EUROPEAN EDUCATION AND CULTURE
EXECUTIVE AGENCY
EACEA

GRANT AGREEMENT PREPARATION

Guidelines for Jean Monnet Actions

Calls 2021 and 2022

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INTRODUCTION

First of all, congratulation for the successful evaluation of your proposal!

The European Education and Culture Executive Agency, **EACEA**, is now in a position to start the grant preparation of your proposal. In this context, you will have already received an automatic notification from the Funding and Tender Opportunity Portal inviting you to submit the grant preparation data.

The preparation of the Grant Agreement consists of two parts that can be handled simultaneously:

PART I - Validation of your entity, bank account and the Legal Entity Appointed Representative (LEAR).

Part II - Grant Agreement Preparation (GAP).

Carefully read the instructions about how to submit your grant preparation data and what we expect to receive from you.

01 VALIDATION

In order to sigh your Grant Agreement, we need to validate your organisation and bank account.

If your organisation is already validated, check the correctness of the information in SyGMA.

What happens if it is not yet validated?

The Central Validation Service will contact the person who registered the organisation and ask him/her to:

- Upload <u>official supporting documents,</u> which will be listed in your notification;

- Clarify any details.

You will receive a confirmation message once the process is completed and the PIC is validated.

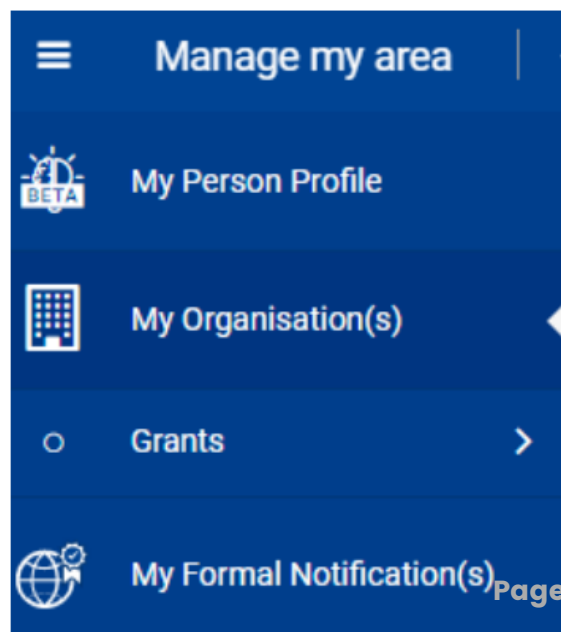## How can you check the status of your organisation?

<u>Step 1</u> Go to https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

European Commission | Funding & tender opportunities
Single Electronic Data Interchange Area (SEDIA)

<u>Step 2</u> Use your EU login credentials to log in

English EN

Register   Login

<u>Step 3</u> Navigate to "**My Organisation**"

☰ Manage my area

BETA My Person Profile

My Organisation(s)

○ Grants

My Formal Notification(s)

Your bank account

The Central Validation Service will contact the Coordinator after the PIC is validated to enter the bank account details into the Participant Register and upload the necessary supporting documents (My Organisation > Actions > Modify Organisation).

If you need to change an already validated bank account, please declare the new bank account details via the Participant Register and upload the required supporting documents. [**IT-How to**]

Legal Entity Appointed Representative

Parallel to the validation of your organization, you will need to appoint your LEAR. This must be done by a legal representative of your institution with the necessary authority to commit the organization for these type of decisions.
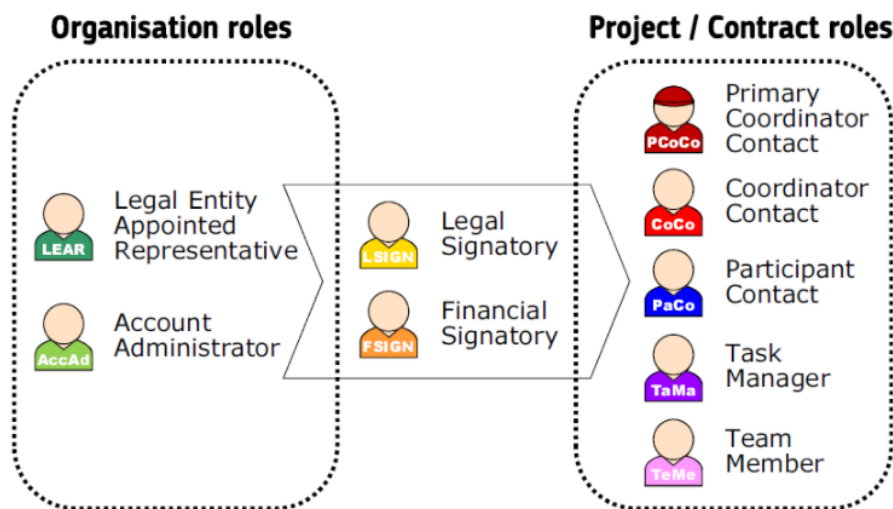
Registration and validation of your organization is a prerequisite for the validation of your LEAR

