

Template for Technical Progress Report(s)

valid for

**Actions of Type 1 (Projects)
from Call for proposal 2005 and
with grant agreement number EIE/06/XXX**

SAVE, ALTENER, STEER, COOPENER and HORIZONTAL KEY ACTIONS

Version: April 2007

Template for Technical Progress Report(s) (PR), 8-10 pages

This reporting template for Technical Progress Report(s) is valid for SAVE, ALTENER, STEER, COOPENER and Horizontal Key Actions of Type 1 (projects) of the Intelligent Energy – Europe (IEE) Programme, resulting from the Call for proposal 2005 and, therefore, with grant agreement numbers EIE/06/XXX. It is meant purely as a documentation tool and do not claim to be exhaustive. Users shall always refer to the provisions of the grant agreement, including any written amendment, which are binding and obviously take precedence. A grant agreement amendment cannot be requested within a Technical Report.

The beneficiaries shall submit in English, through the co-ordinator, a common Technical Progress Report (not payment related, i.e. without financial statements). For project-specific requirements please consult Annex III, together with Articles I.5 and I.6 of your grant agreement.

The Technical Reports are not only an administrative or contractual requisite, but are real management and working tools for all beneficiaries involved in an action. They should be clear, concise, meaningful and comprehensive.

In case of any question, please do not hesitate to contact your project officer.

Please indicate the grant agreement number, acronym and page number in the header/footer of each page.

Front page – *Example in Appendix.*

Table of contents – *Should include page numbering, also for appendices.*

1. Progress Report Summary (1-2 pages)

- 1.1 Objectives of the period –
 - Organising two plenary meetings
 - Setting up Working Group cycle
 - First Working Group reports
- 1.2 Achieved results of the period –
 - 2 plenary meetings
 - 5 management team meetings
 - 5 working groups
 - 6 new working groups planned
 - 5 working group reports

Summarise the achievements for the reporting period in bullet points, such as work performed and the main results of the period.

- 1.3 Identified problems and corrective actions taken in the period
 - Withdrawal of Core Theme leader for Core Theme 5 resulting from termination of his contract with the participating agency. We are in the process of solving this issue.

- 1.4 Main activities in the next period
 - Organisation of 2 plenary meetings (Riga, location of 2nd PM to be confirmed)

– Give an overview on the main activities for the next reporting period.

2. Consortium management in the period (1-2 pages)

Report on the consortium management tasks and co-ordination activities in the period, such as communication between partners, quality control, project meetings, possible co-operation with other projects/ programmes etc.; provide feedback on the comments of your project officer for the last report, if any.

Communication between CA coordinator was improved by installing regular conference calls between SenterNovem and EST. The same instrument is now used with success for the Core Theme leaders. Coordination calls are held every two weeks. Core Theme leaders so far participated in two conference calls.

SenterNovem put forward a discussion document on quality control after the first drafts of the Working Group reports became available. Ideas and remarks from this document – and from the discussion in the MT and Plenary meeting in Vienna – were incorporated into the draft reports. The reports have been sent for language editing and final versions will be available beginning of may. The final reports will be put on the CA ESD website.

Four IEE project coordinators were invited to present their projects during the Vienna plenary in March. This resulted in high quality presentations and discussions with participants at the plenary meeting. Concrete results of this interaction include real interest from at least 5 participants in the follow up of the IEE LTA Uptake project, including participation in the consortium submitting a proposal under the new IEE call.

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3. Progress of work plan in the period (max. 4-5 pages in total)

3.1 Progress on work packages against initial objectives – *Compare in a few lines the activities planned (based on Annex I of the grant agreement and the previous technical implementation report(s)) to the progress made, work package by work package; identify partners involved¹, including their roles, especially if they have different roles in the work packages; describe major subcontractors, advisory committee, market players, etc. involved.*

WP1 Coordination

Partners involved: SenterNovem and EST have jointly taken up coordination of the action. SenterNovem is the official coordinator, EST is the official communicator. The CA Coordinator bears the overall responsibility for the execution of the contract.

