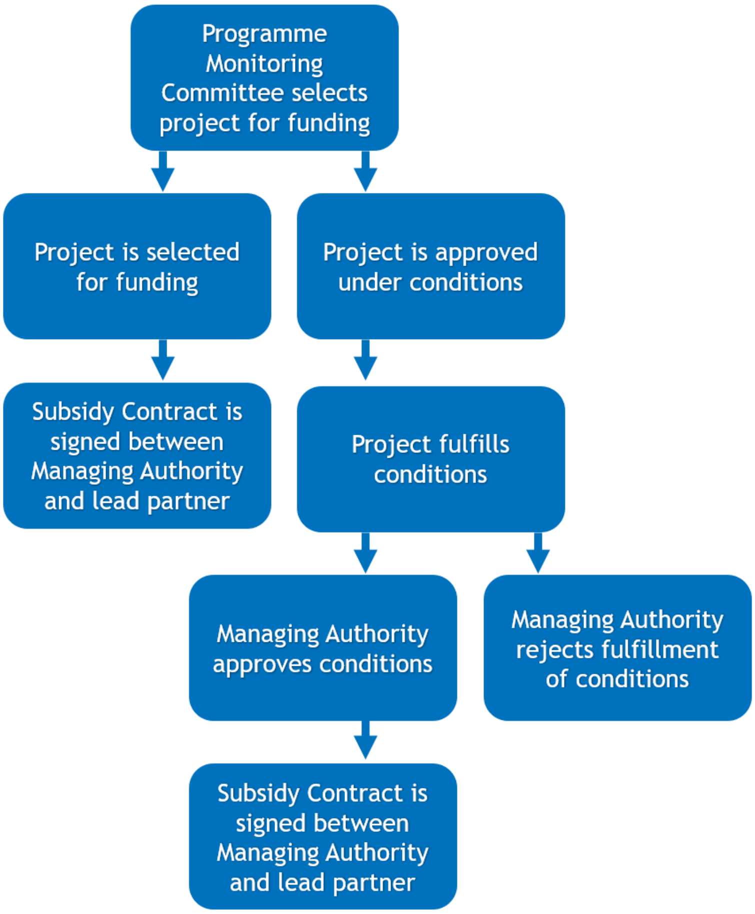


Figure 1 Process from Monitoring Committee selection until Subsidy Contract is signed.

3.1. Fulfilling conditions

The lead partner is responsible for the fulfilment of conditions and updating of the application form accordingly in Jems. The JS contact person sends unofficial information to the lead partner about the Monitoring Committee decision with conditions via email immediately after the Monitoring Committee meeting. When the Monitoring Committee meeting minutes are approved and the funding decisions are official, the JS contact person informs the lead partner about this via email including the official conditions. The lead partner should be in contact with the JS contact person on how to fulfil conditions.

The JS contact person will inform the lead partner when the application can be modified in Jems.

The Joint Secretariat/Managing Authority will review the modified application and ask for additional clarifications, if necessary. If the conditions have not been fulfilled within the set deadline, the project will be rejected. If the conditions have been sufficiently fulfilled within the set deadline, the project will be approved.

3.2. Defining the starting date of the project

Duration of the project is indicated in the application form in Jems. The starting date of the project will be defined after the project is selected for funding. It is important to agree with the JS contact person on the starting date before the project starts its implementation, as the starting date also defines the beginning of the eligibility period for the project costs.

The project can start the implementation at its own risk earliest from the beginning of the next month following the Monitoring Committee meeting decision. The project starting date must be agreed separately in written especially if the project wants to start its implementation before the Subsidy Contract between the Managing Authority and the Lead Partner is signed. The start and end date of the project will be officially set in the Subsidy Contract.

3.3. Subsidy Contract

The draft Subsidy Contract is formulated by the Managing Authority and sent to the lead partner for pre-check via email. The Managing Authority will then send two signed paper copies for the lead partner to sign (please note that the letter will be sent to the project contact person according to the address in the approved Application Form). The lead partner shall sign both copies and return one copy to the Managing Authority. Electronic signatures are used whenever possible.

At the same time with the contract pre-check the lead partner is asked to the confirm per each partner whether beneficial owners exist. **Beneficial owner** in Interreg context means any natural person(s) who ultimately owns or controls the beneficiar(ies) or public procurement contractor(s)and/or the natural person(s) on whose behalf a transaction (e.g. benefiting from the grant) or activity (e.g. obligations resulting from a public procurement contract) is being conducted. Beneficial owners can be identified for corporate structures, trusts, and legal entities such as foundations, and legal arrangements similar to trusts. As such, beneficial owners are not present in public entities.

In case of corporate structures, the beneficial owner:

- owns more than 25% of the company shares directly or indirectly through another company.
- holds more than 25% of the voting rights in the company directly or indirectly through another company.
- exercises actual control over the company on other grounds. Other grounds may refer to a partnership agreement, shareholders' agreement, the exercise of dominant influence or the power to appoint senior management.

The information on beneficial owners can for example be found in Beneficial ownership registers interconnection system (BORIS): https://e-justice.europa.eu/38590/EN/beneficial_ownership_registers_interconnection_system_boris?EUROPEAN_UNION&action=maximize&idSubpage=1&member=1.

After the Managing Authority has signed the Subsidy Contract, a copy of the contract is attached to the *Contracts* section of the application form in Jems. The project status will change to *Contracted* in Jems.

After the signed Subsidy Contract is returned to the Programme and the lead partner bank information is filled in and the financial identification form attached in Jems, the preparation cost lump sum will be paid to the lead partner. See sub-chapter "***Partner details***" for further information about the bank information.

4. Contacts and communication with the Joint Secretariat (JS) contact person

Central Baltic Programme aims to frequent, (pro)active and transparent communication between the project and Joint Secretariat (JS) contact person. Based on the lead partner principle, the project is in contact with the JS contact person via them. Close and proactive communication supports the project implementation in many ways. It supports projects to reach their results by smoothening the project implementation in every part of its life cycle. Active communication decreases the chance for challenges and misunderstandings in reporting, helps to foresee the possible needs for project modifications and supports networking with other projects and actors. Among other things, effective communication creates trust which is a valuable factor in co-operation between the project and the JS contact person.

The Programme has set a minimum framework for communication between the project and the JS contact person. **The project must invite the JS contact person to the project kick-off meeting and the first project steering group meeting. The project must invite the JS contact person to relevant project meetings and events and steering group meetings during the project duration.** The JS contact person will organise annual meetings with the project lead partner and relevant parties which aim to discuss the status of the project as well as discuss the upcoming activities. The JS contact person invites the lead partner and relevant parties to a project midterm meeting halfway through its implementation to monitor and discuss the project achievements. The project activities and financial issues are also monitored though traditional reporting which is done bi-annually in Jems. Contacts via emails, phone calls, teams etc. are a natural part of the communication between the project and the JS contact person.

Elements of active communication between the project and JS contact person:

- Invitation for JS contact person to project meetings and events
- Annual meetings organised by JS contact person
- Project midterm meeting organised by JS contact person
- Project reporting bi-annually via Jems
- Day-to-day emails, phone calls etc.

5. Project communication

Communication is a vital part of any project, and effective communication is essential for success. This chapter will provide you with instructions and guidelines on how to communicate effectively about your project.

Your project is funded by the European Union and Central Baltic Programme 2021-2027, and it is important to communicate this to the public. All project partners must work together to ensure that the project's goals, activities, and results are communicated effectively. This is a shared responsibility of all project partners. To make sure that people understand how EU funding benefits them, the European Commission has adopted rules about how projects must be publicised and communicated. This means that all project partners must make an active effort to communicate about their project throughout its lifetime.

5.1. Key requirements for communication

The following outlines the communication requirements that a project must follow to comply with regulations. The requirements are:

1. **Use the Interreg brand (logo)** prominently on all communication material intended for the public or project participants, such as printed or digital products or websites and their mobile versions. There is a custom project logo for each project. The correct use and positioning of the logo must be followed, and the Interreg logo must remain prominent when including additional logos or visual elements.
2. Each project partner must **display a poster** (A3 or larger in size or equivalent electronic display) at their premises, at a location clearly visible to the public. The poster must include at least basic information about the project (aims and results) and include a reference to the EU funding. You can modify a pre-made poster design available on the Programme website, but you do not have to use it. You are allowed to create your own poster design if it meets the necessary guidelines.
3. A project with a total budget exceeding 100,000 EUR must **display a durable plaque or billboard** clearly visible to the public as soon as the physical implementation of operations involving physical investment starts or purchased equipment is installed. The plaque or billboard must have a reference to the EU funding together with the Interreg Central Baltic Programme brand.
4. **Communicate about the project's benefits** to the relevant target groups and wider audiences is necessary in every project. The project must communicate about its aims, results, and funding source both on partner websites and as widely as possible. It is also relevant to consider and link back to the selected Programme Objective in communication activities so that the project can talk about the big picture and how it contributes to it.
5. Upon request, the project must **make all project publicity and visibility materials available** to the Programme as well as any EU institution, office, or agency.

Referring to the funding and citing your project

When highlighting the EU funding and/or citing your project in publications you must refer to the co-funding by the European Union and the Interreg Central Baltic Programme. In addition, we encourage you to add the project acronym in the citation. Below is an example of a citation which is in line with these requirements:

This activity was supported as part of [ACRONYM], an Interreg Central Baltic Programme 2021-2027 project co-funded by the European Union.

5.2 The Interreg brand (logo)

Below is an overview of how to use the Interreg brand based on the requirements described in the Interreg Brand Design Manual.

The **official brand (logo)** consists of a) the Interreg Central Baltic Programme text with a reference to b) the EU emblem accompanied by c) the statement "Co-funded by the European Union" (Figure 2). The brand fulfils the minimum requirement for visibility. Different file formats and colour modes can be downloaded from the programme website at www.centralbaltic.eu/programme-logos.

Figure 2 The official brand of the Interreg Central Baltic Programme.

The Interreg **custom logo is your official project logo**. This logo is derived from the programme logo and functions to uniquely identify your project as part of the Interreg framework, co-funded by the European Union. The custom logo includes your project acronym in the corresponding priority colour (Figure 3), which is provided to each project by the Joint Secretariat and can be downloaded after contracting from the programme website at https://centralbaltic.eu/for-projects/project_logos/.

Figure 3 Example of the Interreg project-specific custom brand.

The respective colour scheme can be found in Annex 1. "Interreg brand colour scheme".

Using one of these logo versions across your project materials is mandatory, be it the programme's official or project-specific option. Whenever space allows, we recommend **using your custom project logo** as this helps your project to stand out more clearly from others.

Correct use of the Interreg brand (logo)

These rules apply to social media as well.

- The standard is the full-colour version.
- Ideally, the logo should be used on white or light backgrounds only.
- If the logo needs to be placed on a dark background, it must be in a white rectangle, with its size matching at least the clear space (i.e. half the height of the EU flag).
- Whenever full colour is not an option, use the monochrome logo (white). For example, for small items, it is often reasonable to produce the logo(s) in monochrome. Branding sometimes costs more than the item itself.
- The **clear space area** around the Interreg logo should be maintained. The minimum clear space is equal with the space between the logotype and the EU emblem (i.e., half the height of the EU flag). Within this area, no other graphic elements or logos may be placed (figure 4). and it should be increased proportionally when the logo is scaled up.

Positioning of the Interreg brand (logo)

These rules apply to all formats and supports - whether print, digital, small, big, vertical, or horizontal. There is no rule for positioning on social media - if it respects the clear space area rule.

- The Interreg logo (logotype + EU emblem) - without the statement - should be 1/4 of the page's width.
- The logo should always be positioned directly against the margin lines.
- The margins around the Interreg logo should be 1 EU emblem width and should be applied to all sides.
- If the Interreg logo needs to be smaller, the minimum height of the EU emblem must be 1cm. For specific items, like pens or business cards, the emblem can be reproduced in a smaller size.

Use of supplementary visual elements

Together with the Interreg (custom) logo, you can incorporate visuals and labels to enhance your project's communication if you think these bring added value. These elements should depict and explain your project's goals effectively. Just make sure they don't overshadow the EU emblem (i.e., the EU flag), which is a vital part of the Interreg logo. Keep the official Interreg logo with the EU emblem prominent: it should stand out easily on all communication materials, such as the front page of publications and the top of the website, visible without scrolling.

Managing partner organisation logos

In instances where you are including other logos (partner organisations) in your communication materials, it is essential to adhere to the size guidelines by **ensuring that other logos do not exceed the width or height of the EU emblem (flag)** present in your communication materials.

If any of those logos are too large in comparison to the largest EU emblem, you have two options for compliance: resize the official Interreg logo or resize the other logos (partner organisations). The aim is to ensure a balanced and harmonious visual representation.

See (Figure 4) below showing examples of which part of the EU emblem (only the flag's width or height) should be used to make sure it's the same size as the largest of any other logos.

Figure 4 Examples of how to measure the width or height of the EU emblem to meet the minimum size requirement in comparison to other logos.

In a nutshell:

Simply put, there's only a single official project logo. Anything else utilised in your project's visual communication, apart from logos of partner organisations, is considered as diverse visual elements, not additional logos.

Minimum brand size

The minimum height of the EU emblem must be 1 cm. For specific items, like pens or business cards, the emblem can be reproduced in a smaller size. Minimum brand sizes for print, screen and video are specified (Figure 5):

MEDIA	SMALLEST BRAND WIDTH
PRINT A4 PORTRAIT (210×297 MM)	52,5 mm
PRINT A4 LANDSCAPE (297×210 MM)	52,5 mm
PRINT A5 PORTRAIT (148×210 MM)	52,5 mm
PRINT A5 LANDSCAPE (210×148 MM)	52,5 mm
PRINT BUSINESS CARD (85×55 MM)	26,25 mm
PRINT SIGN (PLAQUE) PORTRAIT ANY LARGE FORMAT (A2+)	52,5 mm
PRINT SIGN (PLAQUE) LANDSCAPE ANY LARGE FORMAT (A2+)	52,5 mm
SCREEN SMARTPHONE (960×640 PX)	240 px
SCREEN TABLET (1024×768 PX)	240 px
SCREEN LAPTOP (1920×1080 PX)	300 px
SCREEN DESKTOP (2560×1440 PX)	300 px
POWERPOINT 16:9 (254×142,88 MM)	52,5 mm
VIDEO FULLHD (1920×1080 PX)	300 px
VIDEO HD (1280×720 PX)	300 px
VIDEO SD (1050×576 PX)	240 px

Figure 5 Minimum brand sizes for print, screen and video.

Note: the width used to calculate the dimensions and positioning of the brand is the width of the Interreg logotype + EU emblem - not including the statement nor the margins.

Legal basis

The following regulations provide the framework for communication in the 2021-2027 programming period:

- ➔ The EU Interreg regulation (EU 2021/1059)
  Article 36 describes key communication and visibility requirements applying to Interreg project partners.
- ➔ The EU Common Provisions Regulation (EU 2021/1060)
  Annex IX describes the rules applying to the use of the EU Emblem and details the requirements for beneficiaries of EU funding to deliver publicity materials, including all rights, upon request.

5.3. Creating successful communication

We in the Joint Secretariat have the same task as all our projects: to get the word out about the benefits of Interreg cooperation. Therefore, we also want to cooperate closely with your project when it comes to spreading and sharing your news and results in our channels and networks.

Be clear about your communication objectives. **Define for yourself what** you want to achieve by communication and **why**. It is also good to think of how you can **evaluate** the outcome of your communication afterwards (Figure 6).

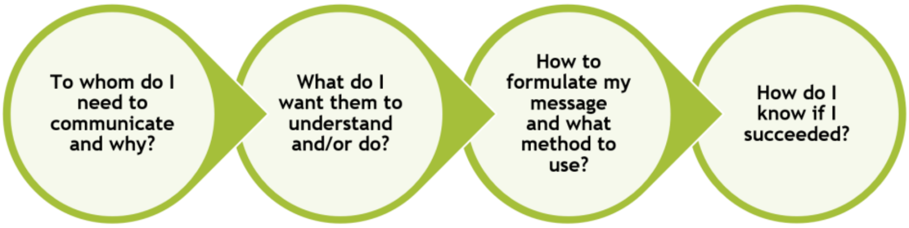


Figure 6 Elements of effective communication

The next key moment of your communication journey is to show how your project is making a difference! Let your project stories and results flow across different countries and channels.

Communication channels

Project Webspace & external project websites

The Programme website hosts the Project webspace that contains a micro-website for each funded project. This micro-website allows you to create and update content about your project, making your life easier when it comes to informing about your project's scope and the EU support throughout its lifetime. The Joint Secretariat provides projects with access information, such as a username and password, and guidance, including a Project webspace user manual, on how to produce and upload content to your webspace.

Your project is responsible for determining which partner will maintain the webspace, which is not necessarily always the Lead Partner. It is mandatory for all projects to update their webspace regularly with content to attract new visitors throughout the entire project implementation.

You can create your own news and events and add content, photos, and materials to your project webspace. This is a terrific opportunity to promote your stories and results and leave a trace of your accomplishments.

Additionally, if justified and useful for reaching your project goals, you may create an additional separate website. For example, you may require advanced features that are not available in the standard Project Webspace or need to develop a specific tool. Note that it is essential to update your designated Project webspace regularly, even if your project has a separate external website.

Social media and networks

Think of your project's activities like a table set for guests coming to a party. You need to send out invitations, host the event, and wrap up so that people feel happy to have been part of it. We encourage you to share your project's news and stories via social media and follow Programme accounts for better information flow and further promotion. We want to support you in making your activities and results visible to multiple audiences on social media. We are all raising awareness of how public money is used and showing the success of cross-border cooperation.

When you are doing project-related posts on social media, remember to include (tag) the Programme's social media handle in your post @CentralBaltic and/or use the hashtags #centralbaltic.

This keeps us notified and allows us to find your posts!

Our social media accounts:

- **Our Facebook page:** facebook.com/centralbaltic
- **Our LinkedIn:** linkedin.com/company/central-baltic-programme
- **Our Instagram:** instagram.com/centralbalticprogramme

Choosing the right channel

When choosing which social media channel to use, consider which ones your target audiences use and which resources you need to manage these channels.

It is also important to acknowledge EU support on your social media accounts. For example, information can be prominently displayed in the description of your social media account: including your project aims and results in the bio/profile description keeps it always visible.

Let us cooperate!

If you have any questions, you are always welcome to approach your contact person from the Joint Secretariat. We are very keen on supporting communication of your results and sometimes attending your events. The collected material or even an interview with you can be shared on our channels for supporting reaching wider target audiences. Our national Contact Points are also here to support you on regional-level communication, for example, in your ventures with local media.

Ensuring accessibility

Make sure that as many people as possible can enjoy and benefit from your work by making your documents and creatives accessible for people with special needs if you publish those. We have pointed out a few suggestions to keep in mind.

Remember to:

- Write in short, clear sentences and paragraphs. Use short headings to group related paragraphs. Good headings provide an outline of the content.

