



FUEL CELLS AND HYDROGEN
JOINT UNDERTAKING

Grant Agreement Preparation

**Overview: calendar,
IT system and roles**

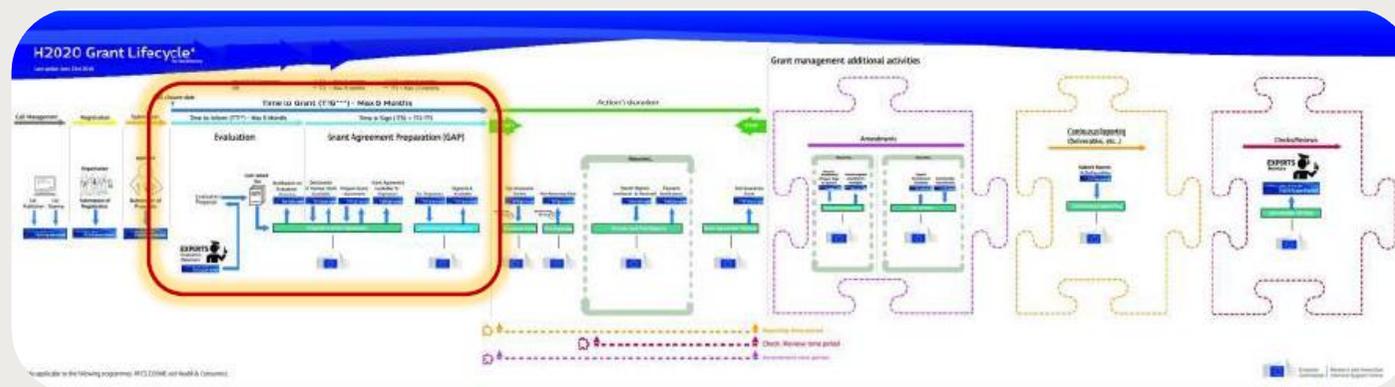
Lionel Boillot

10/09/2020



Horizon 2020 Grant Management Lifecycle

GAP (Grant Agreement Preparation) is the starting piece



Fully electronic process

- Harmonized rules
- Uniform interpretation
- Standard processes

Principles

Single gateway: **Funding and Tenders Portal**

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

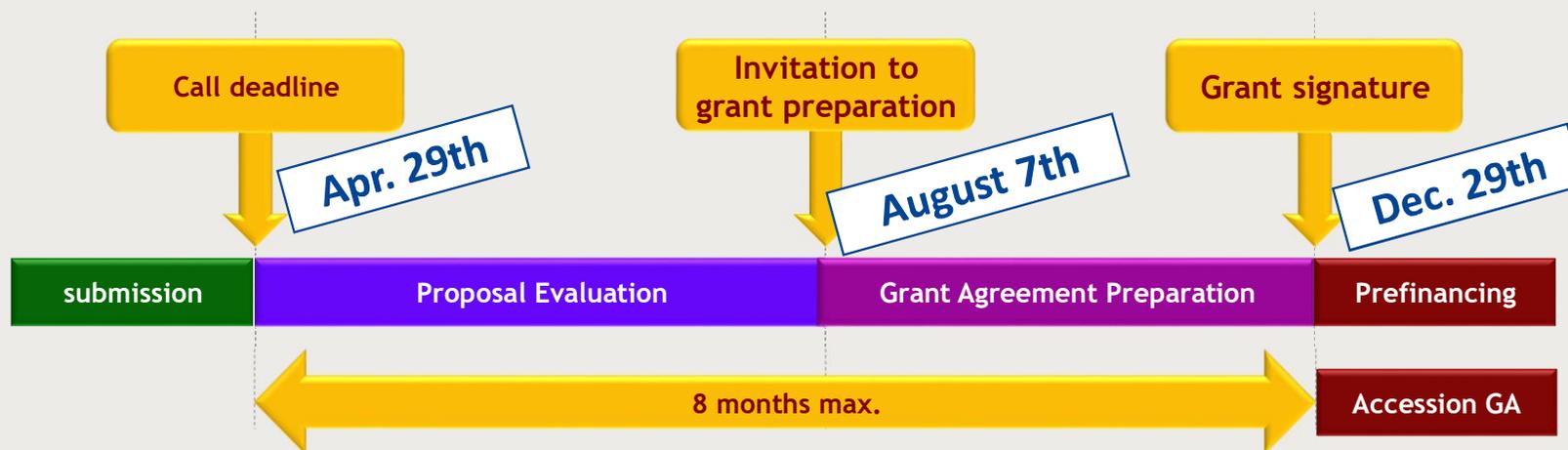
Electronic-only paperless process flows

- **Digital sealing** of documents
- **Digital signature** on all formal documents
- Single, common document repository
- **Full traceability and audit trail ensured** (who-what-when)
- Pre-defined business rules implemented in the IT suite ensure compliance



Time-bound process

Committed to make it simpler and quicker



A time-bound process

- Deadlines for submission are firm
- **GA must be countersigned by FCH2 JU on 29/12/2020 latest**



⚠ If you have **not been granted an extension**, and you fail to meet the established deadlines, preparation of your grant agreement may be terminated and your proposal rejected.

No-negotiation, your proposal is “project ready”

No negotiation does not mean "no control"



Your proposal is taken "as is"

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

BUT this does not mean "no change at all"

- Changes to meet legal and/or financial requirements (additional instructions)
- Changes that are necessary:
 - Requirements resulting from ethics review
 - Due to removal of a participant (if agreed)
 - Correction of clerical errors and obvious inconsistencies
 - Recommendations in Evaluation Summary Report



GAP – the main process steps

