

Grant Agreement Preparation

Description of the Action (DoA)

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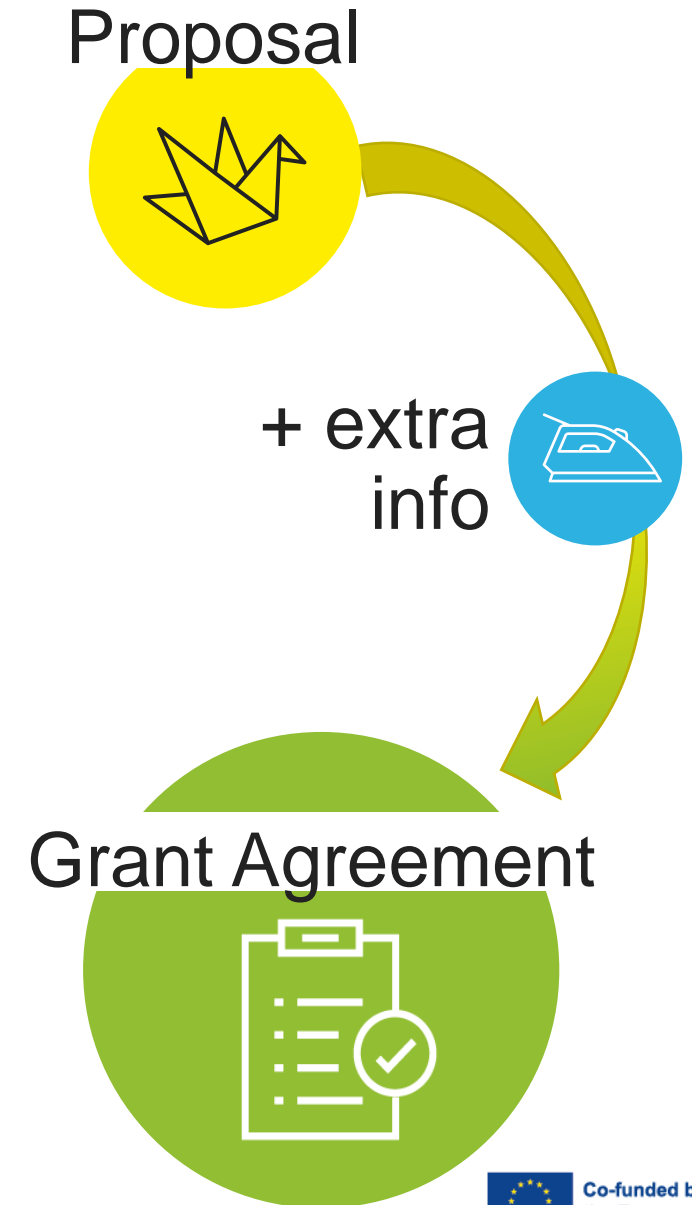
Objectives of the GAP

Transfer information from the proposal to the grant agreement

Collect additional information not present in the proposal (e.g. budget details, third parties)

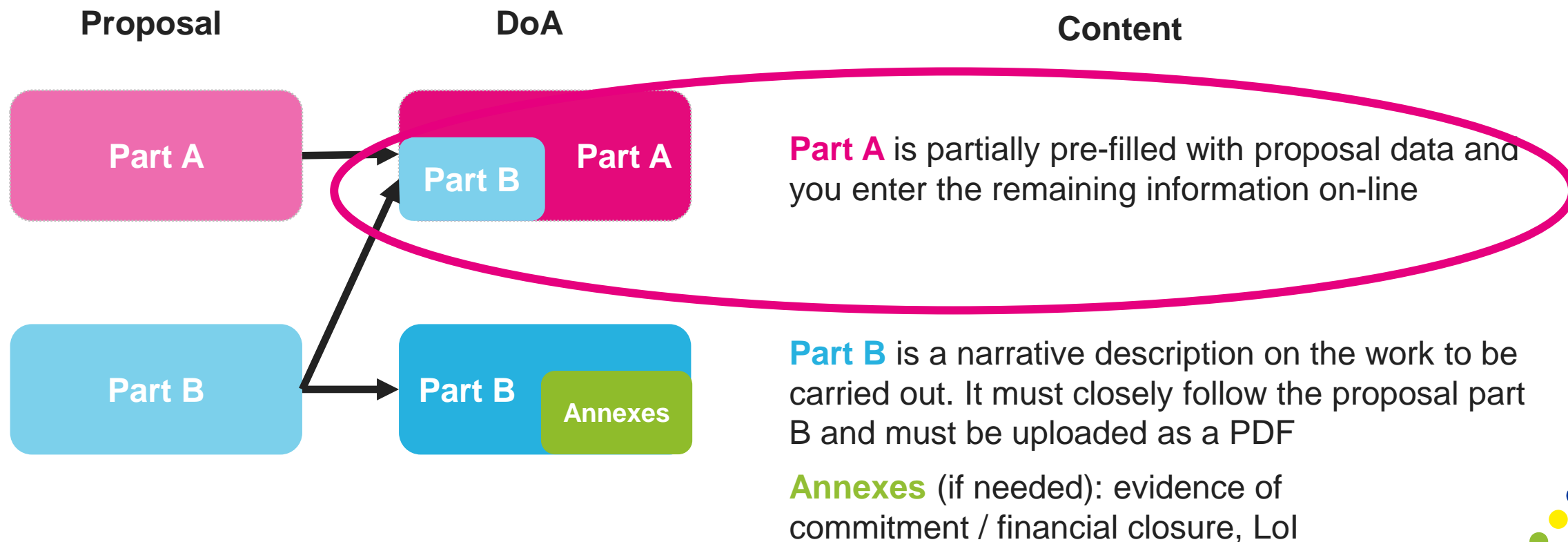
if applicable, also:

- Implement any requirements from an ethics review or security scrutiny
- Removal or replacement of a participant (if agreed)
- Change of administrative aspects (e.g., the legal status of a participant can affect the budget)
- Obvious errors or inconsistencies may be removed
- You may correct shortcomings identified by the experts in the ESR
- Tasks or deliverables specific to Clean Hydrogen JU



Description of the Action (DoA) = Annex I

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Coordinator is able to download the DoA template (instructions) from the Portal at the time of grant preparation invitation.

Description of the Action (DoA) – Part A

Part A of the Description of the Action (DoA) must be completed directly on the Portal Grant Preparation screens.

It includes:

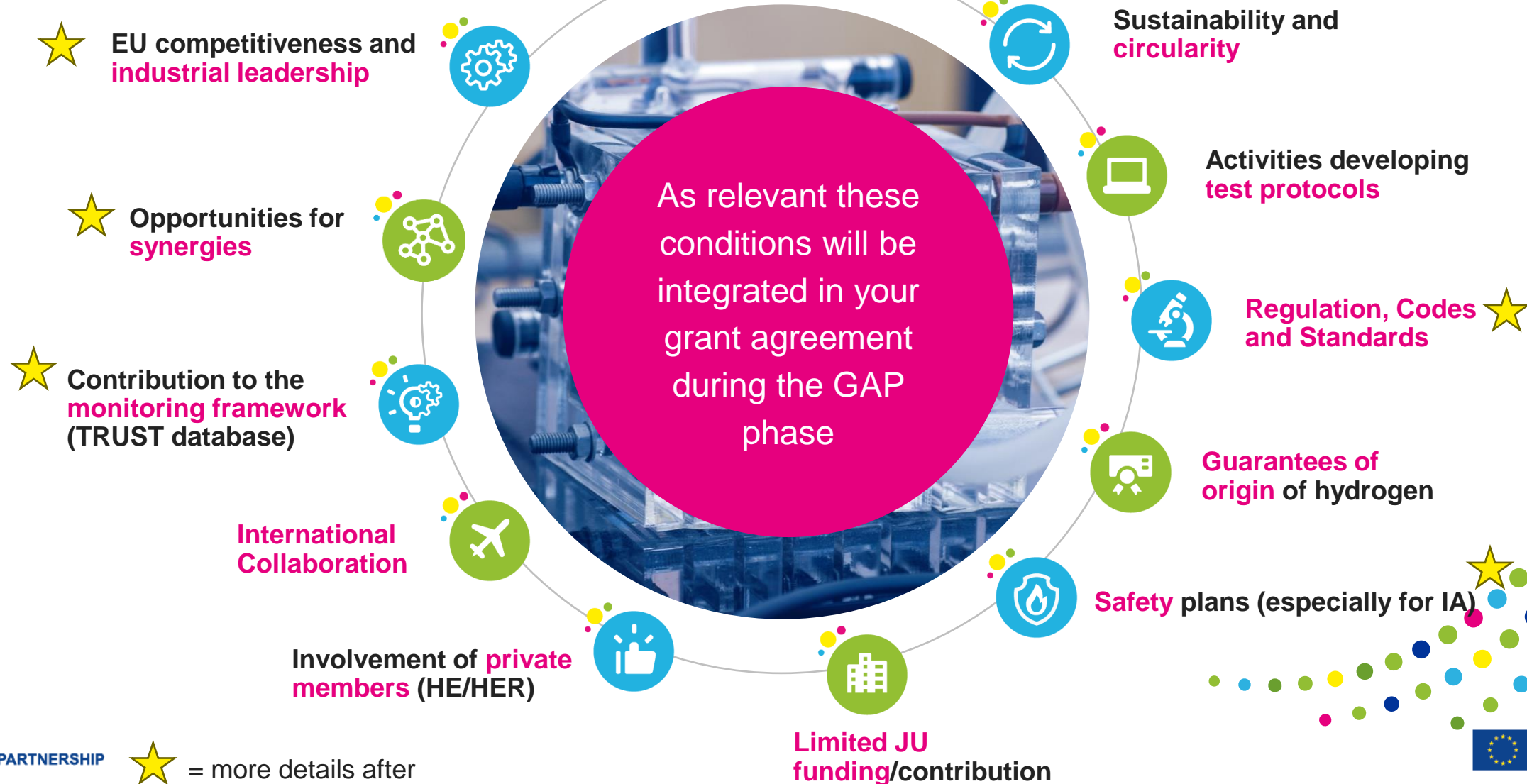
- COVER PAGE
- TABLE OF CONTENTS
- Project summary (automated – based on proposal abstract)
- List of participants (automated – based on proposal information)
- List of work packages (based on proposal table 3.1b)
- Staff effort (based on proposal table 3.1f)
- List of **deliverables** (based on proposal table 3.1c)
- List of milestones (based on proposal table 3.1d)
- List of critical risks (based on proposal table 3.1e)



All changes need to be discussed and agreed with the CleanH2 JU Project Officer. Substantial changes to the proposal are NOT allowed.

Summary of Call 2025 conditions and elements common across topics

5



Plan for dissemination and exploitation, including communication activities - Deliverables - Horizon Europe



HE General Annex A – Admissibility

- *Applications must include a plan for the exploitation and dissemination of results including communication activities*

GAP Phase – Instructions in DoA - part A

- Split deliverables:
 - **Month 6 (max.) = Detailed plan** for dissemination and exploitation, including communication activities
 - **Months X, Y, Z = Periodic update of the plan** in alignment with the project's progress

More info

More details later on today and in the separate Info-Day presentations (Jan. 2025):

- [Communication](#)
- [Dissemination and exploitation](#)

DATA reporting **task and deliverables** - CleanH2 JU specific



✓ **AWP 2025** - Common elements applicable to all topics in the Call

- *To monitor [...] how projects contribute to the CleanH2 JU targets, objectives and indicators, [...] projects will be required to report on an annual basis in a secure online data collection platform*

✓ **GAP Phase** – Instructions in **DoA - part A**

- **Add new task:** “**Annual data reporting for the Clean Hydrogen JU**” in WP of coord. / management
- **Add yearly deliverables** (submission deadline = February) :
 - Annual data collection 1 – February 2027
 - Annual data collection 2 – February 2028
 - ...

