

The European Research Council

Amendments

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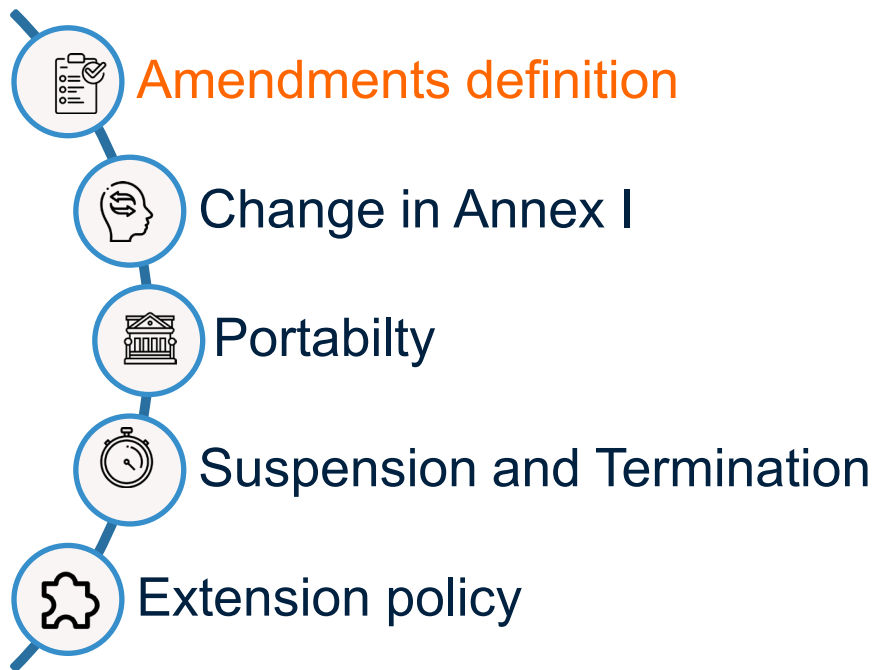
European Research Council

Established by the European Commission



Disclaimer: information contained in this presentation is not legally binding.

Agenda



Amendment



Grants may need to be amended during their lifetime if circumstances affecting the project have changed since the initial agreement was signed.



Changes cannot call into question the decision awarding the grant or breach the principle of equal treatment of applicants

Changes always calling for an amendment



Portability / Change of HI



Beneficiaries / linked third parties (H2020) / affiliated entities(HE)/ Subcontracting / In kind contribution



Additional funding



Project implementation (Commitments, DoA, duration)



Suspension

Changes that DO NOT require an amendment

Scientific aspects

Minor changes with no effect on the objectives or methodology, or redistribution of activities among beneficiaries

Financial aspects

Flexibility in budget management for as long as the project is implemented as per Annex 1 – DoA

