



## Grant Agreement Preparation & IPR Management

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# *Definitions*



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# »» Some definitions

- ▶ European Union (EU):
  - ▷ It is a unique **economic** and **political partnership** between 28 European countries that together cover much of the continent.
  
- ▶ European Commission (EC):
  - ▷ It is the EU's **executive body**. It represents the interests of the European Union as a whole (not the interests of individual countries).



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# »» Some more definitions

## ▶ Coordinator

- ▶ The leading partner in a consortium implementing a project
- ▶ Signs the Grant Agreement
- ▶ Main point of communication with the EC concerning project

## ▶ Beneficiary

- ▶ Every partner in a consortium implementing a project, including the Coordinator



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# *The procedure to signing the Grant Agreement*



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# »» The project is selected. Now what?

- ▶ There is a certain procedure:
  - ▷ Declaration of Honour
  - ▷ Enter and submit grant data
  - ▷ Ethics review
  - ▷ Security review
  
- ▶ Grant signature → Initiation of project



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# »» What must be signed?

- ▶ A Declaration of Honour
  - ▷ This declaration ensures that all beneficiaries comply with the rules and are not in a situation that would exclude them from receiving EU funding (e.g. bankruptcy).
  
  - ▷ Done electronically



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# »» What must be signed

## ▶ Consortium Agreement

- ▶ Provides the rights and obligations between the beneficiaries
  - ▶ Signed among the beneficiaries only.
  - ▶ The EC is NOT involved in the drafting
  - ▶ The EC is NOT signing the CA
  - ▶ CA is mandatory unless otherwise specified in the work programme
  
- ▶ “Blue ink”



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# »» What must be signed

- ▶ Grant Agreement:
  - ▷ Provides the rights and obligations between the EC and the beneficiaries
    - ▶ Contract between the EC and the partners
    - ▶ Signed by the EC and the Coordinator
    - ▶ The other beneficiaries accede to the GA
  
  - ▶ Signed electronically



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## »» Some general remarks

- ▶ Most of the processes done electronically through the Participant Portal
  - ▷ Not the CA
- ▶ Most of the work done by the coordinator
- ▶ But all partners must contribute and sign at some point.