- Provide sufficient contrast between foreground and background.
- Use patterns in charts or add descriptive texts to enable accessibility for people with colour-blindness.
- Images should include equivalent alternative text (alt text). If alt text isn't provided for images, the image information is inaccessible.
- When equivalent alt text is provided, the information is available to people who are blind, as well as to people who turn off images (for example, in areas with expensive or low bandwidth). It is also available to technologies that cannot see images, such as search engines.
- Provide captions (also called "subtitles") for videos so that people who are deaf and hard of hearing get a text version of the speech and non-speech audio information needed to understand the content.
- Write link text so that it describes the content of the link target. Avoid using ambiguous link text, such as 'click here' or 'read more'. Indicate relevant information about the link target, such as document type and size, for example, Read more about 'Results brochure'.

6. Project event quality and feedback from stakeholders

Any Central Baltic project is likely to organise events for their target group and end user representatives to get their contribution towards reaching the targeted project results. To get the best out of these stakeholder events, it is of utmost importance that the events are well organised and have quality contents. This is essential for recording the needs of the stakeholders, for achieving their contribution as well as getting them committed to the project aims to achieve the targeted project results in the best way possible.

The Central Baltic programme encourages all projects to pay attention to the quality of events. To achieve this, you should make sure that you plan events in an orderly fashion, and always collect feedback from the participants to be able to improve the future events. This chapter provides you with guidance related to the events. You should be able to provide an overview of participant feedback from your relevant events, should your JS contact person ask for it. Relevant event here means the collaborative events that are organised for the end users of your planned project results. The programme will not require feedback overviews from events which focus on one-way dissemination of information.

Before the event

Establishment of the basics of the event

- What is the aim of the event?
- Who will be the target group of the event?
- Which format (face-to-face or online or hybrid, possible recordings) and concept
- What is the estimated number of participants expected at the event?
- What are the requirements for the venue?
- What is the reserved budget for the event?

Practical arrangements

- Procurement of venue (sustainability and accessibility etc. should be considered)
- Organising registration, promoting the event, sending invitation reminders
- Defining the responsible person(s) to take care of practicalities at the venue
- Preparing the signature list (use a template that includes the programme logo)
- Equipment and materials at the venue
- Remember the publicity requirements (EU flag, programme logo)
- Make sure that all participants will sign the participant list

After the event

Post-event communication

- Send thank you email & feedback questionnaire to the participants
- Make the relevant materials available
- Analyse the feedback questionnaire results and discuss possibly needed changes for future events

Quality control and feedback

Post-event surveys are tools for acquiring valuable feedback from the participants. By using them you can get insights into both positive and negative feelings about the event. Survey feedback will be helpful in determining how to plan future events for the best participant experience.

The questions that are used in a survey can be of several types such as closed or open-ended questions, multiple choice, rating, or ranking scales etc. The set and type as well as the number of questions used depends on the nature, focus and goals of the event, but there are some basic things that are recommended to be included:

1. Basic participant information
    - country
    - type of organisation

2. Feedback on technical issues
    - suitability of the venue for the event (room(s), seating etc.)
    - functionality of the technical issues (internet, presentations, sound etc.)

3. Feedback on content

Participant satisfaction on the following aspects:

- general satisfaction level
- professionality and relevance of speakers
- quality and relevance of sessions
- structure of the event (agenda structure, timetable)

Remember to include also open-ended questions for free-form feedback on the event quality.

There are several electronic systems that can be used for collecting feedback. As most organisations are already collecting feedback from their events, it is easiest to use the tools that you or your organisation is already familiar with.

7. Horizontal principles and project implementation

The Central Baltic programme and all funded projects have committed themselves to taking the three horizontal principles into account in the implementation of their activities. The principles are *sustainable development*, *equal opportunities and non-discrimination*, and *equality between men and women*. In your project application form you may have defined the contribution of some specific measures of your project towards the horizontal principles. While the contribution towards some of those may be neutral on the level of the project result, there are many smaller everyday measures that can be taken on a practical level to make sure you work according to these principles.

Since horizontal principles are considered as essential elements in the project implementation the Central Baltic programme has drawn some recommendations for the projects to be considered. Horizontal principles in travelling, event organising, and project staff and office set up are topics which can be considered in each project regardless of the Programme Objective (PO), content or topic of the project. Following listings includes recommendations and the lists are not exhaustive:

Travelling:

- Avoid unnecessary travel
- Prefer environmentally friendly (public) transportation
- Consider CO2 compensation when possible
- Share transportation with others
- Accept and consider special needs in travel/accommodation arrangements

Organising events and meetings:

- Consider online meetings or option for online meetings when possible and relevant
- Consider environmental certificates etc. in event procurement
- Choose well-connected location for a venue which can be reach by public transportation
- Prefer digital materials, avoid printing
- Avoid disposable materials
- No gifts, avoid unnecessary promotional materials
- Prefer local, seasonal, vegetarian meals; minimize food waste
- Accept and consider special needs in travel/ accommodation arrangements
- Consider accessibility to the venue
- Consider accessibility of meeting materials (documents etc.)
- Assist people with special needs during the event
- Notice special dietary needs
- Consider the balance between women and men in speakers, panellists etc. when possible

Project staff and office:

- Consider online job-interviews when possible and relevant
- Aim for paperless office
- Consider aspects of sustainable development in procurement of office equipment
- Support remote work to avoid unnecessary travel
- Consider anonymous staff recruitment of staff
- Consider task definitions allowing access to people with special needs
- Aim for balanced gender representation in project staff
- Same pay for all doing same work

8. Project administration and management preparations for project implementation and reporting

There are several administrative and management types of preparations and processes which both lead partner and project partners must keep in mind throughout project implementation. This chapter will highlight some of these. The Programme Manual gives a more comprehensive picture of the processes and requirements, and it should be read to get the full picture. The Manual is available on the Programme website at https://centralbaltic.eu/for-projects/documents/.

Electronic signatures can be used to sign project related documents when possible.

8.1. Project costs and documents

Project-related cost must be clearly visible and traceable in the bookkeeping. Thus, each partner, including the lead partner, must **open a separate account centre or code for the project** in their bookkeeping. The requirement about the separate cost centre or code, primarily, concerns real costs which are occurred due to the project implementation. To smoothen and to make the reporting of your project cost easier, it might be a good practice to have project costs-related documentation in a specific project folder. In addition to this, the occurred cost could also be saved in separate folders according to the six-month reporting periods.

Each person who is working for the project as project staff must have a **work contract or similar document** which shows that the person is employed by the partner (lead partner) organisation and is working for the project. If no new contract is signed for the person, the project-related work can also be stated in an amendment of the work contract. The work contract or similar document with amendments must be attached to the partner report when the staff cost is reported for the first time and whenever there have been changes to it.

Each partner, including the lead partner, must follow the **public procurement rules**. The same rules concern both private and public bodies. There are both EU level and national level thresholds to be followed when preparing for procurements. In addition to these, if it is foreseen that the costs would be 10 000 euros or more (excluding VAT), a bid-at-three procedure (three written tender requests about the planned purchase) must be implemented based on the programme rules. If national or organisational rules are stricter, these rules must be followed. The same purchase must be always tendered as one procurement for the whole project duration. It is advised to start to prepare the procurements early for the best results. Experience has shown that the procurements can sometimes take a long time and may cause delays in the planned project activities. All procurements must be free from conflict of interest.

8.2. Project activities and documents

Smooth and timely project implementation and reporting requires a good **time plan and regular meetings** with the partnership. Practice has shown it is beneficial to agree on regular meetings with the partnership at the beginning of the project implementation. This creates a good framework for the project work as well as making it possible to set relevant milestones and internal checks for it.

Besides regular and frequent meetings, appropriate and easy access to **project related documents** are keys for smooth and successful internal communication, implementation, and reporting. Thus, each project should consider the best ways to share documents that show the work progress for the project partnership and other relevant parties in the very beginning of the project to enable good cooperation. When structuring the project document library or folders, it is good to consider the work package and/or activity structure in project work plan in Jems. This might also be helpful when reporting in Jems.

Each project has designed a work plan for project implementation in Jems. In general, the work plan in Jems does not include very detailed steps and specific timing of each specific project activity. It is recommended to make a more **detailed activity and time plan** which sets responsibilities for different tasks. A detailed plan can be made for the whole project duration. It can also be a bi-annual plan or even a shorter plan with specific details. The detailed plan can be later checked, updated and finetuned during the implementation. The predefined time plan for partner and project level reporting given by the Central Baltic programme should also be considered as part of the detailed work plan. This would allow time resources for reporting and will make the reporting process smoother. If the project sees needs for modifications to the work plan in Jems, they must be discussed with the JS project contact person. Bigger modifications might need a formal modification procedure.

8.3. Templates to support project reporting

The programme has mandatory templates to support your project implementation and reporting. Templates will be available at Programme website https://centralbaltic.eu/for-projects/documents/.

The templates are:

- Report of Hours and Employment Confirmation (Report of hours)
- Output and result indicator templates for Programme Objectives
- GBER (General Block Exemption Regulation) Art 20a monitoring
- List of participants for face-to-face events

Report of Hours and Employment Confirmation template must be filled in by each project staff member. The document must be attached to the list of expenditure of each partner report in Jems.

Output and result indicator templates for Programme Objectives are designed for projects to support the calculation of indicator contribution accumulation. Start using the template for recording the output accumulation and, where relevant, results already from the project's beginning. This will help later when the output and result indicators are reported in Jems.
The template must be attached in project report in Jems when the indicators are reported.

The Programme is asking to collect at least the name, surname and e-mail address or phone number from all beneficiaries (organisations or/and individual persons) in the output/result indicators template to support external evaluation and impact assessment of the Programme.

It is important that the evaluators and the Programme can contact the beneficiaries as part of the evaluation and to collect information from them about their participation experience, and benefit gained from participating in the project. The programme will ensure that GDPR is respected, and the contacts are only used for evaluation purposes.

GBER Art 20a monitoring template is designed for projects to support the follow up of the amount of the financial aid given for third parties, for example for the companies who are participating in the project as beneficiaries. Each partner needs to follow up the amount of the aid channelled for the third parties. The maximum aid amount to an undertaking (for example company) per project is 22 000 euro.

The example **template for participants for face-to-face events** is designed for projects to collect signatures sufficiently, i.e., signatures are collected per participant per event day.

The project can also use its own template if relevant. When face-to-face events are reported by the partner, the signed participant list for each day of the events must be attached to the reported cost in the list of expenditure.

9. Reporting in Jems

Partner and project reporting are done in the e-Monitoring System called Jems. Jems is a web-based application that is used with a web browser.

Both partner and project level reporting are done bi-annually, one reporting period being six months. Jems can be accessed through the Programme website (Figure 7) as well as directly at: https://jems.centralbaltic.eu/

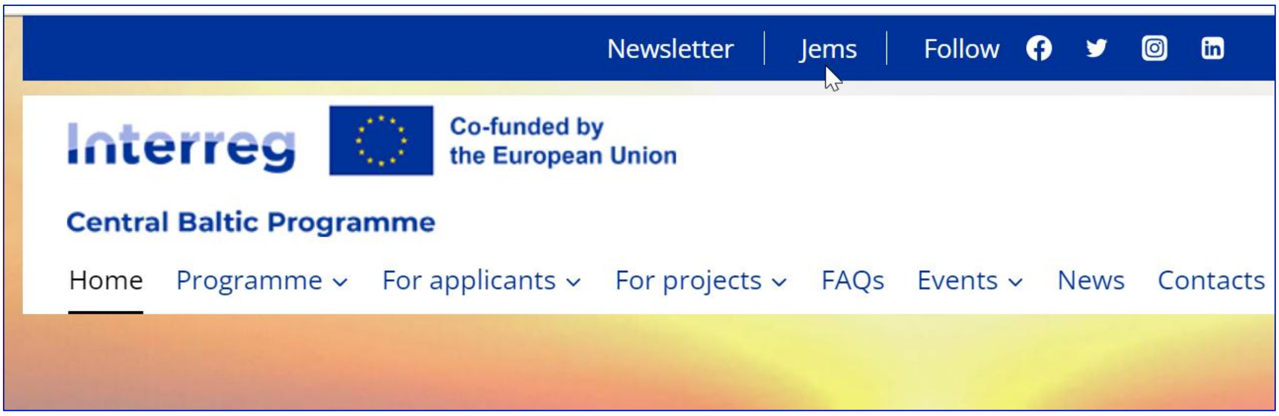


Figure 7 Jems access from the Programme website.

The lead partner must give user rights for each partner for reporting. Read more about user rights from the chapter ***Project privileges***.

A few tips for reporting in Jems:

- SAVE - Due to technical characteristics of web applications, all changes must be saved regularly. You need to save at least before moving on to another section of the report or logging out.
- FOLLOW THE APPLICATION FORM - When implementing the project, always closely follow the project application form in Jems.
- TEXT BOXES - When filling in information in the Jems, please note that text fields have limited length. The number of available characters is indicated next to the text boxes. Be precise: there is no need to use the maximum number of characters if you can provide sufficient and concise information with less characters.
- ENGLISH – Reporting and project modifications in Jems are done in English. Annexes to the report can be also in national languages if English versions are not available.

Regular reporting allows projects to follow their implementation. It is a tool also for the Joint Secretariat/ Managing Authority to get information about how the project is meeting its targets.

A report must be prepared for each reporting period. The reporting period is six months, starting from the start date of the project onwards.

There are two types of reports:

- **Partner Report** - filled in by each project partner. The Partner Report is submitted by each partner to their National Controller in Jems.
- **Project Report** - filled in by the lead partner based on the information provided in the Partner Reports and National Controller certificates. The Project Report is submitted by the lead partner to the Joint Secretariat in Jems.

The project is asked to attach evidence of deliverables, cost items and outputs both to the Partner Report and the Project Report. The maximum file size of one document is 10 Mb. It is recommended that documents are attached in pdf format. Multiple documents can be attached as zip-file. Audio-visual materials should be included in the report as a link when possible.

A few tips for reporting:

- Provide concise, clear, and understandable information about implemented activities and main achievements;
- Avoid specific terminology and abbreviations that hinder understanding for readers that are not familiar with your specific field;
- Be honest and provide information also about challenges and deviations encountered in project implementation. This helps the lead partner and programme staff to better tailor its support to projects and to prevent any future problems;
- When reporting, closely follow and refer to the project work plan (activity plan in work packages);
- Remember to attach relevant evidence documents;
- Limit information to the requested period;
- Start preparing the report in good time before the reporting deadline;
- Do not forget a final check before submitting the report.

9.1. Project privileges (e.g. access to reporting)

Each partner must register to Jems to be able to access the reporting (Figure 8). After that, the lead applicant with “manage” rights must give user privileges to each partner including the lead partner. Add email address of registered user who will fill in reports Jems under each partner. Each person who will do reporting needs to have “edit” rights. Lead partner Jems user should add his/her username under each partner with “view” rights for being able to see partner reports.

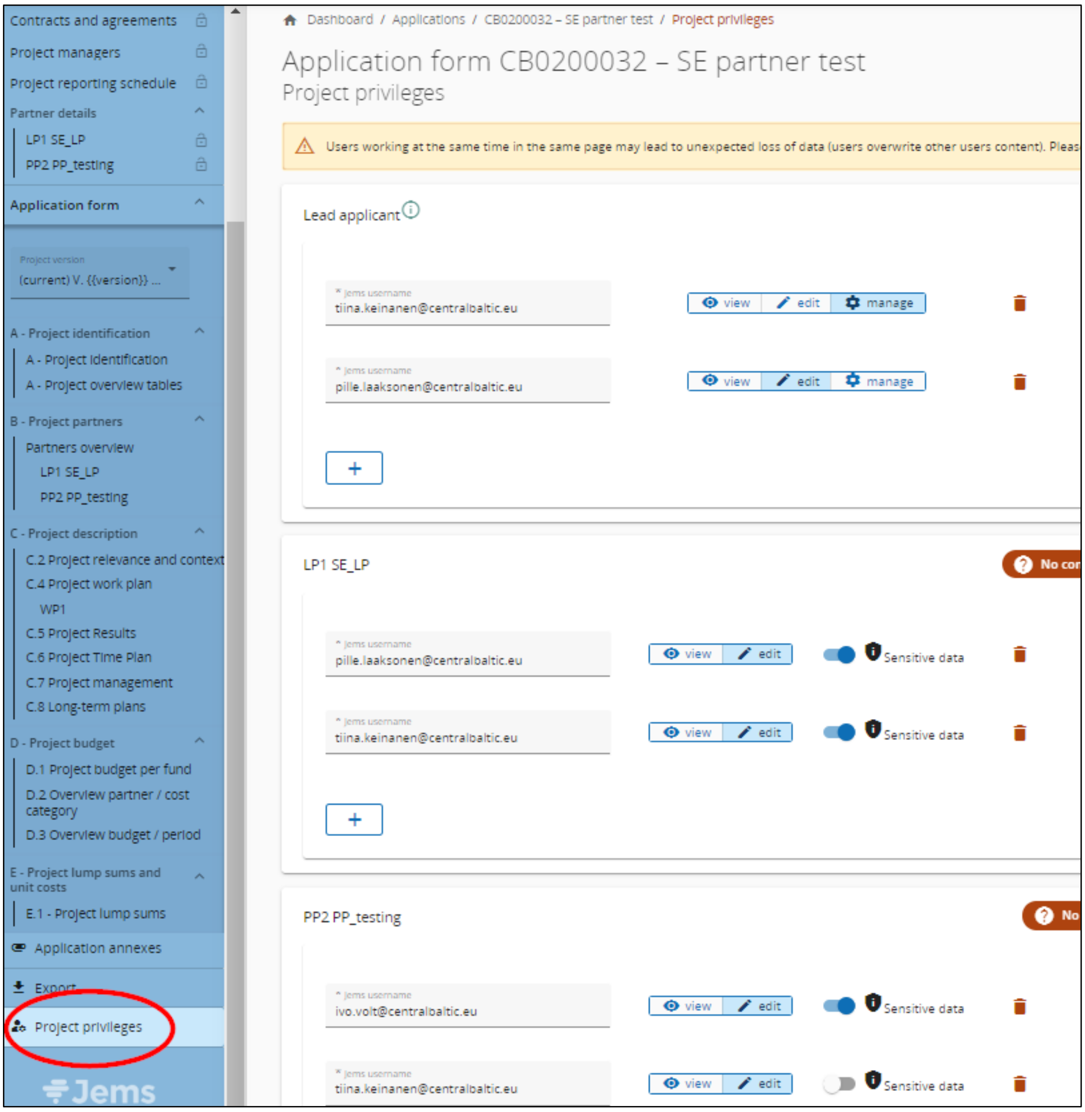


Figure 8 Access to giving project privileges can be found from left hand-side toolbar.

In the figure above Tiina is a lead applicant with “manage” rights. Thus, she can give user rights (*project privileges*) for partners (LP1 SE_LP and PP2 PP_test).

Both Pille and Tiina are doing partner reporting for lead partner (LP1 SE_LP). This is why both have “edit” rights. They can also mark relevant data as sensitive (sensitive data enabled). Sensitive data can be seen only by users who have sensitive data rights for the specific partner. Programme bodies can see the sensitive data.

Ivo is doing partner reporting for project partner (PP2 PP_testing), thus he has “edit” rights for PP_testing. Tiina as a lead partner Project Manager (responsible person of project reporting) has “view” rights to PP2 partner report as she will compile a project level report. “View” rights enable her to see the PP2 partner report. Even though the LP has “view” rights to the PP2 partner report the LP must not have access to sensitive data, like Tiina does not have. Sensitive data is handled according to the GDPR. More information can be found from the Programme webpage https://centralbaltic.eu/programme/data-protection-in-the-programme/.

