

## **Lear Definition: Role and Tasks**

[Please note that the document was not translated. Therefore it is only available in English]

### **1. DEFINITION OF LEAR**

The LEAR or **Legal Entity Appointed Representative** is a natural person appointed by a legal signatory of a legal entity to perform on its behalf certain tasks in the context of the legal entity's dealings with the Research DGs (RDGs) of the Commission (DG RTD, DG CNECT, DG ENTR, DG MOVE and DG ENER) as well as with other implementing bodies (executive agencies, JTI...) of the Research Framework Programmes. The rights and tasks performed by the LEAR are listed below, and they are equally applicable to any Account Administrator that the LEAR may define at the level of the Identity and Access Management of the Participant Portal.

### **2. LEAR RIGHTS**

- The LEAR has the right to consult and request the update of the legal and financial information of his legal entity through a secure Internet site that ensures adequate authentication and confidentiality mechanisms.
- The RDGs commit to the LEAR to treat all personal data provided by the LEAR in accordance with applicable law and regulations on protection of personal data.
- The LEAR will have online access to the status of validation by the RDGs of the legal and financial data of the legal entity he/she represents.
- The LEAR will be informed of or given access to all uses that are made of his legal entity's PIC, in particular in the context of electronic submission of proposals.

### **3. LEAR TASKS**

- The LEAR provides the RDGs upon their request with up-to-date legal and financial data (including supporting documents) concerning the legal entity she/he represents. The LEAR enters the data through URF/PDM and the EC Central Validation Team (CVT) performs the validation after the data have been completed.
- The LEAR engages his organisation to maintain and update regularly the legal and financial data held by the RDGs regarding his legal entity, thus enabling their use for contracting and other transactions between his legal entity and the RDGs. The LEAR should regularly check the correctness of the available data in particular when he is aware of changes and of negotiations and other transactions going on.
- The LEAR encodes and updates in the electronic system provided by the Commission the person(s) within his legal entity authorised to act as

signatory/signatories of financial statements (forms C). This task includes the obligation to revoke this assignment when the person(s) no longer has/have this authorisation.

- The LEAR distributes the Participant Identification Code (PIC) to other employees in his legal entity who might need it in the context of dealing with the RDGs, for example for electronic submission of proposals or negotiation of grant agreements.


*Date and signature:*

*Stamp:*

#### 4. ANNEX

The forms that follow are for information purposes and do not need to be filled in. The forms represent the information that is meant to be kept up to date by the LEAR.

##### 4.1. Documents for legal data information

Grant agreement Preparation Forms			
 EUROPEAN COMMISSION 7 <sup>th</sup> Framework Programme on Research, Technological Development and Demonstration		<b>All Schemes</b>	
		<b>A2.1:</b> <b>Who we are</b>	
Project Number <sup>1</sup>	Project Acronym <sup>2</sup>	Participant number in this project <sup>10</sup>	Participant short name <sup>11</sup>
<b>ONE FORM PER PARTICIPANT</b>			
<b>LEGAL DATA</b>			
If your organisation has already registered for FP7, enter your Participant Identity Code <sup>12</sup>			
Participant Legal name <sup>13</sup>			
Participant Short name <sup>11</sup>			
Status of validation <sup>14</sup>			
<b>SPECIMEN</b>			
<b>Legal address of the participant</b>			
Street name <sup>15</sup>		Number <sup>15</sup>	
Town <sup>15</sup>			
Postal Code / Cedex <sup>15</sup>			
Country <sup>16</sup>			
Internet homepage (optional)			
<b>Registration data of the participant</b>			
Legal registration number <sup>17</sup>			
Place of registration <sup>17</sup>			
Date of registration <sup>17</sup>			
VAT Number <sup>18</sup>			
Legal form <sup>19</sup>			
<b>Contact person for legal information <sup>20</sup></b>			
Family name		First name(s)	
Phone 1 <sup>21</sup>		Phone 2 <sup>21</sup>	
E-mail		Fax <sup>21</sup>	

# Grant agreement Preparation Forms



EUROPEAN COMMISSION  
7<sup>th</sup> Framework Programme on  
Research, Technological  
Development and Demonstration

All  
Schemes

**A2.2:**  
Who we are

Project Number <sup>1</sup>	Project Acronym <sup>2</sup>	Participant number in this project <sup>10</sup>	Participant short name <sup>11</sup>
-----------------------------	------------------------------	--	--------------------------------------