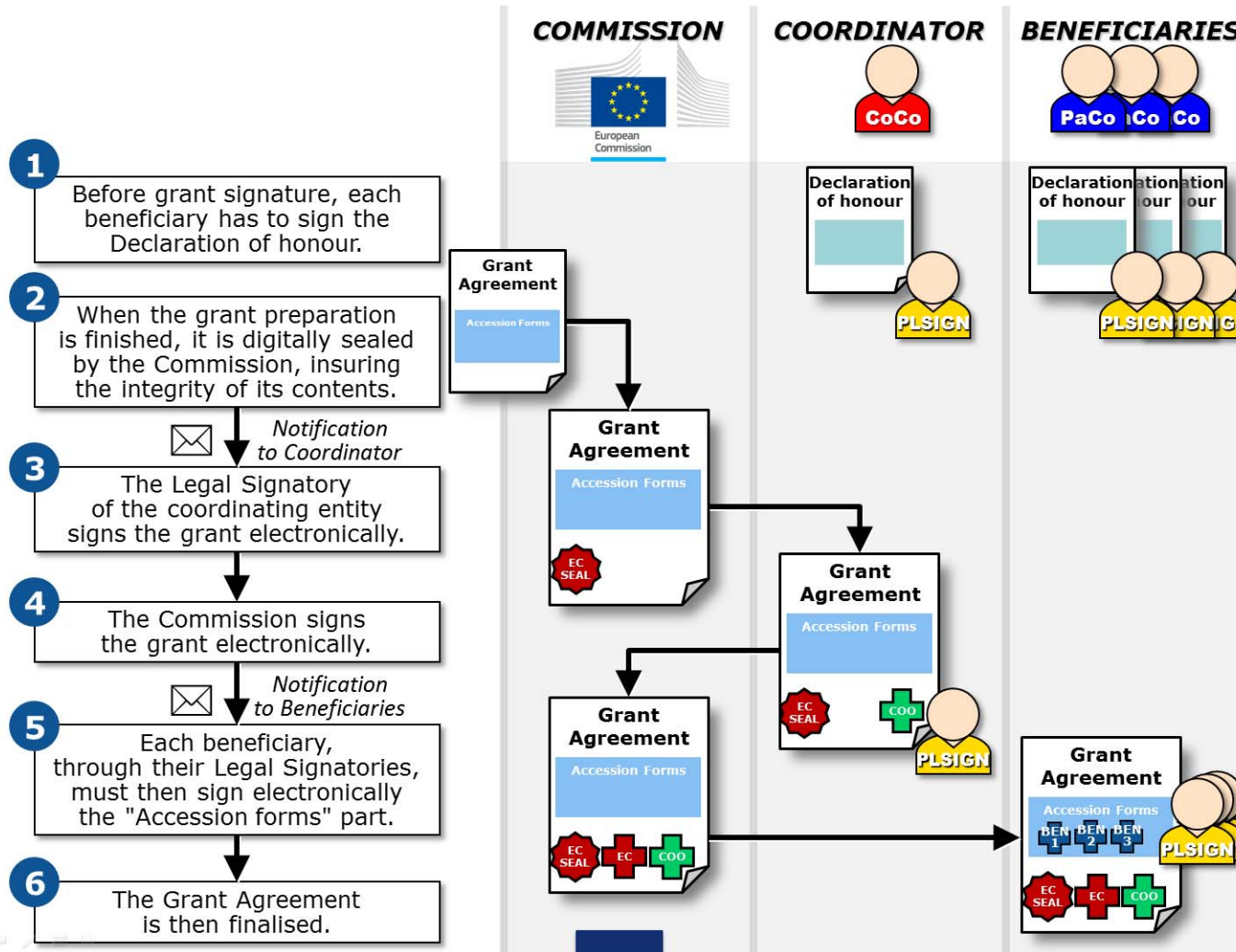


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# »» The process



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# »» Purpose of process

- ▶ Allow the EC to gather legal, administrative and financial information from prospective beneficiaries and any third parties linked to them
- ▶ Make sure the 'Description of the Action' (DoA, Annex 1 to the grant agreement) and the 'Estimated budget for the action' (Annex 2) match the proposal, any relevant information in the invitation to prepare the grant agreement, and, if applicable, the ethics review report, and the security scrutiny report
- ▶ establish the key points of the grant agreement (when the project starts, reporting periods, amount of pre-financing, need for consortium agreement, and, if applicable, ethical issues, third parties linked to the beneficiaries, in-kind contributions provided by third parties, subcontracting)
- ▶ Verify your financial capacity (principally, this concerns certain types of coordinators only; other participants will be checked in exceptional cases).



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# » Enter legal, administrative & financial data

As a beneficiary (including coordinators)

- ▶ Go to the Participant Portal.
- ▶ Log in using your ECAS account.
- ▶ Go to the "My Project(s)" page under the "My Area" tab.
- ▶ Select the action (i.e. project) for which a grant agreement is being prepared.



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## »» Who will do it

- ▶ Ask your coordinator to give you access to the project at the Participant Portal if it is not already displayed there.
- ▶ As a beneficiary, you need access so you can provide an electronic signature.
  - ▷ The contact persons of your organisation indicated in the proposal will automatically be assigned to specific roles and receive the corresponding access rights during grant preparation (see table below).
- ▶ The coordinator of a consortium can enter or edit information for other beneficiaries but cannot sign on their behalf.



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# »» Roles for PP

- ▶ The minimum setup of roles that you need to prepare and conclude the grant agreement at the Participant Portal is shown below:
- ▶ For the coordinating organisation:
  - ▷ Primary coordinator contact (PCoCo)
  - ▷ Legal entity appointed representative (LEAR)
  - ▷ Project Legal signatory (PLSIGN)
- ▶ For other beneficiaries:
  - ▷ Participant contact (PaCo)
  - ▷ Legal entity appointed representative (LEAR)
  - ▷ Project Legal Signatory (PLSIGN)
- ▶ A single person can fulfil several or all of the above roles.



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# »» Declaration of Honour

- ▶ The first step to initiate grant agreement preparation
- ▶ A project legal signatory (PLSIGN) must sign a 'Declaration of Honour' at the Participant Portal on behalf of each beneficiary before the grant agreement can be signed.
- ▶ The coordinator cannot sign it on behalf of other beneficiaries.