Tiina with lead applicant “manage” rights and Pille with “edit” rights can do project level reporting (Project report). Lead applicant with “manage” and “edit” rights do the project modifications.

If the lead partner user has “view” rights to for a partner like Tiina has for PP2 PP_testing, the lead partner can also see “Partner details” under “Contracting” section. Read more from chapter ***Partner details***.

9.2. Contracting

9.2.1 Contract and agreements

Lead partner fills in the requested information. **Partnership Agreement**(s) must be attached by the lead partner before the submission of the first partner reports (Figure 9).

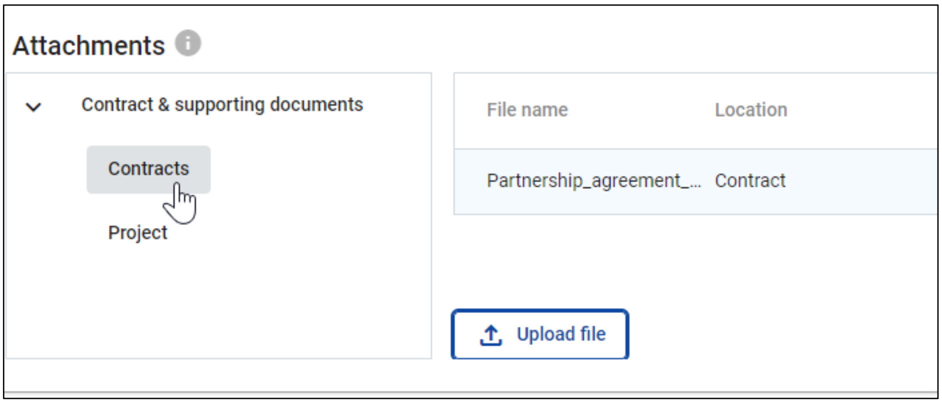


Figure 9 Attach Partnership Agreement by selecting Contracts and upload the file. Name the file as Partnership Agreement.

9.2.2 Project Managers

The lead partner fills in the contact information for the Project manager, Financial manager and Communication manager.

9.2.3 Project reporting schedule

In this section, the project level reporting schedule is defined (Figure 10). Reporting is done in six-month intervals and both content activities and finances are reported in the same report. Date column indicates the deadline for the submission of the project report.

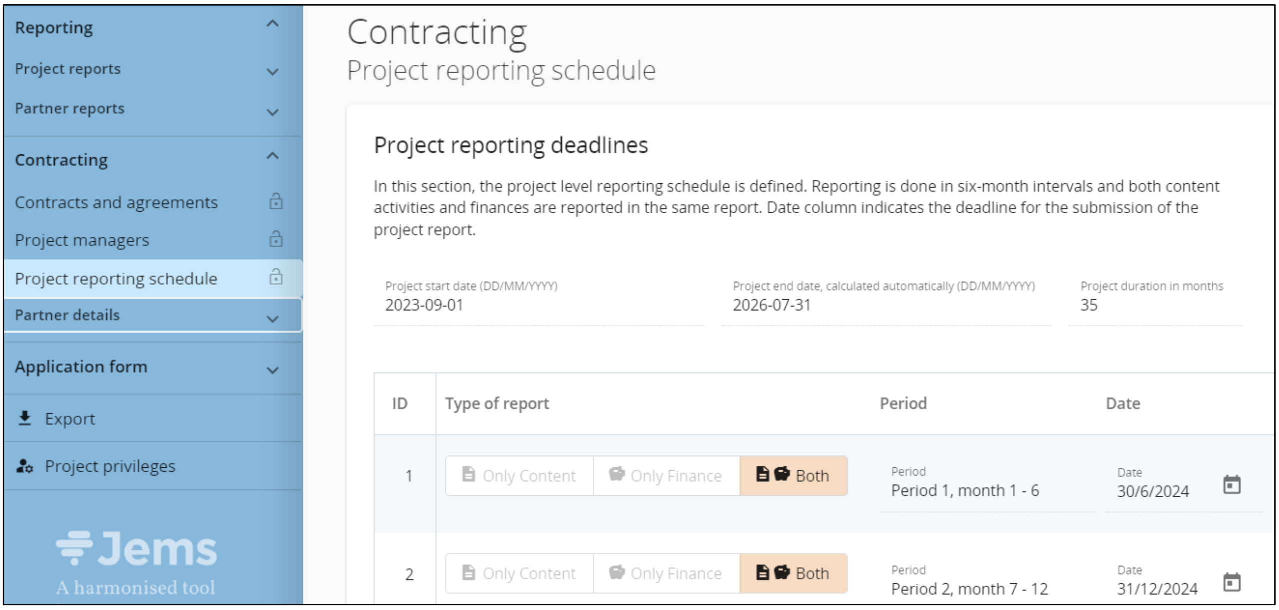


Figure 10 Project report schedule is defined in Jems.

NB! Reporting periods with start and end dates as well as the submission deadlines for partner reports and project report can be found from *Reporting periods* document which attached in “Contracting” section under “Contracts and agreements”.

9.2.4 Partner details

After the conditions are fulfilled and the project is contracted the partner should fill in the partner details. Partner (including the lead partner) needs to have user rights for project partner to being able to add partner details.

During the contracting phase the lead partner has asked to provide information on all partners’ beneficial owners. If project partner has **beneficial owner(s)**, the following information on all beneficial owners indicated during the contracting phase must be filled in in section ‘Ultimate Beneficial Owner(s)’: first name(s), last names(s), dates(s) of birth and VAT registration number(s) or tax identification number(s).

Beneficial owner in Interreg context means any **natural person(s)** who ultimately owns or controls the beneficiar(ies) or public procurement contractor(s)and/or the natural person(s) on whose behalf a transaction (e.g. benefiting from the grant) or activity (e.g. obligations resulting from a public procurement contract) is being conducted. Beneficial owners can be identified for corporate structures, trusts, and legal entities such as foundations, and legal arrangements similar to trusts. As such, beneficial owners are not present in public entities.

In case of corporate structures, the beneficial owner:

- owns more than 25% of the company shares directly or indirectly through another company.
- holds more than 25% of the voting rights in the company directly or indirectly through another company.

- exercises actual control over the company on other grounds. Other grounds may refer to a partnership agreement, shareholders' agreement, the exercise of dominant influence or the power to appoint senior management.

The location of documents section will be filled in for each partner.

The lead partner must also fill in the bank details and attach *the Financial Identification* document to the attachment section.

The Financial Identification document can be found behind the link: https://neighbourhood-enlargement.ec.europa.eu/system/files/2016-12/annex5b_baf.pdf.

9.3. Reporting procedure

1. Each project partner fills in the Partner Report and submits it with all mandatory annexes to the National Controller within 15 days after the end of the reporting period. (Figure 11)
2. The National Controller checks and verifies the eligibility of the costs within three months from Partner Report submission. If the National Controller requires clarifications, the clock stops, and the replying time is not counted into the three months.
3. The lead partner compiles the Project Report based on Partner Reports certified by the National Controller. The lead partner must submit the Project Report in four months after the end of the reporting period.
4. The Joint Secretariat/ Managing Authority have in total 80 days to complete the checks on the Project Report and make the payment to the lead partner based on eligible certified cost, starting from the day the Project Report is submitted in Jems. In case the Joint Secretariat/ Managing Authority requires clarifications, the clock stops, and the replying time is not counted into the 80 days.
5. The eligible ERDF funds will be paid to the lead partner. The lead partner must transfer the shares of funding for each partner immediately.

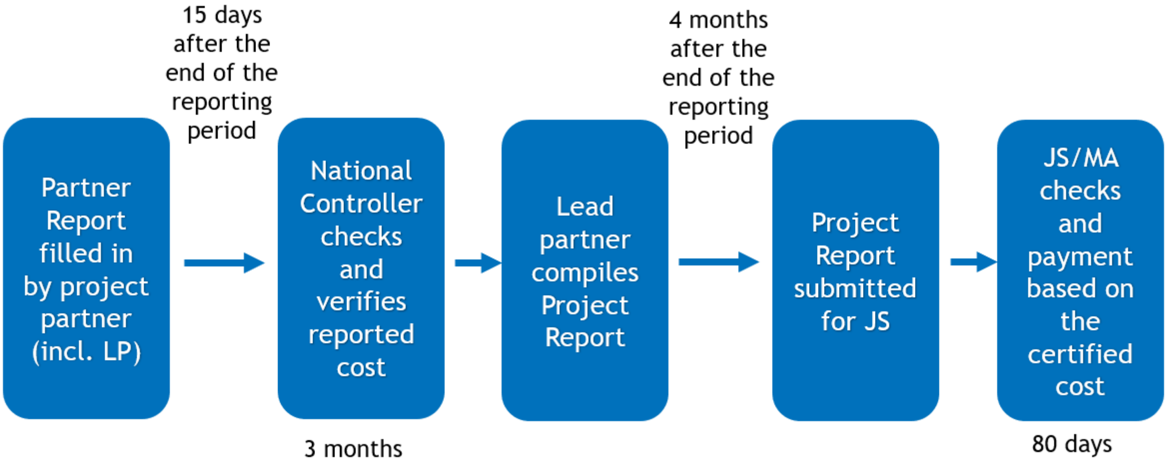


Figure 11 Reporting procedure.

9.4. Partner Report

Each partner (including the lead partner) fills in their partner report. In the partner report, the partner reports the activities they have implemented and the related costs made during the reporting period. Access to the partner report can be found from left hand side toolbar Reporting and Partner reports. A new report can be created through “Add Partner Report” button (Figure 12).

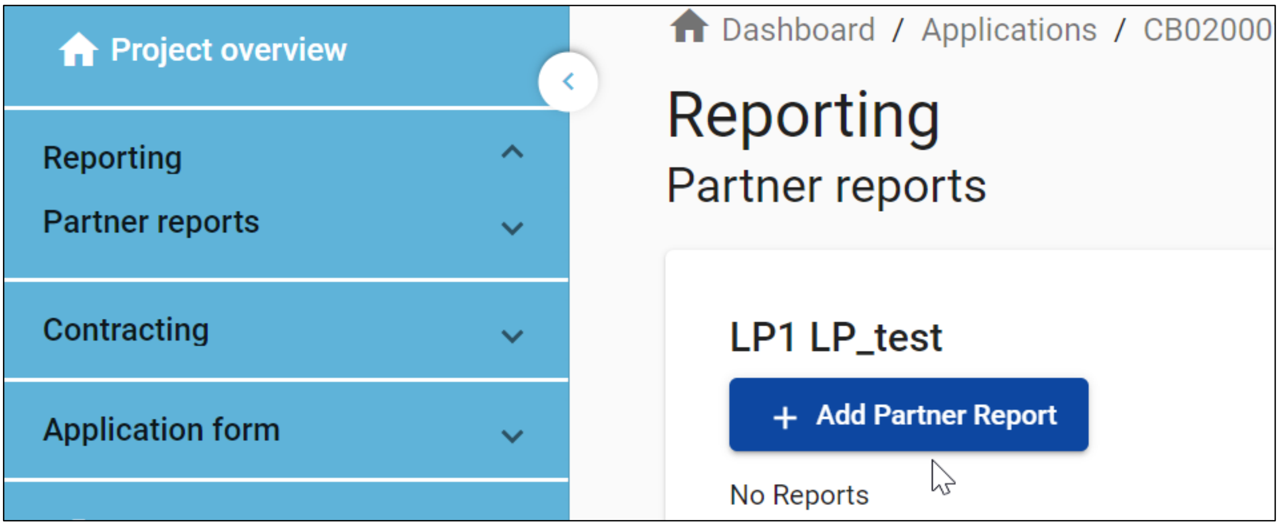


Figure 12 New partner report is opened by clicking “Add partner Report” button.

Partner report includes following sections: Report identification, Work plan progress, Public procurements, List of expenditures, Contributions, Report annexes, Report export, and Financial overview.

9.4.1 Report Identification

Add the reporting period start date and reporting period end date. Make sure that the dates are correct since it affects the eligibility of the reported costs. Choose the correct reporting period. (Figure 13) The JS contact person provides a supporting document (***Reporting periods***) for the lead partner which states the starting and ending dates per reporting period. The document can also be found from left hand-side tool bar under the section “Contracts and agreements” as attachment.

Figure 13 Start filling in your partner report by adding reporting starting and ending date and selecting the correct reporting period.

Fill in the ‘Summary of partner’s work in reporting period’, possible ‘Partner problems and deviations,’ ‘Partner spending profile’ and involvement of ‘Target groups’.

9.4.2 Work Plan Progress

Give information about the work progress according to the work packages defined in the application form.

First give a short summary of your activities under the selected work package. Describe the progress of each implemented activity and attach the evidence document to deliverables and outputs.

A deliverable is a tangible or intangible object produced as a result of the activity that is intended to be delivered to a target group or a stakeholder. A deliverable could be a report, a document, a handbook, a server upgrade, or any other building block of the project results.

An output is the main achievement of a set of project activities which contributes to the programme output indicator(s) of the Programme Objective. Attach for example a list of participants, filled in output/result indicator template.

It is recommended that the evidence documentation is attached in pdf format. If there is a need to attach more than one document per deliverable or output, zip-file can be used.

9.4.3 List of expenditure

The list of expenditure section is the place where partners list the incurred costs. When adding an expenditure item (Figure 14), the options columns for cost reporting show up.

Euro country partners (EE, FI (including AX), LV) report the cost always in euros.

Swedish partners will report the real cost always in Swedish Krones (SEK) and simplified cost options according to the pre-defined unit costs (EUR/SEK). The costs reported in SEK are converted automatically in EUR. Exchange rates are applied when expenditure items in other currencies than Euro are declared. If a report is in draft, exchange rates are updated constantly. Once a report is submitted, the exchange rates shall be taken from the month of submission and frozen.

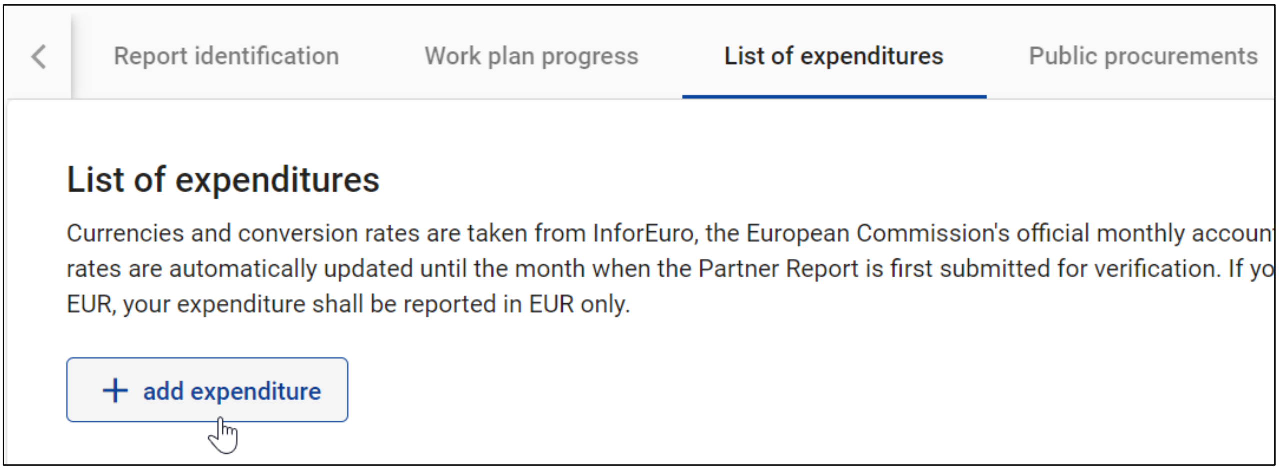


Figure 14 When adding expenditure item options columns will show up.

Add expenditure to the list of expenditure. For the Simplified Cost Options (SCO) select first the correct unit cost (Figure 15). The dropdown menu shows all budgeted Simplified Cost Options for specific partners. For real costs, start by selecting the cost category (Figure 16).

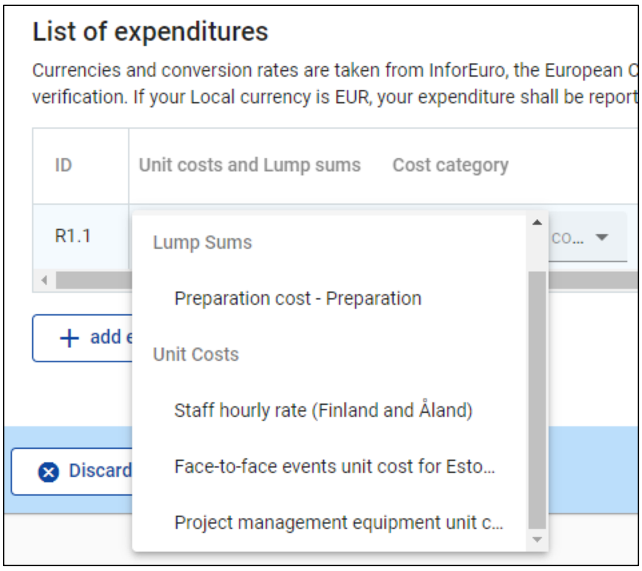


Figure 15 For reporting the Simplified Cost Options select first the correct SCO in the dropdown menu.

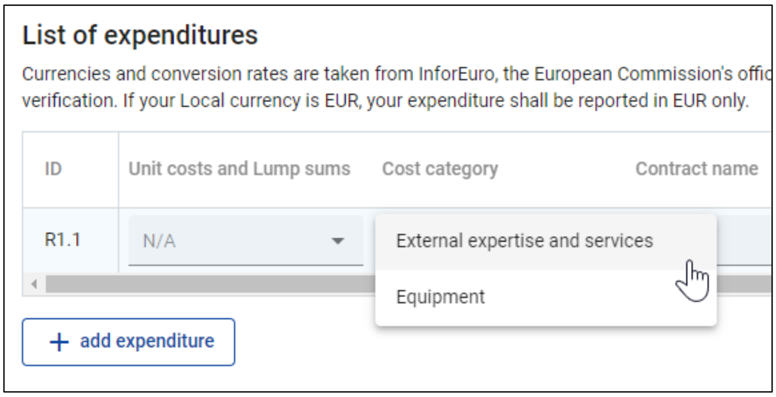


Figure 16 For reporting the real cost select first the correct cost category.

Staff cost

To report staff costs, choose “staff hourly rate” from “unit costs and lumpsums” dropdown menu.

Add the position of the project staff member in “description” box and indicate the period of reported staff cost in “comment” box (Figure 17). Add “number of units” based on the reported number of hours in *Report of hours and Employment Confirmation* (actual working hours for the project during the reporting period). Each staff member must be reported as a separate expenditure. One report of hours (six-month period) is filled in for each staff member and the cost is reported as one item. Remember to report SCO “project management equipment” for staff members as one cost item based on the reported hours under the Equipment cost category.

Figure 17 Add the staff position and reporting period when reporting the staff cost.

