# Grant Agreement Preparation (GAP)

# Overview and actors

**Lionel Boillot, Project Officer / Call Coordinator**

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# GAP: No negotiation

## Your proposal is taken 'as is'

- Proposals were evaluated based on merit and not on their potential
- The Grant Agreement (GA) is prepared on the basis of the proposal selected for funding

## BUT some changes may be necessary:

- Changes to meet legal and financial requirements
- Requirements resulting from ethics review or security scrutiny
- Due to removal of participant (if agreed by CleanH2 JU)
- Correction of clerical errors and obvious inconsistencies
- Correction of shortcomings identified by the experts in the ESR

## No negotiation does not mean no control

- Eligibility and viability checks
- Anti-fraud measures and risk-based controls are carried out

**Non-compliance**, serious breach or negligence of the applicable rules  evokes **the termination of grant preparation** and the rejection of the proposal

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# Portal principles

**Single gateway for all exchanges: Funding and Tenders Portal**

- Deep integration of IT tools and services in the portal
- Uniform experience
- Common business processes

**Electronic-only paperless process flows**

- Digital sealing of documents
- Digital signature on all formal documents replacing blue-ink signatures
- Single, common document repository
- Full traceability and audit trail ensured (who-what-when)
- Predefined business rules in the IT suite ensure compliance

**Secured personalised access**

- User unique EU login account (professional email), linked to the organisation PIC for all roles assigned to the user
- Enable the 2 factor authentication (register your mobile device)

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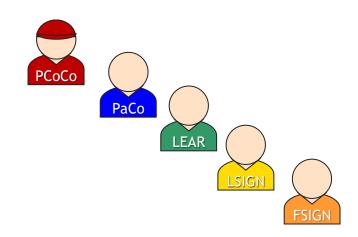
# Appointment of individuals for the key roles

# Identity and access management

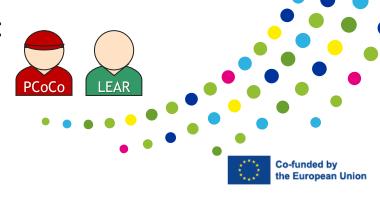The **minimum configuration** of a consortium is:

- 1 Primary Coordinator Contact per project
- 1 Participant Contact per organisation
- 1 LEAR per organisation
- 1 Legal Signatory per organisation
- 1 Financial Signatory per organisation

One person (= 1 EU Login account) can have **as many roles as necessary at the same time**
*(e.g. the owner of a one-person SME can be PaCo, LEAR, PLSIGN and PFSIGN)*

**CleanH2 JU** / **REA services** intervention **only** in defining the roles of:

- **Primary Coordinator Contact**
- **LEAR – Legal Entity Appointed Representative**

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# Nomination process « original roles »

Some roles are automatically provisioned from your proposals ("original roles") as follows:

- The **proposal initiator in the proposal submission phase** will automatically be recognised by the Commission as the **Primary Coordinator Contact**.

- The **"Main Contacts" of the participating organisations** identified during **proposal submission** will become **Participant Contacts** at the beginning of the grant preparation.

- The **LEAR is validated by REA** during the validation process of his/her organisation.
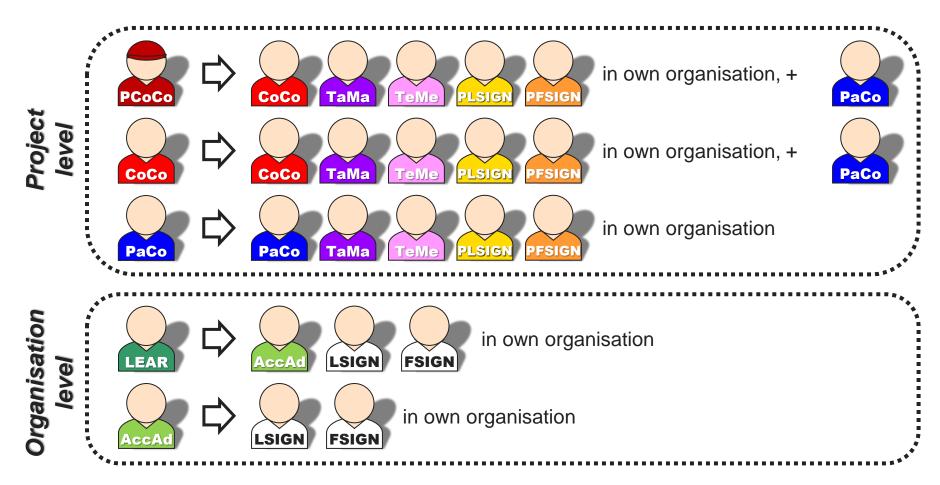
# Nomenclature