From 7th August 2020 to 29th January 2021



When?

7 Aug.
28 Sept.

What?

- Invitation to grant preparation (*evaluation results letter*)
- **Grant preparation** (*first iteration*)
- **Validation of participants** (*automatically triggered, simultaneous process*)
- **Setting user roles**
- **Review by FCH2 JU services (feedback by 12 Oct.)**

Who?

CO and beneficiaries

each beneficiary
each beneficiary

GAP – the main process steps

From 7th August 2020 to 29th January 2021



When?

What?

Who?

7 Aug.
28 Sept.

- **Invitation to grant preparation** (*evaluation results letter*)
- **Grant preparation** (*first iteration*)
- **Validation of participants** (*automatically triggered, simultaneous process*)
- **Setting user roles**
- **Review by FCH2 JU services** (**feedback by 12 Oct.**)
- **Grant preparation** (*second iteration*)
- **Signature of the 'Declaration of honour'** (*e-signature*)
- **Ex-ante checks by FCH2 JU services**

2 Nov.

CO and beneficiaries

each beneficiary
each beneficiary

CO and beneficiaries

GAP – the main process steps

From 7th August 2020 to 29th January 2021



When?

What?

Who?

7 Aug.

28 Sept.

2 Nov.

29 Dec.

29 Jan.

- Invitation to grant preparation (*evaluation results letter*)
- **Grant preparation** (*first iteration*)
- **Validation of participants** (*automatically triggered, simultaneous process*)
- **Setting user roles**
- **Review by FCH2 JU services (feedback by 12 Oct.)**
- **Grant preparation** (*second iteration*)
- **Signature of the 'Declaration of honour'** (*e-signature*)
- **Ex-ante checks by FCH2 JU services**

- **Signature of the GA** (*e-signature*)
- **Signature of the GA by the FCH2 JU services**
- **Payment of pre-financing**
- **Accession of beneficiaries** (*e-signature*)

