

# Guidelines for Reporting

## KoEF Research Cooperation Projects

### Table of content

<b>1. Scientific Report</b> .....	<b>2</b>
1.1. Scientific Mid-term Report (Technical Report) .....	2
1.2. Final Scientific Report.....	3
<b>2. Financial Report</b> .....	<b>3</b>
2.1. General requirements .....	3
2.2. Travel to Austria from a partner country of the Global South (Incoming) .....	5
2.3. Travel from Austria to a country of the Global South (Outgoing) .....	6
2.4. Travel within or between partner countries in the Global South (Field research)....	7
2.5. Travel within Austria .....	8
2.6. Overhead costs.....	9
2.7. Equipment and material (consumables).....	9
<b>3. Note on the use of the term “Global South”</b> .....	<b>9</b>

## 1. Scientific Report

While all projects must submit final report, projects with a duration of 2 and 3 years must additionally submit a mid-term report. Reports must include a scientific and a financial report. The reports have to be in English and have to be submitted by the project coordinator within 2 months after the end of the reporting period. All reports have to be submitted via email to [kooperation-entwicklungsforschung@oead.at](mailto:kooperation-entwicklungsforschung@oead.at).

The exact dates of reporting are stipulated in the grant agreement. The funding amount is divided and transferred in instalments at the project start, after approval of the mid-term report (if applicable) and after approval of the final report. The reporting templates provided on the KoEF website shall be used.

### 1.1. Scientific Mid-term Report (Technical Report)

A mid-term report is NOT required for projects with a duration of 1 year.

As a report on the project progress, it provides an overview of completed activities, achievements and envisaged results during the first reporting period of 2- and 3-year projects.

The mid-term report (word file AND pdf) has to include the following parts (ca. 3-5 pages):

- + Project Overview
- + Narrative Summary of the Project Activities
- + Complete List of Funded Mobilities
- + Achievements and Envisaged Results
- + Contribution to the SDGs, Implementation of Gender and Diversity Issues
- + Reflection on Partnership and Cooperation
- + Changes In Project Environment, Challenges and Mitigating Measures

Together with the scientific mid-term report, a financial mid-term report must be submitted (see section 2).

## 1.2. Final Scientific Report

The final scientific report has to be more detailed than the mid-term report and provides an of the entire project. A summary is published on the KoEF website.

The final report (word file AND pdf) shall include but not be limited to the following parts:

- + Project Overview
- + Short Narrative Summary of the Conducted Project (to be published on the website)
- + Report on Project Activities and Results
- + Complete List of Funded Mobilities of the Entire Project
- + Sustainability and Application of Results
- + Contribution to the SDGs, Implementation of Gender and Diversity Issues
- + Reflection on Cooperation and Envisaged Follow-up Activities and Projects
- + Response to Challenges and Difficulties and Unexpected Outcomes
- + Publications and Pictures

In addition to the final scientific report, a final financial report must be submitted (see section 2).

## 2. Financial Report

Together with each scientific report, **a financial report has to be submitted**. The project relevant expenses of all partner institutions are merged into **one** report by the project coordinator. The expenses submitted in the financial report have to correspond to the budget sheet of the project application. Changes have to be well argued and approved by the KoEF Office prior to submission of the financial report.

The following guidelines for financial reporting in the framework of KoEF comply with the special directive “Maßnahmen zur Internationalisierung” (GZ 41.906/0001-V/7/2019) of the Federal Ministry of Education, Science and Research (BMBWF). According to this directive, only **travel, accommodation and subsistence costs** as well as **project-relevant equipment and material expenses** will be financed.

### 2.1. General requirements

**The following expenses are eligible within the framework of KoEF:**

- + Travel and accommodation/subsistence expenses for researchers who travel to Austria (see section 2.2)

- + Travel and accommodation/subsistence expenses for researchers who travel to partner countries in the Global South (see section 2.3.)
- + Travel and accommodation/subsistence expenses for field research within partner countries in the Global South (see section 2.4.)
- + Material and equipment expenses (see section 2.7.)

