



Erasmus+

Erasmus Mundus Design Measures (EMDM)

Grant Agreement and Amendments Highlights

Kick-off meeting

21st November 2023

*European Education and Culture
Executive Agency*

Terms & Conditions of the Grant Agreement

Grant Agreement

PREAMBLE

DATASHEET

CHAPTER 1 *GENERAL*

CHAPTER 2 *ACTION*

CHAPTER 3 *GRANT*

CHAPTER 4 *GRANT IMPLEMENTATION*

CHAPTER 5 *CONSEQUENCES OF NON-COMPLIANCE*

CHAPTER 6 *FINAL PROVISIONS*

Annotated Model Grant Agreement **GoFund WIKI**

Annexes to the Grant

Annexes

ANNEX 1	<i>DESCRIPTION OF THE ACTION (PART A & B)</i>	!
ANNEX 2	<i>ESTIMATED BUDGET FOR THE ACTION</i>	!
ANNEX 3	<i>ACCESSION FORMS (*)</i>	} Not applicable for EMDMs
ANNEX 3a	<i>DECLARATION OF JOINT & SEVERAL LIABILITY OF AFFILIATED ENTITIES (*)</i>	
ANNEX 4	<i>MODEL FOR THE FINANCIAL STATEMENTS</i>	
ANNEX 5	<i>SPECIFIC RULES</i>	

() if applicable*

Superiority Principle

Art.37 Interpretation of the Agreement

- ▶ **Data Sheet** > over the rest of Terms and Conditions
- ▶ **Annex 5** > over the Terms and Conditions
- ▶ **Terms and Conditions** > over the Annexes, except for Annex 5
- ▶ **Annex 2** > over the Annex 1

Data Sheet

Key Data

1

GENERAL DATA

(e.g. Project number, name, type of action, start and end date and duration)

2

PARTICIPANT

(e.g. Coordinator)

3

GRANT

(e.g. Action grant, budget categories) - Lump sum

4

REPORTING, PAYMENT & RECOVERIES

(e.g. Periodic reporting, payments/recoveries, bank account, etc.)

5

NON-COMPLIANCE

Consequences of non-compliance, applicable law & dispute settlement forum

6

OTHERS

(e.g. Annex 5, record-keeping, audits and reviews, etc.); 3 years (EMDM)

Chapters 1 to 6

Key Articles

ARTICLE 2 *DEFINITIONS*

ARTICLE 6 *ELIGIBLE AND INELIGIBLE CONTRIBUTIONS*

ARTICLE 11 *PROPER IMPLEMENTATION OF THE ACTION*

ARTICLE 17 *COMMUNICATION, DISSEMINATION AND VISIBILITY*

ARTICLE 21 *REPORTING*

ARTICLE 22 *PAYMENTS AND RECOVERIES — CALCULATION OF AMOUNTS DUE*

ARTICLE 35 *FORCE MAJEURE*

ARTICLE 36 *COMMUNICATION BETWEEN THE PARTIES*

ARTICLE 38 *CALCULATIONS OF PERIODS AND DEADLINES*

Audit

ARTICLE 25 – CHECKS, REVIEWS, AUDITS AND INVESTIGATIONS — EXTENSION OF FINDINGS

WHEN?

Up to 3Y after the end of project implementation

WHO?

Agency/Commission staff, external auditors, European Court of Auditors

WHY?

For reasons of accountability

HOW?

Checking supporting documentation for completion of work package and deliverables

WHERE?

In your premises

Amendments

Article 39

1

The party requesting an amendment must submit a request for amendment signed directly in the **Portal Amendment tool**

2

The **coordinator** submits and receives requests for amendment

3

The request for amendment must include: the **reasons why** and the appropriate **supporting documents**

4

The amendment (AMD) must be signed for **45 days from the receiving of the notification**; the deadline may be extended or the AMD could be rejected

5

Request to be **submitted before the end of the action** & sufficiently in advance

6

Enters **into force on the day of the signature** of the receiving party

EXAMPLES



When Amendment is **not needed**:



Name & address of the organization, legal form, etc. but obligation to update information in the participant portal



When Amendment is **needed**:



