Project 101051759
Initiating activities to implement the European Social Partners Framework Agreement on Digitalisation (EFAD)
co-funded by the European Union

Project no. 101051759

"Initiating activities to implement the European Social Partners Framework Agreement on Digitalisation" - EFAD project

co-funded by the European Union and the National Commission of NSZZ "Solidarność„

Karol Nosal – KK NSZZ „Solidarność"/Project Manager

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Periodic Reports

- According to the article 6, 21 and 22 of Grant Agreement and p.3.3.4 – Reports & payment requests of Online Manual (please read it carefully):

in order to receive payments, the consortium must submit periodic reports (following the schedule set out in the Grant Agreement). When these are due, they must be submitted directly in the Periodic Reporting Module of the Portal Grant Management System (SyGMa)

- Project duration: from 01/09/2022 to 31/08/2024 (24 months).

- 1st reporting period: 1.09.22 - 31.08.2023 (12 months) – **all payments should be done before 31.08.2023 to include in the 1st periodic report.**

- 2nd reporting period: 1.09.23 - 31.08.2024 (12 months)

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1st Reporting period - details

1. All communication and reporting through the eGrant system.

2. Reporting provisions of GA you can find under art. 6,21 and 22

3. (Technical report) -Continous reporting tool - **Part A** - from the 1st day of the project, filled in on the regular basis in accordance with the project implementation progress schedule - i.e. lists of attendance, results, products, etc. **Part B - technical periodic report after 12** and 24 months.

4. **(Financial Report) Individual financial statement: the appropriate tile for periodic reporting will be available after 31.08.2023 and each beneficiary (co-applicants not associated org.) will have to enter the expenses himself and sign own individual financial report using the UE Login by FSIGN (Financial Signatory).**

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1st Reporting period - details

5. (Financial Report) -

In addition, most programmes require either a detailed cost reporting table (excel table) or <u>the use of resources report (online wizard).</u>

6. All participants should contribute to the parts, but it is the Coordinator who will have to submit them as a single report.

7. You should start preparing the periodic report in the Grant Management System right after the periodic reporting is opened at the end of each reporting period (1st since 1.09.23) — deadline for submission for particular Beneficiary is 30 days – 30.09.2023, after initial approval by Coordinator.

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1st Reporting period - details

8. In the periodic report, you should report on the progress of the work and costs claimed *(send all technical and finnacial information to us for approval in the due time – we will also send the reminder)* . When the Coordinator submits the periodic report, the IT tool will capture the information from the Continuous Reporting Module in order to generate the Part A of the Technical Report. **The system will also consolidate the Individual Financial Statements and it will generate the use of resources report (if required) and the Summary Financial Statements (for the consortium). Part B will be created by „Solidarnosc" on the basis of information provided by all Partners.**

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1st Reporting period – how we will proceed? / deadlines

1. As we are doing it for the 1st time and Leader should check your financial interim statement before submitting into the Grant Management System by each Beneficiary, please be so kind to send us:

a. Your financial statement in the excel file and format used during the project preparation together with all supporting documents (timesheets, payslips, invoices etc. -in electronic format) **before 15th of September 2023 (deadline).**

2. After rewiev by the Leader each of Beneficiary should complete and sign individual financial statement in the SyGMa system before 29th of September 2023 (deadline).

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1st Reporting period – how we will proceed? / deadlines

Reporting process:

- Continuous reporting > Preparing your periodic report > Approving Partners' reports > Submitting the report to the Commission > Acceptance or rejection by the Commission > Interim payment

- For **additional prefinancings** if the statement on the use of the previous prefinancing payment shows that less than 70%, the amount set out in the GA will be reduced by the difference between the 70% threshold and the amount used.

- If reports accepted by EC next 40% of EU grant will be distributed to the Beneficiaries.