**ONE FORM PER PARTICIPANT**

**STATUS OF YOUR ORGANISATION**

Certain types of organisations benefit from special conditions under FP7 participation rules. If you are one of these, please tick the appropriate box(es) below. <sup>22</sup>

Your organisation is:

<input type="checkbox"/>	Natural person <sup>23</sup>		
<input type="checkbox"/>	Public body <sup>24</sup>		
<input type="checkbox"/>	• Non profit public body <sup>25</sup>		
<input type="checkbox"/>	• Profit public body <sup>26</sup>		
<input type="checkbox"/>	• International organisation of European interest <sup>27</sup>		
<input type="checkbox"/>	• International organisation – other <sup>28</sup>		
<input type="checkbox"/>	Secondary and higher education establishment <sup>29</sup>		
<input type="checkbox"/>	Non-Profit Research organisation <sup>30</sup>		
<input type="checkbox"/>	Enterprise <sup>31</sup>		
<input type="checkbox"/>	• SME <sup>32</sup>		
<input type="checkbox"/>	• Non-SME <sup>33</sup>		
<input type="checkbox"/>	None of the above	Please specify	

**Indirect costs <sup>41</sup>**


Actual indirect costs <sup>42</sup>

Simplified method <sup>43</sup>

Standard flat rate <sup>44</sup>

Special transitional flat rate <sup>45</sup>

## 4.2. Documents for financial data information

 <p style="margin: 0;"><b>EUROPEAN COMMISSION</b> 7<sup>th</sup> Framework Programme for Research, Technological Development and Demonstration</p>	<h1 style="margin: 0;">Grant agreement Preparation Forms</h1> <h2 style="margin: 0;">Appendix 1: Simplified accounts</h2>
---	---

Project Number <sup>1</sup>		Project Acronym <sup>2</sup>		Participant number in this project <sup>9</sup>	
-----------------------------	--	------------------------------	--	---	--

### RESTRUCTURED SIMPLIFIED ACCOUNTING BALANCE SHEETS & PROFIT AND LOSS ACCOUNTS

	Year N	Year N-1
Closing date (dd/mm/yyyy)		
Duration (in months)		
Currency		

SPECIMEN

#### Accounting Elements

		Year N	Year N-1
<b>ASSETS</b>	1- Subscribed capital unpaid		
	2- Fixed assets (2.1+2.2+2.3)	0,00	0,00
	2.1- Intangible fixed assets		
	2.2- Tangible fixed assets		
	2.3- Financial assets		
	3- Current assets (3.1+3.2.1+3.2.2+3.3+3.4)	0,00	0,00
	3.1- Stocks		
	3.2.1- Debtors due within one year		
	3.2.2- Debtors due after one year		
	3.3- Cash at bank and in hand		
3.4- Other current assets			
<b>Total assets (1+2+3)</b>	<b>0,00</b>	<b>0,00</b>	

		Year N	Year N-1
<b>LIABILITIES</b>	4. Capital and reserves (4.1+4.2+4.3+4.4)	0,00	0,00
	4.1- Subscribed capital		
	4.2- Reserves		
	4.3- Profit and loss brought forward from the previous years		
	4.4- Profit and loss brought forward for the financial year		
	5. Creditors (5.1.1+5.1.2+5.2.1+5.2.2)	0,00	0,00
	5.1.1- Long term non-bank debt		
	5.1.2- Long term bank debt		
5.2.1- Short term non-bank debt			
5.2.2- Short term bank debt			
<b>Total liabilities (4+5)</b>	<b>0,00</b>	<b>0,00</b>	

# Grant agreement Preparation Forms



EUROPEAN COMMISSION

7<sup>th</sup> Framework Programme for  
Research, Technological  
Development and Demonstration

## Appendix 1: Simplified accounts

### Profit and Loss Account(s)

		Year N	Year N-1
	Turnover		
+	Variation in stocks <sup>(1)</sup>		
+	Other operating income		
=	Operating income (OI)		0,00
-	Cost of materials and components		
-	Other operating charges		
-	Remuneration and charges on contracts		
=	Gross Operating Profit or Loss (GOP/GOL)	0,00	0,00
-	Depreciation and value adjustments on non-financial assets		
=	Net Operating Profit or Loss (NOP/NOL)	0,00	0,00
+	Financial income and value adjustments on financial assets		
-	Interest paid		
-	Similar charges		
=	Profit or Loss on ordinary activities	0,00	0,00
+	Extraordinary income		
-	Extraordinary charges		
-	Taxes on profits		
=	Profit or Loss for the financial year (Net result)	0,00	0,00

(1) Positive or negative amount