NB! Swedish partners report their staff cost in SEK (predefined unit cost 501 SEK). Thus, the currency must be selected as SEK (Figure 18). When the currency is selected the reported staff cost can be saved.

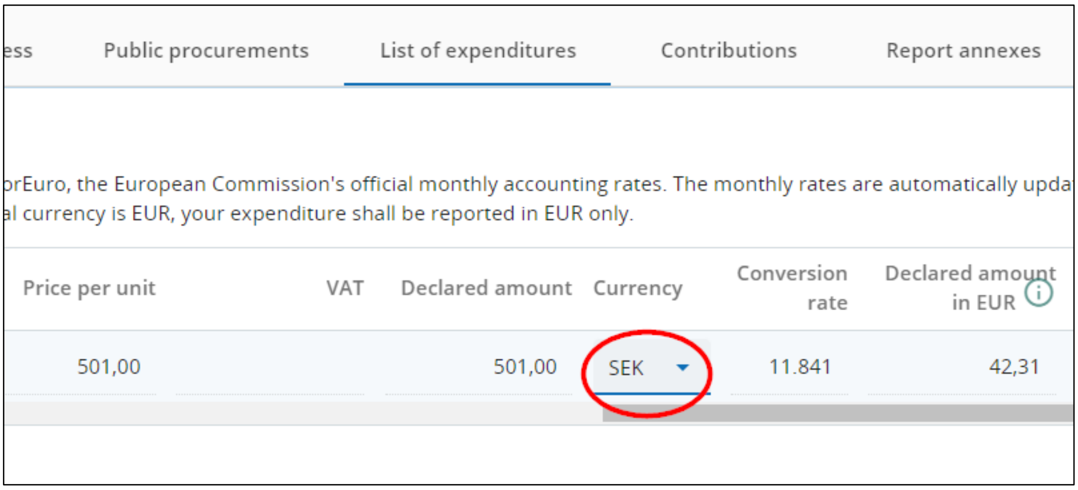


Figure 18 Swedish staff costs are reported in SEK.

The *Report of hours and Employment Confirmation* (later Report of hours) template is available on the Programme website https://centralbaltic.eu/for-projects/documents/ (Report of hours). **Make sure that you are using the latest version of the template.** There is also a guidance video how to fill in the Report of hours template on the website https://centralbaltic.eu/for-projects/documents/#videos.

Attach the *Report of hours and Employment Confirmation* to “attachments” section of the reported expenditure.

When the staff position is reported for the first time or when the work contract is changed, add the employment document (work contract or appointment decision) to the “Report annexes” (Figure 19). Make sure that information about the responsibilities related to the project is included in the employment document. In case the person is already employed by the organisation and has valid work contract, tasks related to the project can be defined in the annex to the existing employment document. Both employment document and annex must be attached in the report. Add the staff position to the file name or to the “description”.

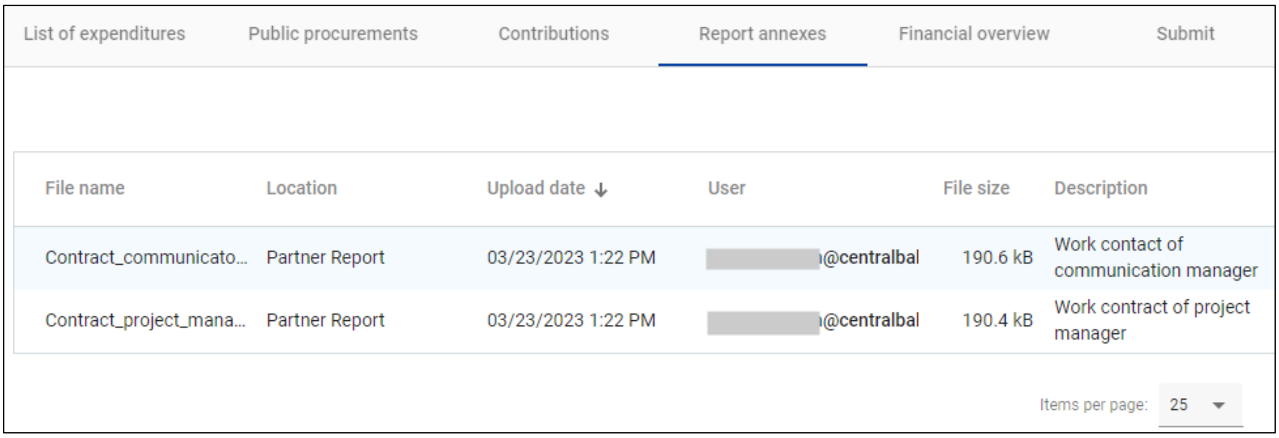


Figure 19 When the staff position is reported for the first time or when the work contract is changed, add work contract or equivalent agreement to the “Report annexes”.

Filling in “Report of Hours and Employment Confirmation”

The *Report of hours* must be filled in by all project staff, also the staff who is working full-time for the project. Both hours worked for the project and other activities must be filled in. Only productive working hours for the project are reported. Thus, for example holidays, sick leave time and travelling time outside working time are not reported.

When filling in the report, summarise the main tasks carried out by the employee during the reporting period. Make sure the description clearly reflects the work related to the project implementation and justify the number of hours reported. Productive hours for the project work as well as other task hours are filled in the report for each day.

The maximum working hours for the project work which can be reported in the list of expenditure is 860 hours per reporting period (6 months). Insert into the List of Expenditure the amount of hours indicated in report of hours section "Summary of data for the partner report in Jems", column "Figure to be entered in Jems" (Figure 20). If the person works for the partner organisation part-time or works for the project less than 6 months during the reporting period, pro-rata calculation will be made of maximum 860 hours that can be reported for the project.

4. SUMMARY OF DATA FOR THE PARTNER REPORT IN JEMS:

First name	Last name	Position		Workload (incl. tasks and contracts outside the project) Working time/ week (hours)	Share of full-load (%) (full-time employee = 100%)	No. of months for which staff costs are reported	Maximum hours	Figure to be entered in Jems	No. of hours worked in total (all contracts)
Jane	Tester	Project Manager		20	50.00 %	2	143.33	143.33	344.00

The reported hours worked on the project exceeded the maximum no. of hours. Therefore, the value for JEMS has been reduced accordingly.

Figure 20 Number of hours to be reported from *Report of hours* in Jems.

The report of hours must be signed by the employee, his/her supervisor, and employer representative. The report can be signed digitally.

In cases when the employee (project worker) is also in the position of supervisor, it is enough that the report is signed by the employee and employer representative. In such cases, the employer representative must be some person other than the employee in question, for example a chair of the board or similar who holds the right to sign on behalf of the organisation. In the case of bigger organisations, the employer representative can be, for example, a unit leader if the person holds a right to sign such documents.

Office and administration

Office and administration costs will be automatically calculated as a 15% flat rate from reported staff cost. Cost will be visible in “Financial overview.”

Travel and accommodation

Travel and accommodation costs will be automatically calculated as a 15% flat rate from reported staff cost. Cost will be visible in “Financial overview.”

External expertise and services

For **reporting face-to-face event** costs choose “Face-to-face events…” from the dropdown menu. Remember to select the right country unit cost. Add name of the event to “description” and event dates to “comment”. Add number of participants per day to the “number of units” (i.e., 24 participants x 2 day = 48 units). (Figure 21)

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated
verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Description	Comment	Total invoice value	VAT	Number of Units
R1.1	Project Manager	January 2023 - June 2023	0,00	0,00	620,00
R1.2	Communication Manager	January 2023 - June 2023	0,00	0,00	230,00
R1.3	1st training session for the target grou	7.-8.3.2023	0,00	0,00	48,00

Figure 21 When reporting face-to-face event unit cost (R1.3) name the event, add the dates when event took place as well as correct unit amount.

As evidence of the reported face-to-face event unit costs, a signed participation list for each event day as well as agenda of the event must be attached. Since only one attachment per expenditure is currently allowed, please combine the documents in one pdf or zip file before attaching it to the expenditure.

Keep in mind that any eligible real costs related to the purchase of a service, relevant for projects’ activities, with no or minor physical items included in the acquisition compared to the services value, belong fully to the **external expertise and services cost category**, no matter how they were initially planned in the projects’ application form and budget.

Before starting to fill in the real costs, fill in the “Public procurements” section in Jems (for more info see ***Public procurements*** chapter). For **reporting the real costs** choose “cost category” “External expertise and services”. **Select the correct contract from the “Contract name” dropdown menu.** This field is used to link the expenditure to public procurements. All contract names created by the partner in the public procurement section show up here. Add also internal reference, invoice number, invoice date and date of payment for the expenditure. (Figure 22)

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates a
verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Cost category	Contract name	Internal reference...	Invoice no.	Invoice date	Date of payment
R1.1	Staff costs	N/A				
R1.2	Staff costs	N/A				
R1.3	External expertise a...	N/A				
R1.4	External expertise a...	Visual design	0005	0023	3/1/2023	3/5/2023

Figure 22 When reporting external expertise and services real cost (R1.4) link the cost to correct public procurement or tender by selecting correct contract name from the dropdown menu "Contract name".

Add the name of the service provider to "description" and short description of the cost item to explain what, when, to whom, where, why and/or how it relates to the project activities in "comment" box. Give the total value of the invoice, VAT and the declared amount. (Figure 23)

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first su
verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Description	Comment	Total invoice value	VAT	Number of Units	Price per unit	Declared amount
R1.1	Project Manager	January 2023 - June 2023	0,00	0,00	620,00	36,00	22.320,00
R1.2	Communication Manager	January 2023 - June 2023	0,00	0,00	230,00	36,00	8.280,00
R1.3	1st training session for the target group	7.-8.3.2023	0,00	0,00	48,00	55,00	2.640,00
R1.4	MyVisuals Oy	Design of manual	3.500,00	840,00			3.500,00

Figure 23 When reporting external expertise and services real cost (R1.4) add the name of the service provider, what service was provided, and total value of invoice, VAT and the declared amount of cost.

Add the evidence documents related to the expenditure to the "attachments" in the list of expenditure. Since only one attachment per expenditure is currently allowed, please combine the documents in one pdf or zip file before attaching it to the expenditure.

Indicative list of evidence:

- An invoice or a request for reimbursement providing all relevant information in line with the applicable accountancy rules
- Outputs of the work of external experts or service deliverables
- Proof of payment

Equipment

For **reporting project management equipment** choose “Project management equipment” from the dropdown menu. Add N/A to “description” and indicate the period of reported management equipment to “comment”. Add the number of units based on totally reported staff working hours for period to the “number of units”. For example, Project Manager 620 units + Communication Manager 230 units = 850 units reported for management equipment. Each time when staff cost is reported project management equipment unit cost must be reported as well. Project management equipment for staff members is reported as one cost item based on the reported hours under the Staff cost category.

Keep in mind that any eligible real costs related the purchase of physical items, supplies and materials, relevant for projects’ activities, with no or minor services included in their acquisition compared to the physical item value, belong fully to the **equipment cost category**, no matter how they were initially planned in the projects’ application form and budget.

Before starting to fill in the real costs fill in “Public procurements” section in Jems (for more info see ***Public procurements*** sub-chapter). For **reporting the real cost** choose “cost category” “Equipment.” Select the correct contract from the “Contract name” dropdown menu. This field is used to link expenditure to public procurements. All contract names created by the partner in the public procurement section show up here. Add also internal reference, invoice number, invoice date and date of payment for the expenditure.

Add the evidence documents related to the expenditure in the “attachments” in the list of expenditure. Since only one attachment per expenditure is currently allowed, please combine the documents in one pdf or zip file before attaching it to the expenditure.

For reporting IT costs including hardware, software, tools subscriptions, and supporting infrastructure see Annex 2 Cost categories for reporting of IT costs.

Indicative list of evidence:

- An invoice or a request for reimbursement providing all relevant information in line with the applicable accounting rules
- Proof of equipment purchased
- Proof of payment

9.4.4 Public procurements

All procurements to which the Programme, national and EU level thresholds apply must be added in *Public Procurements* section in the Jems.

Insert each procurement by pushing “Add Procurement” button. (Figure 24)

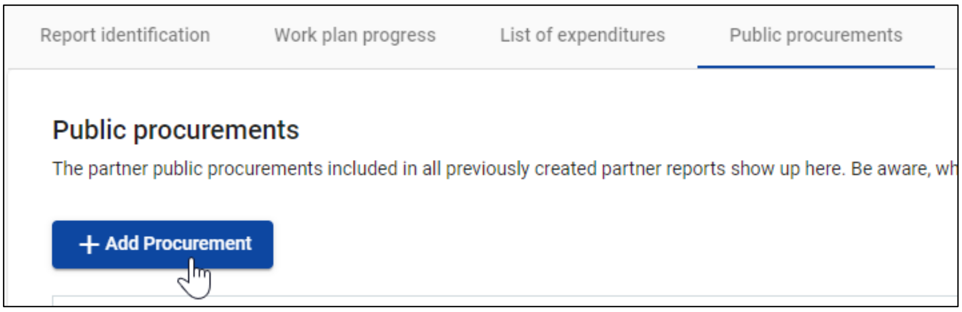


Figure 24 Each procurement which contract is above national and EU level thresholds as well as cost that exceed 10 000 euro (excluding VAT) are added separately in the list by bushing "Add Procurement".

Fill in required information for the procurement. **The Contract Name is reused in the List of expenditure** (Figure 25). It is therefore important that the partner provides a distinct name, so that the procurement can be easily identified in the List of expenditure. When the compulsory information has been added, the procurement can be created. Make sure that all fields concerning the procurement are filled in correctly. It is not possible to correct the information after the report where the procurement was created has been submitted.

Figure 25 Given contract name is used when costs (R1.4) are reported in the list of expenditure.

For any procurements above EU-thresholds, fill in the section Beneficial owner(s) of the contractor (Figure 26). **For any sub-contractor above 50 000 euro, fill in section Subcontractor(s)** (Figure 27). In the EC Regulation 2021/1060 (CPR) Annex XVII art 23 and 24 it is requested that beneficial owners and subcontracts are listed in the procurements section.

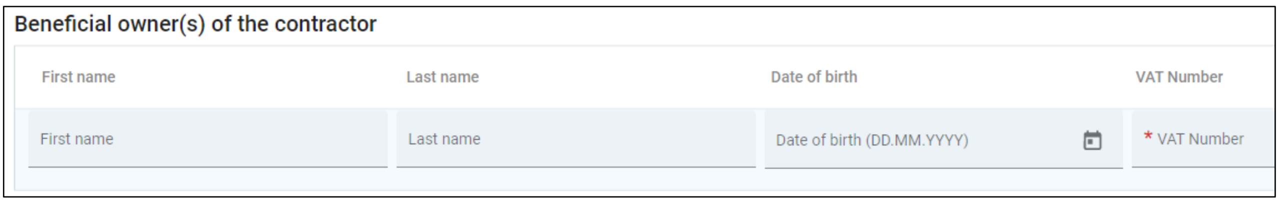


Figure 26 Fill in information about Beneficial owner(s) of contractor.

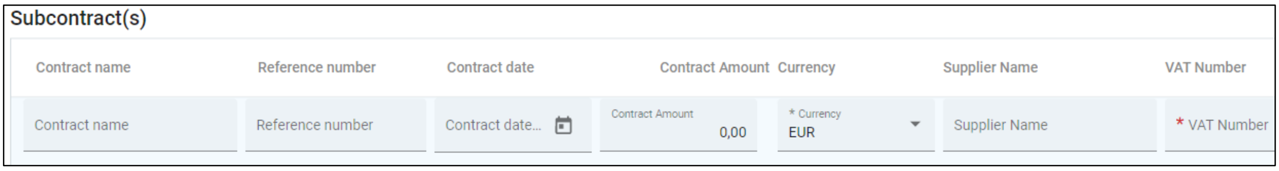


Figure 27 Fill in information about the Subcontract(s).

Beneficial owner in Interreg context means any natural person(s) who ultimately owns or controls the beneficiar(ies) or public procurement contractor(s)and/or the natural person(s) on whose behalf a transaction (e.g. benefiting from the grant) or activity (e.g. obligations resulting from a public procurement contract) is being conducted. Beneficial owners can be identified for corporate structures, trusts, and legal entities such as foundations, and legal arrangements similar to trusts. As such, beneficial owners are not present in public entities.

In case of corporate structures, the beneficial owner:

- owns more than 25% of the company shares directly or indirectly through another company.
- holds more than 25% of the voting rights in the company directly or indirectly through another company.
- exercises actual control over the company on other grounds. Other grounds may refer to a partnership agreement, shareholders' agreement, the exercise of dominant influence or the power to appoint senior management.

The information on beneficial owners can for example be found in Beneficial ownership registers interconnection system (BORIS): https://e-justice.europa.eu/38590/EN/beneficial_ownership_registers_interconnection_system_boris?EUROPEAN_UNION&action=maximize&idSubpage=1&member=1.

Add documentation related to the procurement in “Attachment(s)”:

- Evidence of the procurement process (announcement, selection, award) in line with the legal status/organisational/regional/national procurement rules or the EU procurement rules depending on the amount of the contract and programme specific rules.
- For *external expertise and services*, a document showing the services to be provided with a clear reference to the project and the programme. For experts paid based on a daily fee, the daily rate together with the number of days contracted and the total amount of the contract must be included in the contract. Any changes to the contract must comply with the public procurement rules and must be documented.
- For *equipment*, a document showing the services to be provided with a clear reference to the project and the programme. Any changes to the contract must comply with the public procurement rules and must be documented.
- For costs that are 10 000 EUR (excluding VAT) or more a price comparison documentation must be added (if national public procurement level or/and organisations practises will not apply with lower limits).

As the public procurements section is cumulative, the following aspects of the section must be considered:

- Regardless of which report a procurement is added, it will show up in all following partner reports.
- A procurement can only be deleted and edited in the report where it was created.
- Beneficial owners, Sub-contractors and attachments can still be added in future reports

9.4.5 Contributions

Partners (including lead partner) do not need to fill in this section.

9.4.6 Report annexes

All attachments that a partner has attached to other parts of the partner report are listed under this section.

Employment documents or equivalent documents are attached in report annexes when the staff member costs are reported for the first time, or when the contract is changed.

If real costs are reported in the partner report attach **book-keeping list/ general ledger** to “Report annexes”.

9.4.7 Financial overview

Under the Financial overview section, there are various financial tables summing up the declared expenditure.

Flat rate (office and administration, travel and accommodation) costs and preparation cost lump sum are only visible in “Financial overview.”

9.4.8 Submit

Before submitting the partner report, make sure that you have filled in all fields and inserted all necessary information into the report. Partner reports are not reverted for corrections and errors in submitted reports will lead to delays in checks or full re-doing the report. Make sure that reporting periods dates are correct, staff costs are reported one line per staff member, Project management equipment unit cost has been reported if some staff costs have been reported, all procurements are filled in correctly, required attachments are in place.

After the Report identification, Work plan progress, List of expenditure, Public procurement, are filled in by the project partner, the partner can submit the report to National controller by clicking Submit partner report. A confirmation for submitting the Partner Report is asked.

9.4.9 Partner level financial follow up

Partner can follow up its spending and paid ERDF amounts in the Financial Living Tables in Jems. If partner wants to check remaining budget after the last payment the partner must choose “Total Verified by JS/MA” from the drop-down menu (Figure 28).