**The following requirements apply to all modes of mobility:**

- + Only project participants who were nominated in the application are eligible for reimbursement. New participants must be nominated in writing by sending an email with a short CV and a description of their tasks and role in the project to [kooperation-entwicklungsforschung@oead.at](mailto:kooperation-entwicklungsforschung@oead.at).
- + Each mobility must utilize the most economical means of transportation.
- + Travel expenses within Austria are not eligible for funding.
- + All funded mobilities require thorough documentation in scientific reports.
- + The overall duration of all mobilities of one person must not exceed 12 months.
- + If any invoice/receipt is not in English (or German), a working translation must be provided additionally.
- + Foreign currency invoices and receipts must be converted to EUR.

The financial report must cover the entire reporting period and must be submitted as an Excel-file using the provided template for KoEF financial reporting (see). It includes a list of expenses in tabular form as well as correspondingly numbered invoices/receipts. Every invoice/receipt must be listed in a separate line. All invoices/receipts of the Austrian as well as the non-Austrian partners must be submitted as originals. Copies of originals are only accepted if the project accounts are embedded in the accounting system of an Austrian university (SAP). In this case the universities must confirm that (1) the copies of the invoices/receipts with a total amount of EUR [please insert respective amount] correspond to the original invoices/receipts and that (2) they are only submitted to KoEF/OeAD-GmbH for funding within this project.

Only actual expenses submitted with the financial reports and verified and approved by OeAD are subject to funding. Unused, incorrectly and insufficiently documented funds must be returned to OeAD within a period of 100 calendar days after the notification from the programme officer. Overheads are not eligible for KoEF funding.

Only expenses that are supported by invoices/receipts will be refunded. An invoice/receipt must absolutely contain the following information:

- Name and address of the issuer of the bill (invoice)
- Place and date of issue
- Exact specification of the object purchased or of the service provided
- Currency, amount, and tax, if any
- Confirmation of payment / receipt

**Foreign currency:** Foreign currency invoices and receipts must be converted to EUR. They must contain a currency exchange confirmation or bank receipt or credit card statement confirming the exchange rate at the respective period of time. If foreign invoices/receipts are embedded in the accounting system of an Austrian university (SAP), the conversion rate used by the university is eligible. If a valid currency exchange information is missing and/or the foreign invoice is not embedded in the accounting system of an Austrian university (SAP), the invoice amount shall be converted using <https://www1.oanda.com/lang/de/currency/> converter with the invoice date and the full invoice amount for each invoice separately.

The reporting language is English. If the invoice/receipt is issued in a language other than English (or German), a working translation (of the invoice/receipt on the invoice/receipt itself and in the list of expenses) must be provided.

## 2.2. Travel to Austria from a partner country of the Global South (Incoming)

The following travel and subsistence costs for KoEF project members travelling to Austria can be refunded. Project (co-)coordinators may decide to reduce reimbursement amounts if deemed beneficial for the project.

**Travel costs: max. EUR 1,500 per trip, reimbursement of face value:**

- Flight – only economy class tickets:
  - For reimbursement the original invoice/ receipt, plane ticket and original boarding passes are needed.
- Travel costs to and from the airport
  - In Austria public transport must be used. Original invoices/receipts are needed.
- Visa costs
  - For reimbursement the original invoice/receipt is needed.

- Travel insurance
  - For reimbursement proof of insurance and the original invoice/receipt is needed.

**Accommodation and subsistence expenses, lump sums depending on qualification of project member and duration of stay:**

- PhD/doctoral students:
  - stays of up to 12 days: EUR 100 / day
  - stays of 13 days or more: EUR 1,250 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.
- Scientists (post-doc):
  - stays of up to 14 days: EUR 100 / day
  - stays of 15 days or more: EUR 1,400 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.

### 2.3. Travel from Austria to a country of the Global South (Outgoing)

The following travel and subsistence costs for KoEF project members travelling from Austria to a partner country of the Global South can be refunded. Project (co-)coordinators may decide to reduce reimbursement amounts if deemed beneficial for the project.