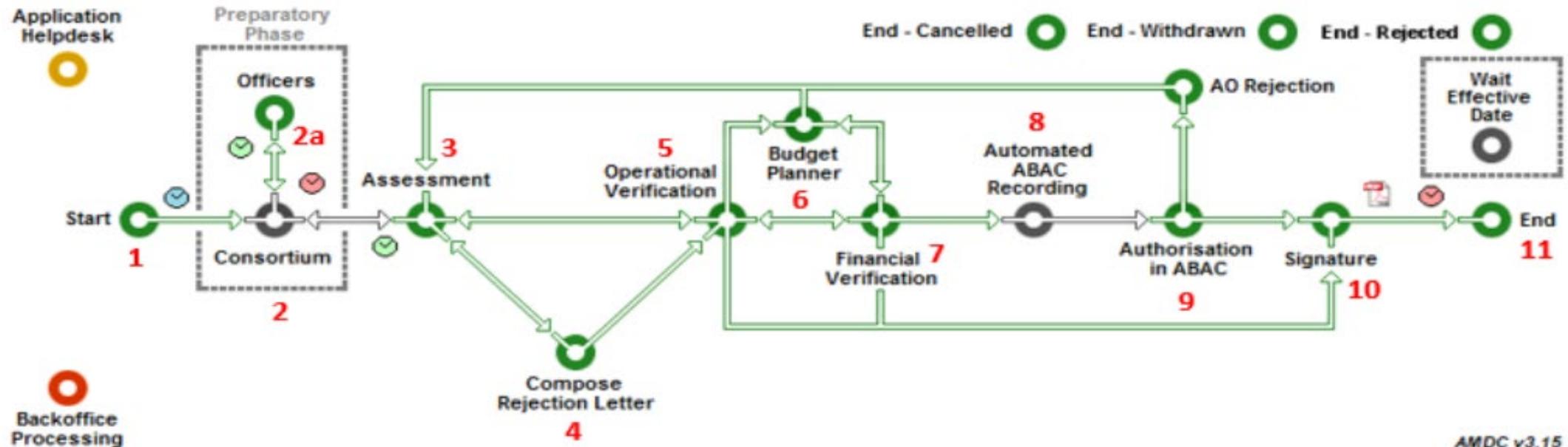
Extension of eligibility period, bank account,...



Significant changes in planned activities/deliverables

Amendments Main Steps

Amendment - Consortium Request



Amendments Main Steps

Step 1

1

Launch the Amendment preparation in the F&T Portal

The coordinator logs in to the F&T Portal

More information:

- [How to launch an amendment - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)
- [Amendments - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)
- [amendment-guide_en.pdf \(europa.eu\)](#)
- If you have doubts: contact your PO prior to the launch of your Amendment via the Communication Centre in the portal

Amendments Main Steps

Step 2

2

The Coordinator launches the amendment request, prepares all data and sends to the EU for review

a

Launching a new interaction with the Service

i Only the Coordinator Contact Person can perform this action.

Grant Management Services

Generic DEVUSERCOORDINATOR

Launch new interaction with the EU +

Consortium Requested Amendment
AMD-208167-6
02 Dec 2020

▶

▶ Process documents

▶ Process communications

▶ Process history

Launched Prepared Submitted Admissible Decision

Amendments Main Steps

Step 2

2

The Coordinator launches the amendment request, prepares all data and sends to the EU for review

b

Preparing the amendment data – the task will be available, as soon as the button 'Lock for Review' appears

The screenshot displays a user interface for managing an amendment. At the top, a blue information icon is followed by the text "All beneficiaries can perform this action." Below this, a card titled "Consortium Requested Amendment AMD-981576-1" is shown. A progress bar with five stages is visible: "Launched" (with a play icon and date "05 Aug 2020"), "Prepared", "Submitted", "Admissible", and "Decision". A red box highlights the "Amendment preparation" task, which has a warning icon. A red arrow points to this task. To the right of the task list is a yellow button labeled "Lock for review". Below the main card are three expandable sections: "Process documents", "Process communications", and "Process history".

Amendments Main Steps

Step 2

2

The Coordinator launches the amendment request, prepares all data and sends to the EU for review

c

Locking the amendment request for review

i Only the Coordinator Contact Person can perform this action.