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1st Reporting period -Missing statements

1. Report without Financial Statements from certain Partners *(e.g. if a Beneficiary cannot submit its individual Financial Statement on time)*. If this happens, you will be asked to confirm that you are aware of this and that therefore these costs will not be considered for the current payment. **The participant's costs will be considered zero for this reporting period**, but they will be able to declare their costs in the next financial report (next reporting period). In this case 2nd pre-payment could be lower than planned.

2. All Expenses in accordance with Grant Agreement and National Law - Proper accounting and audit path must be ensured for a period of 5 years from the balance payment.

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Project schedule - update

- New concrete days of project events.

- Division of the project into 4 work packages (connected with time-sheets).

- Activities already done and next steps you can find in Maria Żytko's presentations.

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Project schedule - update

		1	2	3	4	5	6	7	8	9	10	11	12 08	13	14	15	16	17	18	19	20	21	22	23	24	Partners involved
	Month/year	9'22	10'22	11	12	01'23	02	03	04	05	06'23	07	08	09	10	11	12'23	01'24	02	03	04	05	06	07	08'24	
WP 1	Project Management, Coordination, Administration	1st working meeting	SG Gda /PL								SG Ita 15-16.06.				SG Lit 26-27.10.								SG War/ PL			NSZZ "S" with SG members (participation of all partners)
WP 2	National Workshops & National Action Plans (NAPs)			QE	QE					CSS	TW Ita			NW1 + WP 12.09	TW Lit		NW 2 + WP mid-12'		NA Ps 29.02		REP-1 ver.	REP ready	REP translat			All partners coordinated by external expert and "S"
WP 3	Trainings									TM - 1 ver.	TM 30.06.23			IT 1 PL (LT) 27-29.09		IT2 RO 22-24.11		IT 3 PL (LT) 17-19.01.24		IT 4 ITA	IT 5 N.M.					All partners coordinated by Instrat and "S"
WP 4	Dissemination																	PA 1				ES+ PC	PC		PA 2	All partners coordinated by "S and Lewiatan

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Project schedule

Description of abbreviations used in the schedule:

SG = Steering Group meeting; QE = Questionnaires, CSS = case study summary, TW = Transnational Workshop (connected with SG meeting), NW = National Workshop, NAPs = National Action Plans, REP = Final Report, TM = Training materials, IT = International Training, WP = Working Papers; ES = Experts' Seminar; PA = Project Article, PC = Promotional Campaign

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Project schedule - next steps

1. Preparing of training module (final ver. – 06'23) – Instrat Foundation

2. Translation of training module (30.06 – 18.08) – CISL, BLOC, Leader

3. Organization of the 1st National Workshop in all countries (09'23)

4. Organization of the 3rd Steering Group meeting connected with 2nd Transnational Workshop in Vilnius –LPS „Solidarumas" – confirmed: 26-27.10 (arrival 25.10)-Vilnius/Lithuania

5. Organization of the 1st (27-29.09.23) and 2nd Training in Romania – Bloc – 22-24.11.23

6. Organization of the 2nd National Workshop in all countries (12'23)

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ACTIVITIES AND WORK PACKAGES

1. Work packages have to be connected with Timesheets

2. We have 4 Work Packages in the project:

a. WP1: Project Management and Coordination (M1-M24)

b. WP2: National Workshops & National Action Plans (M2-M22)

c. WP3: Trainings (M2-M21)

d. WP4: Dissemination (M17-M24)

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Financial details (for co-applicants / beneficiaires):

I. Staff costs:

1. Calculation: Annual salaries + social charges + taxes and other costs / 215 days x number of actual days worked for the project.

Max. 215 days per year / 12 months = 19.92 working days / month.

Person/Month calculation – proper way of calculation: i.e. 24 days worked for the project /19.92 = 1.2 person/month.

2. It is necessary to prepare project staff timesheets (according to the template developed by the EC) in conjunction with the specification of which work package relates (WP1-WP4).

The appropriate template was already sent to the beneficiaries to be filled in and uploaded as deliverable in the F&T Portal of GMS at the due date forseen in this system.