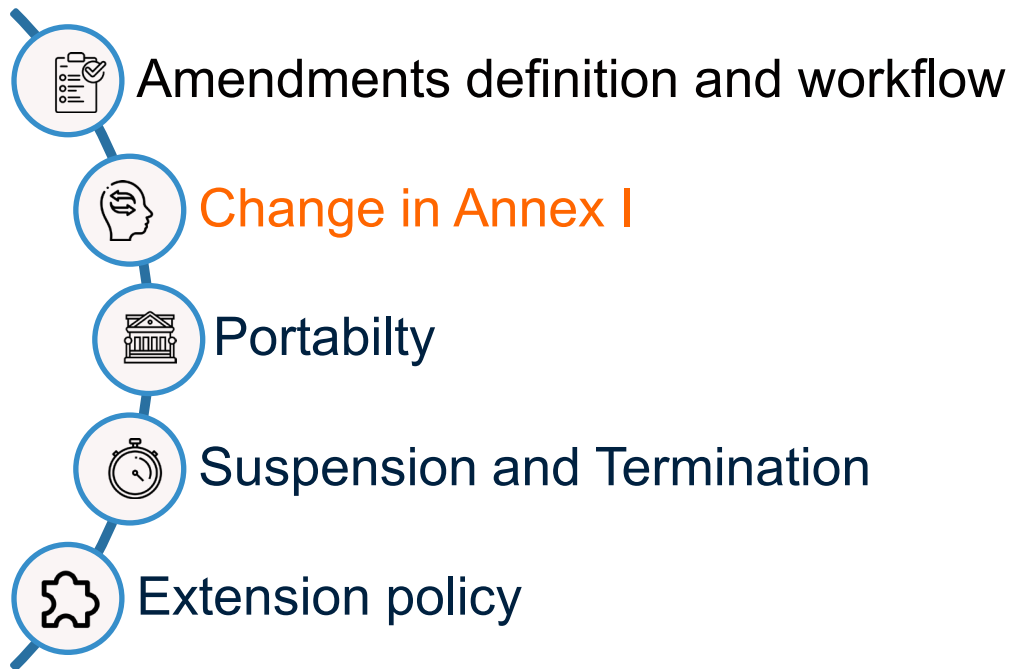
Administrative aspects

UTRO

name or address of a beneficiary or bank



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Change in Annex 1 (Description of the Action)

- ✓ Change of **action tasks** (e.g. if tasks are added/removed) or their division among the beneficiaries
- ✓ Change of **PI's time commitment**
- ✓ Changes concerning, **beneficiaries, subcontracts or in-kind contributions** provided by third parties, **affiliated entities**

SIMPLIFIED AMENDMENT FEATURES

- ✓ Use the **Template addendum** sent by your Project Officer
- ✓ Template addendum vs. PI's Justification Letter



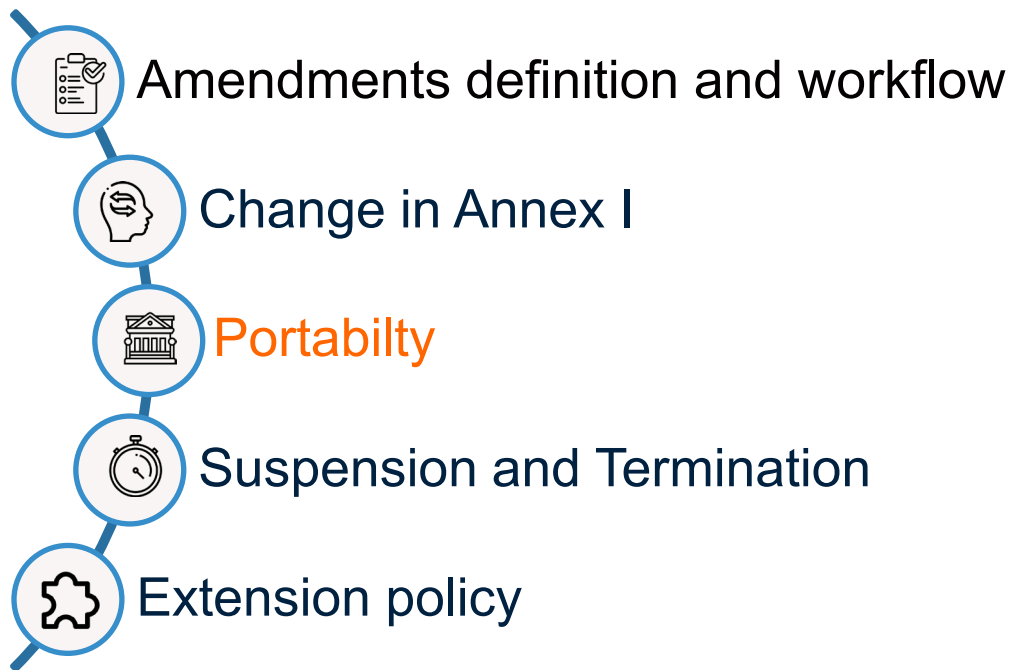
Budget changes impacting on DoA

Overall principle - **flexibility** in budget management

Budget transfers and re-allocation	Amendment needed?
From one beneficiary to another	NO
From one budget category to another	NO
Between forms of costs within the direct personnel costs budget category	NO
Addition/removal of tasks in Annex 1 Re-allocation of tasks in Annex 1	YES
New subcontracts, in-kind contributions, beneficiary, affiliated entity	YES



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Portability/Transfer of the Agreement

- ✓ H2020 Art 56a GA and HE Art 41 GA
- ✓ PI Right to request transfer of the ERC grant to a new beneficiary at any time during the action's implementation
- ✓ On any ground beneficial to the PI, provided that the objectives of the action remain achievable
- ✓ New HI has to agree on joining the GA
- ✓ The role of the former HI to be clarified (remains or leaves).