Consortium Requested Amendment
AMD-981576-1

05 Aug 2020

Launched Prepared Submitted Admissible Decision

Cancel amendment

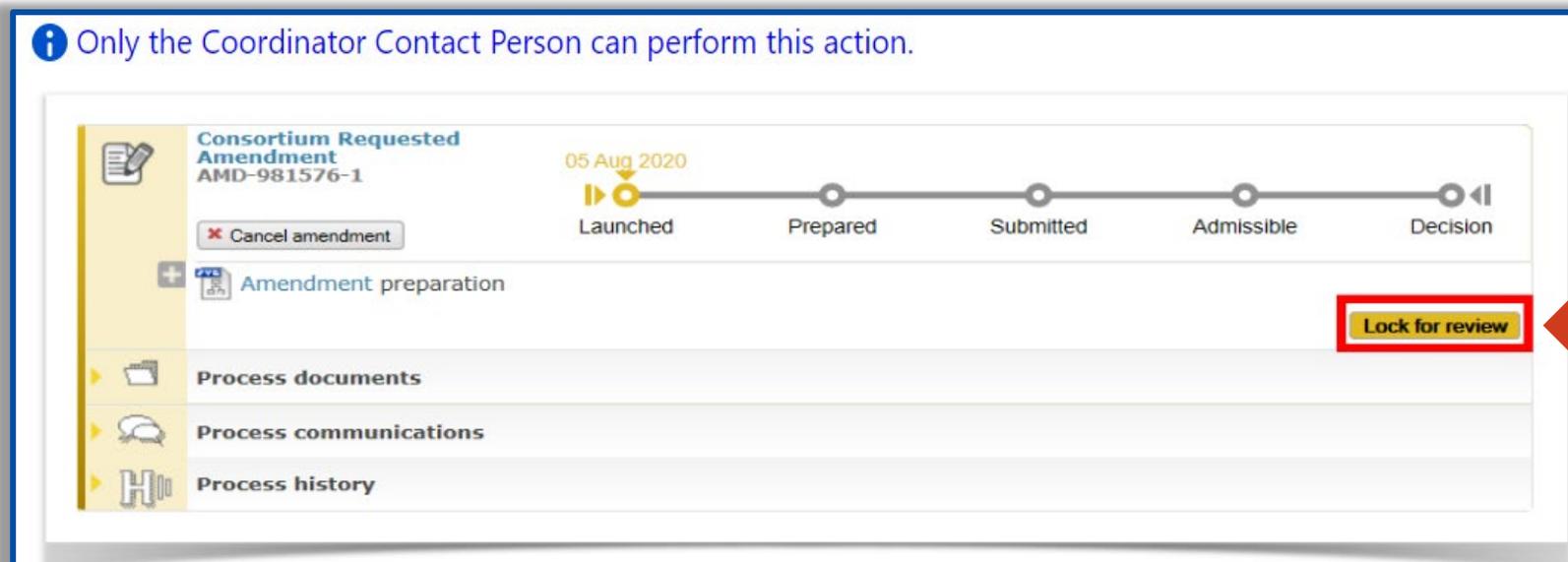
Amendment preparation

Lock for review

Process documents

Process communications

Process history



Amendments Main Steps

Step 2

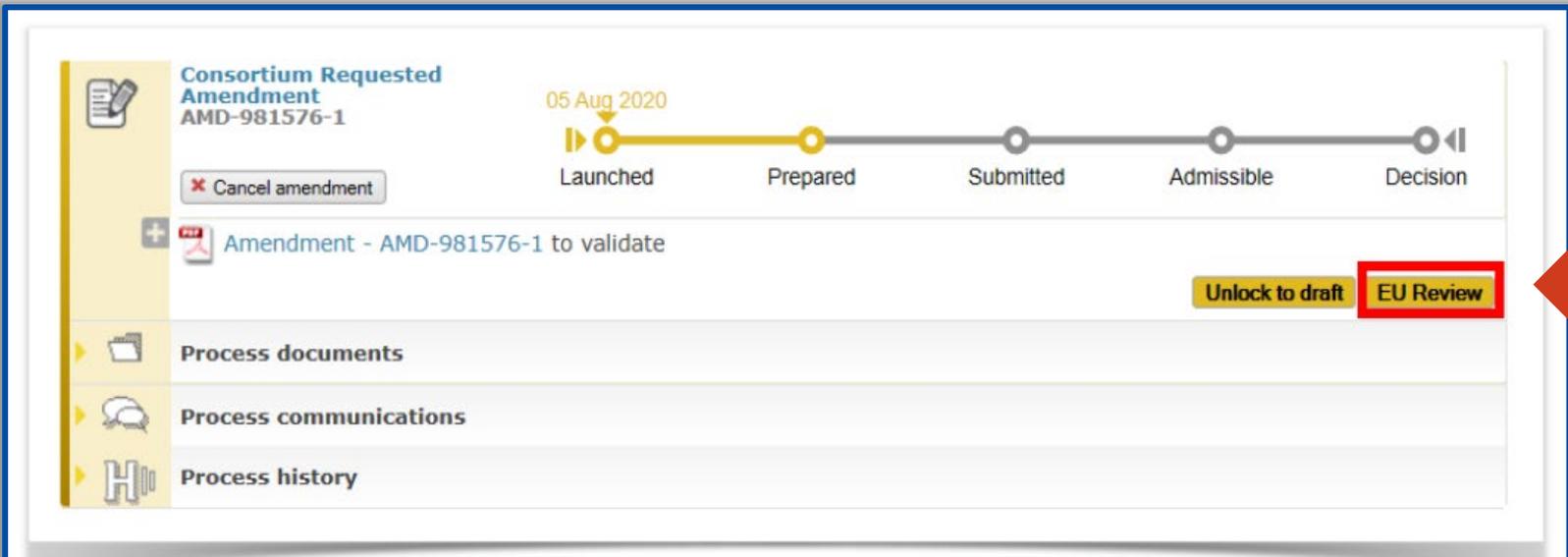
2

The Coordinator launches the amendment request, prepares all data and sends to the EU for review

d

Sending the amendment request for review by the EU

➤ Option to cancel amendment is available



The screenshot displays a user interface for managing an amendment request. At the top, it shows the title "Consortium Requested Amendment" with the ID "AMD-981576-1". A progress bar below the title indicates the current stage is "Launched" (dated 05 Aug 2020), with subsequent stages being "Prepared", "Submitted", "Admissible", and "Decision". A "Cancel amendment" button is visible. Below the progress bar, there is a document icon and the text "Amendment - AMD-981576-1 to validate". At the bottom right of the main content area, there are two buttons: "Unlock to draft" and "EU Review", with the "EU Review" button highlighted by a red box and a red arrow pointing to it from the right. On the left side, there is a sidebar with three expandable sections: "Process documents", "Process communications", and "Process history".

Amendments Main Steps

Step 2 & 3

2

The EU Services review the amendment request (mandatory)

3

The Project Legal Signatory signs and submits the amendment request to the EU Services after the EU review

The screenshot displays a project management interface for a 'Consortium Requested Amendment' (AMD-981576-1). A progress bar at the top shows five stages: 'Launched', 'Prepared', 'Submitted', 'Admissible', and 'Decision'. The 'Launched' stage is highlighted with a yellow bar and a date of '05 Aug 2020'. Below the progress bar, a document icon is labeled 'Amendment - AMD-981576-1 signature and submission'. At the bottom right of the interface, there are two buttons: 'Unlock to draft' and 'Sign & Submit'. The 'Sign & Submit' button is highlighted with a red border and a red arrow points to it from the right. On the left side, there are three expandable sections: 'Process documents', 'Process communications', and 'Process history'.

Amendments Main Steps

Step 4 & 5

4

The EU Services assess the amendment

- The EU Services have 45 days to assess the request.
- Once the request has been assessed, the process goes to the status "**Admissible**"

5

The EU Services accept (countersign the amendment) or reject (make available a rejection letter)

- On completion of the assessment, the amendment is accepted or rejected and countersigned by the EU. The metro line moves to the status decision

SYGMA Screen

The screenshot displays the SYGMA interface for project 667980 (CARAT). The top navigation bar includes 'Grant Management' and 'Amendments of Grant Agreement Data'. A menu of tabs is visible, with 'Project Summary' highlighted in a red box. Below the tabs, the 'Project Summary' section shows the project name 'Project 667980 (CARAT) - SIGNED (IN FORCE)'. Key details include the responsible unit (RTD/E/05), call (H2020-PHC-2014-2015), topic (PHC-16-2015 - Tools and technologies for advanced therapies), type of action (RIA), and duration (48). The 'Important Dates' section lists the entry into force (08/12/2015), project start date (01/01/2016), and project end date (31/12/2019). The 'Amendment Information' section, also highlighted in a red box, shows the amendment number (to be assigned), reference (AMD-667980-8), and type (CR (Consortium Requested)). The 'Budget Information' section shows a total cost of 5,989,158.75 € and a maximum grant amount of 5,989,158.75 €, representing 100.00% of the total costs. A 'Validate' button is located at the bottom right of the screen.