For LEAR validation, the following documents have to be uploaded in the Participant Register:

1- The LEAR appointment letter;

2- The Declaration of consent to the EU Funding & Tenders Portal Terms and Conditions;

3- Copies of an official and valid proof of identity of the legal representative and the appointed LEAR;

4- Document(s) proving that the legal representative appointing the LEAR is empowered as such.

02 ROLES & ACCESS RIGHTS

Organisation roles

- Legal Entity Appointed Representative (LEAR)
- Account Administrator (AccAd)

- Legal Signatory (LSIGN)
- Financial Signatory (FSIGN)

Project / Contract roles

- Primary Coordinator Contact (PCoCo)
- Coordinator Contact (CoCo)
- Participant Contact (PaCo)
- Task Manager (TaMa)
- Team Member (TeMe)

Once the LEAR has been confirmed by the Central Validation Service and the account has been activated [IT-How to], you can start assigning the legal (**LSIGN**) and project legal (**PLSIGN**) signatories in the Participant Portal for your organization. You also need to assign these roles on the level for your project in SyGMa.

Some roles are automatically provisioned in the early stages of the Project as follows:

⮞ The proposal initiator in the proposal submission phase will automatically be recognised by the EU as the Primary Coordinator Contact (**PCoCo**). PCoCo can read/write all forms; submit all forms to EC and make changes to project documents. Can only be revoked or modified by the EU Project Officer (PO).

⮞ The contact persons of the participating organizations identified during proposal submission will become Participant Contacts (**PaCo**).

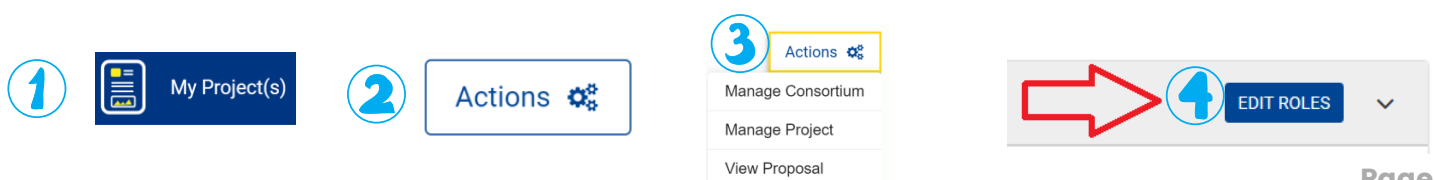## How can you assign or revoke roles? [IT-How to]

Step 1 Go to FTOP

European Commission | Funding & tender opportunities
Single Electronic Data Interchange Area (SEDIA)
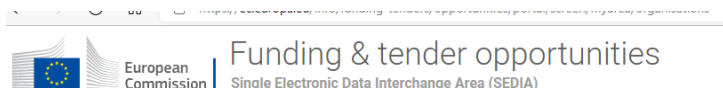
Step 2 Use your EU login credentials to log in

Login

Step 3 Navigate to "My Project(s)" via the left-hand bar (**1**), click on "Actions" (**2**) and select "Manage Consortium" (**3**), then click on "Edit" (**4**).

Step 4 Edit the roles for your organization.

1 My Project(s)   **2** Actions ⚙

3 Actions ⚙
- Manage Consortium
- Manage Project
- View Proposal

4 ⇨ EDIT ROLES ⌄

03 SYGMA

You need to introduce your grant preparation data in the Grant Management System Portal. Use your EU login credentials to log in, navigate to My Project(s) , click on Actions and select **Manage Project**.

The Grant Management Services provide three levels of information:

Project information

This box contains the key project data such as call, type of action, acronym, duration, start date, estimated project cost, requested EU contribution, EU Officer assigned to your project, etc. On the Document Library you can find all the documents related to your project: proposal, notification letters, etc.