**Organisation roles**

Legal Entity Appointed Representative — LEAR

Account Administrator — AccAd

Legal Signatory — LSIGN

Financial Signatory — FSIGN

**Project roles**

Primary Coordinator Contact — PCoCo

Coordinator Contact — CoCo

Participant Contact — PaCo

Task Manager — TaMa

Team Member — TeMe

Legal Signatory assigned to a project — PLSIGN

Financial Signatory assigned to a project — PFSIGN

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# Nomination / revocation of roles

**Who can appoint and revoke project roles?**

# Identity and access management <u>for project</u>

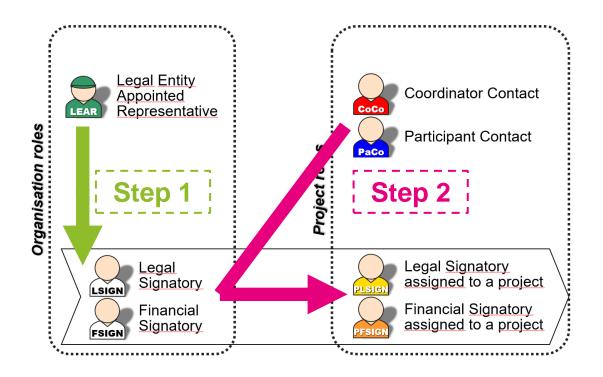| Role | Read | Write / Save | Submit to Coordinator | Submit to Clean H2 | Sign GA | Sign Financial Statements | Assign / revoke access to project |
|------|------|--------------|----------------------|-------------------|---------|---------------------------|-----------------------------------|
| PCoCo / CoCo | ✓ | ✓ | ✓ | ✓ | ✗ | ✗ | ✓ |
| Paco | ✓ | ✓ | ✓ | ✗ | ✗ | ✗ | ✓ |
| TaMa | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |
| TeMe | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| **P**LSIGN | ✓ | ✓ | ✗ | ✗ | ✓ | ✗ | ✗ |
| **P**FSIGN | ✓ | ✓ | ✗ | ✗ | ✗ | ✓ | ✗ |

# How to appoint FSIGN and LSIGN?

**LEAR** is formally nominated by the legal representative of the organization

**Step 1**

**LEAR appoints** on the funding & tender opportunity portal a list of persons authorised to **sign legal documents (LSIGN)** and **financial statements (FSIGN)**