CO and beneficiaries

each beneficiary

each beneficiary

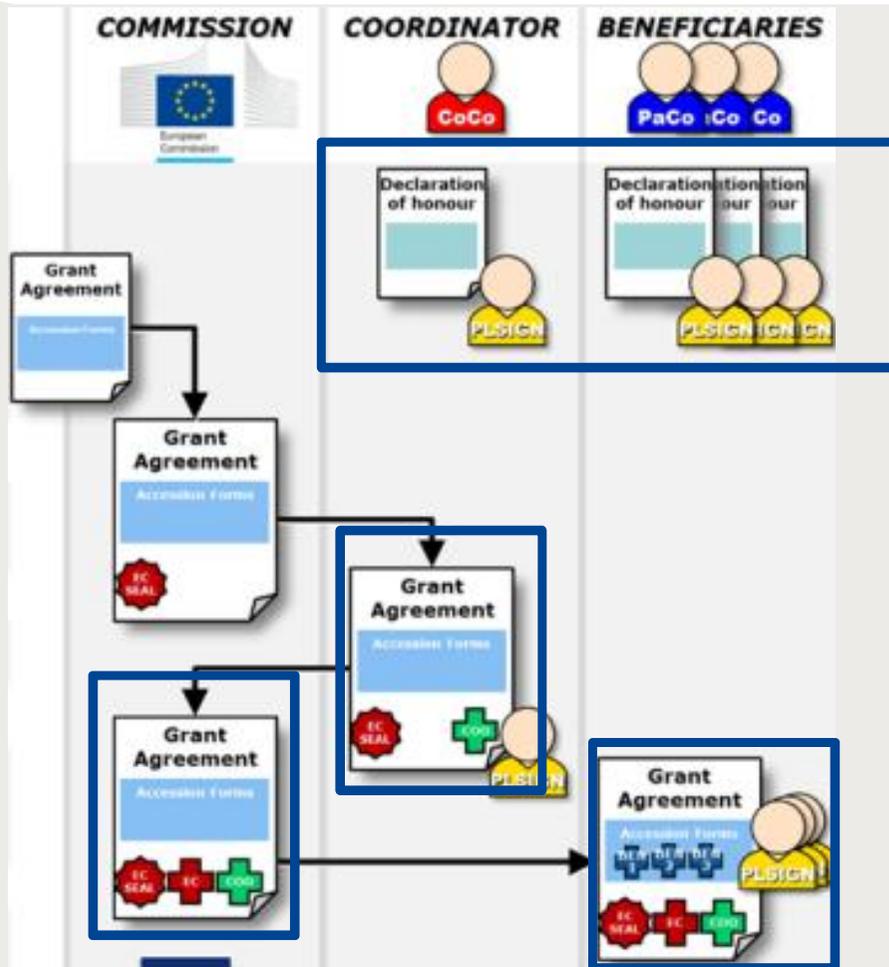
CO and beneficiaries

CO

each beneficiary

Electronic signature in the Grant Agreement Preparation (GAP)

Important signatures in GAP



Declaration of honour

02/11/2020

the coordinator and each beneficiary, signed by the **LSIGN**

The Grant Agreement

29/12/2020

- first the coordinator, by the **LSIGN**
- second the FCH JU

Accession Forms

29/01/2021

each beneficiary - by the **LSIGN**

IT system suite for grant management

Fully integrated in the Tenders and Funding Portal



RESEARCH & INNOVATION
Participant Portal - Grant Management Services

Process description and reference

Process timeline

MY PROJECT

HORIZON 2020

Call: H2020-INNOVUP-2014-5
Type of Action: H2020-FCT-2015
Acronym: Mindflex
Current Phase: Grant management
Number: 28109
Duration: 46 months
Start Date: 2013-04-23
Estimated Project Cost: €4,545,454.00
Requested EU Contribution: €999,123.00
Contact: James

See all data ...

Project Tools

H2020 ONLINE MANUAL

HOW TO

Proposal Management & Grant Preparation
28109 - Mindflex

Submitted (12/04/2013) | Evaluated (12/08/2014) | Ranked | Invited | Prepared | Signed | Paid

Grant agreement data preparation

Submit to EU

Documents

Messages

Open and perform the task (Available to you when in a yellow box)

Complete the task (enabled when available to you)

Key Project Data

H2020 Business Information

How to use the IT system



IT system suite for grant management

Working on process task: inside the grant management tool



portal nexteri (EXTERNAL) ?