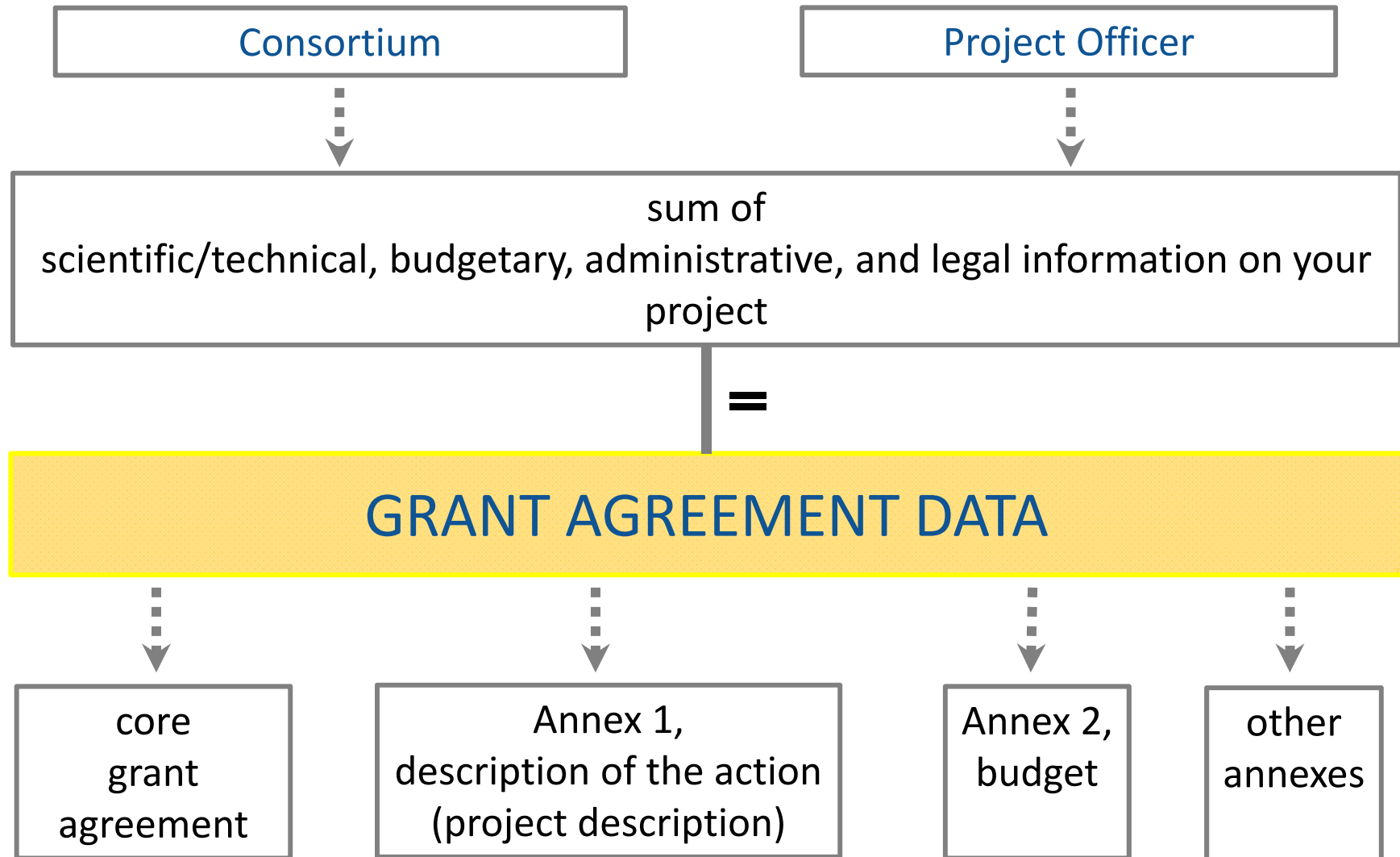


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# Grant Data



# »» The coordinator's role

- ▶ Set the date on which the project is to start
  - ▷ the first day of the month after the EC signs the GA
  - ▷ if needed, a fixed start date may be agreed (it must be the first day of a month)
- ▶ Check that all beneficiaries' Participant Identification Codes (PICs) are validated
- ▶ Check that the Participant Identification Codes (PICs) of any linked third parties have been entered and are validated.



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