Process information

This panel contains the current processes for your project. Each process is defined by a yellow, blue or black box.
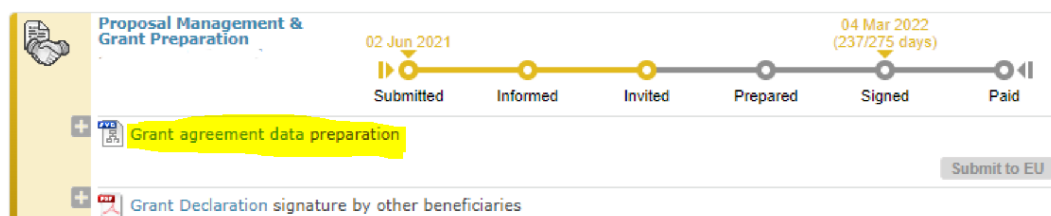
Task information

Click on Grant Agreement Data preparation to edit and compete the necessary forms.

SyGMa: introduce your grant preparation data

Before starting with your grant preparation data, take into account the following:

⚠ Proposals may NOT be substantially changed. Contact your Project Officer, s/he needs to be informed and will verify that changed elements comply with the call conditions for the call.

⚠ Consortia/projects can be altered ONLY under exceptional circumstances, and ONLY if duly justified.

⚠ You do not need to sign a hard copy of the grant agreement or 'Declaration of Honour'. All signatures are electronic.

⚠ If you have not been granted an extension and fail to meet the established deadline, preparation of your Grant Agreement may be terminated and your proposal rejected.
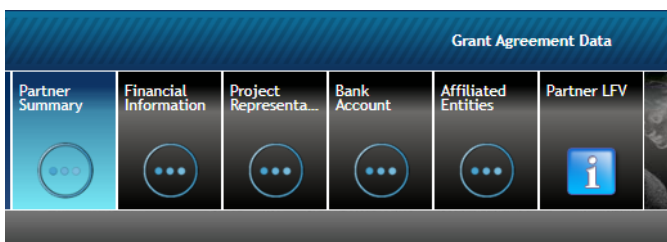
[IT-How to]
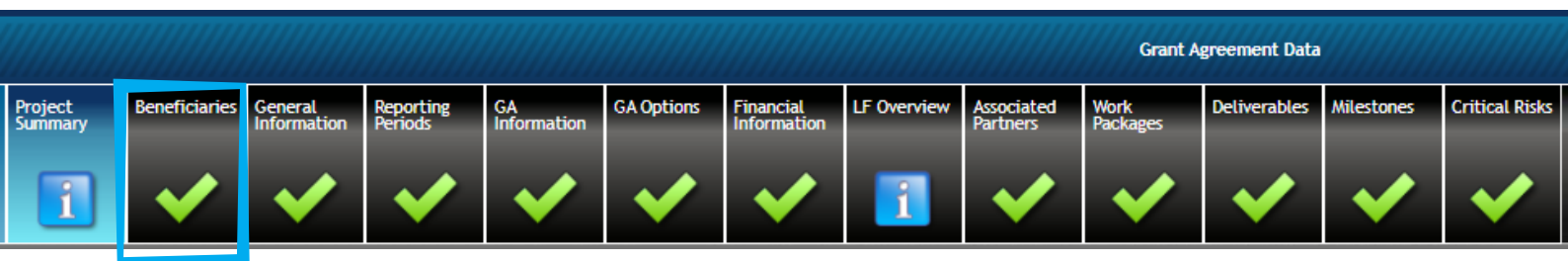
BENEFICIARIES

Your institution and your partners, if any, are automatically listed after receiving the invitation letter.

Click on your institution in order to get the following tabs:

- Partner summary: mandatory to add your department;
- Financial information: the EU contribution should be in line with your invitation letter;
- Project representative: your LEAR should appear here;
- Bank account: select the bank account in case there are more than one validated.

GENERAL INFORMATION

The Project General Information is automatically filled in. Check the correctness of the data and select the start date of your project. By default the system offers you the first day of the month after the signature of the Grant Agreement. However, if you can justify that there is a need to start before the signature of the GA, please fix the start date.

 Retroactive starting dates bear the risk that the grant might in the end not be signed. The action starting date cannot be before the submission of the proposal.

REPORTING PERIODS

Modules, Chairs and Centers of Excellence have one final report at month 36.

For other Jean Monnet actions, a interim report is due halfway through, in month 18. It must be submitted within 60 days after the period ends (M18+60 days).