SyGMa
System for Grants Management

Grant Agreement Data

Project 888823 (Project 888823) HORIZON 2020 Call: H2020-INFRAIA-2014-2015 Action 1 CSA Resp. Unit: RTD/B/07 Duration: 36	Beneficiaries	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Work Packages	Deliverables	Milestones	Reviews	Critical Risks
	✗	✗	✓	⚠	✓	✗	i	✗	✗	⚠	⚠	⚠

DOCUMENTS

Project Summary

Project 888823 (Project 888823)

Responsible Unit: RTD/B/07
Call: H2020-INFRAIA-2014-2015
Topic: INFRAIA-1-2014-2015 - Integrating and opening existing national and regional research infrastructures of European interest
Type of Action: CSA
Duration: 36

Budget Information:
Total Costs in the Proposal: 256.00 €
Max EU Grant Amount(following evaluation): 1,240.00 €
Total Costs: 1,240.00 €
Maximum Grant Amount: 1,237.00 € 100 % of total costs

Officers:
Project Officer: Maria ALLEGRIINI (RTD/B/07)

Deadlines:
Deadline for first version of the grant agreement data (incl. annexes) 20/05/2014
Deadline for the signature of the participants certified declarations 11/07/2014
Deadline foreseen for the signature of the grant agreement 28/07/2014

Validate





Funding & tender opportunities

Single Electronic Data Interchange Area (SEDIA)

English **EN**

[Register](#) [Login](#)



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

select programme

Funding & tender opportunities (the Single Electronic Data Interchange Area) is the entry point for participating in EU funding programmes of the European Commission and other EU bodies.

Public access

EU Login or registration

Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes...

EU Programmes

- 3rd Health Programme (3HP)
- Asylum, Migration and Integration Fund (AMIF)
- Consumer Programme (CP)
- Creative Europe (CREA)
- European Defence Industrial Development Programme (EDIDP)
- EU Aid Volunteers Programme (EUAID)
- Erasmus+ Programme (EPLUS)
- Europe For Citizens (EFC)





Funding & tender opportunities

Single Electronic Data Interchange Area (SEDIA)

Welcome **Lionel BOILLLOT**  EN

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

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

My Proposal(s)

Personalised access to the user account

- My roles
- Security Settings
- IT Helpdesk
- My Account
- Logout

Results: 0 Download excel list

PROGRAM	CALL	FUNDING SCHEME	PROPOSAL ID	ACRONYM	STATUS	REMAINING TIME	CLOSURE DATE	ACTIONS
No records found								

Page 1 of 10

Personalised access to the IT tools



I have no EU Login

What should I do?



- Go to Funding & tender opportunities portal and create one

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

English EN

Register Login

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

Funding & tender opportunities (the Single Electronic Data Interchange Area) is the entry point for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes... Search

Register

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

Create an account

[Help for external users](#)

First name

Last name

E-mail

Confirm e-mail

E-mail language
English (en)

Enter the code

By checking this box, you acknowledge that you have read and understood the [privacy statement](#)