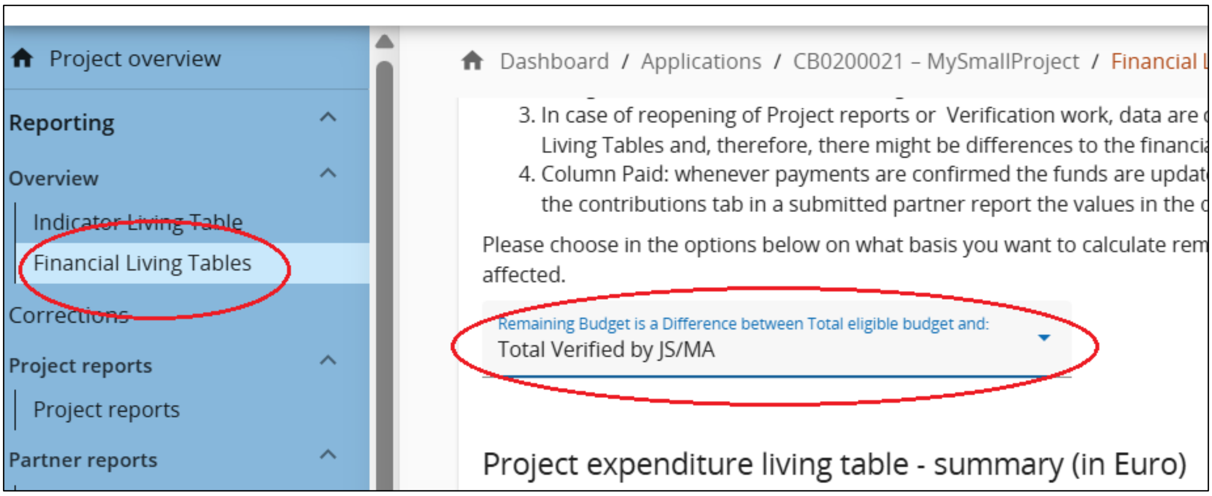
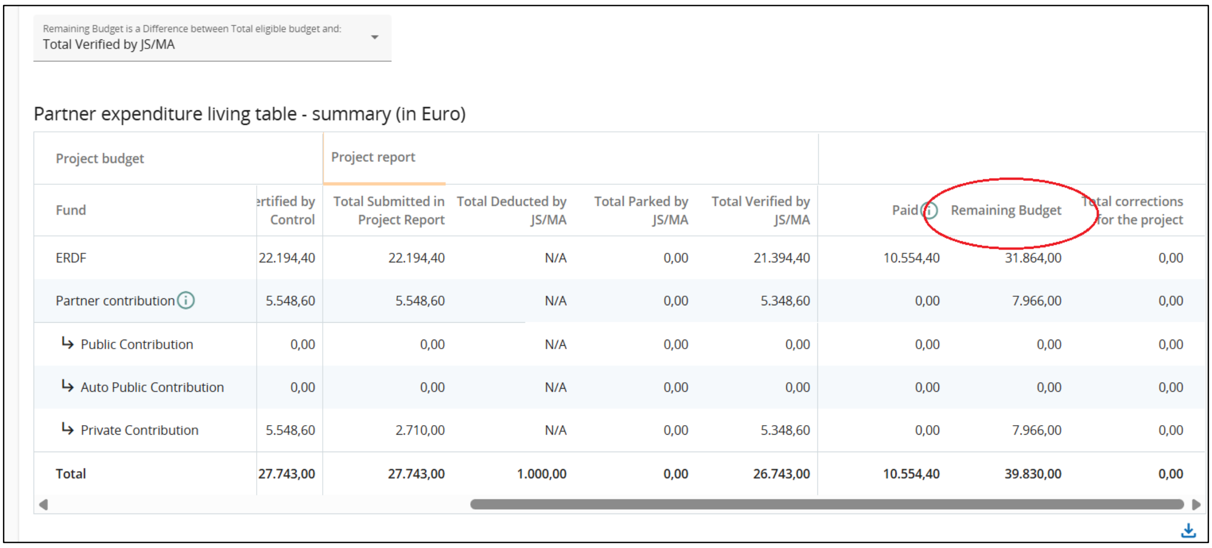


Figure 28 To check remaining budget after the last payment the partner must choose “Total Verified by JS/MA” from the drop-down menu.

The partner’s remaining budget can be found in the column “Remaining budget” (Figure 29). However, this does not take into account recently submitted partner or project reports that have not yet been paid to the lead partner. In addition, it does not include recoveries from previous periods (cuts made after the project report has been paid and deducted in a later period). Recoveries are shown in the column “Total corrections for the project”.



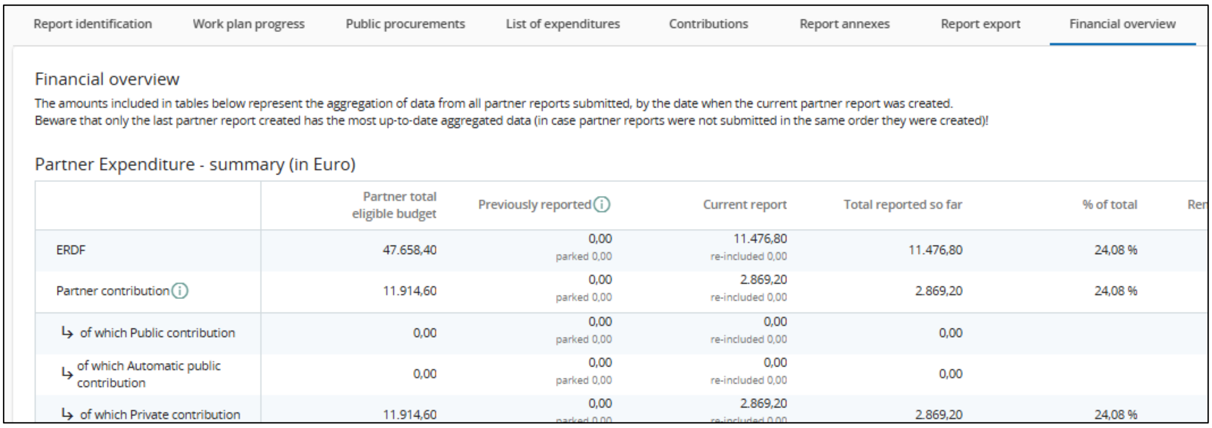
Remaining Budget is a Difference between Total eligible budget and:
Total Verified by JS/MA

Partner expenditure living table - summary (in Euro)

Project budget		Project report						
Fund	ertified by Control	Total Submitted in Project Report	Total Deducted by JS/MA	Total Parked by JS/MA	Total Verified by JS/MA	Paid	Remaining Budget	tal corrections for the project
ERDF	22.194,40	22.194,40	N/A	0,00	21.394,40	10.554,40	31.864,00	0,00
Partner contribution	5.548,60	5.548,60	N/A	0,00	5.348,60	0,00	7.966,00	0,00
↳ Public Contribution	0,00	0,00	N/A	0,00	0,00	0,00	0,00	0,00
↳ Auto Public Contribution	0,00	0,00	N/A	0,00	0,00	0,00	0,00	0,00
↳ Private Contribution	5.548,60	2.710,00	N/A	0,00	5.348,60	0,00	7.966,00	0,00
Total	27.743,00	27.743,00	1.000,00	0,00	26.743,00	10.554,40	39.830,00	0,00

Figure 29 Partner’s remaining budget can be found from the column “Remaining budget”.

The Financial Overview tables (Figure 30) in the partner report may not be accurate depending on when the report was opened. For example, if the report is opened before the previous period’s project report is verified, the sums from previous report are not included in the financial tables. In addition, some corrections made by national controllers or at the JS/MA level may not yet be visible in the financial tables.



Report identification | Work plan progress | Public procurements | List of expenditures | Contributions | Report annexes | Report export | Financial overview

Financial overview

The amounts included in tables below represent the aggregation of data from all partner reports submitted, by the date when the current partner report was created.
Beware that only the last partner report created has the most up-to-date aggregated data (in case partner reports were not submitted in the same order they were created)!

Partner Expenditure - summary (in Euro)

	Partner total eligible budget	Previously reported	Current report	Total reported so far	% of total
ERDF	47.658,40	0,00 parked 0,00	11.476,80 re-included 0,00	11.476,80	24,08 %
Partner contribution	11.914,60	0,00 parked 0,00	2.869,20 re-included 0,00	2.869,20	24,08 %
↳ of which Public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00	
↳ of which Automatic public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00	
↳ of which Private contribution	11.914,60	0,00	2.869,20	2.869,20	24,08 %

Figure 30 Financial Overview tables in the partner report.

When the Managing Authority informs the lead partner about the ERDF payment, the project financial follow-up table is attached to the same email (Figure 31). The table includes information such as the spending rate, paid ERDF amounts etc. In other words, after each payment the project can see the financial situation of the project in the document. For example, the financial follow-up document attached to the payment decision for reporting period 1 will show the financial situation up to the end of period 1.

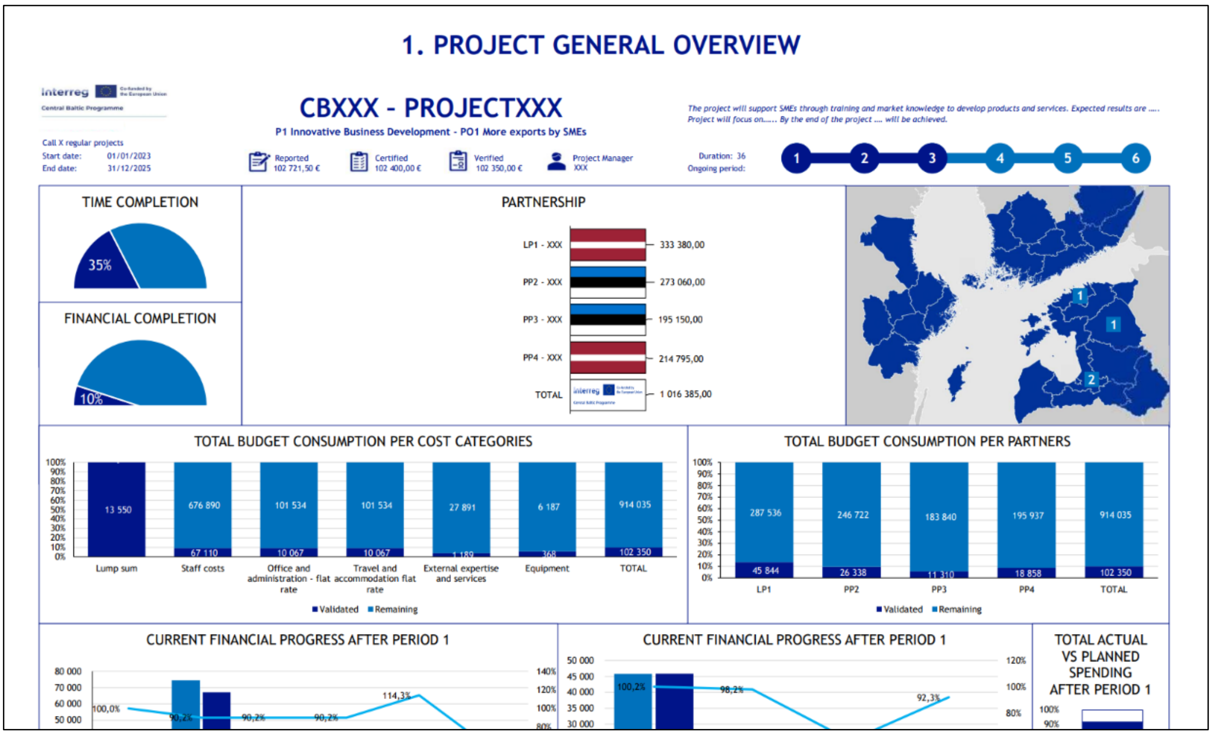


Figure 31 When the Managing Authority informs the lead partner about the ERDF payment, the project financial follow up table is attached in the same email.

9.5. Project Report

The lead partner prepares and submits the project report based on the partner reports that have been certified by the National Controller.

The project report builds on the partner reports, and it provides an overview of the project as a whole. The content must be filled in by the lead partner and is based on the information provided by the partners, as well as the approved work plan. The content and the attachments are not automatically transferred from partner reports; it is up to the lead partner to provide the information of the whole project and compile a joint report for the period.

Access to the project report can be found from left hand side toolbar *Reporting* and *Project reports*. A new report can be created through "Add Project Report" button (Figure 32).

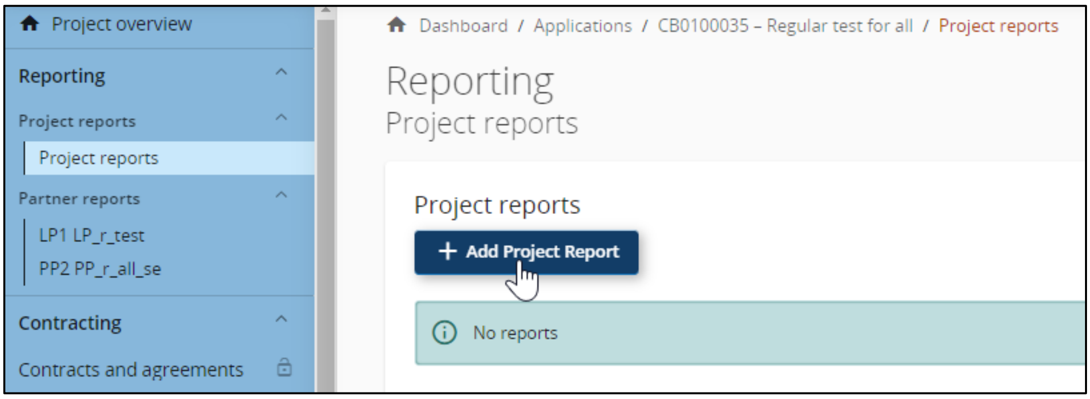


Figure 32 Opening project report.

Open a new project report only after the previous project report has been verified by the JS/MA (Figure 33). A new project report may be opened before the previous one is verified only in exceptional cases. In such cases, consult the JS contact person before opening the project report. When a newer report exists, data affecting cumulative figures—for example, output and result indicator values—cannot be corrected in a reopened report.

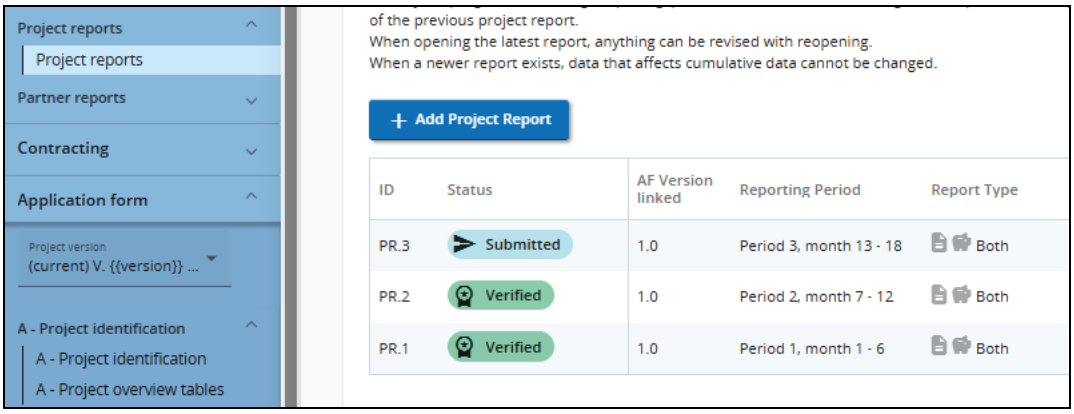


Figure 33 A new project report may be opened only after the previous report has reached verified status.

The project report includes following different sections: Report identification, Work plan progress, Project results & Horizontal principles, List of partner certificates, Project report annexes, Financial overview, Report exports and Submit.

9.5.1 Project progress report identification

Add the reporting period start date and reporting period end date (Figure 34). The JS contact person provides a supporting document for the lead partner which states the starting and ending dates per reporting period. The *Reporting periods* document can be also found from "Contracts" section "Contracts and agreements" as attached document. Select the correct reporting period from the dropdown menu "Link to reporting schedule (contracting)". Type of the project report will be added automatically as "Both" and reporting deadline will appear.

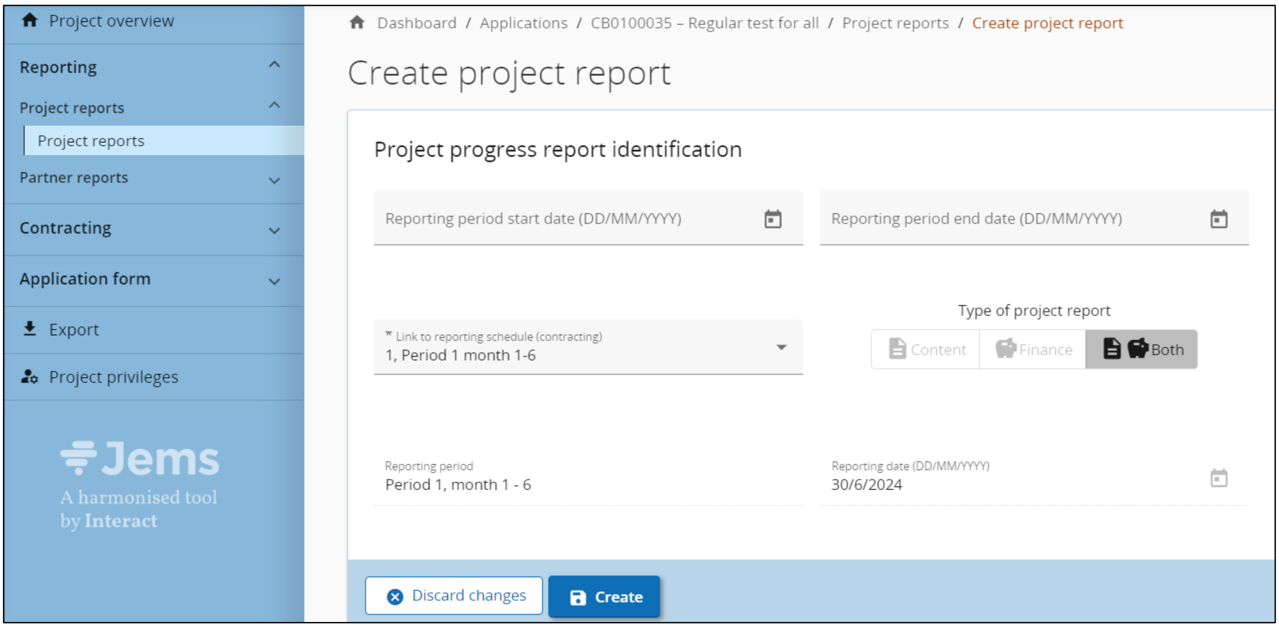


Figure 34 In the starting page of the project report correct reporting period must be defined.

Highlights of main achievements

Please describe project progress up to now including specific objectives reached and main outputs delivered by also highlighting the added value of the cooperation. The summary should highlight main achievements, be interesting and understandable for non-specialists.