Reporting periods

Reporting Period No.	From Month	To Month	Payment type
1	1	36	Final payment

GRANT AGREEMENT INFORMATION AND OPTIONS

This information is available but is read-only for you. Any missing fields are completed by us, EU Officers.
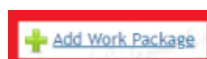

FINANCIAL INFORMATION

This information is automatically filled in. Check the budget table and that all cost categories, if applicable, are present.

WORK PACKAGES, DELIVERABLES, MILESTONES and CRITICAL RISKS

You need to introduce the work package(s) foreseen in your application: title, lead beneficiary, start/end month, objectives, description and deliverables description. Click Ok and then SAVE.

Ensure you link each deliverable and milestone to a work package.
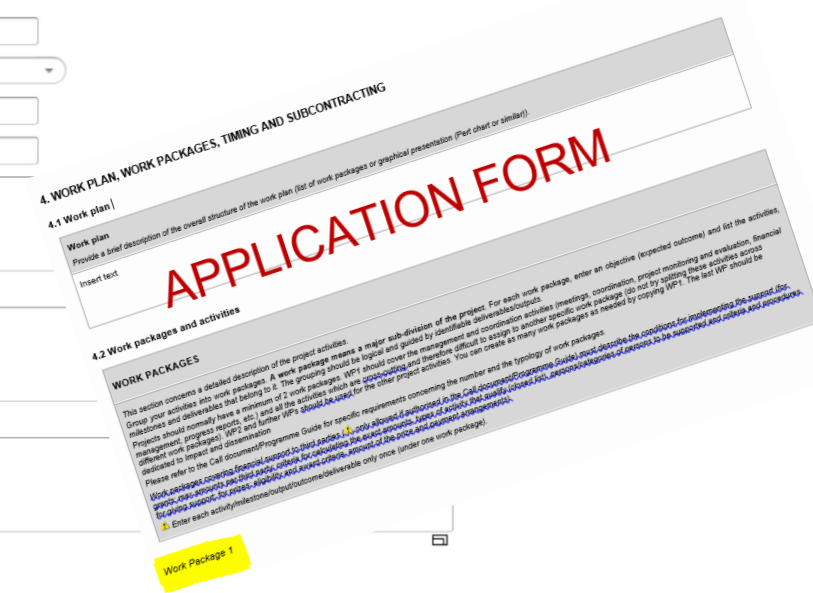

The dissemination levels for your deliverables are the following:

- PU — Public: fully open (automatically posted online on the Project Results platforms)
- SEN — Sensitive (limited under the conditions of the Grant Agreement)
- R-UE/EU-R — EU Classified (RESTREINT-UE/EU-RESTRICTED)
- C-UE/EU-C — EU Classified (CONFIDENTIEL-UE/EU-CONFIDENTIAL)
- S-UE/EU-S — EU Classified (SECRET-UE/EU-SECRET)

All changes need to be discussed and agreed with your EU Project Officer. Substantial changes to the proposal are NOT allowed.

04 YOUR ANNEX I
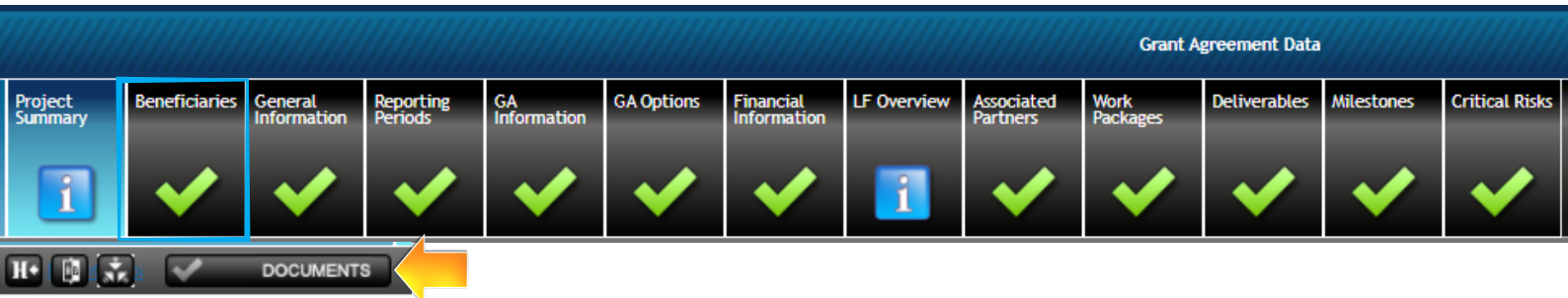
The Description of the Action, **DoA**, will be part of your Grant Agreement. It contains the details of how the project will be carried out. It consists of two parts: Part A and B.