How it works?

- Templates provided by CleanH2 JU (depending on technology, application, TRL, etc)
- Available via dedicated online platform: [Knowledge Hub](#)
- Access in password-protected and limited to Project Coordinators
- **Each project** will have different templates for technology and qualitative feedback
- Projects will be invited to submit their data in 2027, covering results generated during 2026

Descriptive and Operational Templates: [Knowledge Hub](#) platform

Research Object Parameters

[Manage Parameters](#)

Descriptive Operational Comments

Parameter	Description	Is KPI	Report at project level	Activation year	Unit	Type	SoA/Targets (2020/2024/2030)	Exclude Research Instance	Operation
At start level - Availability of the storage facility		x			%	Decimal			▼
CAPEX - surface facilities	Capital costs include all necessary surface equipments to operate the reservoir, including compression and purification. The costs are referred to the mass flow rate of hydrogen recovered from the storage	x			€/ (kg/h)_H2	Decimal			▼
CAPEX subsurface equipment and development costs	Capital cost of all subsurface equipment and development costs, including wells and cushion gas.	x		2023	€/kg_H2	Decimal			▼
Country	Country in which the unit/system/vehicle/vessel/railcar is located or its licence plates are issued	x				List			▼
Environmental impact		x				Text			▼
H2 off takers	The counterparties?to an Offtake Agreement -(clients)	x				Text			▼
H2providers	Name the hydrogen providers and specify in the comment box if it is green or blue hydrogen and the quality	x				Text			▼
Levelised cost of storage LCOS	The cost of kg of H2, icluding CAPEX surface and subsurface also OPEX, fixed and viable, of the H2 withdrawn though the lifetime of the facility	✓		2023	EUR/kg	Decimal			▼

More details on the [relevant](#) Clean Hydrogen JU webpage

Contribution to sustainability and circularity

LCA checklist - CleanH2 JU specific



✓ AWP 2025 - Common elements applicable to all topics in the Call

- *For all topics, applicants are encouraged to address sustainability and circularity aspects in the activities proposed.*
- *While proposals have a certain leeway to address the sustainability and circularity aspects in general as a function of their activities, **for all topics, proposals undertaking Life-Cycle Assessments (LCAs) should follow and comply with the LCA checklist developed by the JRC.***

✓ GAP Phase – Instructions in **DoA - part A**

The following phrase should be added in the description of deliverable(s) associated with Life-Cycle Assessments (LCA):

- The LCA study will follow and comply with the LCA Checklist developed by the JRC. The deliverable will include an annex with the LCA checklist filled in to enable verifying compliance.

✓ Reference documentation

- [LCA Checklist](https://publications.jrc.ec.europa.eu/repository/handle/JRC136429): a tool to improve the communication of the environmental sustainability of the Clean Hydrogen Joint Undertaking projects

<https://publications.jrc.ec.europa.eu/repository/handle/JRC136429>

SAFETY Task and deliverables - CleanH2 JU Specific for Innovation Actions



AWP 2025 - Topic description (Innovation actions)

- *Proposals should provide a **preliminary draft** on ‘hydrogen safety planning and management’ at the project level, which will be further updated during project implementation.*

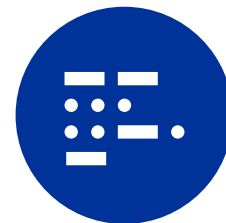
GAP Phase – Instructions in **DoA - part A**

- **Add** a new **task**: “**Safety plan**” in WP of coord. / management
 - **Add 2 confidential deliverables** :
 - Hydrogen Safety planning - **Draft plan**. Due month: M3 (tentative)
 - Hydrogen Safety planning - **Final plan**. Due month: M12 (tentative)
- Deliverables to be reviewed by the EHSP
Due months to be agreed with your PO

Reference documentation and guidance on the EHSP webpage (*)

- Safety Planning and Management Guidance document
- Simple template for a safety plan

(*) https://www.clean-hydrogen.europa.eu/get-involved/european-hydrogen-safety-panel-0/reference-documents_en



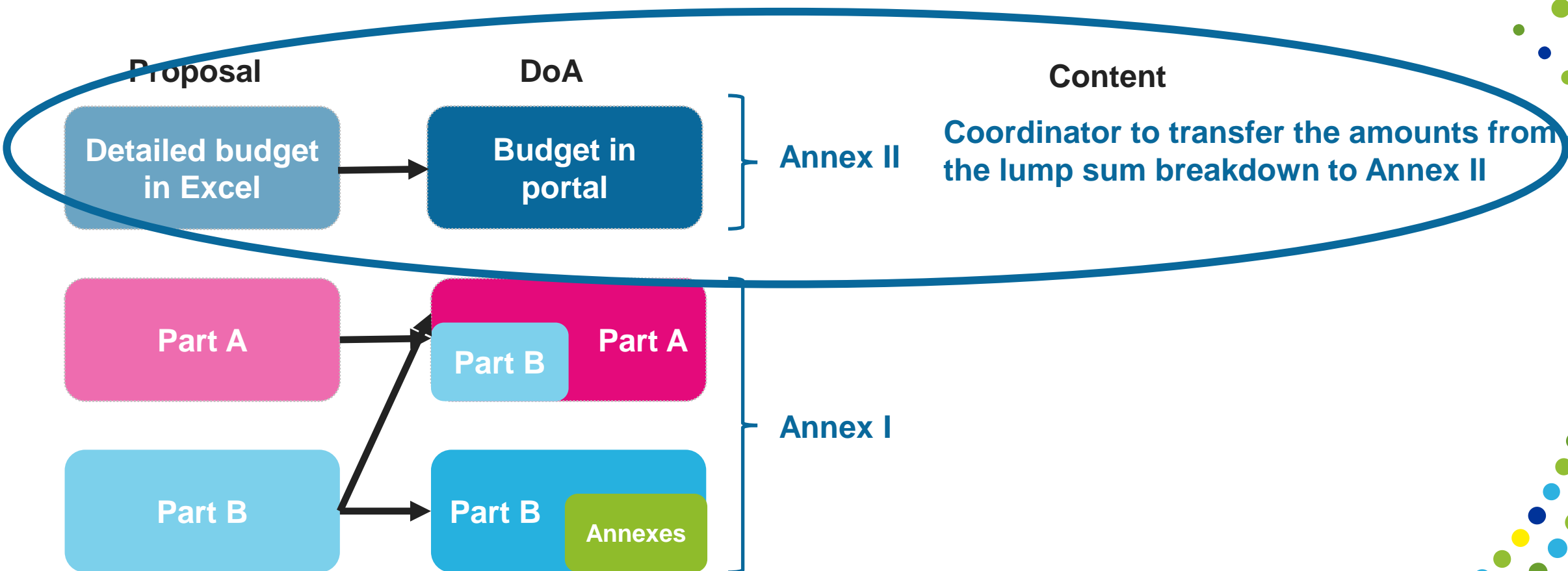
✓ AWP 2025 - Common elements applicable to all topics in the Call

- *For Innovation Actions, proposals should consider a [public report with both the Legal and Administrative Processes \(LAP\)](#) and the [Regulations, Codes and Standards](#)*

✓ GAP Phase – Instructions in **DoA - part A**

- **Add** a new **task**: "**Contribution to Regulation, Codes, and Standards**" in WP of coord. / management
- **Add deliverable(s)** :
 - Public report(s) with both the Legal and Administrative Processes (LAPs) and the Regulations, Codes and Standards
 - Periodicity: month X (case by case)

Description of the Action (DoA) = Annex I



Coordinator is able to download the DoA template (instructions) from the Portal at the time of grant preparation invitation.

Lump Sum Grant



Simplification

- Follow the DoA template instructions as for actual costs grants and remove tables with information on individual costs, i.e. Table 3.1.h (Purchase costs) – Table 3.1.i (Other costs categories) – Table 3.1.j (In-kind contributions provided by third parties)

Changes are limited

- For cost items that were flagged during evaluation as doubtful or overestimated, applicants will be invited to provide additional information
- Changes to the lump sum budget that are not documented in the ESR are possible, if they are necessary to correct obvious clerical errors or to comply with the rules (e.g. in case of ineligible costs that were not detected during evaluation).

Follow up in
liaison with the
Project Officer

Budget embedded in the portal

- The detailed budget table (Excel) does not become part of the grant agreement. Instead you must transfer the amounts from the lump sum breakdown (Excel) to Annex II (portal)

Lump Sum Grant

WP5	WP6	WP7	WP8
0.00	0.00	65,647.50	132,670.00
0.00	118,106.18	15,000.00	80,928.00
144,775.00	63,250.00	72,812.50	25,437.50
0.00	31,843.75	81,843.75	75,718.75
66,041.65	0.00	94,322.89	65,104.15
0.00	64,196.05	20,815.35	134,892.10
0.00	0.00	142,100.00	0.00
21,503.79	74,715.63	90,465.63	81,883.63
0.00	0.00	0.00	0.00
232,320.44	352,111.60	583,007.61	596,634.13
7.7%	11.7%	19.3%	19.8%



GA Options	Financial Information	LF Overview	Associated Partners	JU Contributio...	Researchers	W
✓	✓	i	✓	✓	✓	

refinancing percentage will be approximated and rounded (and may therefore no longer be er

Percentage	Date P
80.00 %	
5.00 %	

	WP5	WP6	WP7	WP8
10 €	0.00 €	0.00 €	65,647.50 €	132,670.00 €
35 €	0.00 €	118,106.18 €	18,596.04 €	80,928.00 €
10 €	144,775.00 €	63,250.00 €	72,812.50 €	25,437.50 €
10 €	0.00 €	31,843.75 €	81,843.75 €	75,718.75 €
55 €	66,041.65 €	0.00 €	94,322.89 €	65,104.15 €
35 €	0.00 €	64,196.05 €	20,815.35 €	134,892.10 €
75 €	0.00 €	0.00 €	142,100.00 €	0.00 €
58 €	21,503.78 €	74,715.62 €	90,465.63 €	81,883.63 €
10 €	0.00 €	0.00 €	0.00 €	0.00 €
	232,320.43 €	352,111.60 €	586,603.66 €	596,634.13 €

Principles:

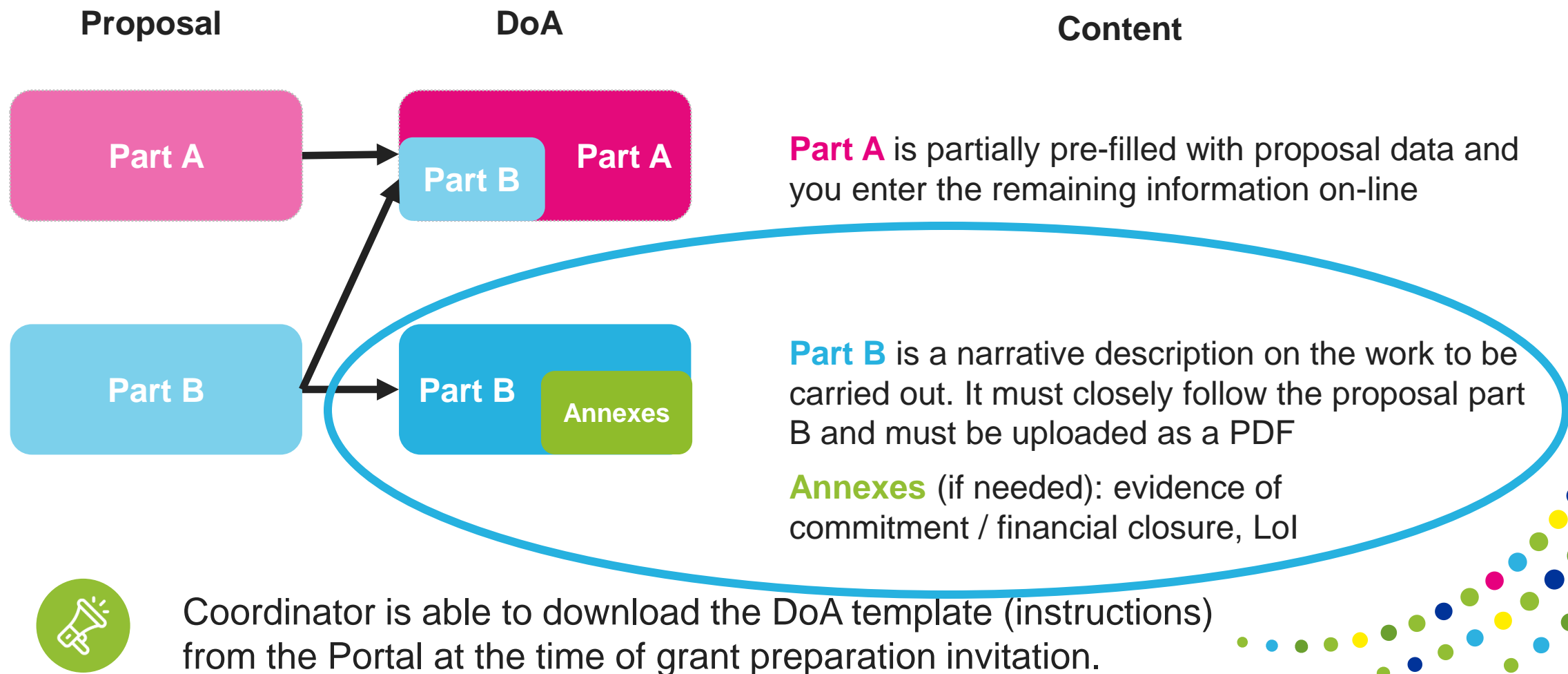
- Requested grant amount cannot increase X
- If \sum WP breakdown in Excel > requested grant, then explain the distribution of the reductions in history of changes

Lump Sums Guidance

- Guidance: "[Lump sums - what do I need to know?](#)"
- [Comprehensive information on lump sum funding in Horizon Europe](#)

Description of the Action (DoA) = Annex I

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Instructions

- **START** from Part B of your proposal. Use the version that was submitted for evaluation.
- **REMOVE** the cover page, if any.
- **DELETE** the header, if any.
- **REPLACE** the footer with the following information '[Proposal number] [Proposal acronym] – Part B – [Page number (starting at 1 for Part B)]'.
- **REMOVE** the list of participants. This is included in Part A.
- **REMOVE** tables 3.1a (list of work packages), 3.1b (work packages descriptions), 3.1c (list of deliverables), 3.1d (list of milestones), 3.1e (critical risks for implementation) and 3.1f (summary of staff effort) from section 3.1 (they are encoded in the screens and included in Part A).
- **REMOVE tables 3.1h (Purchase costs), 3.1i (Other costs categories) and 3.1j (in-kind contributions provided by third parties)**
- **CREATE** a section 4 'ethics self-assessment' and copy into this section the ethics self-assessment you included in the proposal Part A.
- **ADD** a table with the history of changes. Specify all changes compared to your proposal. Changes should be described concisely. You do not need to include minor changes that do not modify the substance of the DoA (e.g. correction of spelling and grammar, changes in formatting).
- **ADD** a table of contents with page numbers



Use the submitted version of the proposal. All changes need to be discussed and agreed with the CleanH2 JU Project Officer. Substantial changes to the proposal are NOT allowed.

Resulting structure – Part B

History of changes

Table of contents

1. Excellence

1.1 Objectives and ambition

1.2 Methodology

In this section you must record all changes implemented in comparison with the submitted proposal or previous DoA version – 3 columns table: When? Where? What?

Generate a table of content with page number

Same heading,
Same numbering
as in the proposal

Avoid repetition of information

- E.g., no duplication between work plan tables (Part A) and free text (Part B)
- All information should appear in one, findable place only

Ethics and security

**Ethics and security
processes are on-going**

Ethics review and security scrutiny

- If GAP has **NO** serious and complex ethics issues
- If GAP has **NO** security issues



**Copy-paste the self-
assessment from your
proposal**

Extract from
Grant
Agreement



14.1 Ethics

The action must be carried out in line with the highest ethical standards and the applicable EU, international and national law on ethical principles.

Ethics review and security scrutiny

- The proposals are subject to an **ethics review** and may be subject to **security scrutiny**.
- The results of the ethics review and/or a security scrutiny must be implemented in the grant agreement
- Coordinator needs to update the ethics section in Part B (DoA) to ensure that any 'ethics requirements' are met
- Similarly for security scrutiny



AWP 2025 - Common elements applicable to all topics in the Call

- To monitor *technology progress against SOA*, [...] projects will be required to report [...]

GAP Phase – Instructions

- List in **DoA - Part B** section 2 "Impacts" the relevant **SRIA KPIs** for the project / topic
- Add in **DoA - part A** a new task: "**Regular monitoring of project objectives and targets**"

And then?

An assessment of the progress towards the achievement of the project KPIs should be provided in each of the reporting periods (as an Annex in part B of the periodic report)

Clean Hydrogen JU SRIA KPIs							Project KPI (targets)
SRIA reference	SRIA KPIs (parameter)	Unit	SoA (2020)	Target 2024	Targets 2030		
Pillar / KPI table	[From SRIA table]	[From SRIA table]	[From SRIA table]	[From SRIA table]	[From SRIA table]	[project specific]	
1 [e.g. Pillar Heat & Power/ table Solid Oxide Stationary Fuel Cells]	[e.g. CAPEX]	[e.g. €/kW]	[e.g. 10,000]	[e.g. 6,000]	[e.g. 3,500]	[project value]	
Additional project KPIs							
SRIA reference (if relevant)	KPI (Parameter) [1]	Unit	SoA	Source (SoA)	Project Targets		
[create link to SRIA KPI as relevant]	[parameter name]	[...]	[...]	[...]	[project specific]		
N [e.g. Pillar Heat & Power / table Solid Oxide Stationary Fuel Cells/Efficiency]	[e.g. Power density of the stack per surface area]	[e.g. W/m2]	[...]	[...]	[project value]		

Indicative



AWP 2025 - Common elements applicable to all topics in the Call

*All topics [...] contribute to **EU competitiveness and EU industrial leadership** by supporting a European value chain for hydrogen and fuel cell systems components, cells and stacks as well as hydrogen related infrastructure. [...]*

As a result, proposals, and specially for all Innovation Actions topics, are expected to demonstrate the contribution to EU competitiveness and industrial leadership of the activities to be funded including but not limited to the origin of the equipment and components as well infrastructure purchased and built during the project. These aspects will be evaluated and monitored during the project implementation.



GAP Phase – Instructions **specific for Innovation Actions**

- **Update** in the **DoA - Part B** the information on the contribution of the project to EU competitiveness and industrial Leadership and add the statement: “*The project will contribute to EU Competitiveness and EU leadership by supporting a European value chain for hydrogen and fuel cell systems and components*”
- **Add in DoA - part A a new task:** “**Contribution to EU competitiveness and EU industrial leadership**” in the relevant WP (e.g. Coordination, reporting, management)

Synergies, Funding and Financing – CleanH2 JU Specific for Innovation Actions



AWP 2025 - Common elements applicable to all topics in the Call

- Applicants are expected to pursue the specific opportunities for *synergies with other partnerships and programmes* as identified in each of the topics...
- Applicants in the Call 2025, especially for flagship projects, may consider additional synergies with other Programmes
- For all Innovation Actions, exploitation and dissemination of results should include a *strong business case and sound exploitation strategy*

GAP Phase – Instructions specific for Innovation Actions

- **Update** in the **DoA - Part B** the information on synergies and updated strategy for the co-funding/financing relative to proposal
- **Add in DoA - part A a new task "Synergies, Funding and Financing"** in the relevant WP (e.g. Coordination, reporting, management) to report throughout the duration of the project

In addition to the requirements applicable to all Innovation Actions

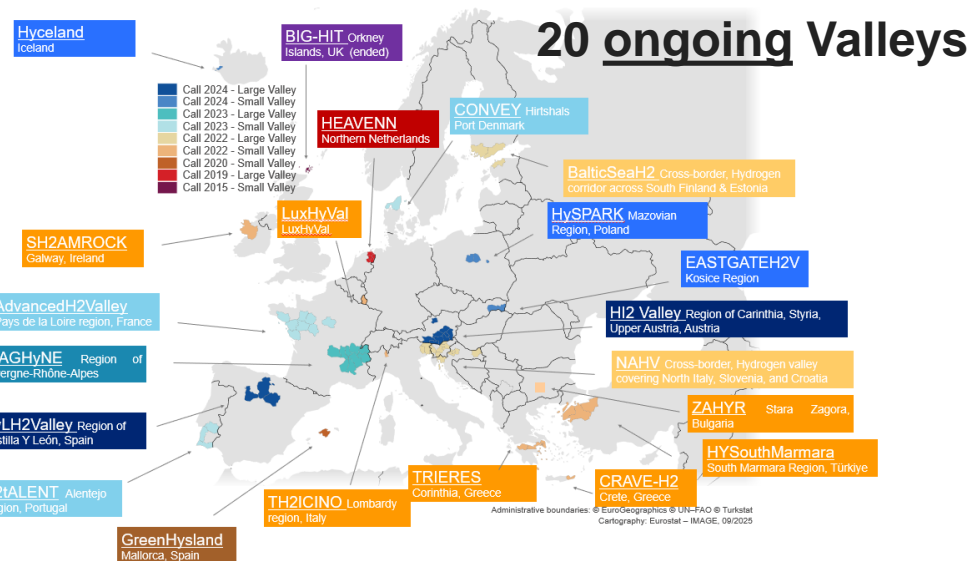
5 Valleys selected for Grant Preparation Call 2025



Do not communicate yet about your project without consulting your Project Officer – Grant not signed yet!!