Create an account

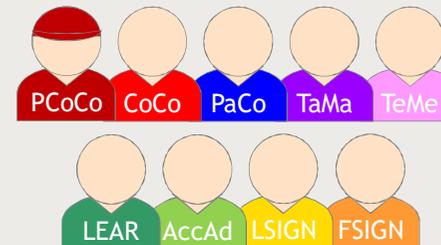


Personalised services

Access to personalised space is based on 3 elements

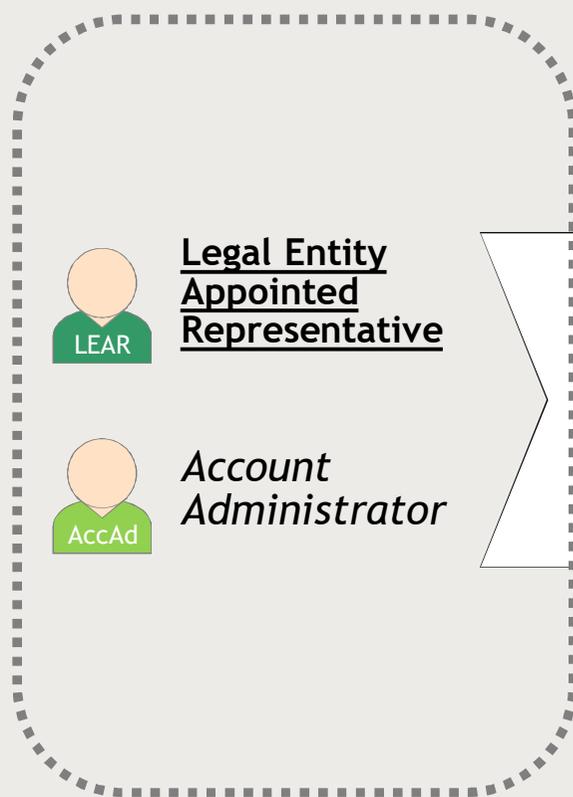


- Each user is supposed to have a **unique EU Login account**, which is the **unique identifier for persons** (linked to their professional email address).
- Each EU Login account is linked to one (or more) **PIC(s)**, the **unique identifier of the organisation**.
- EU Login account is linked to all roles that the user has in projects and/or organisations.
One user can have as many roles as necessary.

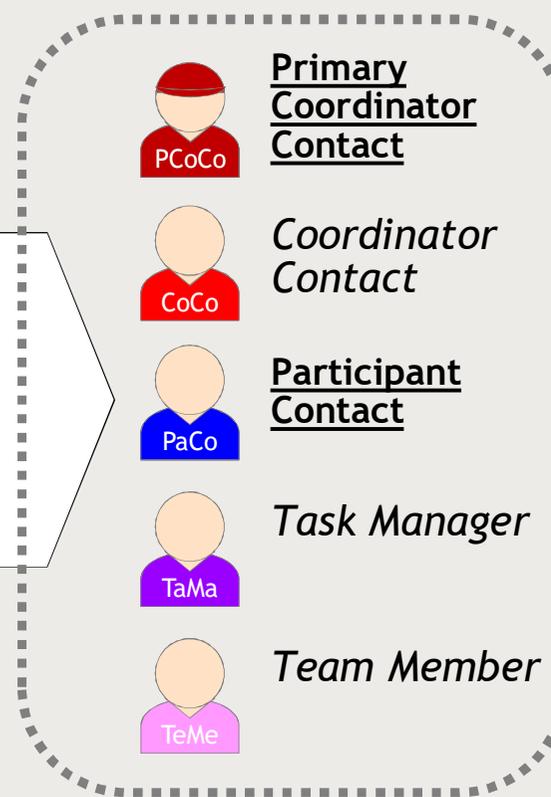


Roles - Nomenclature

Organisation roles



Project roles



Roles and access right – ORGANISATION data

Organisation



Role	Read	Write	Assign/ Revoke AcAd role	Assign/ Revoke LSIGNs and FSIGNs
LEAR	✓	✓	✓	✓
AcAd	✓	✓	✗	✓
LSIGN	✓	✗	✗	✗
FSIGN	✓	✗	✗	✗



Roles and access right – PROJECT data

Project



Role	Read	Write/ Save	Submit to Coordinator	Submit to EU service	SIGN GA	SIGN FS financial statement	Assign revoke access to project
CoCo	✓	✓	✓	✓	X	X	✓
PaCo	✓	✓	✓	X	X	X	✓
TaMa	✓	✓	X	X	X	X	X
TeMe	✓	X	X	X	X	X	X
PLSIGN	✓	✓	X	X	✓	X	X
PFSIGN	✓	✓	X	X	X	✓	X