Part A will be generated automatically by the system with the information you encode under work packages, deliverables, milestones and risks. Please do not introduce again this information in your Part B!
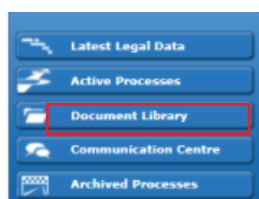**Part B** is the narrative description of the work to be carried out.

How to make your Part B
Click on DOCUMENTS and download the Template .
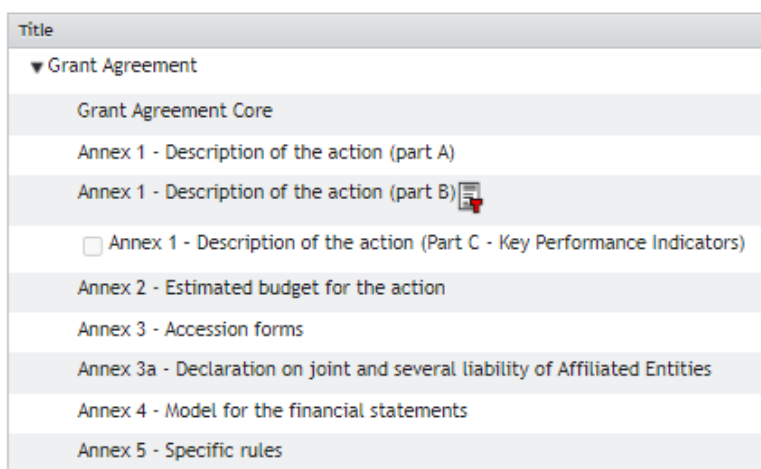
Use the cover page reading Description of the Action and add the narrative part of your application saved on the Document Library under Part B-Section 1 and the budget table under Part B-Section 3 (see page 7 to know how to get to the library).

Part B-Section 1: narrative part

Part B-Section 3: budget table

JMO Modules Teaching Hours

The lump sum is calculated based on the total number of teaching hours.
A Jean Monnet Module must include a **minimum of 40 teaching hours per academic year.**
Insert as many rows as needed.

Name of the Professor	Year 1 Hours	Year 2 Hours	Year 3 Hours	TOTAL HOURS
Prof. Javier Domenech	30	30	30	90
Prof. Natalia Gonzalez	26	26	26	78
Prof. David Oliviero	10	10	10	30
Prof. Stephan Janeiro	10			10
				0
				0
				0
				0
				0
				0
Total	76	66	66	208

The lump sum amounts can be found in the Programme Guide under specific funding rules for Jean Monnet Modules
Please double check that the total amount is the same as the requested grant amount entered in the Submission System.

For **Jean Monnet Modules and Chairs**, we ask you to introduce the distribution of teaching hours per academic year.

For other Jean Monnet actions, we need the information under the BE-WP-Overview tab and the detailed consolidation table for all your work packages and members of the consortium.

Your Requested EU Contribution :	69.376 EUR					
BE NR/AE	**Acronym**	**WP 001** Communication and Dissemination	**WP 002** Project Management	**WP 003** Methodology	**WP 004** Action	**Maximum Grant Amount**
Test Org	Test	9.048	428	5.136	3.810	18.422
Test Org	Test	1.772	10.700	14.980	3.852	31.304
Test Org	Test	1.284	8.950	2.996	6.420	19.650
TOTAL	Consortium	12.104	20.078	23.112	14.082	69.376