GAP Phase – Instructions

- **DoA - Part B** must have clear project **Gantt Chart and milestones**. Include **key phases** of the implementation of the project **and their duration** (i.e. preparation of the specifications of equipment, manufacturing, deployment and operation).
- **Hydrogen Valleys Summary** - as a shared excel file (link to be provided by your PO)



https://www.clean-hydrogen.europa.eu/get-involved/hydrogen-valleys_en

Synergies

Your project will be part of a wider family
Exchanges and collaboration (bidirectional) with the Hydrogen Valleys Facility are expected
Exchanges with the successful proposal on training for permitting authorities expected

Location/Identifier of a Hydrogen Valley element [1], [2]				Technical			
	Category	Type / Application	Application comment	Technical parameter 1		Technical parameter 2	
	Please first specify a location or identifier in Column A	First specify the category, then select the application from the dropdown menu below	When other (Category / Type / Application) has been selected, please specify technology, application, etc.	First specify the category and application		First specify the category and application	
	Select the category from the dropdown menu below			Value	Unit	Value	
Electrolyser	Hydrogen Production	Electrolysis		5	MW	600	to
Pipeline	Hydrogen Distribution	New H2 Pipeline		3	kilometres		
Blending	EndUses Energy	H2 injection in gas grid	Blending	2	% H2 by volume in gas grid	190	tonnes H2 off-take per year
Logistics	Hydrogen Distribution	Tube-trailers		3	number		NA - no input required

H2 valley summary table – Technical and Financial part
(will also be used to collect information on the different elements of the H2 Valley Value Chain)

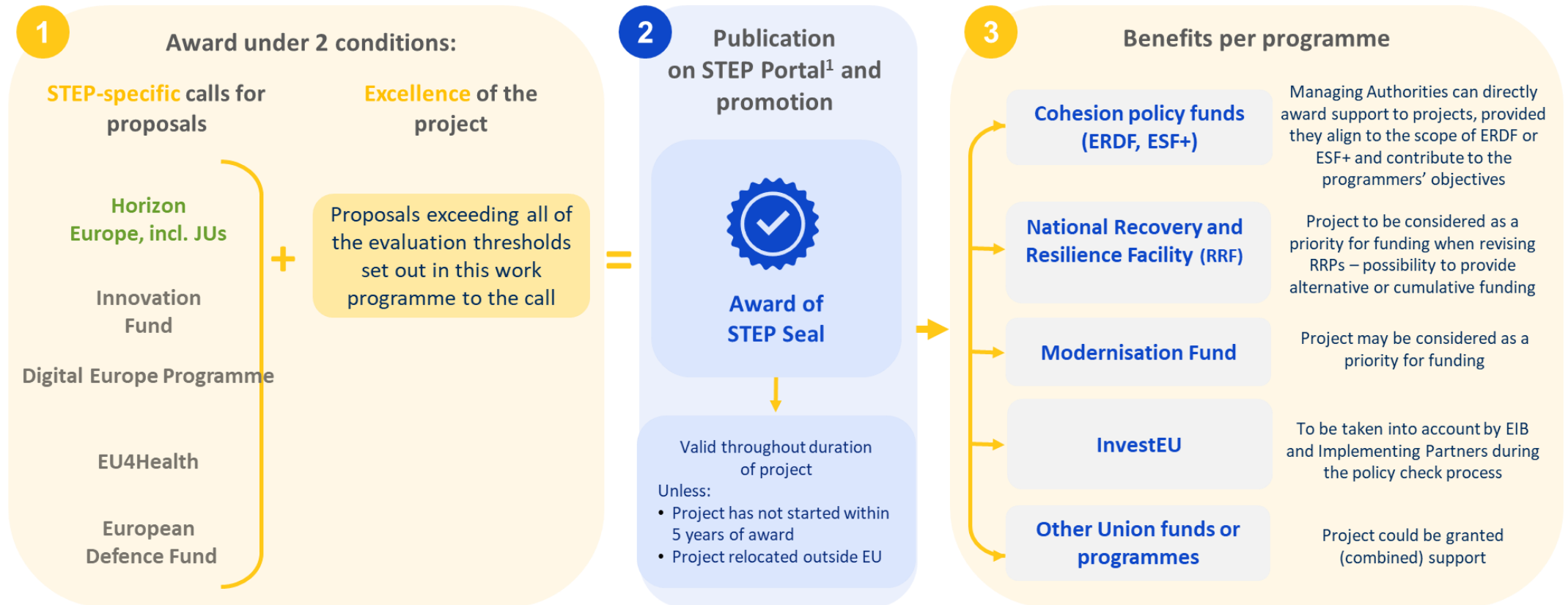
Financial											
Partner incurring/declaring the costs	Total cost related to all equipment/infrastructure items	Type of Cost		Costs declared in the JU grant							
Long name	Value (MEUR)	If purchase of equipment, select value from dropdown menu below.		If yes, include the requested CHJU funding for the specific item							
		purchase[3]/subcontract	depreciation, full capitalised costs, leasing, other	Yes/No	Value (MEUR)	Comment on cost declaration	Other financing / funding sources	Name of programme	Status of the funding	Value (MEUR)	
Partner A	14	Purchase of equipment	Other	Yes	2,55	No	Private funding/financing (e.g. debt finance-equity-own resources-others)	Own resources	Planned	11,45	
Partner B	1,51	Purchase of equipment	Other	Yes	0,11	No	Private funding/financing (e.g. debt finance-equity-own resources-others)	Own resources	Planned	1,4	
Partner C	0,85	Purchase of equipment	Other	Yes	0,461	No	Private funding/financing (e.g. debt finance-equity-own resources-others)	Own resources	Planned	0,389	
Partner D	0,471	Purchase of equipment	Other	Yes	0,201	No	Private funding/financing (e.g. debt finance-equity-own resources-others)	Own resources	Planned	0,27	

Synergies with National and Regional Programmes

STEP (Sovereignty) Seal



Overview



4

STEP Seal is an initiative managed by DG BUDG of the EC.

Source: DG BUDG

1. Subject to consent

Synergies with National and Regional Programmes

STEP (Sovereignty) Seal



Purpose

Purpose: increase visibility of quality projects available for funding and help attract alternative and cumulative funding for quality projects, and simultaneously to provide a potential project pipeline for regional and national programmes

The STEP Seal is awarded at the level of the project

In the Call 2025, STEP Seals have been awarded to proposals exceeding all of the evaluation thresholds set out in the work programme.



What has happened so far

46 proposals from Call 2025 (6 IAs topics) awarded with the Seal (inc. Hydrogen Valleys, including proposals selected for funding and those in the reserve list)

Subject to consent

- Projects have been included in EC promotional activities e.g. [STEP Seals dashboard](#)
- Information shared with EU and National funding bodies (e.g. managing authorities of cohesion policy) and with [STEP Seal National Contact Points](#) network

Projects' dashboard & interactive map



Search for Proposal

Q Acronym: AH2V, ALEJA, APLEH2C

Q Proposal Title: Advancing Partners..., Amber Hydrogen V..., Biolg Enabled Adv...

Q Sector: Cleantech, Biotech, Digital/deep tech

Q Programme: EDF, HORIZON, InnovFund

Q Country: AT/Austria, AU/Australia, BE/Belgium

Q Region: /, AT11/Burgenland, AT13/Wien

Q Awarded EU funding: No, Yes

[Clear selection](#)

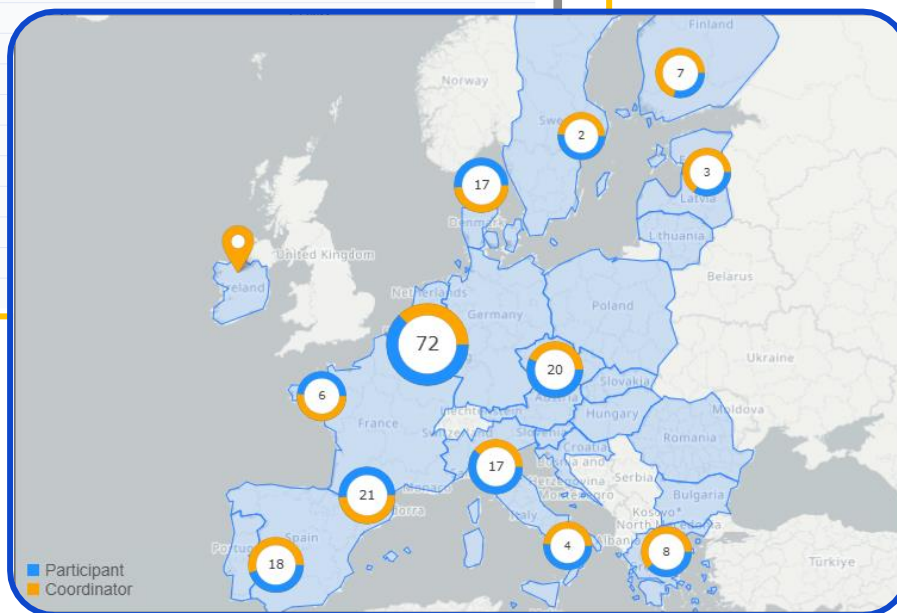
List of Proposals

[Download Data](#)

Acronym	Sector	Programme	Awarded EU Funding	Requested EU Funding
AH2V	Cleantech	HORIZON	No	€20.00M
ALEJA	Cleantech	HORIZON	No	€5.98M
APLEH2C	Cleantech	HORIZON	No	€9.00M
BEACON	Cleantech	HORIZON		
BIOCRACK	Cleantech	HORIZON		
CHALET	Cleantech	HORIZON		
COLDSPARK PHASE II	Cleantech	HORIZON		
COUPLE	Cleantech	HORIZON		
CRACKEN	Cleantech	HORIZON		
FliHyPorts	Cleantech	HORIZON		
FUSION	Cleantech	HORIZON		
GLEANNCELT	Cleantech	HORIZON		
Green Energy Hub	Cleantech	HORIZON		

The Commission publishes and promotes the following information:

- Project number
- Project acronym
- Project title
- Project abstract
- Project location
- Programme name
- Topic to which you submitted your application
- Legal name and address of the applicant(s)
- Requested EU funding
- Awarded EU funding (Yes/No)



STEP Seal explained, example

How could it work, e.g under cohesion policy funds

Managing authorities can directly award support to projects if they align to the scope of ERDF and ESF+ contribute to the programme objectives

Launched with mono-beneficiary projects in mind but does not exclude supporting multi-beneficiary projects (SEAL is awarded to projects)

Scenario 1:

- **One managing authority of a cohesion policy programme support all beneficiaries** of the operation, even if part of them are located in a different region or MS (or outside the EU), provided that the operation contributes to the objectives of the programme

Scenario 2

- **A multi-beneficiary project awarded the STEP Seal could be supported by more than one managing authority.** This option requires a significant coordination effort between the different managing authorities

What next?

- Reach out your [STEP National Contact Points](#) (public authorities in the Member States)
- Check funding opportunities in your region/country, particularly under
- [Cohesion Policy Funds](#) and [Recovery and Resilience Facility \(RRF\)](#) (EU funding).

- Subject to a project's interest in pursuing the benefits that the STEP Seal may bring, the JU will be happy to further engage with you



- [Discover the STEP Seal](#)
- [STEP Seal National Contact Points](#)
- [Brochure](#) for STEP National Contact Points and Managing Authorities

STEP in Member States

National Contact Points are there to support you



The **STEP NCPs** are officials designated by EU Member States to **oversee and support the implementation of STEP at national level**

NCPs can advise you on additional funding possibilities. Contact them!