**Travel costs: max. EUR 1,500 per trip, reimbursement of face value:**

- Flight – only economy class tickets
  - For reimbursement the original invoice/ receipt, plane ticket and boarding passes are needed.
- Travel costs to and from the airport
  - In Austria, public transport must be used. Original invoices/receipts are needed.
- Public transport – only economy class tickets
  - For reimbursement the original invoice/receipt is needed.
- Car (in partner country)
  - For reimbursement original invoices/receipts and a completed vehicle logbook are needed.
- Visa costs
  - For reimbursement the original invoice/receipt is needed.

- Travel insurance
  - For reimbursement proof of insurance and the original invoice/receipt are needed.
- Travel vaccinations and malaria prophylaxis
  - Original invoices/receipts are needed.

### **Accommodation and subsistence expenses, lump sums depending on qualification of project member and duration of stay:**

- PhD/doctoral students:
  - stays of up to 12 days: EUR 100 / day
  - stays of 13 days or more: EUR 1,250 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.
- Scientists (post-doc):
  - stays of up to 14 days: EUR 100 / day
  - stays of 15 days or more: EUR 1,400 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.

**Please note:** The “Confirmation of Receipt Accommodation and Subsistence Expenses” template (available for download from the KoEF website) must be used for reimbursement.

## **2.4. Travel within or between partner countries in the Global South (Field research)**

The following travel and subsistence costs for KoEF project members travelling within or between partner countries of the Global South can be refunded. Project (co-)coordinators may decide to reduce reimbursement amounts if deemed beneficial for the project.

### **Travel costs: max. EUR 1,500 per trip, reimbursement of face value:**

- Flight – only economy class tickets
  - For reimbursement the original invoice/ receipt, plane ticket and boarding passes are needed.
- Travel costs to and from the airport
  - For reimbursement original invoices/receipts are needed.

- Public transport – only economy class tickets
  - For reimbursement the original invoice/receipt is needed.
- Car
  - For reimbursement original invoices/receipts and a completed vehicle logbook are needed.
- Visa costs
  - For reimbursement the original invoice/receipt is needed.
- Travel insurance
  - For reimbursement proof of insurance and the original invoice/receipt are needed.
- Travel vaccination and malaria prophylaxis
  - Original invoices/receipts are needed.

**Accommodation and subsistence expenses, lump sums depending on qualification of project member and duration of stay:**

- PhD/doctoral students:
  - stays of up to 12 days: EUR 100 / day
  - stays of 13 days or more: EUR 1,250 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.
- Scientists (post-doc):
  - stays of up to 14 days: EUR 100 / day
  - stays of 15 days or more: EUR 1,400 / month
  - For stays longer than one month the calculation starts again after each full month.
  - A report about the research stay must be included in the scientific report. Proof of receipt is needed.

**Please note:** The “Confirmation of Receipt Accommodation and Subsistence Expenses” template (available for download from the KoEF website) must be used for reimbursement.

## 2.5. Travel within Austria

Travel within Austria is not eligible for funding.



## 2.6. Overhead costs

Overhead costs are not eligible for funding.

## 2.7. Equipment and material (consumables)

It is assumed that the project partners are already adequately equipped with the basic tools to undertake the envisaged work, therefore, no general infrastructure can be financed. If additional equipment is required for e.g. laboratory or field stations, then it must be project specific and remain with the partners in the respective partner country in the Global South. Full justification must be provided for its purchase and usage during the project period and beyond.

Equipment & material (consumables) specifically relevant for the project can be covered up to a maximum amount of EUR 3,000 for the entire project duration.

- + Original invoices/receipts must be submitted. Please note: If any invoice/receipt is not in English (or German), a working translation must be provided additionally.
- + A confirmation is needed: justification of the need of the equipment, confirmation that the equipment is project specific and that it remains with the partner institutions in the respective countries in the Global South.

## 3. Note on the use of the term “Global South”

For the purpose of this project call the term Global South is used to refer to the group of countries classified as “least developed countries”, “other low income countries” and “lower middle income countries and territories” (excl. India) in the [OECD DAC list of ODA recipients for 2024/2025](#).