WP2 CA Management Team

Partners involved:

WP3 Core Themes

WP4 Working Groups

WP5 CA ESD Plenary Meetings

WP6 Communication and Dissemination

3.2 Deviations from the project work plan – *If any, identify the nature and the reason for the deviation, identify partners involved, clarify impacts on the activities and deliverables planned, present the*

¹ For COOPENER projects: please report on the progress of work of your local partners (sub-contractors) in the same detail as for your European partners

strategy to get back on the track, give comments on deviations in appendix table 2 of the technical progress report; in case of deviations described in the last report describe how you have managed to get back on the track; up-date of time schedule.

3.3 Progress regarding deliverables – *Assess deliverables listed in Annex I of the grant agreement against results achieved so far; give reference to appendix table 1 of the technical progress report.*

3.4 Progress regarding performance indicators – *Assess performance indicators listed in Annex I of the grant agreement against impacts of the action achieved so far.*

4. Work plan for the next period (1-2 pages)

4.1 Planned activities in the next period – *Give an outlook on planned activities for the period until the next report (on-going work packages, tasks per partner, due deliverables), consider any strategy developed in section 3.2.*

4.2 Planned meetings and dissemination activities – *Give an overview on your planned project meetings (date, location, main topic, etc.) and dissemination activities (date, location and main topics of workshops, seminars, conferences etc.), at least for the period until the next report.*

5. Other issues (0-1 page)

If any, indicate other issues.

If favoured, you may use table formats for the technical progress report, for example

- *in chapter 3, a work package progress table including work package N°, work package name, progress, role of each partner, deviations, impact of deviations, corrective actions taken, result of corrective actions, etc.*
- *in chapter 4, a planned activities table including work package N°, work package name, partner, tasks per partner, due dates, etc.*

Appendices to the Technical Progress Report

Table 1: First/updated list of submitted deliverables since starting date

Please indicate the progress of your deliverables from the start of the project until the end of this reporting period.

Del. N°¹	WP N°¹	Deliverable name¹	Month of completion¹	Submission with report²	Deliverable uploaded at website?³

¹ This information must be identical with your List of Deliverables in Annex I of your grant agreement.

² Please indicate the report with which you have submitted the deliverable (PR1, PR2, ..., IR).

³ Please upload all due deliverables with public dissemination level (PU) at your project website for public download. Note: Deliverables uploaded at an internal website area are not considered as being uploaded for public download. Please ensure that the reference to IEE funding, the IEE logo and the legal disclaimer are indicated in your published deliverables. For guidance on how to make the most of your project website, how to refer to IEE funding and where to find the IEE logo and disclaimer see http://ec.europa.eu/energy/intelligent/implementation/index_en.htm.

Table 2: First/updated indicative state of advancement of hours spent (in %) since starting date per partner and per work package

Please regard that this indicative state of advancement is an indicative estimation, which has to correlate with the information given in the report and should be used by the coordinator and project officer to monitor the technical progress of your project.

For "actual achievement" you indicate the hours that you and your partners have actually spent on the respective work package from the beginning of the work package until the end of the reporting period.

For "planned achievement" you indicate the hours that you had planned to spend on the respective work package from the beginning of the work package until the end of the reporting period.

Of course, your "planning" needs to be in line with the tasks and the efforts stipulated in the work programme (Annex I) and in the budget (Annex II).

As example: Work Package x runs from month 2 to month 10. After 9 months (reporting period) partner y has actually spent 40% of the working hours foreseen for the complete work package ("actual achievement"). It was however planned that this partner would have almost finished the work for this work package, i.e. 90%, by then ("planned achievement"). It would be evident that the work package shows a delay or that it takes less effort than expected even if one takes into account that work is not always carried out in a linear way.

landscape format

Work package	Actual/Planned Achievement	Total Partners	Partner 1	Partner 2	Partner 3
WP 1:	Actual	%	%	%	%	
	Planned	%	%	%	%	
WP 2:	Actual	%	%	%	%	
	Planned	%	%	%	%	
WP 3:	Actual	%	%	%	%	
	Planned	%	%	%	%	
.....						
Total Action		%	%	%	%	

Table 3: Updated list of main persons in charge of the action

The IEEA assumes that the main persons in charge of the project are those indicated in the CPF of each beneficiary (or the new persons indicated in previous reports). If necessary, please update the list of main persons in charge of the project with name, telephone, fax, e-mail. Note: If there are any changes at the coordinator, please contact your project officer immediately.

landscape format

Participant N°	Participant Short name	Family name, first name	Telephone N°	Fax N°	E-mail	Date of Change	Justification

Updated version of the publishable summary slides and project fact sheet

In general, the publishable 1-2 page project fact sheet and summary slides should be submitted in English within one month from the starting date of the action by e-Mail to EACI-IEE-REPORTS@ec.europa.eu, see Annex III of your grant agreement. Please use the fact sheet template and regard the guidelines for the creation of project slides, both provided at http://ec.europa.eu/energy/intelligent/implementation/index_en.htm.