Contact details of **National Contact Points** available on the **STEP Portal**



- Manage my area
- My Organisation(s)
- GRANTS
- My Proposal(s)
- My Project(s)**
- My Formal Notification(s)

SEARCH FUNDING & TENDERS HOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT

select programme 1022

Online manual "Grant management" IT HOW TO "Grant management"

My Project(s)

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

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

Results: 1

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
H2ME 2	H2020-JTI-FCH-2015-1	H2020	700350	Active	<div>1</div> <div>Manage Consortium</div> <div>Manage Project</div> <div>View Proposal</div>

Takes you back to your sealed proposal

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Grant management service



The screenshot shows the 'RESEARCH & INNOVATION Grant Management Services' portal. The user is logged in as 'Generic DEVUSERCOORDINATOR'. The interface includes a 'MY PROJECT' sidebar on the left, a main content area with a 'process overview' timeline, and a bottom section with links to 'ONLINE MANUAL' and 'HOW TO'.

Labels and their corresponding elements:

- project overview**: Points to the 'MY PROJECT' sidebar.
- caution!**: Points to a red box containing a 'Terminate' button.
- process overview**: Points to the timeline showing stages: Submitted, Informed, Invited, Prepared, Signed, Paid.
- hyperlink to the IT system**: Points to a box containing 'Grant agreement data preparation' and 'GA Declaration - GAP-219850 - 973276467 signature'.
- declaration of honour template**: Points to the 'GA Declaration' link.
- submit to EU**: Points to a yellow 'Submit to EU' button.
- history linked to the specific process**: Points to a box containing 'Process documents', 'Process communications', and 'Process history'.
- a common repository to access processes, documents, legal data**: Points to a sidebar menu with 'Latest Legal Data', 'Active Processes', 'Document Library', 'Communication Centre', and 'Archived Processes'.
- online manual**: Points to the 'ONLINE MANUAL' button.
- IT how-to**: Points to the 'HOW TO' button.

<div><div><div>SyGMA System for Grant Management</div></div><div>Grant Agreement Data</div></div>																			
HORIZON-...		Project Summary	Beneficiaries	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners	JU Contributio...	Researchers	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info	Security
Call: HORIZON-JTI-CLEANH2-2022-1 Topic: HORIZON-JTI-CLEANH2-2022-02-07																			
 		 DOCUMENTS																	
Project Summary ?																			



Information complete



Missing information: **blocking**



For information only



Missing information: not blocking at this point



This screen is only editable by EU Officers

Beneficiaries



Grant Management

Grant Agreement Data

224 Cal Top

Project Summary

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LF Overview

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Beneficiaries

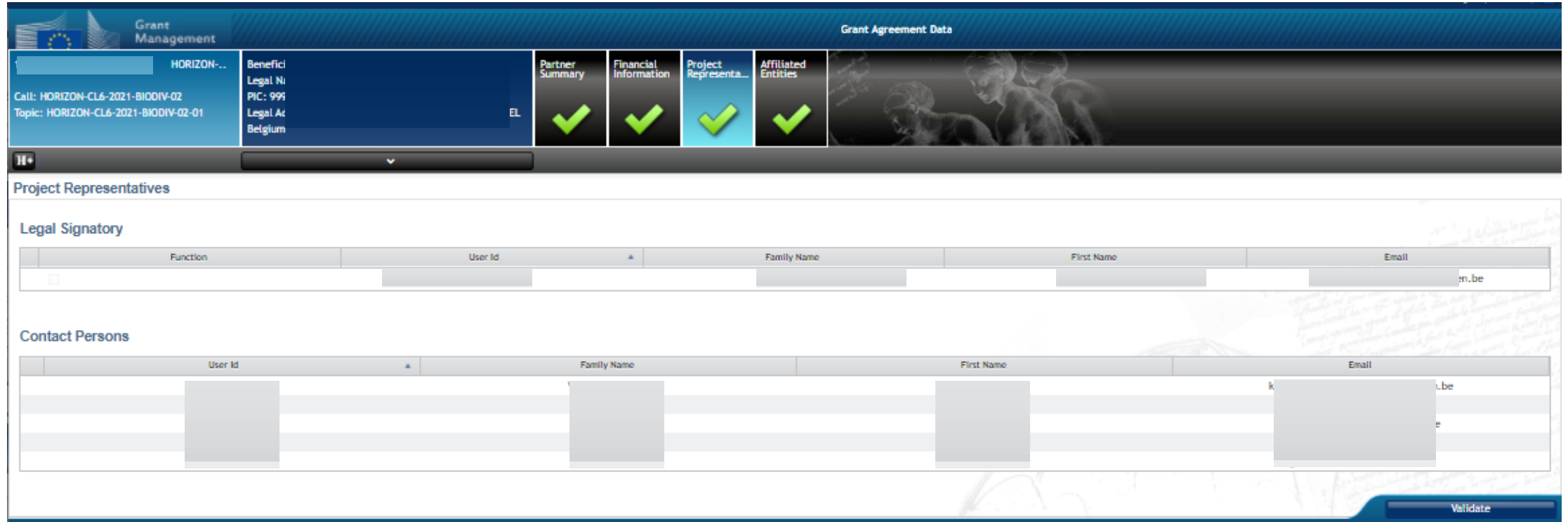
SAVE

+ Change Coordinator + Add New Beneficiary

Number	Short Name	Legal Name	Role	Country	VALIDATED
1			CO		VALIDATED
2			BEN		VALIDATED

Validate

Project representatives



Grant Management

Grant Agreement Data

HORIZON-...

Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

Benefici
Legal Ni
PIC: 999
Legal At
Belgium

EL

Partner Summary

Financial Information

Project Representa...

Affiliated Entities

Project Representatives

Legal Signatory

Function	User Id	Family Name	First Name	Email
				en.be

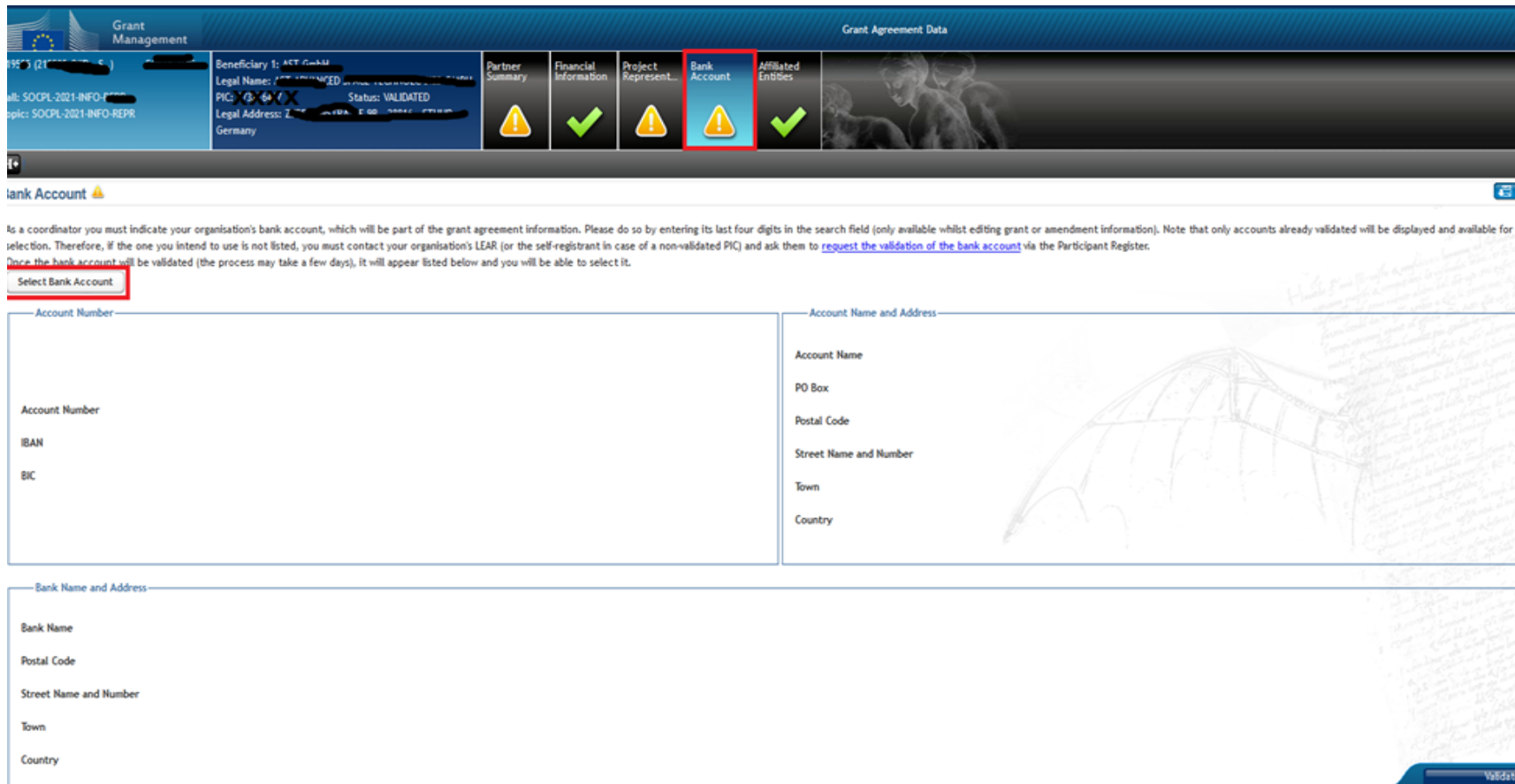
Contact Persons

User Id	Family Name	First Name	Email
			...be
			...
			...

Validate

- If no Project Representatives are listed, please complete in the **roles management section of the F&T Portal**.
- Check all information and update, if necessary, in the **roles management section of the F&T Portal**.
- Nominate in the Funding & Tenders Portal, the Legal Entity Appointed Representative (LEAR) and Project Legal Signatory (PLSIGN). Once this has been done, **the PLSIGN who will appear in the Grant Agreement has to be selected in this screen**. Please note that all other PLSIGNs can sign the Grant Agreement.

Bank account (coordinator only)



The screenshot shows the 'Grant Management' interface. At the top, there's a navigation bar with 'Grant Management' and 'Grant Agreement Data'. Below this, a table displays various tabs: Partner Summary, Financial Information, Project Represent..., **Bank Account** (highlighted with a red box), and Affiliated Entities. The 'Bank Account' tab is active, showing a warning icon. Below the tabs, a section titled 'Bank Account' contains instructions: 'As a coordinator you must indicate your organisation's bank account, which will be part of the grant agreement information. Please do so by entering its last four digits in the search field (only available whilst editing grant or amendment information). Note that only accounts already validated will be displayed and available for selection. Therefore, if the one you intend to use is not listed, you must contact your organisation's LEAR (or the self-registrant in case of a non-validated PIC) and ask them to [request the validation of the bank account](#) via the Participant Register. Once the bank account will be validated (the process may take a few days), it will appear listed below and you will be able to select it.' Below the instructions, a red box highlights the 'Select Bank Account' link. The main form area is divided into two sections: 'Account Number' and 'Account Name and Address'. The 'Account Number' section includes fields for 'Account Number', 'IBAN', and 'BIC'. The 'Account Name and Address' section includes fields for 'Account Name', 'PO Box', 'Postal Code', 'Street Name and Number', 'Town', and 'Country'. A 'Validate' button is located at the bottom right of the form.