Overview of Project outputs and result overview

This section is filled in automatically based on the reported values of the programme output and result indicators. Output indicators are reported in *Work plan progress* section and result indicators in *Project results & horizontal principles* section.

Partner problems and deviations

If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solution found.

If applicable, please describe any deviations in the spending profile compared to the amounts indicated in the application form.

Partner spending profile (in Euro)

This section will appear when partner certificate is added in project report. The section is filled in automatically.

Target groups

Please explain for each target group in what way and to what extent they were involved in your project in this reporting period.

9.5.2 Work plan progress

Project specific objective and communication objective

Please explain the progress of specific work package towards the objectives is as defined in the application form. Select also progress status (not achieved, partly achieved, fully achieved).

Progress

Please explain the overall progress of the work package and how the partners were involved and contributed to the overall progress.

Investments

If the project includes investments, please describe the progress of investments in the reporting period.

Activities

Please describe progress made in each activity and deliverable. Select also progress status (not achieved, partly achieved, fully achieved). Attach the evidence document to activities and deliverables. (Figure 35)

A deliverable is a tangible or intangible object produced as a result of the activity that is intended to be delivered to a target group or a stakeholder. A deliverable could be a report, a document, a handbook, a server upgrade, or any other building block of the project results.

It is recommended that the evidence documentation is attached in pdf format. If there is a need to attach more than one document per deliverable or output, zip file can be used.

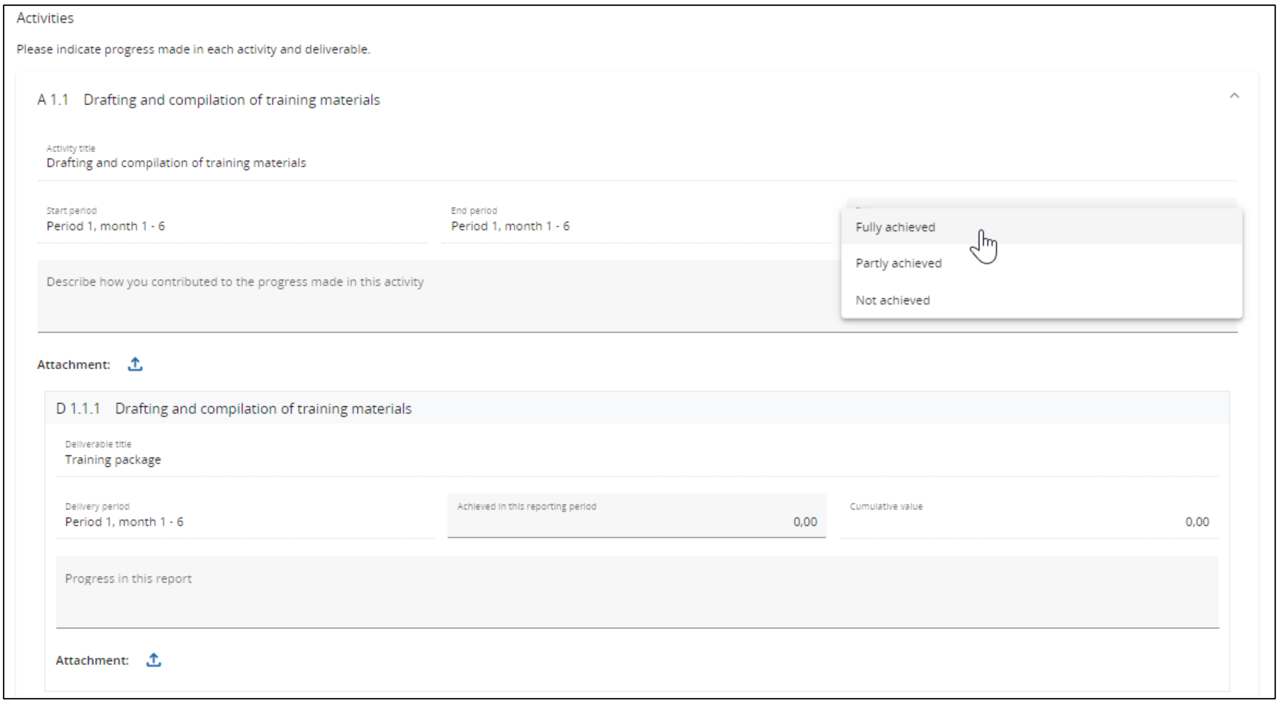


Figure 35 Reporting of activities and deliverables.

There are no numerical values set for the deliverables in the application form. Thus, numerical values related to the progress made in deliverables can be left empty (Figure 36).

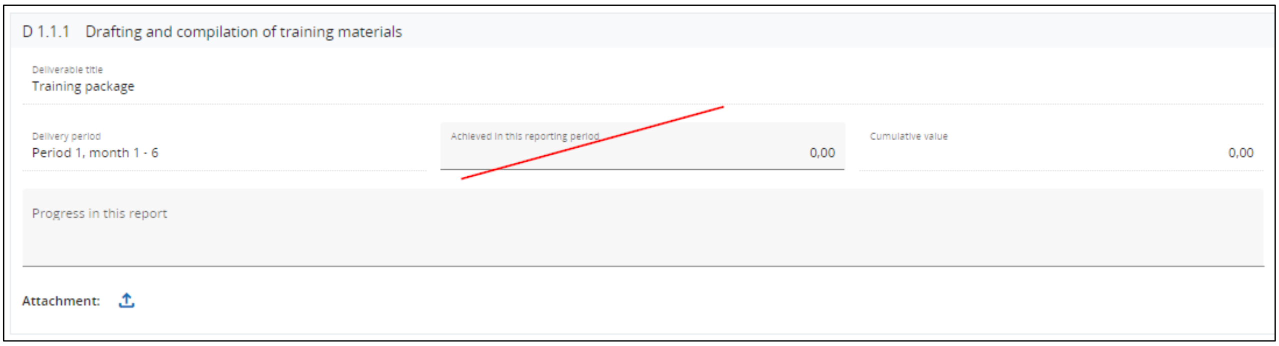


Figure 36 Numerical values for deliverables are not reported.

Outputs

An output is the main achievement of a set of project activities which contributes to the programme output indicator(s) of the Programme Objective.

Explain the progress towards project outputs and output indicators. Note that output indicators are reported only in every second report starting from the period 2 report, and in all cases in the last report, regardless of which reporting period it covers. Remember to include the full year’s contribution (two reporting periods) in the report. Enter the value of the output indicator achieved in the box “Achieved in two last reporting periods.” Attach the cumulatively completed output (and result) indicator template to the outputs.

If more than one document needs to be attached per deliverable or output, a zip file may be used.

Guidance videos on how to report indicators in Jems are available on the website: https://centralbaltic.eu/for-projects/documents/#videos.

When reporting output indicators for **Programme Objectives 1, 2, 6, and 7**, ensure that the cumulative value of the output indicator(s) you report matches the output indicator value in the output (result) indicator Excel template (Figure 37).

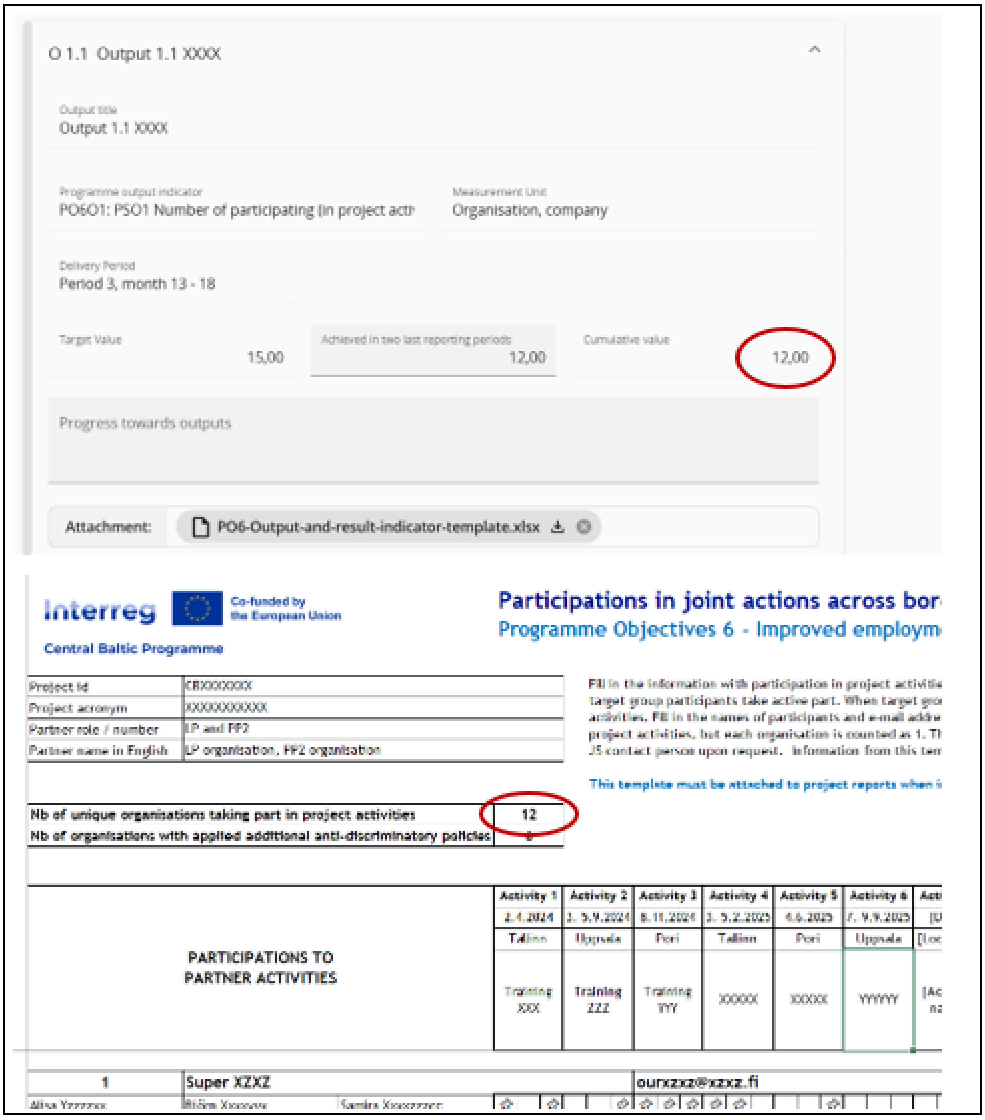


Figure 37 Output values must match between the Excel template and the project report.

When reporting the output indicators for **Programme Objectives 3, 4, and 5**, remember to check that the output indicator value for “Participations in joint actions across borders” in the Excel template matches the total cumulative value in Jems.

If your application form includes several outputs that contribute to the same output indicator target value, the total reported value of these outputs must match the total value in the Excel template (Figure 38).

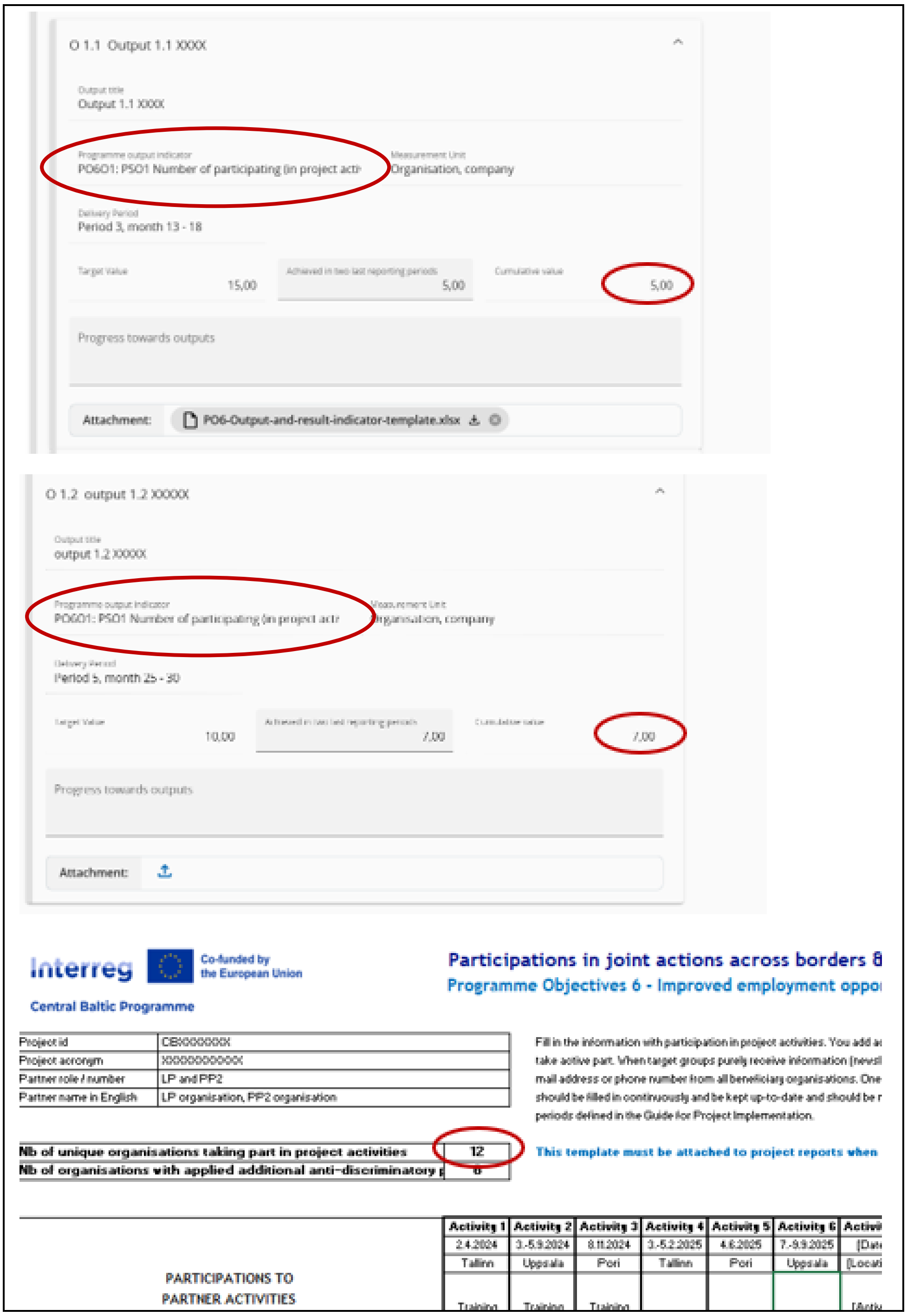


Figure 38 The total reported value of outputs must match the total value in the Excel template.

9.5.3 Project results and Horizontal principles

Project results

The project result is a change compared to the initial situation deriving from the use of project outcomes by target groups and stakeholders (it could be formulated as a statement describing improvement of a current state or condition). It should directly contribute to the achievement of programme result indicator.

Explain the progress towards project results and the result indicator. Note that the result indicator is reported only from the fourth reporting period onwards, and thereafter in every second period, as well as in the last report regardless of which reporting period it covers.

When reporting the indicator for the first time, remember to include the full two years (four reporting periods). Later on, include the full year's contribution (two reporting periods) in the report. Enter the value of the result indicator achieved in the box "Achieved so far." Attach the evidence document to the results. For Programme Objectives 1, 2, 6, and 7, also attach the cumulatively filled in output (result) indicators template to the results.

If more than one document needs to be attached per deliverable or output, a zip file may be used.

Guidance videos on how to report indicators in Jems are available on the website: https://centralbaltic.eu/for-projects/documents/#videos.

When reporting the result indicator for **Programme Objectives 1, 2, 6, and 7**, ensure that the cumulative value of the result indicator you report matches the result indicator value in the Excel template (Figure 39).

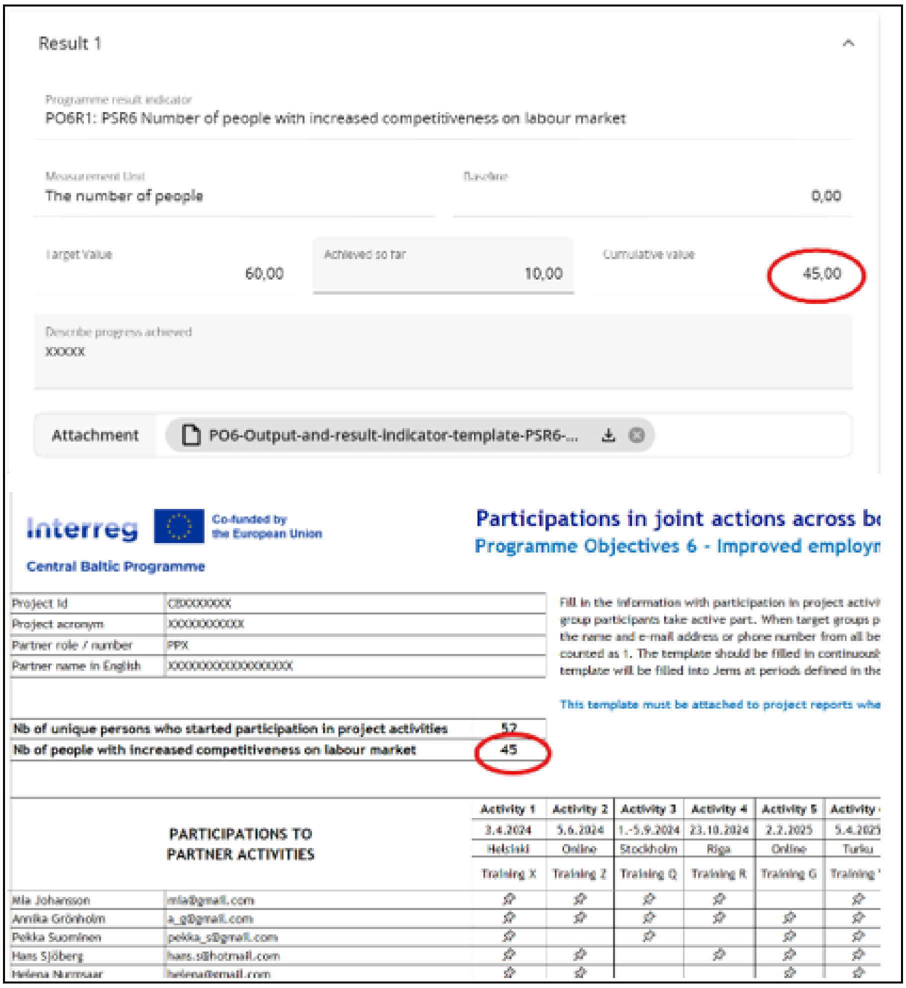


Figure 39 Result indicator values must match in the excel template and the project report.

Result indicator values for **Programme Objectives 3, 4, and 5** projects are not recorded in the Excel template. The achievement of result indicators is reported only in the Jems project report.

Horizontal principles

Please indicate which type of contribution to horizontal principles applies to the project and describe the contribution in the last project report.

9.5.4 List of partner certificates

Please include the relevant partner certificates for the reporting period in the project report (Figure 40). Only in very exceptional cases can a partner certificate be included in the project report for the following period. In such cases, consult the JS contact person before submitting the project report.