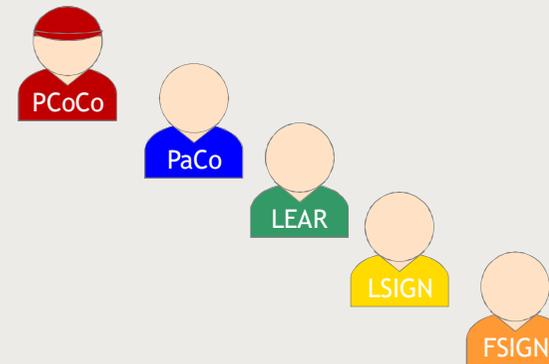
Important remarks



- **No FCH2 JU/REA services intervention** in defining the roles (except for the **LEAR** and **Primary Coordinator Contact**)

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

- ✓ The Primary Coordinator Contact
- ✓ 1 Participant Contact per beneficiary
- ✓ 1 LEAR per organisation
- ✓ 1 Legal Signatory per organisation
- ✓ 1 Financial Signatory per organisation

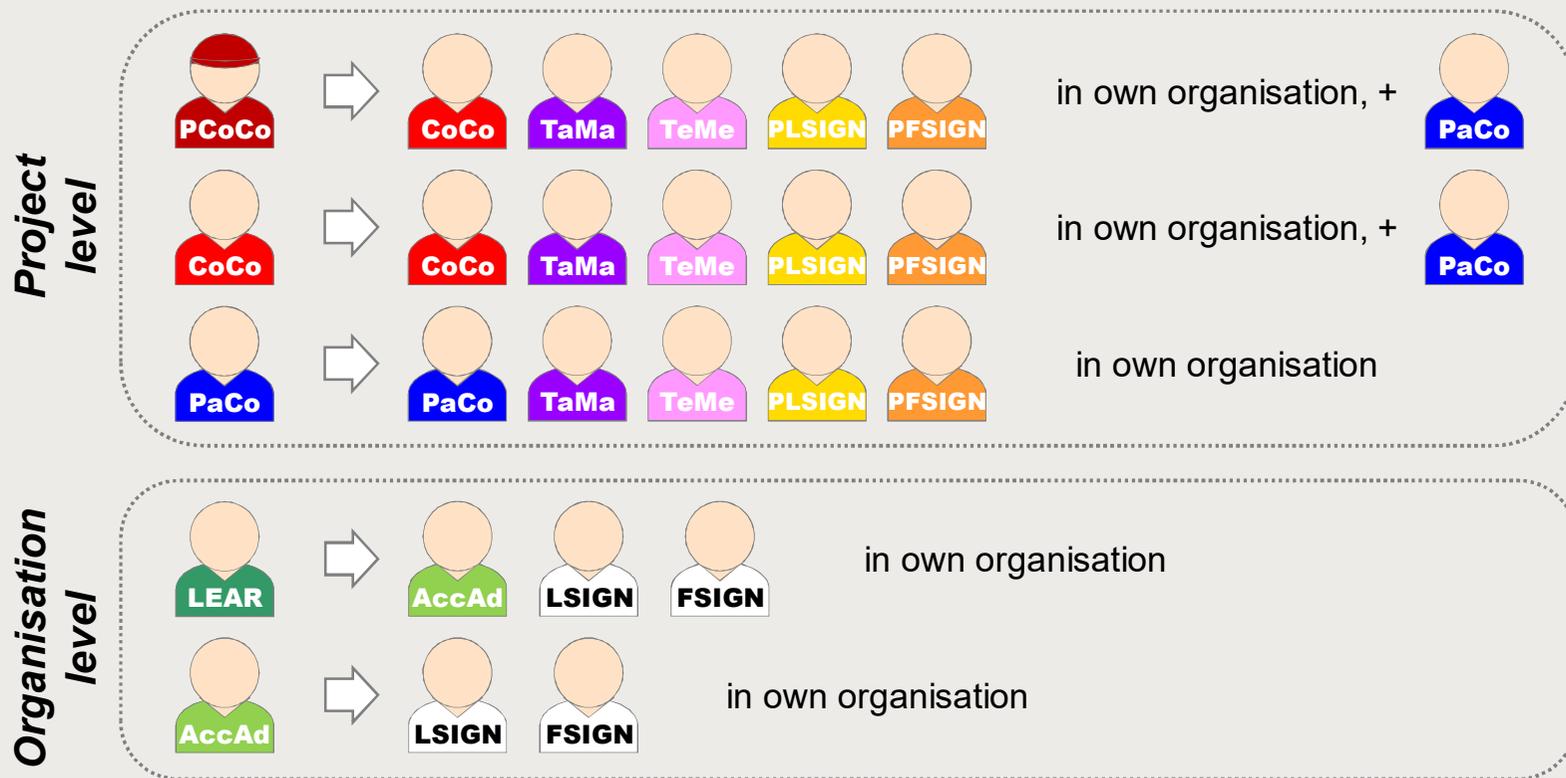


- **One person** (= 1 EU Login account) **can have as many roles as necessary at the same time** (e.g. the owner of a one-person SME can be PaCo, LEAR, PLSIGN and PFSIGN)



The nomination/revocation process

Who can appoint and revoke project roles?



The nomination process “original roles”



Some roles are automatically provisioned in the early stages of the Project (“**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 the Commission** during the validation process of his/her organisation.



Roles – Right management - principles

Chain of trust



- **LEAR** is formally nominated by the legal representative of the organization
- LEAR appoints on the funding & tender opportunity portal a list of persons authorised to **sign legal documents** (LSIGN) and **financial statements** (FSIGN)
- Only these persons get access to sign relevant documents on the funding & tender opportunity portal after Project contacts (PaCos and CoCos) have appointed them to a given project (becoming PLSIGN and PFSIGN)
- "Sign and submit" triggers creation of **digitally signed pdf documents**
- All persons that need to know about signature are **notified** and have **access** to the signed documents
- Full **audit trail** of all electronic transactions



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

Funding & tender opportunities
Single Electronic Data Interchange Area (SEDIA)

Participant Register

If you want to participate in a project proposal, your organisation needs to be registered and have a 9-digit Participant Identification Code (PIC). Please quote your PIC in all correspondence with the Commission.