If necessary, please up-date the publishable 1-2 page project fact sheet and send a separate electronic version of this fact sheet to EACI-IEE-REPORTS@ec.europa.eu. Please use the latest fact sheet version for your up-date provided by IEEA at http://ec.europa.eu/energy/intelligent/implementation/index_en.htm.

If necessary, please up-date the summary slides of your project with your achievements made so far and send a separate electronic version of these slides to EACI-IEE-REPORTS@ec.europa.eu.

Copy of the deliverables produced during the reporting period

Please submit a copy of the due deliverables produced during the reporting period, in line with appendix table 1. Please agree the submission of a hardcopy or electronic copy, number and languages of copies with your project officer. As general guideline, the deliverables may be submitted as electronic copy only. However, any main deliverables like brochures, guidelines, publications, etc. shall be submitted in at least two hardcopies, if possible in more copies and/or languages for dissemination via IEEA desk or within the Commission.

Before sending the technical progress report to IEEA, please make sure that your submission is in line with the following checklist.

Checklist for submission of Technical Progress Report (PR)
Checking before submission
<input type="checkbox"/> The technical progress report is written in English. <input type="checkbox"/> The number of pages is in the range of 8-10 pages excluding appendices. <input type="checkbox"/> The technical progress report follows the template provided at the IEE website. <input type="checkbox"/> First/updated list of submitted deliverables since starting date is provided in appendix. <input type="checkbox"/> First/updated indicative state of advancement of the hours spent since starting date is provided in appendix. <input type="checkbox"/> Updated list of main persons in charge of the action is provided in appendix. <input type="checkbox"/> Updated version of the publishable summary slides and project fact sheet is provided in appendix. <input type="checkbox"/> Copy of the deliverables produced during the reporting period is provided in appendix. Hardcopy or electronic copy has been agreed with the project officer. If hardcopy, number and languages of the deliverables have also been agreed with the project officer. <input type="checkbox"/> The instructions for the use of the IEE logo, disclaimer and reference to IEE funding have been considered, especially for publication of technical deliverables, papers and the project website. <input type="checkbox"/> The technical progress report has been proof-read by the co-beneficiaries. <input type="checkbox"/> The technical progress report does not contain any request for a grant agreement amendment.
Submission
<input type="checkbox"/> The consolidated package to be sent within 30 days after the end of the period to the IEEA address as indicated in the grant agreement includes two hard copies of the technical progress report including all appendices as listed above and is accompanied by a cover letter indicating the grant agreement number, acronym and title of the action. <input type="checkbox"/> One electronic version of this consolidated package was sent to EACI-IEE-REPORTS@ec.europa.eu . In case of technical deliverables with large size (MB) an electronic CD submission may be agreed with the project officer.
Other important information for project officer
<input type="checkbox"/> The project website is accessible and updated, considering the IEE guidance for project websites. <input type="checkbox"/> All due technical deliverables with public dissemination status (PU) are available on the project website for public download. <input type="checkbox"/> The project officer is provided by e-mail with further information, like minutes of the meetings, login and up-to-date password of your internal website, etc.

Appendix – Front page for Technical Reports

Project logo (optional)

**Grant agreement no.****Project acronym****Full title of the action**

Intelligent Energy – Europe (IEE)

SAVE *or* ALTENER *or* STEER *or* COOPENER *or* Horizontal Key Actions

Key action:

Technical Progress Report (PR) *or*
Interim Technical Implementation Report (IR) *or*
Final Technical Implementation Report (FR)

Period covered: from to

Due date:

Start date of the action:

Duration:

End date of the action:

Project coordinator name/ organisation/ e-mail/ telephone number:

Project website *[has to be accessible at the latest 6 months after the starting date of the action until at least 2 years after the end of the action]:*