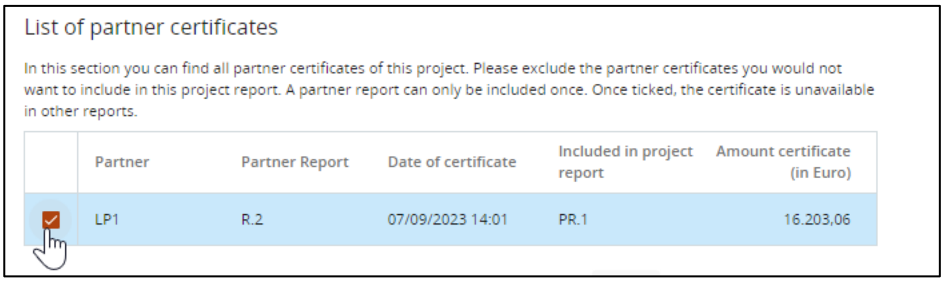


Figure 40 Tick box to include partner certificates.

9.5.5 Project report annexes

All attachments that have been attached to other parts of the project report are listed under this section.

Signed **Confirmation letter to the project report** must be attached in each project report. The Confirmation Letter must be signed by the same person who signed the Subsidy Contract unless signatory rights for the project have changed. If the signee is not the same person the signature rights of the person must be confirmed by adding relevant documentation in Jems under *Contracting* section, *Contracts and agreements*. The document can be signed electronically, if preferred. The document can be found from https://centralbaltic.eu/for-projects/documents/

Lead partner must indicate the amount of applied ERDF in the Confirmation Letter. ERDF amount can be found from *Financial overview* section (Figure 41).

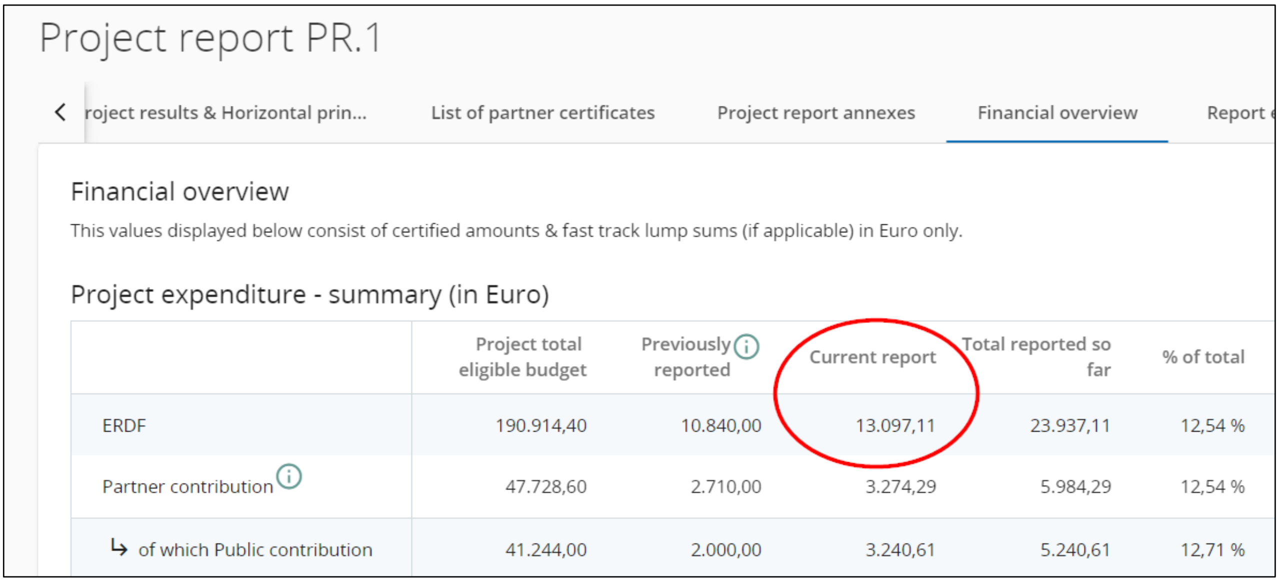


Figure 41 The lead partner must indicate the total amount of ERDF in the Confirmation letter to the project report. Total ERDF amount of the current report can be found from Financial overview table. Relevant partner certificates must be included in the project report before the total ERDF sum of the report comes visible in the table.

9.5.6 Financial overview

Under the Financial overview section, there are various financial tables summing up the declared expenditure. Financial tables show information from partner certificates which are included in the project report.

9.5.7 Submit

After the Report identification, Work plan progress with relevant attachments, Project results and Horizontal principles, List of partner certificates are filled in and the signed Confirmation letter to the project report is attached in Project report annexes, the lead partner can submit the project report to the Joint Secretariat by clicking Submit project report.

9.5.9 Reporting output and result indicators

Project level progress is reported bi-annually i.e., in six-month intervals. Following the six-month reporting periods, each project must report the contribution towards output indicators starting from the second reporting period i.e., after one full year of the project implementation. Result indicators are reported from fourth reporting period i.e., after two full years of the project implementation. After the first indicator reporting, the indicator contribution is reported in every second report i.e., on an annual basis. The indicator reporting is done as part of the project progress reports in Jems.

When reporting the contribution towards the output and results indicators, it is mandatory to stick to output and result indicator definitions laid out in the Indicator Fiches in the Programme Manual. It is recommended that the lead partner discusses about the indicators reporting requirements with the JS contact person in the very beginning of the project implementation.

The Programme has prepared templates to support the follow-up and reporting of the output and result indicators. Each project shall use the prepared template for recording the contribution. Besides the progress reporting, the information given in the templates will be used and needed for evaluation of the Programme and its impact. The templates can be found from the Programme website at https://centralbaltic.eu/for-projects/documents/.

Reporting of achieved output and result indicators as part of project reports must be based on the records in output and result indicators templates. **The output (result) indicators template must be attached in the project report in Jems when the indicators are reported.**

Based on the output and result indicator templates and project reports, JS contact person will discuss progress of achievement of output and result indicators at least twice with each project: in the mid-term (project midterm meeting) and during last reporting period. Thus, it is expected that output and result indicator templates are kept up to date during the whole project implementation and up to one year after the project end. Last reporting of the achievement of results (result indicators) will take place one full year after project has ended and it is the obligation of the lead partner to ensure that relevant result indicator achievement information is available and submitted to the Programme. The obligation to report result indicator achievement concerns Programme Objectives 1, 2, 3, 4, 5 and 7. Programme Objective 6 projects do not need to report the achievement one year after the project end date.

9.5.10 Project level financial follow up

At the project level, the partnership can follow up its spending and paid ERDF amounts in the Financial Living Tables in Jems. If the project wants to check the remaining budget after the last payment, it must select “Total Verified by JS/MA” from the drop-down menu (Figure 42).

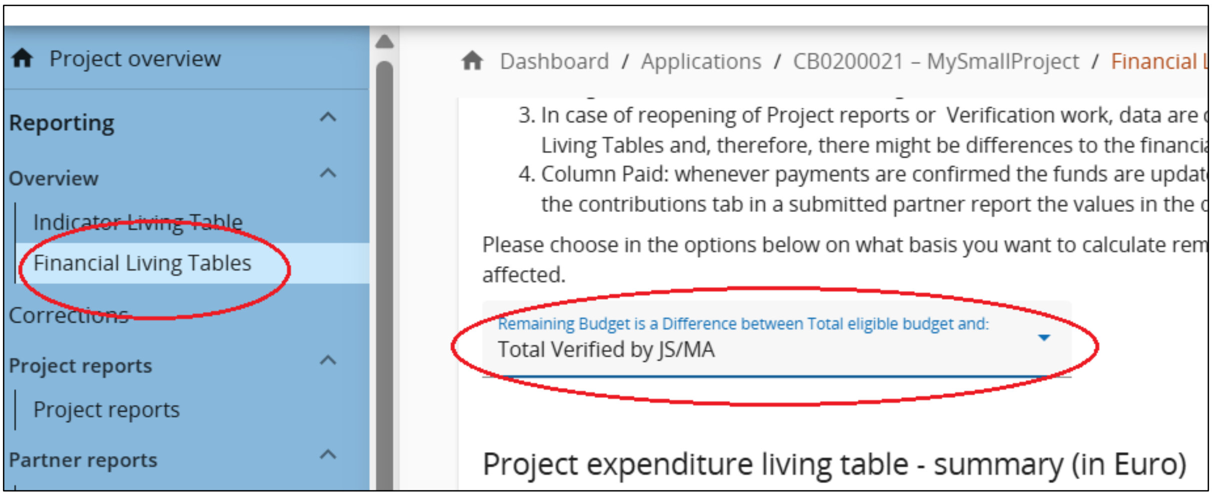
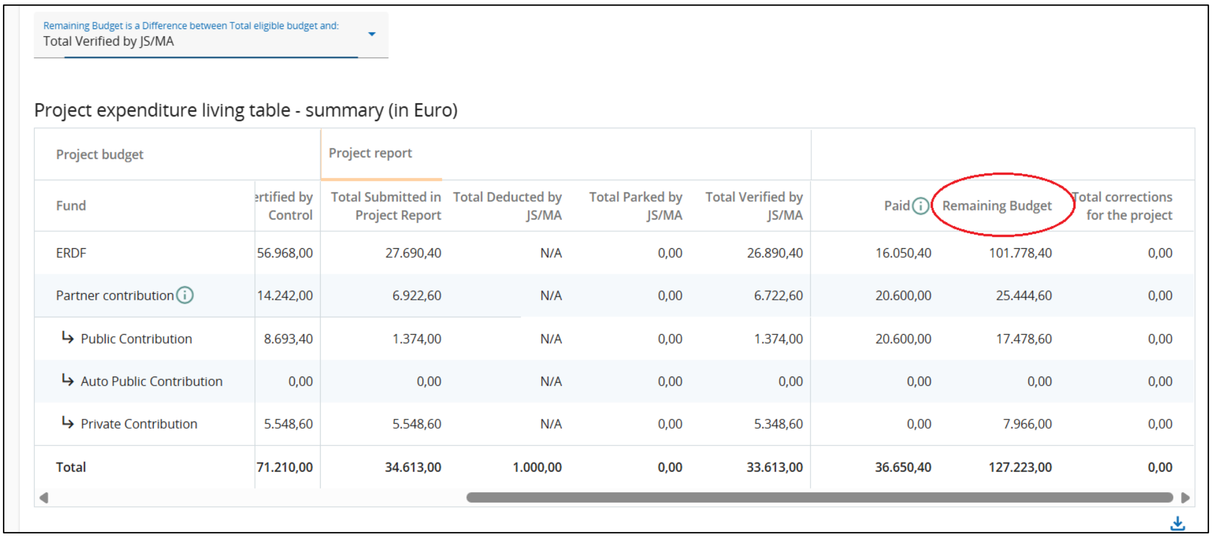


Figure 42 To check remaining budget after the last payment project has to choose “Total Verified by JS/MA” from the drop-down menu.

The project’s remaining budget can be found in the column “Remaining budget” (Figure 43). However, this does not take into account recently submitted partner or project reports that have not yet been paid to the lead partner. In addition, it does not include recoveries from previous periods (cuts made after the project report has been paid and deductions in a later period). Recoveries are shown in the column “Total corrections for the project”.



Remaining Budget is a Difference between Total eligible budget and:
Total Verified by JS/MA

Project expenditure living table - summary (in Euro)

Project budget		Project report						
Fund	ertified by Control	Total Submitted in Project Report	Total Deducted by JS/MA	Total Parked by JS/MA	Total Verified by JS/MA	Paid	Remaining Budget	Total corrections for the project
ERDF	56.968,00	27.690,40	N/A	0,00	26.890,40	16.050,40	101.778,40	0,00
Partner contribution	14.242,00	6.922,60	N/A	0,00	6.722,60	20.600,00	25.444,60	0,00
↳ Public Contribution	8.693,40	1.374,00	N/A	0,00	1.374,00	20.600,00	17.478,60	0,00
↳ Auto Public Contribution	0,00	0,00	N/A	0,00	0,00	0,00	0,00	0,00
↳ Private Contribution	5.548,60	5.548,60	N/A	0,00	5.348,60	0,00	7.966,00	0,00
Total	**71.210,00**	**34.613,00**	**1.000,00**	**0,00**	**33.613,00**	**36.650,40**	**127.223,00**	**0,00**

Figure 43 Project’s remaining budget can be found from the column “Remaining budget”.

The Financial Overview tables (Figure 44) in the partner report may not be accurate depending on when the report was opened. For example, if the report is opened before the previous period’s project report is verified, the sums from that previous report are not included in the financial tables. In addition, some corrections made by national controllers or at the JS/MA level may not yet be visible in the financial tables.

eport identification | Work plan progress | Project results & Horizontal prin... | List of partner certificates | Project report annexes | Financial overview | Repo

Financial overview

This values displayed below consist of certified amounts & fast track lump sums (if applicable) in Euro only.

Project expenditure - summary (in Euro)

	Project total eligible budget	Previously reported	Current report	Total reported so far	% of total	Remaining budget	Previously verified	Previously paid
ERDF	128.668,80	56.968,00	0,00	56.968,00	44,27 %	71.700,80	26.890,40	16.050,40
Partner contribution	32.167,20	14.242,00	0,00	14.242,00	44,27 %	17.925,20	6.722,60	N/A
↳ of which Public contribution	18.852,60	8.693,40	0,00	8.693,40	46,11 %	10.159,20	1.374,00	N/A
↳ of which Automatic public contribution	0,00	0,00	0,00	0,00		0,00	0,00	N/A
↳ of which Private contribution	13.314,60	5.548,60	0,00	5.548,60	41,67 %	7.766,00	5.348,60	N/A
Total	**160.836,00**	**71.210,00**	**0,00**	**71.210,00**	**44,27 %**	**89.626,00**	**33.613,00**	**16.050,40**

Figure 44 Financial Overview tables (Picture XXX) in project report.

When the Managing Authority informs the lead partner about the ERDF payment, the project financial follow-up table is attached to the same email (Figure 45). The table includes information such as the spending rate, paid ERDF amounts etc. In other words, after each payment the project can see the financial situation of the project in the document. For example, the financial follow-up document attached to the payment decision for reporting period 1 will show the financial situation up to the end of period 1.

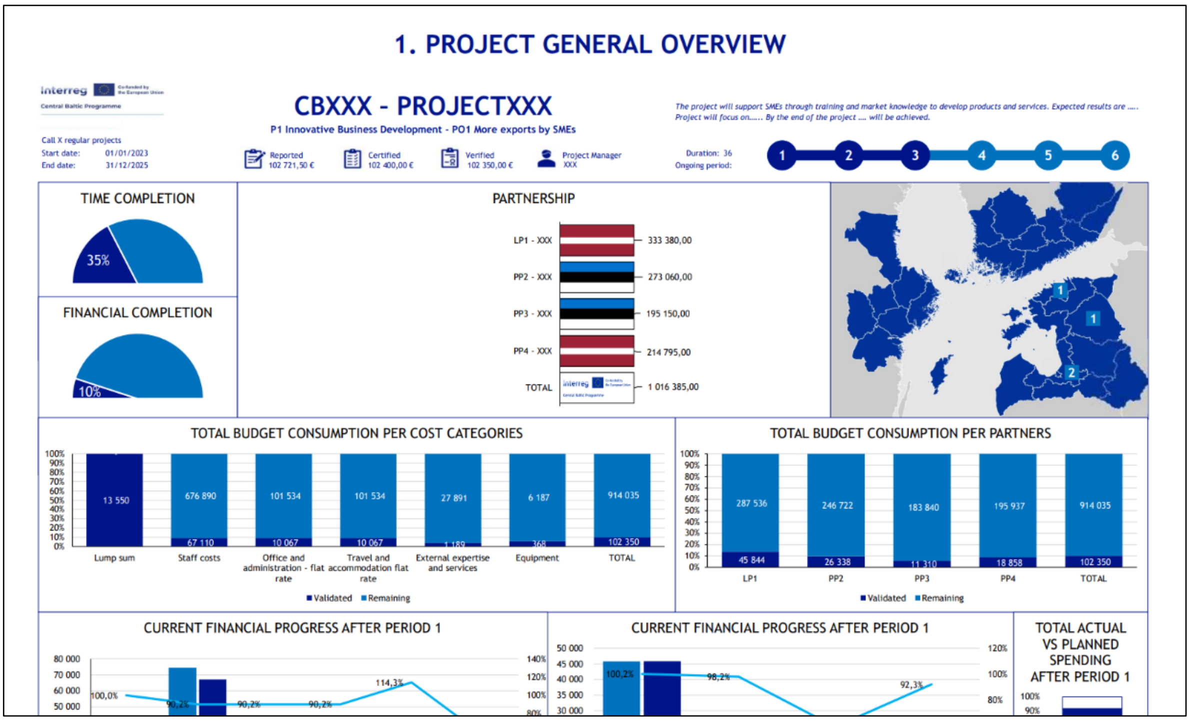


Figure 45 When the Managing Authority informs the lead partner about the ERDF payment, the project financial follow up table is attached in the same email.

9.6. Checks of the Project Report and payments to projects

The Project Report is checked by the Joint Secretariat/ Managing Authority (JS/ MA). The focus is on getting a good understanding of the progress of the project, ensuring that costs and activities are eligible and relevant for the project, and that the outputs and results are being achieved according to plans.

The Joint Secretariat and Managing Authority have in total 80 days to complete the checks on the Project Report and pay the corresponding eligible ERDF (European Regional Development Fund) amount to the lead partner, starting from the day the Project Report is submitted in Jems. If there is information missing in the Project Report the JS/ MA will send an email to the lead partner explaining which information needs to be added to the report. The lead partner must complement the report and give clarifications.

When the report questions are sent to the lead partner the calculation of the 80 days stops until the lead partner has answered the questions.

The eligible ERDF funds based on the JS/MA checks will be paid to the lead partner. The lead partner is informed about the payment by email. The lead partner must transfer the shares of funding for each partner immediately.

The lead partner bears the responsibility to cover any possible additional costs in case of incorrect bank information in Jems.

10. Project Modifications

If the partnership notices that the approved project application needs to be updated in order to reach the promised results and outputs, the project may apply for a project modification. Modifications have been divided into two groups depending on whether the change requires a modification of the Application Form or not. The rules related to modifications are described in the Programme Manual, chapter 4.4. Updating the project plan during implementation.

10.1 Flexibility rule

The project may use the flexibility rule to adjust its budget during implementation. Projects are allowed to overspend by a maximum of 20% or 40 000 euro (whichever is higher) of the individual cost categories at project level. The project and partner total budget cannot be exceeded. The use of the flexibility rule must be agreed with the lead partner before using it.

Within the budget flexibility rule it is not possible to change the nature (and intended use) of equipment items or increase amount of planned equipment. All changes related to equipment items must be approved by the JS before applying them.

New cost items added in the framework of the flexibility rule must always serve the implementation of the approved work plan.

If some budget changes are made under the flexibility rule, they must be taken into account when the Application Form is updated after approval of formal project modification.

10.2 Minor changes

Minor adjustment like changes of timetables for activities or deliverables, changing place of meeting are communicated as deviations in partner report and project report.

Technical modifications that do not have an impact to the content of the project (change of the partner's name, legal status, change of hosting organisation, change of contact person etc.) are made on a need basis. The JS contact person must be notified of these types of modifications as soon as possible. These changes are done in Jems to the application.