DETAILED CONSOLIDATION		BE 001 Test Org		
	UNITS	COST PER UNIT	BENEFICIARY TOTAL COSTS	
Total WORK PACKAGES:			23.027	
Communication and Dissemination				
A. DIRECT PERSONNEL COSTS			700	
A1. Employees (or equivalent) man days			700	
Type 1	1	300	300	
Type 2	1	200	200	
Type 3	1	150	150	
Type 4	1	50	50	
Other	-	-	-	
A.2 Natural persons under direct contract	-	-	-	
A.3 Seconded persons	-	-	-	
A.4 SME Owners without salary	-	-	-	
A.5 Volunteers	-	-	-	
B. Subcontracting costs	-	-	-	
C. Purchase costs			9.870	
C.1 Travel and subsistence per travel or day			1.570	
Travel	1	1.000	1.000	
Accommodation	1	500	500	
Subsistence	1	70	70	
C.2 Equipment (please refer to the Depreciation Cost sheet)	-	-	-	
C.3 Other goods, works and services			8.300	
Consumables	15	500	7.500	
Services for Meetings, Seminars	-	-	-	
Services for communication/promotion/dissemination	-	-	-	
Website	1	800	800	
Artistic Fees	-	-	-	
Other	-	-	-	
D. Other cost categories			-	
D.1 Financial support to third parties	-	-	-	
TOTAL DIRECT COSTS INCLUDING SUBCONTRACTING (A+B+C+D)			10.570	
E. Indirect costs 7% (rounded to zero decimals)			740	
TOTAL COSTS (A+B+C+D+E) -			11.310	

(WP 001)

Once your Part B is ready, convert it into PDF and upload the document in the system:

Title	
▼ Grant Agreement	
Grant Agreement Core	
Annex 1 - Description of the action (part A)	
Annex 1 - Description of the action (part B)	
☐ Annex 1 - Description of the action (Part C - Key Performance Indicators)	
Annex 2 - Estimated budget for the action	
Annex 3 - Accession forms	
Annex 3a - Declaration on joint and several liability of Affiliated Entities	
Annex 4 - Model for the financial statements	
Annex 5 - Specific rules	

All changes in your Part A or B need to be discussed and agreed with your EU Project Officer. Substantial changes to the proposal are NOT allowed.
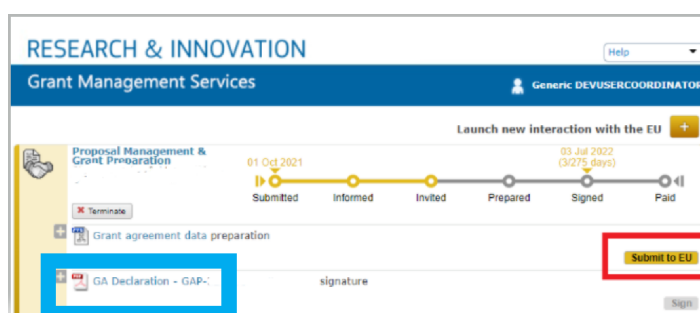
05 SUBMIT YOUR DATA

When all the sections are completed, click on the **Validation** button, which will give you an overview of errors which prevent you from saving. When everything is ✅ , save the data.
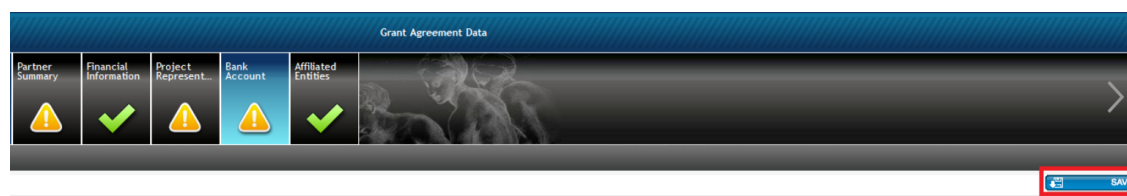
✅	No missing information
❌	Missing information. You won't be able to submit if the missing information is not completed
ℹ️	Only for information
⚠️	Warning: Not blocking at this point but might become blocking later in the process

Before you submit the grant preparation data, be sure the GA Declaration is signed. The signature of the **Declaration of Honour** (DoH) is a prerequisite for signing the Grant Agreement. It must be signed **electronically** by your Project Legal Signatory (**PLSIGN**).

The Project Officer responsible for validating your data may contact you after the submission in case a clarification or correction is needed.

NEXT STEP

Signing the Grant Agreement is the last step of the grant agreement phase. It is done directly in the Portal Grant Management System (electronic signature) and demonstrates that both contracting parties formally approve the agreement and its annexes.

06 HELPDESKS & LINKS

IT Helpdesk — for IT-related questions

Participant Validation Helpdesk — for legal questions relating to

participant validation and LEAR appointment

Europe Direct — for general questions on the EU

Funding and Tender Opportunities Portal

Participant Register Portal

Step-by-step online guide through the processes from proposal

preparation to reporting on your on-going project.

Roles and access rights