3. More information about project staff salary calculation please find in AGA (Annotation Grant Agreement – new version available dated on 1.04.23) - point 6.2

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II. Travel, subsistence and accommodation costs = unit costs

Travel, subsistence and accommodation costs = unit costs and will be covered according to the rules set out in our Grant Agreement -art. 6 and EC decision C(2021) 35 final dated on 12.1.2021 authorising the use of unit costs for travel, accommodation and subsistence costs within an action or work programme under the 2021-2027 multi-annual financial framework.

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II. Travel, subsistence and accommodation costs = unit costs

2. For travel: unit costs are calculated according to distance which should be measured using the rail or flight calculator. You can find it under below link.

https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/calculate-unit-costs-eligible-travel-costs_en

- According to the information placed under this link these are costs for **RETURN TRIP.**

- According to the EC representative this Decision will be revised in 2023 in order to bring them in line with actual expenses but it could be too late for our project. Until then, we must comply with the Travel policy that I have already sent.

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II. Travel, subsistence and accommodation costs = unit costs

3. For accommodation and subsistence we have to use unit costs in accordance with the tables in the Decision C(2021) 35.

- <u>Exception: only if the country concerned is not mentioned in this Decision the actual (real) costs can be used.</u>

- For individual participants nothing changed according to our travel policy: travel costs will be refunded on the basis of actual (real) costs and supporting documents i.e. tickets, boarding cards, invoices etc. but the ticket price has to be consulted before purchase in case the ticket price is above unit costs and we always have to search the cheapest way of travelling.

- It is the beneficiary who calculates the unit costs and reports them to the EC in an interim and final financial report.

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Currency for financial statements and conversion into euros

1. The financial statements must be drafted in euro.

2. Beneficiaries with general accounts established in a currency other than the euro must convert the costs recorded in their accounts into euro, at the average of the daily exchange rates published in the C series of the *Official Journal of the European Union* (ECB website), calculated over the corresponding reporting period.

- Link: https://www.ecb.europa.eu/stats/policy_and_exchange_rates/euro_reference_exchange_rates/html/eurofxref-graph-pln.en.html

3. Beneficiaries with general accounts in euro must convert costs incurred in another currency into euro according to their usual accounting practices.

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Participant Register/PIC number – remarks from kick-off meeting

You should regularly update the data on the Funding & Tender portal (Participant register) for a given organization with a PIC number, i.e. authorities changes as well as LSIGN and FSIGN, change of registered office address, changes in court registers and update the financial statements of your organizations during the project.

Only after submitting changes to the Central Validation System (CVS), we can apply for an amendment to the grant agreement.

Information about project staff changes should be reported to the Leader with the justification of this change, the name of new person and his/her CV if replaced person was named as crucial Staff member at the stage of project preparation. According to the Partnership Agreement in case of staff member replacement it should be a person of the same or higher qualifications.

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ACTIVITIES AND WORK PACKAGE 2

- Objectives: To develop National Action Plans and Final Report–Continous Reporting Tool

- Activities:

1. ~~Desk research in 5 countries~~

2. ~~Questionnaires 1 and 2: 11/12'2022~~

3. ~~Case study collecting by NLE: 12'2022-04'2023~~

4. ~~Case study summary by NLE (CSS): 05'2023~~

5. 1st Transnational Workshop in Italy: 06'2023 (con. with 2nd SG)

6. 1st National Workshops in partners' countries: 06-09'2023

7. 2nd Transnational Workshop in Lithuania: 10'2023 (con. with 3rd SG)

8. 2nd National Workshops in partners' countries: 11-12'2023

9. National Action Plans (NAPs) on R2D- final versions: 02'2024

10. Final Report (REP): 06'2024

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Dissemination

Project subpage:

https://www.solidarnosc.org.pl/szkolenia/wspolpraca-zagraniczna/programy-europejskie/realizowane/item/21709-cyfryzacja-rynku-pracy-projekt-efad

Please inform about project implementation on your own website. We will ask to send us links while preparing periodic reports.

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THANK YOU FOR YOUR ATTENTION

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