There are also technical modifications which can be made by the lead partner or project partner in the *Contracting* section of the Jems. The lead partner or project partner must independently keep *Partner details* and *Project managers* information updated. No approval for these updates is needed from the JS Contact person.

Small adjustment or technical corrections related to the activity plan or budget (such as adding new activities or equipment items) should be brought to the attention of the Joint Secretariat contact person as soon as possible. Small adjustment to equipment items must be always approved before the purchase is done. The correspondence is done by e-mail, and the changes are entered to Jems when a formal modification procedure is initiated, and Application Form is opened for modifications.

10.3 Formal modifications

Any modifications beyond the scope of the flexibility rule, minor changes or technical modifications require a formal approval by the Managing Authority and in certain cases, by the programme Monitoring Committee. The lead partner has to contact the JS contact person and discuss modifications as soon as the need for them appears.

It is strongly suggested to carefully plan ahead and incorporate as many modifications as possible needed by the project into one request for modification. The lead partner must involve all partners in the discussions in due time so that the needs of the whole partnership are reflected in the modification request.

Modifications related to activities or the budget should be done not more than 2 times during project implementation. The last modification request must be submitted no later than 6 months before the end date of the project. Project modifications come into force on the date of the approval only.

Project Steering Group has to handle official changes in the project and approve them before the lead partner submits the material to the Joint Secretariat. Minutes from Steering Group meeting where the modification is approved must be attached to Modification Request. Approval can be also done via written procedure.

10.3.1 Modification procedure

1. The lead partner contacts the JS contact person about the project modification. The lead partner has to introduce the applied modifications and give reasoning/justification for the modifications by using the Modification Request template. The template for the Modification Request is available at the programme webpage https://centralbaltic.eu/for-projects/documents/.
2. The JS contact person will assess the Modification Request within 20 days. Clarifications may be asked from the lead partner. In case the JS contact person requires clarifications, the time for the lead partner to reply satisfactorily to the questions is not counted into the 20 days handling time.
3. When the Modification Request is approved by the Project Steering Group and the clarification process is finalised with the JS contact person, the JS contact person opens the Application Form in the Jems and the lead partner can update the Application Form (Figure 46).

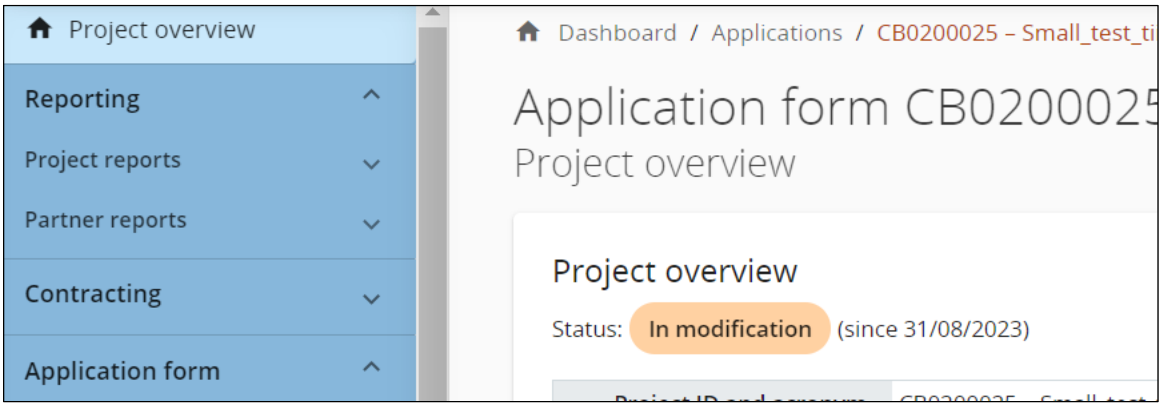


Figure 46 Project status shows that the application form can be modified.

4. When the modification is completed by the lead partner and JS contact person has pre-checked the correctness of modification, the lead partner can submit the modification though “Check and Submit” function (Figure 47). Before submission pre-submission check need to be valid.

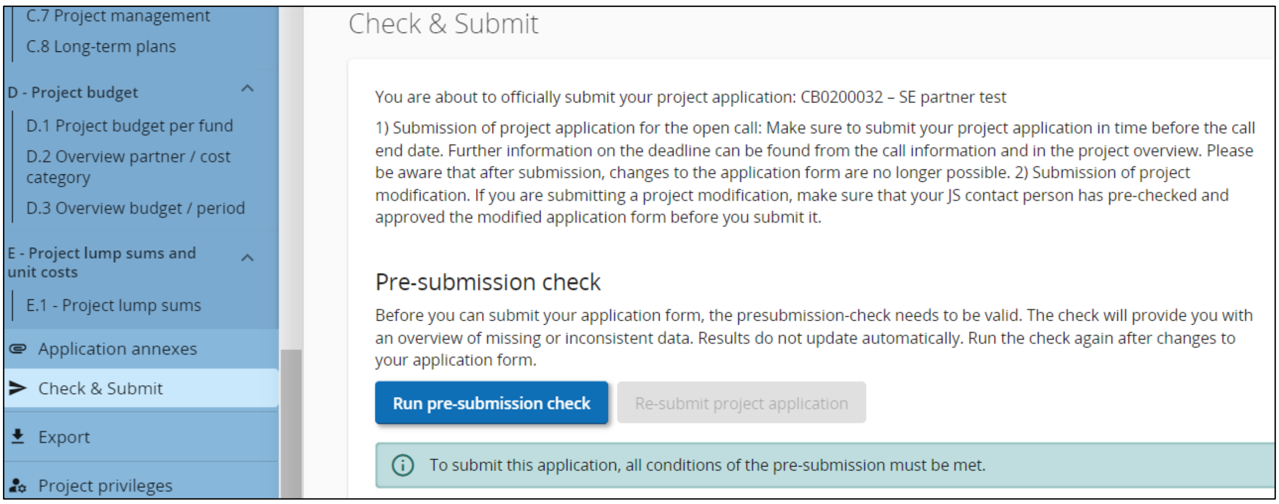


Figure 47 Submitting the modification.

5. After the JS contact person has checked the updated Application Form, the modification request is sent to the Managing Authority or Monitoring Committee for decision taking.
6. When the modification is approved by the Managing Authority or Monitoring Committee the modification comes into force, and a new version of the Application Form will be the valid one. No separate paper documents will be made to the Subsidy Contract. The Subsidy Contract always refers to the valid Application Form in the Jems. The modification request can be also rejected by the Managing Authority or Monitoring Committee.

10.3.2 Project Modification and partner reports

Partner report is linked to the application form version which is the valid one (contracted) when the partner report is opened.

10.3.3 Modification history and different Application Form versions

Access to application form versions can be found in the left-hand side toolbar (Figure 48).

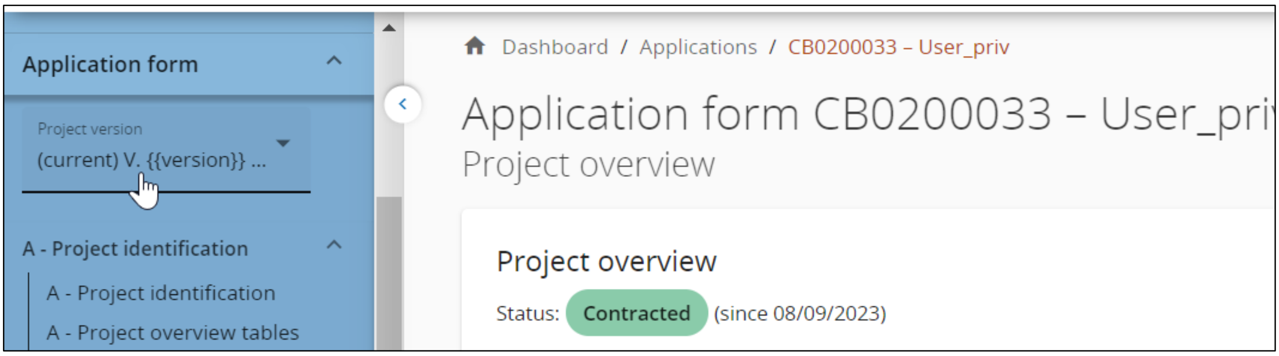


Figure 48 Access to application form versions.

11. Project closure and duties after the project ends

Closing the project includes several steps from finalising the activities to the final reporting requirements. The time span of the steps for closing the project is quite long usually including the last months of project implementation time, the closure period and time after the end date of the project. (Figure 49)

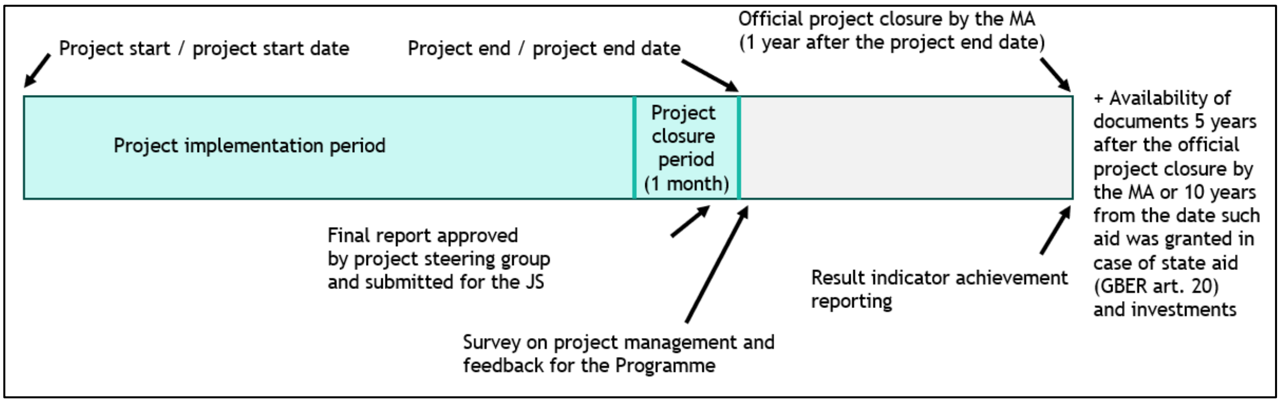


Figure 49 Different steps and terms related to the project closure and duties after the project end.

Project closure period is a technical term for the last month of the project which is designed for closing the project accounts as well as for preparing and handling the Final Report. The possibility to generate costs for project partners ends at the same time when the implementation period ends. For the lead partner, there is a possibility still to generate costs related to project management, i.e. finalising of the project. During the closure period all partners can still receive and pay invoices for the activities that have taken place during the project implementation period.

Final Report

At the end of the project, the whole project is summarised in the Final Report (Annex 3). The Final Report is a separate document. The aim of the Final report is to tell about project achievements from the perspective of the project content. The main responsibility of filling in the Final Report remains with the lead partner. However, the Final Report must be discussed and the content of it must be agreed by the whole project partnership. The Final Report must be discussed and approved by the project steering group as well as submitted for the JS by the project end date. The JS contact person must be invited in the steering group meeting.

Publishing Project Summary and Outcomes on the Project Webspace

When your project ends, it's crucial to share the main results and outcomes on the Project webspace. This involves writing a summary of the project's results and publishing key outcomes. Project outcomes are specific, tangible items or materials produced during the project, such as guidelines, reports, analyses, informational materials, videos, tools, solutions, or other relevant material. These outcomes should clearly demonstrate what was achieved and be useful to others.

The "Result Summary" will appear on your Project Webspace's opening page and the outcomes will be listed beneath, providing visitors with a comprehensive overview of the achievements and specific outcomes before they explore more detailed information on other pages.

Guidance on how to publish project results in the Project Webspace is provided in the "Project Webspace User Manual," available on the Programme website at https://centralbaltic.eu/for-projects/documents.

Feedback survey

The Programme is collecting feedback about the Programme support, procedures and practices as well as project management in a survey format after the project has reached the project end date. A link to the survey questionnaire is sent via email both for the lead partner and project partners. Responding to the survey is very important and will support the Programme to develop its support towards the project beneficiaries as well as project applicants.

Result indicator achievement reporting

One year after the project end (end date), the Managing Authority will send to the lead partner a request to report on result indicators. It is mandatory to answer the request. Thus, it is important to remember to keep on monitoring and recording result indicators progress by using the output and result indicator template designed for the Programme Objectives 1, 2 and 7. Result indicator achievement for Programme Objectives 3-5 will be asked through a separate questionnaire. Programme Objective 6 projects do not need to report the achievement one year after the project end date.

In addition to the result indicator reporting, The Managing Authority will send a survey on the durability of achievements as well as follow-up activities after the project has ended.

Availability of documents

Each project partner including the lead partner must keep all project related documentation available five years after the official project closure by the Managing Authority, or in case of state aid (GBER article 20) and investments 10 years after the date when such aid was granted. *Location of documents* must be filled in Jems section under *Partner details*.

Annex 1. Interreg brand colour scheme

The colour scheme is developed to label the thematic objectives clearly. The same colours are used in the Interreg custom brand (project-specific brand), which includes project acronym in the corresponding priority colour.

Programme Objectives 1-2	
1. More exports by SMEs	CMYK 72/0/43/0
2. More new scaled-up companies	HEX #18BAA8
	RGB 24/186/168
Programme Objectives 3-5	
3. Joint circular economy solutions	CMYK 48/0/89/0
4. Improved coastal and marine environment	HEX #9ACA3C
5. Decreased CO2 emissions	RGB 154/202/60
Programme Objective 6	
6. Improved employment opportunities on labour market	CMYK 10/75/60/1
	HEX #DA5C57
	RGB 218/92/87
Programme Objective 7	
7. Improved public services and solutions for the citizens	CMYK 73/9/6/0
	HEX #00ADDC
	RGB 0/173/22

Annex 2. Cost categories for reporting of IT costs

Office & administration flat rate	Project management equipment unit rate	Real costs under Equipment cost category
What is covered? Central and general IT systems costs of an organisation **Concrete examples** - Partner's organisation's IT staff and maintenance activities ensuring employees' general session, accounts and accesses to the partner's organisations systems - Nothing more!	**What is covered?** Basic IT equipment package needed by each employee working in the partner's organisation to carry his/her tasks and supporting project general management and functioning **Concrete examples (list is not exhaustive)** - Adobe, Lyyti, Zoom, Dropbox, etc. - Microsoft Copilot / office software / licences (or similar) - ChatGPT, Canva and Lovable used by the project staff for tasks supporting project general management and functioning - Standard analytical surveys / tools for the partners internal use to organise projects activities or events, or to collect feedback on project activities or events - ... **Additional precisions** - Basic IT hardware and IT software used for project-related activities directly needed for the project and not yet or not sufficiently available in the partner's organisation - Includes licence fees of software, maintenance and repair of IT hardware, video-conferencing tools, project management and communication software, subscriptions, web domain costs, databases, external servers and analytical tools that are used for the project to be launched, kept running and closed, and that are not directly related to projects deliverables	**What is covered?** Specific tools or equipment directly used for the building, preparation, delivery or maintenance of project deliverables **Concrete examples** - Equipment in use by project staff for testing and piloting project deliverables - Particular and non-standard software or tools subscriptions needed to create, modify, deliver or maintain material or content for target groups defined as deliverables in the AF - Specific tools and subscriptions paid by the project and used by the target group during project activities - Particular and non-standard communication and marketing tools subscriptions supporting non-routine tasks (e.g. Mailchimp) **Additional precisions** - Must be planned in the AF - OK if initially planned as part of a general external service but to be reported under the Equipment cost category to be eligible - If not planned anywhere in the AF - must be approved before the purchase is done by JS contact person - If reported as part of a global invoice including other IT services the whole invoice is to be reported under the External expertise and services cost category - no splitting of the invoice

Annex 3. The Final Report content

The Final Report

CBxx 'Project name'

Date: Click or tap to enter a date.

1. Project story

Please describe the project's final achievements in a "Project Story" format. Ensure the story is engaging and understandable for non-specialists, as it may be used for publications.

Remember, you are expected to publish the "Achieved result(s)" on your project webspace and may use this text. Additionally, this story will be included in the KEEP.EU database, which aggregates data on European projects and beneficiaries.

Questions	Your project story
Context and problem: • What were the regional and sectoral challenges? • What specific problem was addressed?	Click or tap here to enter text.
Idea and solution • What was the core project idea? • What was the solution developed and implemented?	Click or tap here to enter text.
Implementation and impact • Why was cooperation among partners crucial? • What impact was achieved in targeted regions and sectors? • What was the benefit for target groups?	Click or tap here to enter text.

2. Project's relevant mentions and prizes (will be published in Keep.eu database)

Please list any relevant mentions and prizes that you as a project achieved below. Only the name of the prize or mention should be indicated. In case the project did not receive mentions or prizes this section can be left empty.

Project's relevant mentions and prizes
Click or tap here to enter text.

3. Achieved results and outputs

Be as brief and to the point as possible.

Instructions	Your project’s achieved results and outputs
3.1 Describe project contribution to Programme Objective result indicator. Please describe the achieved results behind the figures with concrete examples.	Click or tap here to enter text.
3.2 Describe project contribution to Programme Objective output indicator(s). Please describe the achieved outputs behind the figures with concrete examples.	Click or tap here to enter text.
3.3 Describe what other relevant achievements the project has reached that are not measured by result indicator.	Click or tap here to enter text.
3.4 What has been the impact on the target groups? Please describe the involvement, participation and the benefits for the main target groups of the project.	Click or tap here to enter text.

4. Added value from cross-border cooperation

Be as brief and to the point as possible.

Instructions	Your project’s added value from cross-border cooperation
4.1 Explain which specific contribution each partner brought to the project. Please describe how each partner was essential in the achievement of the project’s outcomes.	Click or tap here to enter text.
4.2 Describe the joint activities and joint practical achievements the project has delivered. Please describe what could not have been reached without cross-border cooperation.	Click or tap here to enter text.

5. Durability and transferability

Be as brief and to the point as possible.

Questions	Your project's durability and transferability
5.1 How do you plan to maintain and/or use the project's achievements? Please explain how you plan to keep the outcomes you have achieved available and alive.	Click or tap here to enter text.
5.2 Do you see that project's achievements could be developed further after the end of the project and how? Please reflect on what you can do to transfer project's achievements to others.	Click or tap here to enter text.

6. Final reminders and confirmations

Please tick each statement, confirming that this is in place at the end of the project and will remain this way afterwards.
☐ Project related documentation is stored and available and will remain as such as described in the subsidy contract.
☐ Projects outcomes are and will remain freely available.
☐ The project will provide information related to result indicator achievement one year after the project has ended (upon Managing Authority's request).

Please fill in below the name and contact information of the person within the Lead Partner organisation with whom the Programme will be in contact after the project has ended. This person should be able to answer any request after the project has ended (availability of documents, audits, result indicator reporting, etc.):	
Name	Click or tap here to enter text.
Email	Click or tap here to enter text.

Annex 4. Changes made compared to the previous version of Guide for project implementation

Changes – Version 6.0	**Page**
External expertise and services – further guidance on reporting added.	36
Equipment – further guidance on reporting added.	38
Equipment – reference to Annex 2, IT costs reporting added.	38
Availability of documents – state aid requirement clarified.	61, 62
Annex 2, Cost categories for reporting IT costs added.	64