Portability

Send the AMD to Officers step

Submit

AMD Information

- Beneficiaries
- WPs and deliverables
- Financial info
- PI info

SyGMA

HI

Launch AMD

PI

Contact PO

Contact the PO to ask info on procedure

Inform HI

Negotiate the modalities of the transfer:

- Date
- Team
- Equipment

Negotiate

Documents

Prepare documents

- DoA
- Justification letter
- Supplementary Agreement



Reminders for Portability

- A. Portability requires an AM!
- B. The Old HI remains responsible until the signature of the AM

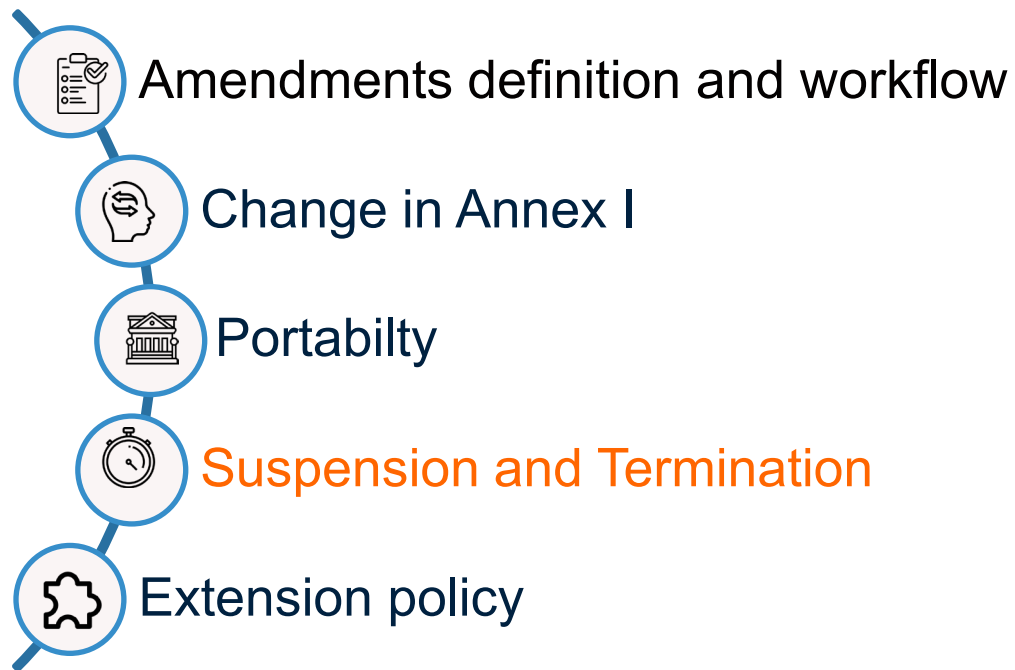
Details in relation to the team, the start date, equipment etc. to be negotiated between the Old HI, the New HI and the PI



The date of transfer should match the PI's employment date with the New HI

The New HI can claim costs only after the AM has been formally signed (Attention: Start Date vs. Eligibility of Costs)

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SUSPENSION (Consortium-requested)

When? Circumstances making **implementation impossible**.

Examples: Serious illness, Public Appointments

Eligible costs: Costs incurred during the suspension are not eligible.

Reinstatement: with an amendment, assessing the scientific value especially for suspensions longer than 12 month.

H2020 (Article 49.1): Via **Formal Notification**. It is lifted with an amendment.

HE (Article 31.1): Via **Amendment**. It is lifted with an amendment.



TERMINATION (Consortium-requested)

Examples: Loss of the action's scientific or technological relevance, or because the action finished ahead of schedule.

Eligible costs: Only those incurred before the end of work date (HE)

Terminations cannot be retroactive.

New in HE: The date the consortium ends work on the action ('**end of work date**') and the date the termination takes effect ('**termination date**'), which must be after the date of the submission of the amendment request

H2020 (Article 50.1): Via **Formal Notification**.