**Step 2**

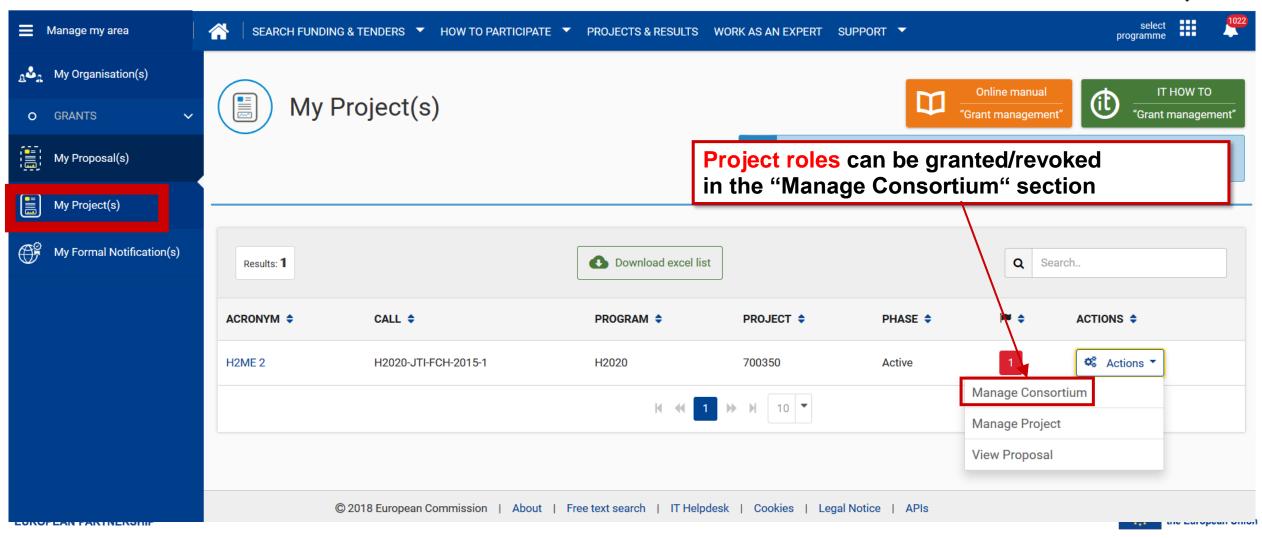Project contacts (**PaCos and CoCos**) must appoint LSIGN and FSIGN to a given project (becoming **PLSIGN** and **PFSIGN**)

*Organisation roles*

LEAR — Legal Entity Appointed Representative

Step 1

LSIGN — Legal Signatory

FSIGN — Financial Signatory

*Project roles*

CoCo — Coordinator Contact

PaCo — Participant Contact

Step 2

PLSIGN — Legal Signatory assigned to a project

PFSIGN — Financial Signatory assigned to a project

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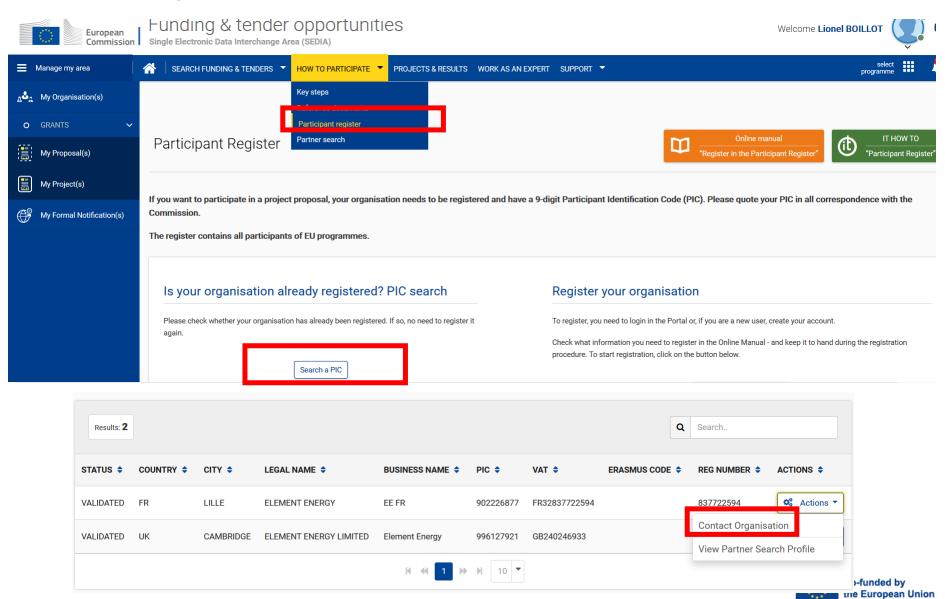
# Where to manage access and project roles?

# Who is my LEAR in 4 steps?

1. Funding & Tender opportunities Portal

2. Participant register

3. Search for your organisation

4. Use "Contact Organisation" function

# Element required in Horizon Europe

## Task to be performed by your LEAR (required during the GAP)

# Gender equality plan

As an **ELIGIBILITY** criterion, public bodies, research organisations (private and public) and higher education establishments from Member States and Associated Countries are required to have in place a gender equality plan. The requirement applies also for Affiliated Entities.