The register contains all participants of EU programmes.

Is your organisation already registered? PIC search

Please check whether your organisation has already been registered. If so, no need to register it again.

Search a PIC

Results: 2

STATUS	COUNTRY	CITY	LEGAL NAME	BUSINESS NAME	PIC	VAT	ERASMUS CODE	REG NUMBER	ACTIONS
VALIDATED	FR	LILLE	ELEMENT ENERGY	EE FR	902226877	FR32837722594		837722594	Actions
VALIDATED	UK	CAMBRIDGE	ELEMENT ENERGY LIMITED	Element Energy	996127921	GB240246933			Contact Organisation View Partner Search Profile



- 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

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

1 10

- Manage Consortium
- Manage Project
- View Proposal

Takes you back to your sealed proposal

Documentation and Guidance

Where to find help?



Online Manual: online guide divided by business processes. Provides full information on the process & reference documents, and links to the relevant IT How To sections

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm

IT How To wiki: screens & step-by-step guidance on the tools, including videos

<https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/IT+How+To>

FAQ database – searchable by categories and keywords

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq>

H2020 ONLINE MANUAL

online guide divided by business processes. Provides full information on the process, reference documents



HOW TO

screens & step-by-step guidance on the tools, including videos

FAQ database – searchable by categories and keywords



Documentation and Guidance

The nomination process for LEAR - documents



- **LEAR appointment letter:**
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lear-applet_en.doc
- **LEAR role and tasks:**
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lear-roltas_en.doc
- **Terms and conditions of use of the electronic exchange system:**
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lev-terms-of-use_en.pdf
- **Declaration of consent to the terms and conditions of use:**
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lev-declaration-consent_en.doc