- Select your bank account from the list of accounts already registered in the Participant Register. For more info about how to register a bank account in the Participant Register, please click [here](#).

Affiliated entities



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Grant Management Grant Agreement Data

Call: SOCPL-2021-INFO-REPR
Topic: SOCPL-2021-INFO-REPR

Benefic Legal N
PIC: 97
Legal A
Germar

IBH

Partner Summary Financial Information Project Represent... Bank Account Affiliated Entities

Affiliated Entities

SAVE

Add new Affiliated Entity

Short Name	Legal Name	Country	PIC	PIC Status	Joint Several Liability	Actions
✓		DE		VALIDATED	<input type="checkbox"/>	

Grant Management Grant Agreement Data

2193XXXXX - S..) S0XXXX

Call: SOCPL-2021-INFO-REPR
Topic: SOCPL-2021-INFO-REPR

Beneficiary 1: XXXXXXXX
Legal Name: XXXXXXXX
PIC: 97XXXXX Status: VALIDATED
Legal Address: XXXXXXXX, UHR
Germany XXXXXX

Affiliated Entity 1: XXXXXXXX
Legal Name: XXXXXXXX, DUESSELDORF
PIC: 99XXXXX Status: VALIDATED
Legal Address: XXXXXXXX, DUESSELDORF Germany

Partner Summary Financial Information

Financial Data

Amount Guarantee Required Guarantee Amount

Partner is exempted from CFS ☐ Yes ☒ No

Individual costs table:

Category	Form of Funding	Total Amount
▼ Estimated eligible costs (per budget category)		
▼ Direct costs		
▼ A. Personnel costs		
(a1) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	actual	0.00 €
(a4) A.5 Volunteers	unit	0.00 €
▼ B. Subcontracting costs		
(b) Subcontracting	actual	0.00 €
▼ C. Purchase costs		
▼ C.1 Travel and subsistence		
(c1a) Travel	unit or actual	0.00 €
(c1b) Accommodation	unit or actual	0.00 €
(c1c) Subsistence	unit or actual	0.00 €
(c2) C.2 Equipment	actual	0.00 €
(c3) C.3 Other goods, works and services	actual	0.00 €
▼ D. Other cost categories		

Validate

Grant Agreement Data

Project Summary	Beneficiaries	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners	JU Contribution	Researchers	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info	Security

MENTS

SAVE

ng, all system calculations will be done on the basis of the customised amount. The prefinancing percentage will be approximated and rounded (and may therefore no longer be entirely accurate).

Amount	Percentage	Date Paid	
2,412,887.78 €	80.00 %		of 3,016,109.72 €
(MFF) / Guarantee Fund (MFF 2014-2020)	150,805.49 €	5.00 %	of 3,016,109.72 €

Default

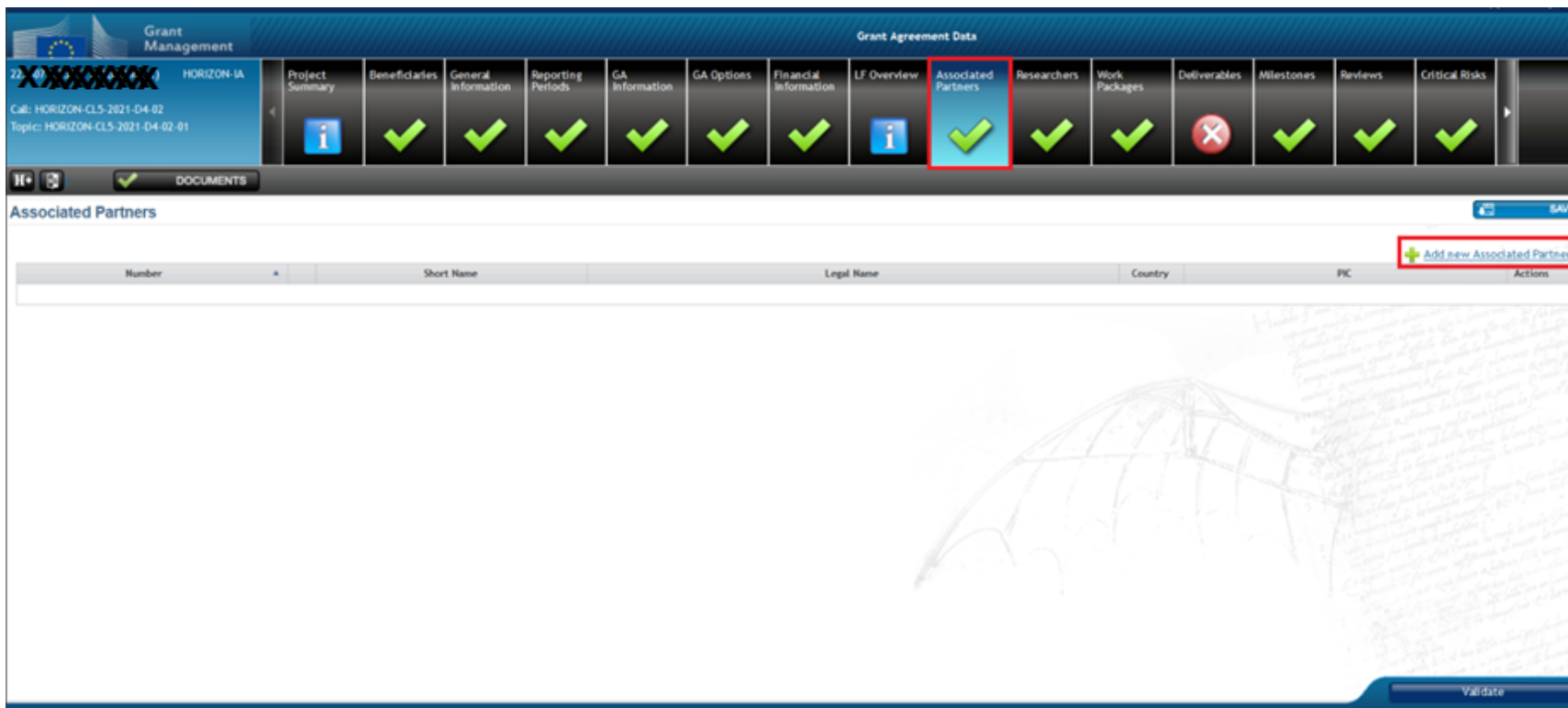
Default

sion) 3,016,109.72 €

Estimated EU contribution												
Estimated eligible lump sum contributions (per work package)												
WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	WP9	WP10	WP11	WP12	Maximum grant amount
100,115.00 €	103,555.00 €	0.00 €	9,397.00 €	0.00 €	0.00 €	65,647.50 €	132,670.00 €	0.00 €	0.00 €	17,007.50 €	15,106.00 €	443,498.00 €
15,314.79 €	12,637.78 €	19,829.85 €	19,829.85 €	0.00 €	118,106.18 €	18,596.04 €	80,928.00 €	0.00 €	0.00 €	19,829.85 €	0.00 €	305,072.34 €
5,000.00 €	5,000.00 €	20,000.00 €	10,000.00 €	144,775.00 €	63,250.00 €	72,812.50 €	25,437.50 €	0.00 €	0.00 €	10,000.00 €	0.00 €	356,275.00 €
0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	31,843.75 €	81,843.75 €	75,718.75 €	81,718.75 €	72,750.00 €	16,500.00 €	0.00 €	360,375.00 €
0.00 €	0.00 €	49,166.65 €	63,541.65 €	66,041.65 €	0.00 €	94,322.89 €	65,104.15 €	0.00 €	0.00 €	11,822.91 €	0.00 €	349,999.90 €
0.00 €	9,657.68 €	9,657.68 €	20,815.35 €	0.00 €	64,196.05 €	20,815.35 €	134,892.10 €	0.00 €	0.00 €	0.00 €	0.00 €	260,034.21 €
0.00 €	8,200.00 €	58,442.50 €	87,903.75 €	0.00 €	0.00 €	142,100.00 €	0.00 €	0.00 €	0.00 €	40,392.50 €	0.00 €	337,038.75 €
0.00 €	0.00 €	33,866.68 €	33,866.68 €	21,503.78 €	74,715.62 €	90,465.63 €	81,883.63 €	0.00 €	0.00 €	13,699.50 €	0.00 €	350,001.52 €
23,227.50 €	8,868.75 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	97,556.25 €	124,162.50 €	0.00 €	0.00 €	253,815.00 €

- You need to enter the amounts from the Detailed Budget Table. (Excel)

Associated partners

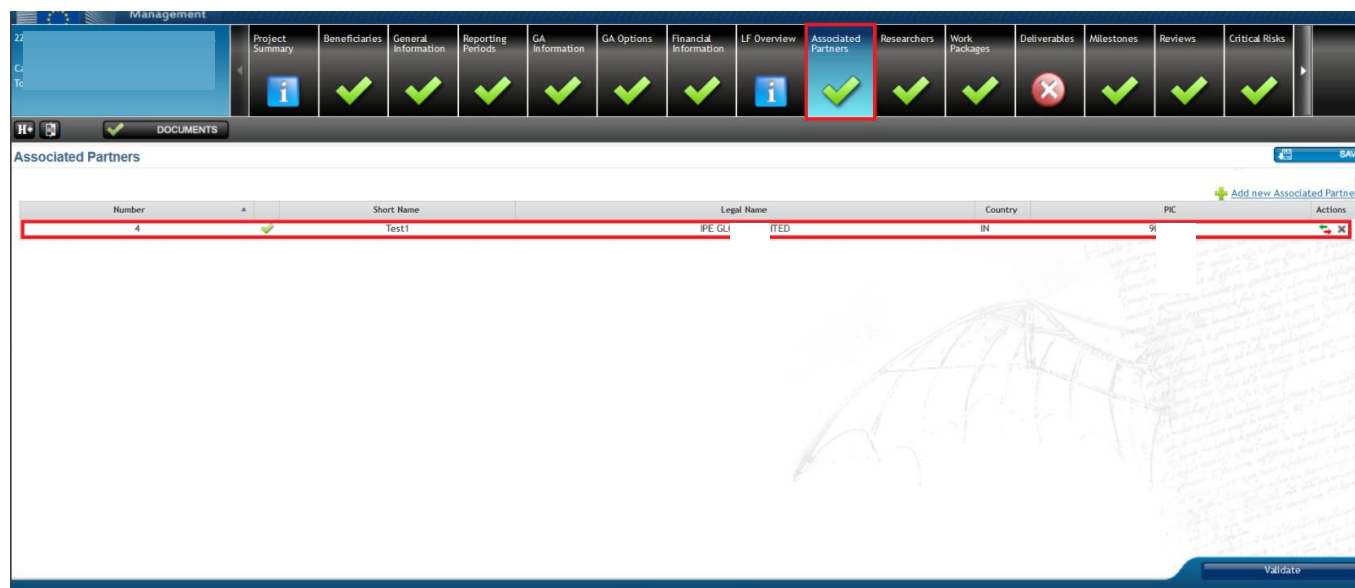
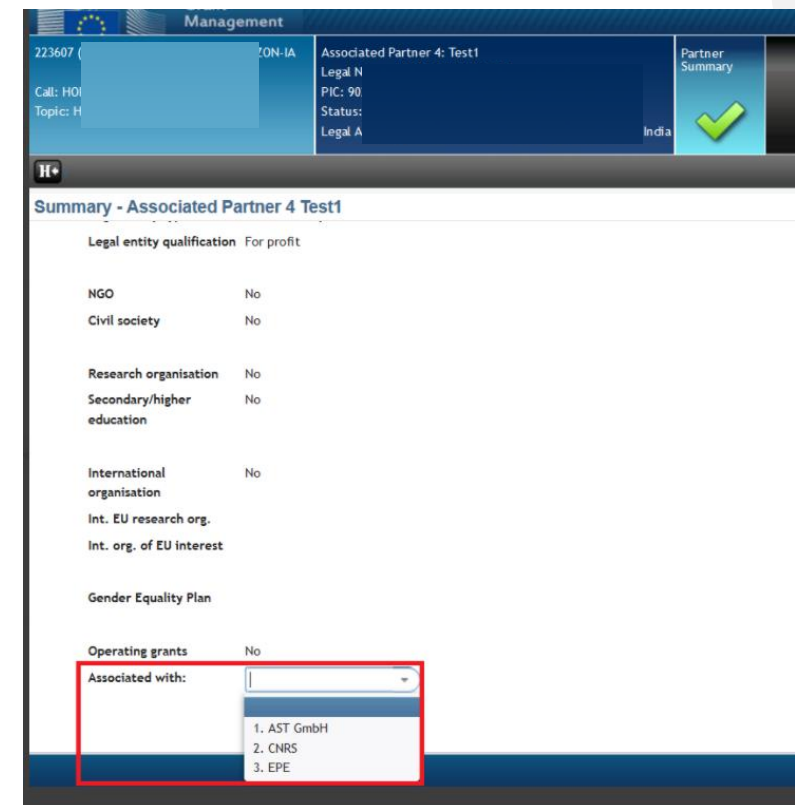