667980 (CARAT) RIA
Reference: AMD-667980-8
Type: CR (Consortium Requested)

Project Summary

Project 667980 (CARAT) - SIGNED (IN FORCE)

Responsible Unit: RTD/E/05
Call: H2020-PHC-2014-2015 submitted for H2020-PHC-2015-two-stage / 21 Apr 2015
Topic: PHC-16-2015 - Tools and technologies for advanced therapies
Type of Action: RIA
Duration: 48

Important Dates:
Entry into force of the Grant: 08/12/2015
Project Start Date: 01/01/2016
Project End Date: 31/12/2019

Amendment Information:
Number: (number will be automatically assigned as soon as the amendment is signed by both parties)
Reference: AMD-667980-8
Type: CR (Consortium Requested)

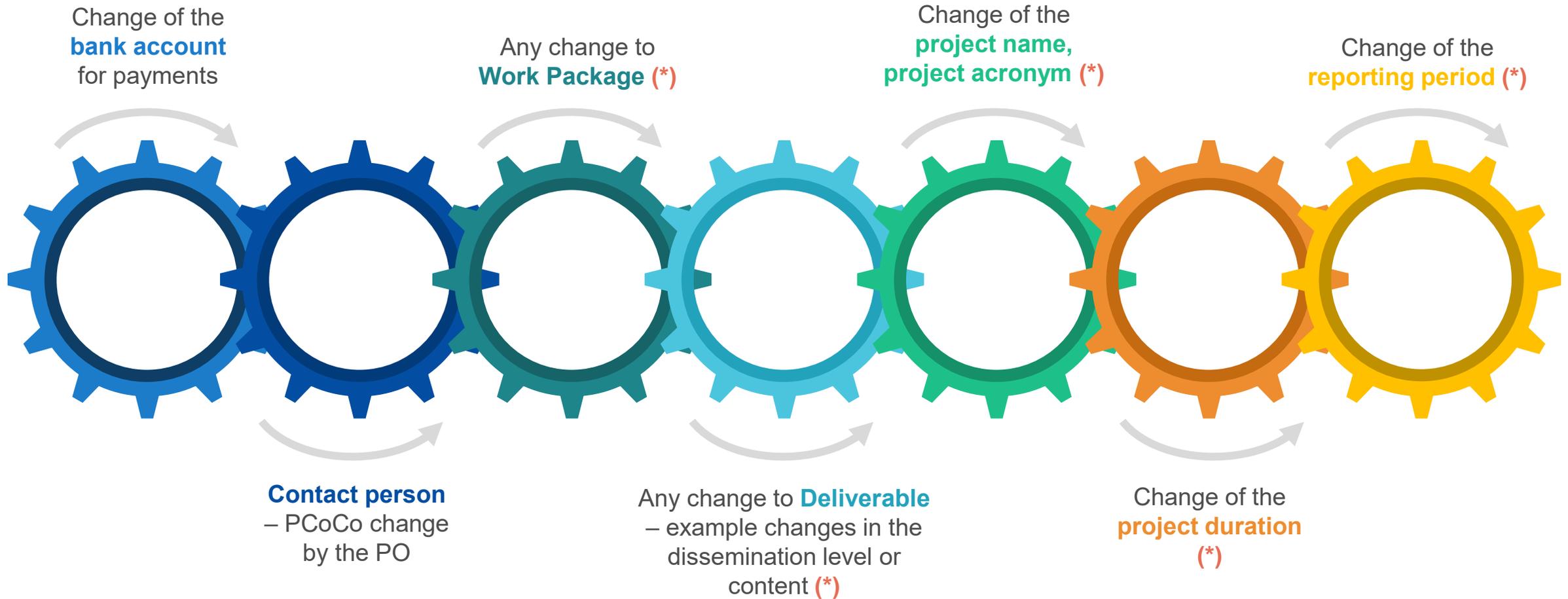
Budget Information:
Proposal overall costs : 5,989,158.75 €
Maximum grant amount after evaluation : 5,989,158.75 €
Total costs (including non-EU funded) : 5,989,158.75 €
Total Costs: 5,989,158.75 €
Maximum Grant Amount: 5,989,158.75 € 100.00 % of total costs

Officers: Validate

Consortium makes all the needed changes (e.g., change Start date, duration, etc.) in the related tabs

At least one modification has to be done

The most common Amendments



(*) These changes on project data will automatically trigger the setting of the "Change of annex 1" type

Changes without Amendment

Certain data changes which do not require a formal amendment:

➤ **AMD Information Procedures** such as change of legal data (name, address, VAT); change of bank account information (bank name, branch address, bank account holder)...

[AMD Information Procedures - GoFund - Confluence \(europa.eu\)](#)

➤ Change of the **deliverable due date**

Thank you



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