*Self-declaration in the proposal*

## Gender Equality Plan

**Process:**
- Publication: a formal document published on the institution's website and signed by the top management;
- Dedicated resources: commitment of resources and expertise in gender equality to implement the plan
- Data collection and monitoring: sex/gender disaggregated data on personnel (and students, for the establishments concerned) and annual reporting based on indicators
- Training: awareness raising/training on gender equality and unconscious gender biases for staff and decision-makers
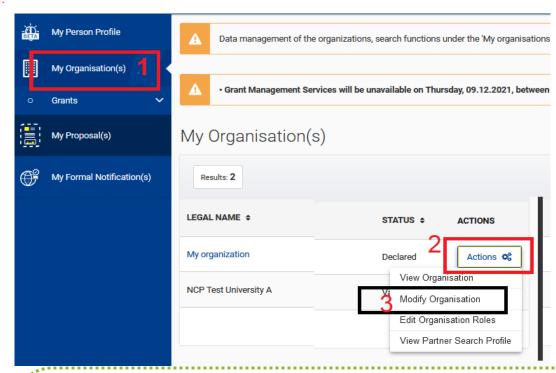
**Content**
- work-life balance and organisational culture
- gender balance in leadership and decision-making
- gender equality in recruitment and career progression
- integration of the gender dimension into research and teaching content
- measures against gender-based violence, including sexual harassment.

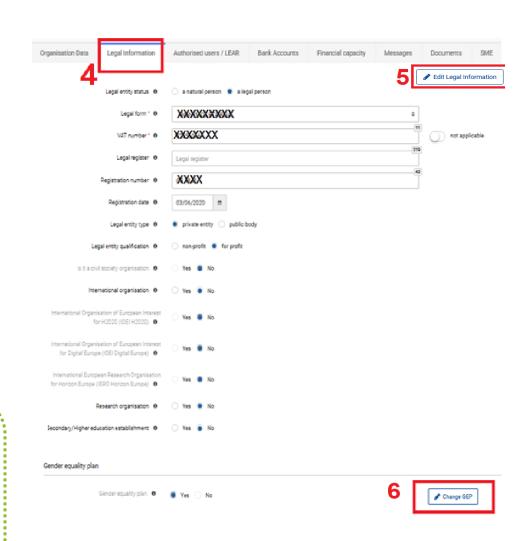**More info on Gender Equality Plan here**

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# Declaring a gender equality plan



**Declaring a Gender Equality Plan in participant register**

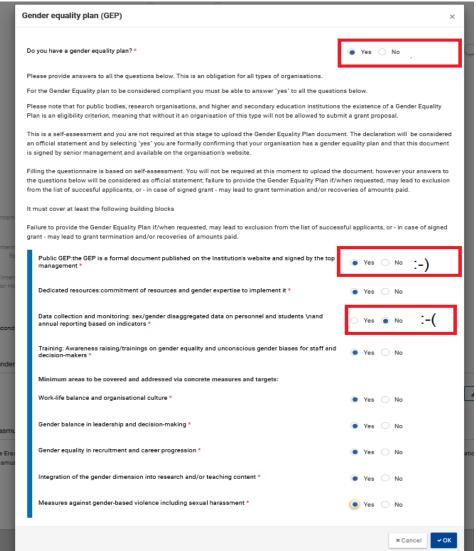If you are from a **concerned organisation that requires a GEP** to participate, then:

- you log in the F&T portal
- Select My Organisation (step 1)
- Select actions (Step 2) → Modify organisation (step 3)
- Select the tab → legal information (step 4)
- Select edit legal information (step 5) → change GEP (Step 6)

# Declaring a gender equality plan



**Declaring a Gender Equality Plan in participant register:**

- In the wizard that opens, you need to select yes to the first question: **does your organisation have a gender equality plan?**

- Then you need to carefully read all the required criteria and answer the **subsequent questions**

- Failure to fulfil one of the required criteria (at least the top 4 ones) is equivalent to not having a gender equality plan → the initial question (if you have a GEP) will be automatically set to 'No'.