- Data prefilled with proposal information
- Associated partners do not sign the grant agreement and cannot declare costs
- They are allowed to be WP leaders
- Budget table in GA (Annex 2) will not include any information of the budget of AP. Information is included in the proposal and **some information can also be included in DoA - part B**
- Coordinator will be able to enter researchers in the researcher table for AP

Follow up in
liaison with the
Project Officer

Associated partners

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In the Grant Agreement, Article 9.1 specifies to which entity the Associated Partner is linked to:

- if the associated partner is linked to one beneficiary, this beneficiary will be named under Article 9.1
- if the associated partner is linked to the whole consortium (i.e. not linked to a specific beneficiary), Article 9.1 will display only the name of the AP.

ASSOCIATED with:

- whole consortium
- or a beneficiary

SyGMa

System for Grant Management

Grant Agreement Data

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H+

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JU Contributions

Number		Participate In Projects	PIC	Legal Name	Membership	Financial contributions give	IKAA	IKOP
1		Yes			Unknown	0.00 €	0.00 €	0.00 €
2		Yes			Unknown	0.00 €	0.00 €	0.00 €
3		Yes			Unknown	0.00 €	0.00 €	0.00 €
4		Yes			Unknown	0.00 €	0.00 €	0.00 €
5		Yes			Unknown	0.00 €	0.00 €	0.00 €
6		Yes			Unknown	0.00 €	0.00 €	0.00 €
7		Yes			Unknown	0.00 €	0.00 €	0.00 €
8		Yes			Unknown	0.00 €	0.00 €	0.00 €
9		Yes			Unknown	0.00 €	0.00 €	0.00 €
10		Yes			Unknown	0.00 €	0.00 €	0.00 €
11		Yes			Unknown	0.00 €	0.00 €	0.00 €
Total						0 €	0 €	0 €

IKOP per beneficiary = Total Costs (Excel)** – Grant Requested

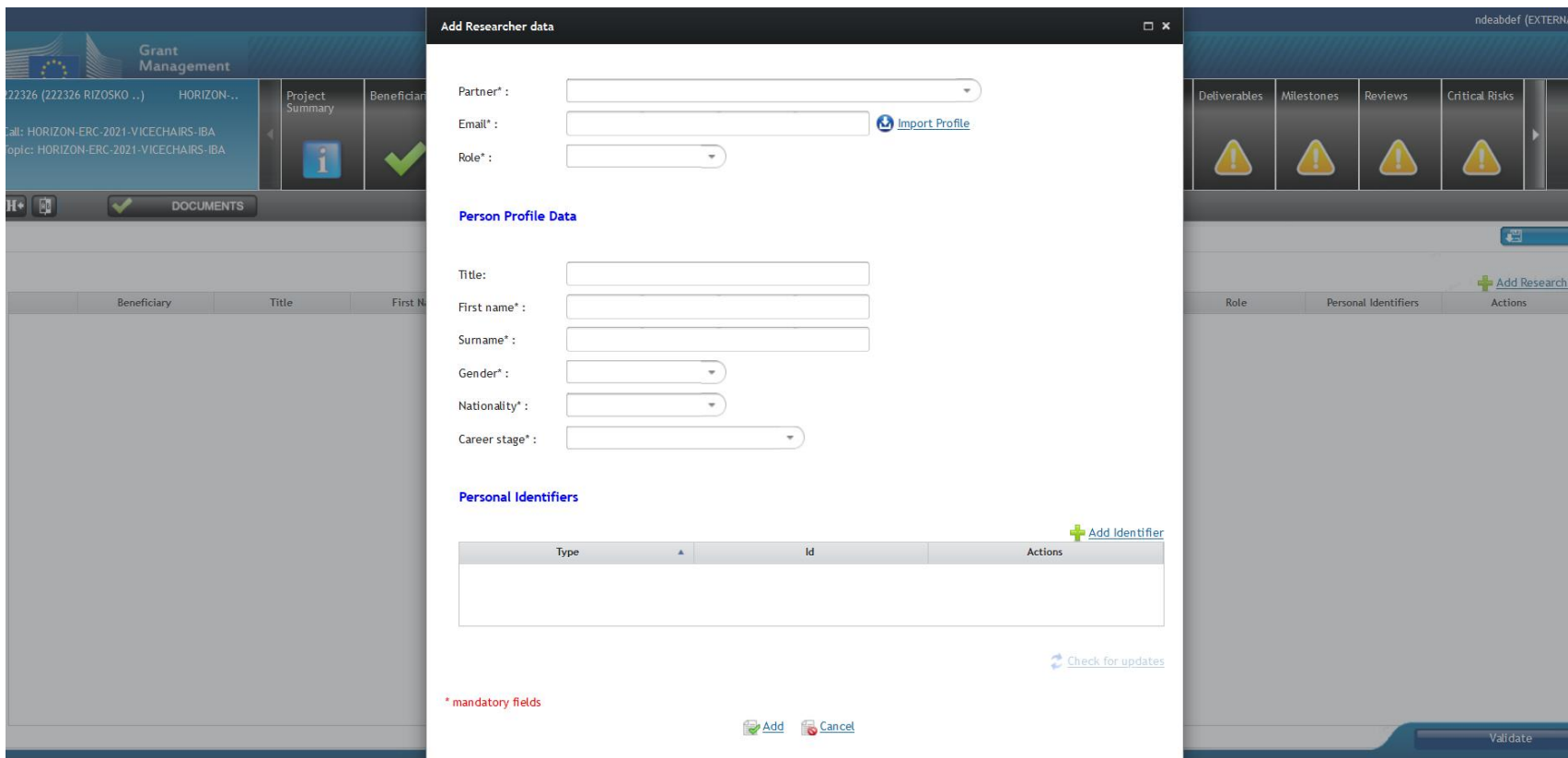
JU Contribution – IKOP

TOTAL DIRECT PERSONNEL COSTS AND PURCHASE COSTS (A+C)			1878717,01
TOTAL DIRECT COSTS (A+B+C+D)			1944217,01
E. INDIRECT COSTS (25% * (A+C))			469679,25
F. TOTAL COSTS (A+B+C+D+E)			2413896,26

<
>
Instructions
BE list
WP list
Lump sum breakdown
Person-months overview
Summary per WP
BE1
BE2
BE3
BE4
BE5
...

**** For the IKOP calculation, use the total costs from the Beneficiary tab.**

This is important as this cost has not yet been affected by a funding rate.

Grant Management

222326 (222326 RIZOSKO ...) HORIZON...

Call: HORIZON-ERC-2021-VICECHAIRS-IBA
Topic: HORIZON-ERC-2021-VICECHAIRS-IBA

DOCUMENTS

Beneficiary

Add Researcher data

Partner* :

Email* : [Import Profile](#)

Role* :

Person Profile Data

Title:

First name* :

Surname* :

Gender* :

Nationality* :

Career stage* :

Personal Identifiers

[Add Identifier](#)

Type	Id	Actions

[Check for updates](#)

* mandatory fields


[Add](#) [Cancel](#)

Validate

- Listing the researchers funded by the action is obligatory under HE; each beneficiary enters their own
- Option A: Complete manually all the mandatory data fields
- Option B: Retrieve the researcher's personal data (the ones made public, using the information provided by the researcher in the My Person Profile section of the F&T Portal)
- Removal of researchers listed in proposal only conditional (subject to CleanH2 JU agreement)

Work packages





Grant Management

Grant Agreement Data

HORIZON...

Call: HORIZON-CL6-2021-BIODIV-02

Topic: HORIZON-CL6-2021-BIODIV-02-01

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Work Packages

Number		Name	Lead Beneficiary	Total Effort	Start Month	End Month	Deliverables No.
1	✓			61.25	1	84	1, 2, 3 ...
2	✓			1186.07	1	84	10, 11 ...
3	✓			30.25	1	84	17, 18 ...
4	✓			28.5	1	84	24, 25 ...
5	✓			26.25	1	84	30, 31 ...
6	✓			15.5	1	84	36, 37 ...
7	⚠			0	1	84	42, 43 ...
8	✓			10.5	1	84	49, 50 ...
9	✓	Coordination and Management		190.6	1	84	56, 57 ...
Total:				1548.92			

Validate

- The Project Work Packages are not automatically listed after receiving the invitation letter.
- Complete all necessary work packages
- You can change the order of the work packages by **dragging and dropping**.



Grant Management

Grant Agreement Data

HORIZON-...

Call: HORIZON-CL6-2021-BIODIV-02

Topic: HORIZON-CL6-2021-BIODIV-02-01

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Deliverables

Number	Relative Number in WP		Name	Lead Beneficiary	Type	Dissemination Level	Due Date (in months)
D1	D1.1				R	SEN	1
D2	D1.2				R	SEN	12
D3	D1.3				R	SEN	16
D4	D1.4				R	PU	21
D5	D1.5				R	SEN	21
D6	D1.6				R	PU	21
D7	D1.7				R	SEN	19
D8	D1.8				R	SEN	22
D9	D1.9				R	SEN	28
D10	D2.1				R	SEN	6

Validate

- Deliverables are not automatically listed
- All deliverables in proposal need to be included with the same details
- Select appropriate Dissemination status (Public, Sensitive (limited under conditions in GA), **EU classified (EU-restricted/EU-confidential/EU-secret)**).