HE (Article 32.1): Via **Amendment**.



ERCEA can also SUSPEND or TERMINATE

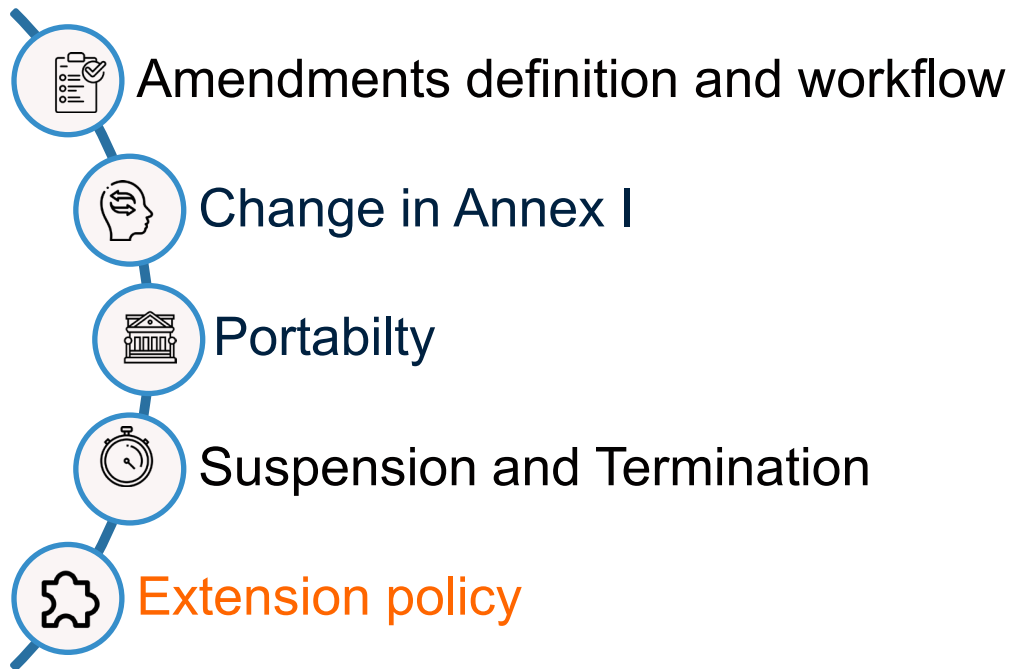
Suspension (Article 31.2 HE, H2020 Article 49.2) in case of Substantial Errors, Irregularities, Fraud, Serious Breach of Obligations, Loss of Scientific Relevance.

Termination of GA or Beneficiary (Article 32.3 HE, Article 50.3 H2020) in case of:

- ✓ Legal, financial, technical situation that substantially affects the implementation
- ✓ Bankruptcy or Beneficiary in breach of social security or tax obligations
- ✓ Beneficiary found guilty of grave professional misconduct
- ✓ Beneficiary committed fraud, corruption, money laundering
- ✓ Circumvent fiscal, social or other legal obligations in the country of origin



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Extension policy

- ✓ Extension is an **exceptional** option
- ✓ Up to a maximum of **12 months** (through one or several amendments)
- ✓ Extensions justified by “**force majeure**” or PI personal circumstances do not count against the 12-month rule
- ✓ After the **approval of the Mid-Term Scientific Report**



2 Years Rule

A researcher, already participating as Principal Investigator in an ERC excellence grant, may not submit a proposal for another ERC grant of this type, unless the existing project ends no more than two years after the call deadline.

In line with the above, in case a PI has an ongoing application, or intends to apply for an excellence grant within this time frame, consider removing or reducing the period of extension so that the application does not become ineligible.



Legal and IT instruments for AMD

✓ The legal basis

- [ERC 2025 Work Programme](#)
- [H2020 Model Grant Agreement](#)
- [HE Model Grant Agreement](#)

✓ For legal & procedural aspects

- [H2020 Annotated Grant Agreement](#)
- [HE Annotated Grant Agreement](#)

✓ For IT aspects - the Online manual:

- [Amendments - H2020 Online Manual \(europa.eu\)](#)
- [Online Manual - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)
- [IT How to – Amendments](#)

Financial and administrative matters explained in 6 [videos](#)



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Evaluation QR code