- Please read all the relevant information and answer carefully; **Failure to provide the Gender Equality Plan** if/when requested, may lead to **exclusion** from the list of successful applicants, or – in case of signed grant – may lead to **grant termination** and/or **recoveries of amounts paid.**

# Overview of the IT platform for GAP
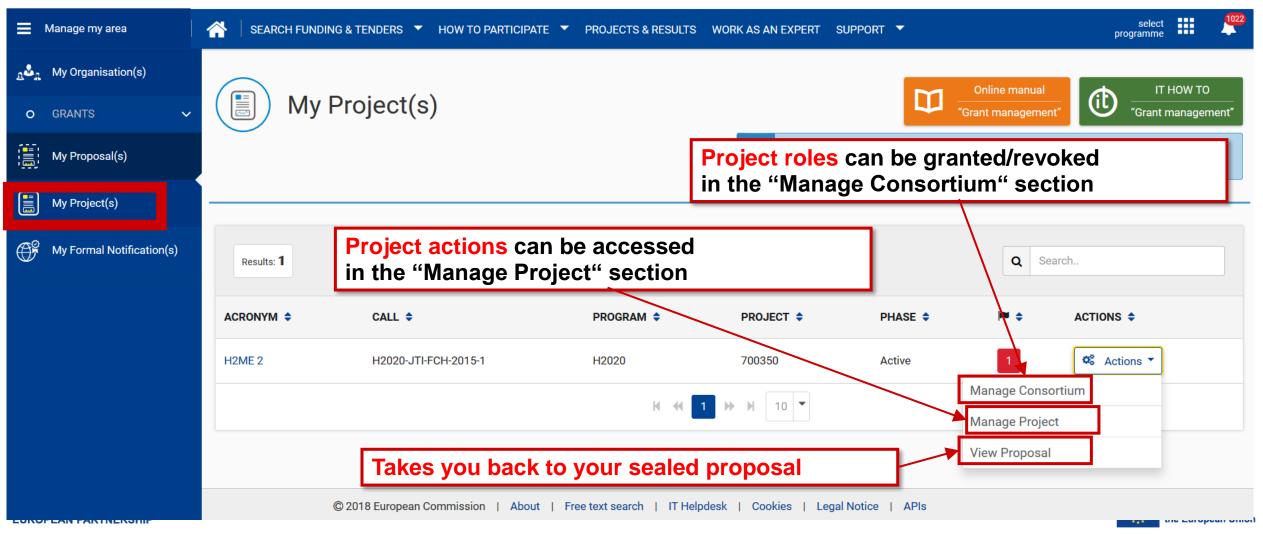
# Technical aspects

# IT system for grant management

**Clean Hydrogen Partnership**

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

Welcome **Lionel BOILLOT**

☰ Manage my area | 🏠 | SEARCH FUNDING & TENDERS ▼ | HOW TO PARTICIPATE ▼ | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT ▼ | select programme

- My Organisation(s)
- GRANTS ⌄
- My Proposal(s)
- My Project(s)
- My Formal Notification(s)

## My Project(s)

Online manual "Grant management"

IT HOW TO "Grant management"

**Project roles** can be granted/revoked
in the "Manage Consortium" section

**Project actions** can be accessed
in the "Manage Project" section

Results: **1**

🔍 Search..

| ACRONYM ⇅ | CALL ⇅ | PROGRAM ⇅ | PROJECT ⇅ | PHASE ⇅ | 🏳 ⇅ | ACTIONS ⇅ |
|---|---|---|---|---|---|---|
| H2ME 2 | H2020-JTI-FCH-2015-1 | H2020 | 700350 | Active | 1 | ⚙ Actions ▼ |

Manage Consortium

Manage Project

View Proposal

|◁ ◁◁ **1** ▷▷ ▷| 10 ▼

**Takes you back to your sealed proposal**

# Grant management service

# Overview

# GAP: the main steps of the process

**August 2025**

**December 2025**

**1** → **4**

**1** Invitation for grant preparation

**2** Grant preparation (COO+Ben)

**2** Review of Grant data

**Validation of participants**

**Setting identity access management (IAM) roles** (each ben)

**3** Signature of the agreement (COO)

**4** Signature of the agreement (CleanH2)

**5** Signature of the accession forms (Ben)

**6** Payment of pre-financing

**Clean Hydrogen Partnership**

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