Grant Management

Grant Agreement Data

HORIZON-...
Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

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Milestones


Number		Name	Lead Beneficiary	Due Date (in months)	Means of Verification	Work Package No.
M1	✓			1		1
M2	✓			1		1
M3	✓			1		1
M4	✓			1		1
M5	✓			1		1
M6	✓			2		1
M7	✓			3		1
M8	✓			4		1
M9	✓			4		1
M10	✓			5		1
M11	✓			5		1
M12	✓			7		1

Validate

- Milestones are not automatically listed
- All milestones in proposal need to be included with the same details

Critical risks




Grant Management

Grant Agreement Data

HORIZON-...
Call: HORIZON-CL6-2021-BIODIV-02
Topic: HORIZON-CL6-2021-BIODIV-02-01

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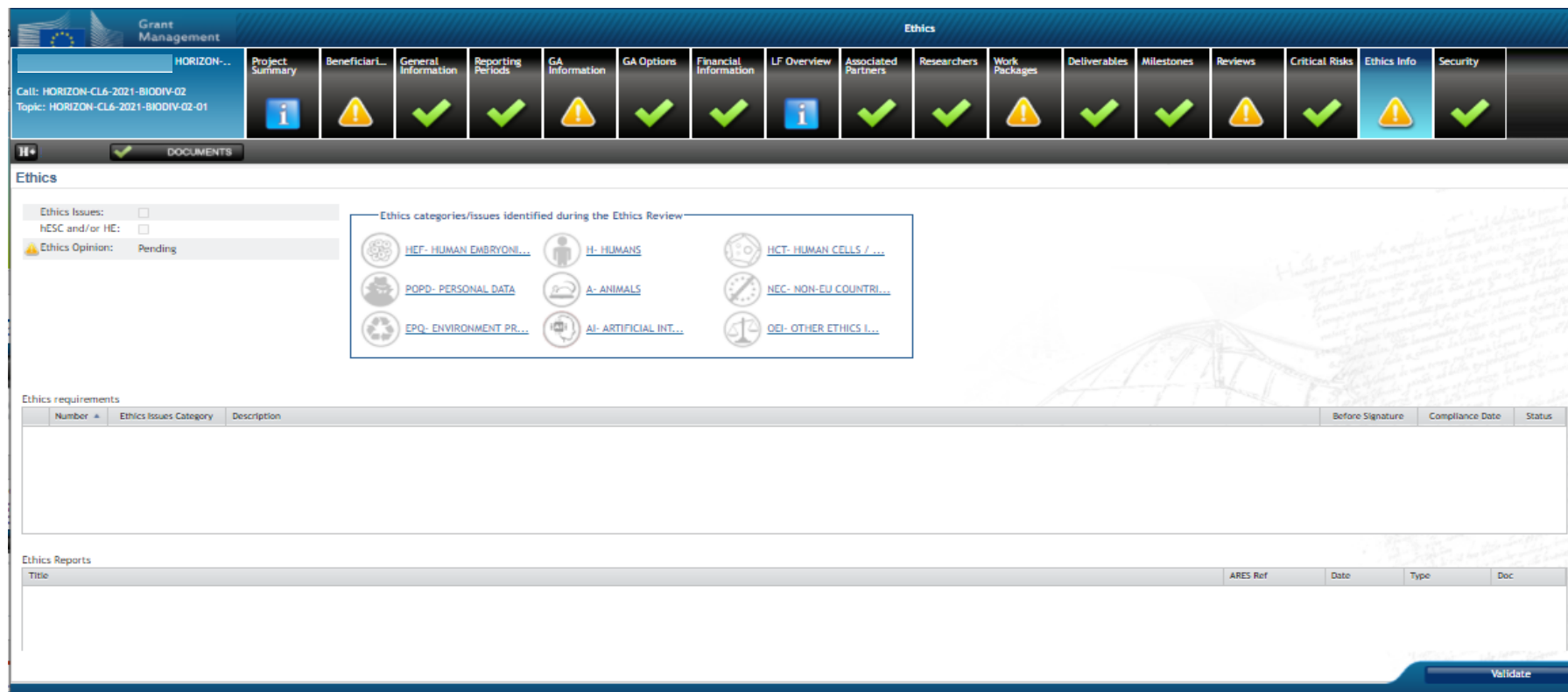
DOCUMENTS

Critical Risks For Implementation

Number		Description	Risk Mitigation Measures	Work Package No.
1	✓	Risk	gree A lar the p f m m part	ides, ether ill to all also 1, 2, 3 ...
2	✓	Pi	um reason and W due ti activi	a i Team work in of the rk, or 1, 2, 3 ...
3	✓	Ris	od: Any B	ional e sir 1, 2, 3 ...
4	✓		New poti cons	h the and in as 1, 2, 3 ...
5	✓	Ris	ers. It wil par detai	vera+ res (ERsA) 1, 2, 3 ...

Validate

- Critical risks are not automatically listed
- All critical risks in proposal need to be included with the same details


The screenshot shows the 'Ethics' section of the Grant Management system. At the top, there's a navigation bar with various tabs like 'Project Summary', 'Beneficiaries', 'General Information', etc. The 'Ethics' tab is active. Below the navigation bar, there's a status bar showing 'Call: HORIZON-CL6-2021-BIODIV-02' and 'Topic: HORIZON-CL6-2021-BIODIV-02-01'. The main content area is titled 'Ethics' and contains several sections:

- Ethics Issues:** A section with checkboxes for 'Ethics Issues:', 'HESC and/or HE:', and 'Ethics Opinion: Pending'.
- Ethics categories/issues identified during the Ethics Review:** A grid of icons and links for various categories: HEF- HUMAN EMBRYON..., H- HUMANS, HCT- HUMAN CELLS / ..., POPD- PERSONAL DATA, A- ANIMALS, NEC- NON-EU COUNTR..., EPQ- ENVIRONMENT PR..., AI- ARTIFICIAL INT..., and OEL- OTHER ETHICS I....
- Ethics requirements:** A table with columns: Number, Ethics Issues Category, Description, Before Signature, Compliance Date, and Status.
- Ethics Reports:** A table with columns: Title, ARES Ref, Date, Type, and Doc.


















At the bottom right, there is a 'Validate' button.


- Ethics screen is available as read only
- Before a final Opinion is encoded by Ethics experts in the Ethics evaluation process, at times, additional information may be requested from the applicant.
- The Consortium or its representative has to upload the requested information in Grant Management application in the Funding & Tenders Portal, under section 'Additional Information request'




Grant Management

Grant Agreement Data

HORIZON-...	Project Summary	Beneficiary...	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners	Researchers	Work Packages	Deliverables	Milestones	Reviews	Critical Risks	Ethics Info	Security
Call: HORIZON-CL6-2021-BIODIV-02 Topic: HORIZON-CL6-2021-BIODIV-02-01																	

 DOCUMENTS

Security

Security Issues: ☐

Security Classification:

- ☒ NSC No security concern
- ☐ REC Security recommendations
- ☐ R-UE/EU-R RESTREINT UE/EU RESTRICTED
- ☐ C-UE/EU-C CONFIDENTIEL UE/EU CONFIDENTIAL
- ☐ S-UE/EU-S SECRET UE/EU SECRET
- ☐ NOF Proposal too security-sensitive to be funded

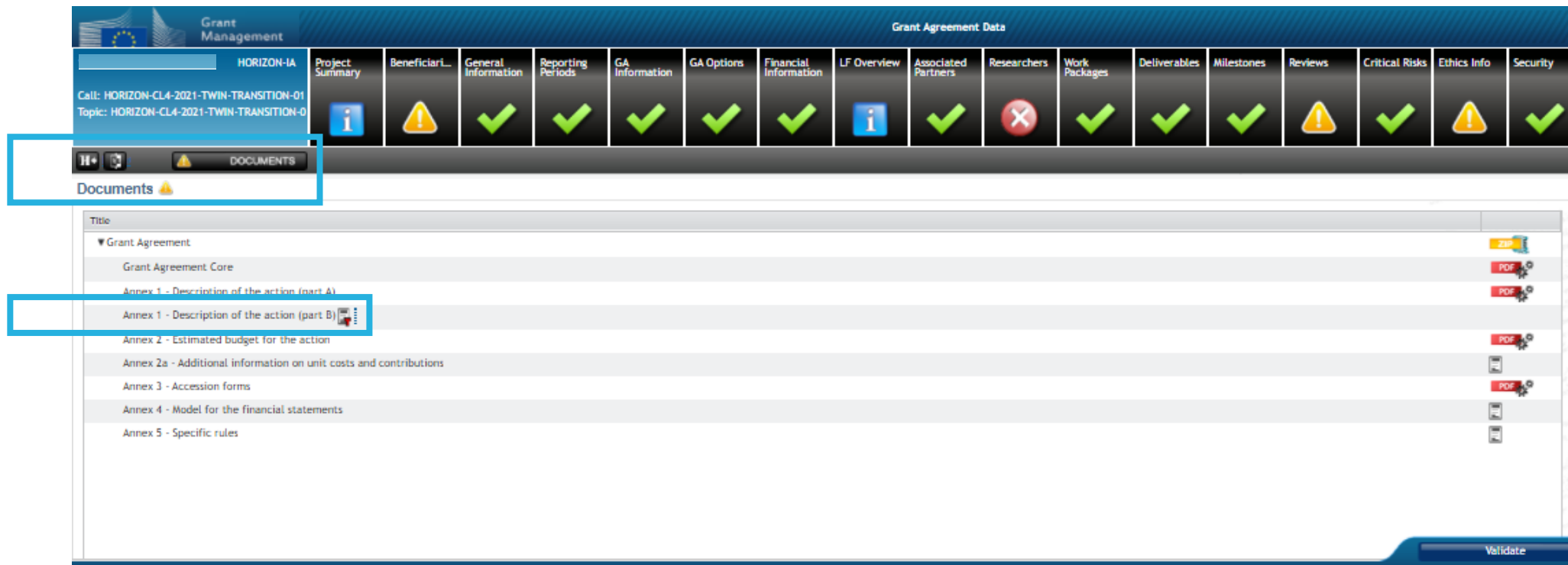
Security Classification Reason:

The Security Appraisal is not foreseen. The proposal was automatically cleared by the system.

Security Recommendations:

Number	Recommendations	Before Signature	Compliance Month	Status

Validate

Grant Management

Grant Agreement Data

HORIZON-IA

Call: HORIZON-CL4-2021-TWIN-TRANSITION-01
Topic: HORIZON-CL4-2021-TWIN-TRANSITION-01

Project Summary Beneficiary General Information Reporting Periods GA Information GA Options Financial Information LF Overview Associated Partners Researchers Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info Security

DOCUMENTS

Documents

Title

▼ Grant Agreement

Grant Agreement Core

Annex 1 - Description of the action (part A)

Annex 1 - Description of the action (part B)

Annex 2 - Estimated budget for the action

Annex 2a - Additional information on unit costs and contributions

Annex 3 - Accession forms

Annex 4 - Model for the financial statements

Annex 5 - Specific rules

Validate

Check instructions on slide 17 of this presentation

- Before uploading the part B, please remove the cover pages, the list of participants and add a history of changes. Changes need to be described concisely. Please add also a table of contents and page numbers.
- Please remove also, deliverables, milestones, risks and work packages as these are included in part A
- After creating the PDF, you may upload in the documents section
- Avoid repetition of information

Keep in touch

