



Adaptations to the LERU Consortium Agreement template for MSCA ITNs

Fifth Meeting of the WG 2 Finance
COST Targeted Network TN1302: BESTPRAC

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Agenda

- Why a CA for MSCA ITNs?
 - The financial perspective
- Research, Training and Networking (RTN) costs
- Management and indirect costs
- Family allowance
- Costs for Partner organisations



Why a CA for MSCA ITNs?

- Regulation of rights and obligations
- Budget allocation among consortium members
 - Allocation may differ from the Grant Agreement
- Rules on funding of costs for partner organisations



Cost categories that may be reallocated

- Management and indirect costs
- Research, Training and Networking (RTN) costs
- Family allowance
 - EU funding may be insufficient
 - Need for rules for this scenario



Management and indirect costs

- May be reallocated without GA amendment
 - Clearly stated in the EU guidelines
- Allocation for management costs to the Coordinator should be agreed in advance
- Our adaptation of the LERU template:
 - Clarifying the principles and basis of allocation of management budget for the Coordinator
 - Should be based on the amount of effort and resources required
 - Cost calculation a consequence of effort and resources



Research, Training and Networking (RTN) costs

- May be reallocated without GA amendment
 - This is not clearly stated in the EU guidelines, but has been confirmed in writing
- If costs for hosting av network events are not proportional to researcher month allocation
 - Allocation of budget for hosting of network events allocated to hosting beneficiaries or the coordinator (if event is hosted by a partner organisation)
- Spare fund for unforeseen RTN costs retained for later allocation



Family allowance

- Max grant in GA budget based on assumption:
 - 50% of researcher months qualify for family allowance
- All researchers that qualify for family allowance are entitled to full payment of this allowance
- If more than 50% of researcher months qualify:
 - EU funding for family allowance insufficient
- Need to agree on how to cover this funding gap
- Our suggestion:
 - Reallocate from budget for RTN costs



Costs for Partner organisations

- Partner organisations are not parties to the Grant Agreement (GA)
- They have no budget in the GA
- There may be valid and strong arguments for reimbursing project costs for partner organisations, for
 - hosting secondments
 - hosting network events
 - participating at network events
 - participating at review meetings, if requested by the EC
- Our adaptation of the LERU template:
 - Clarifying the principles and budget amounts for funding of costs for partner organisations

Which parts of the CA?

- Section 7: Financial provisions
 - Added text to:
 - 7.1.5 “Allocation of Management and Overheads cost category”
 - New sub-section:
 - 7.1.6 “Allocation of Research, Training and Networking costs (RTN costs)”
 - New sub-section:
 - 7.1.7 “Allocation of Family Allowance”
 - Changed text (dividing payment in several instalments):
 - 7.3.2 "The payment schedule"
- Attachment 7: Template Secondment Agreement
 - Added text in sub-section "5. Finance arrangements", establishing max limit on reimbursement of costs for secondment host
- Attachment 8: Consortium Plan Budget
 - Table for allocation of Research, Training and Networking (RTN) costs



Questions?

