



**FUEL CELLS AND HYDROGEN**  
JOINT UNDERTAKING

# **Grant Agreement Preparation**

## **Overview**

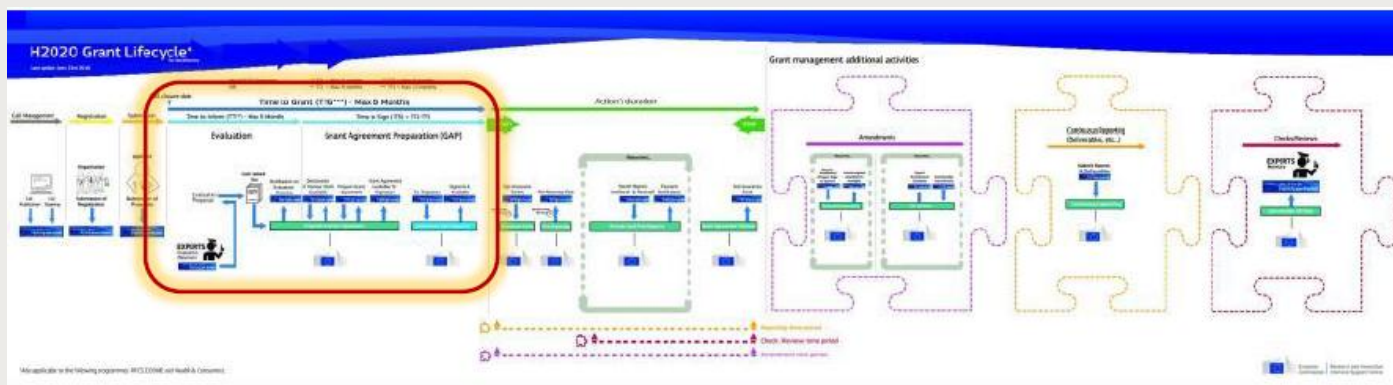
**Dionisis Tsimis**

19/09/2019



# Horizon 2020 Grant Management Lifecycle

GAP (Grant Agreement Preparation) is the starting piece



## Principles

Single gateway: **Funding and Tenders Portal**

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

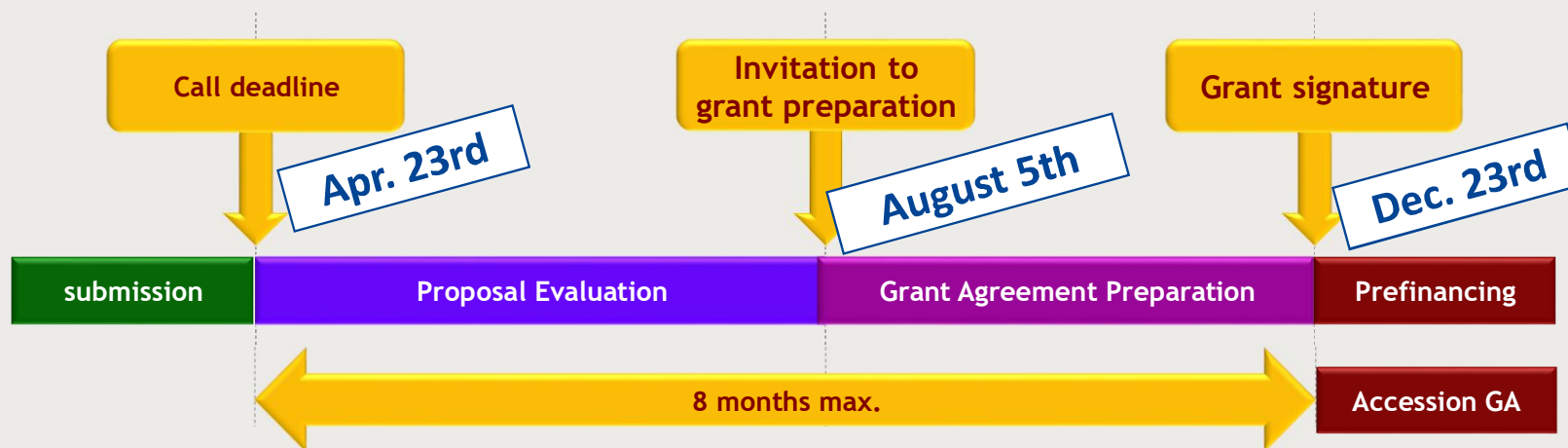
**Electronic-only** paperless process flows

- **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



## Fully electronic process

- **Harmonized** rules
- **Uniform** interpretation
- **Standard** processes

## A time-bound process

- Deadlines for submission are firm
- **GA must be countersigned by FCH2 JU on 23/12/2019 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.

# GAP – the main process steps

From 5<sup>th</sup> August 2019 to 23<sup>rd</sup> January 2020



## When?

**5 Aug.**  
**25 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 EU services**

## Who?

*CO and beneficiaries*

*each beneficiary*

*each beneficiary*

# 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



# 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** (points to 'Proposal Management & Grant Preparation 28109 - Mindflex')

**Process timeline** (points to the timeline showing stages: Submitted, Evaluated, Ranked, Invited, Prepared, Signed, Paid)

**Key Project Data** (points to the sidebar containing project details):  
Call: H2020-INNOSUP-2014-5  
Type of Action: H2020-FCT-2015  
Acronym: Mindflex  
Current Phase: Grant management  
Number: 28109  
Duration: 48 months  
Start Date: 2013-04-23  
Estimated Project Costs: €4,545,454.00  
Requested EU Contribution: €999,123.00  
Contact: James

**Open and perform the task (Available to you when in a yellow box)** (points to 'Grant agreement data preparation')

**Complete the task (enabled when available to you)** (points to 'Submit to EU' button)

**Project Tools** (points to icons at the bottom of the sidebar)

**H2020 Business Information** (points to 'H2020 ONLINE MANUAL')

**How to use the IT system** (points to 'HOW TO' button)





# IT system suite for grant management

Working on process task: inside the grant management tool



<< portal nexteri (EXTERNAL) ?

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**SyGMA**  
System for Grant Management

Grant Agreement Data

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

DOCUMENTS

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Project Summary SAVE

**Project 888823 ( Project 888823 )**

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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

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

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

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**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








# Electronic-only grant management

## Identity and Access Management



- E-only: paper-free process endorsed by e-signature
- Based on "Chain of trust" enabling e-signature
- Roles enabling e-signature
- **Legal Entity Authorised Representative (LEAR)**
- **Legal Signatory (LSIGN)** and **Financial Signatory (FSIGN)**

The **minimum configuration** is:

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

### EU Login

One account, many EU services

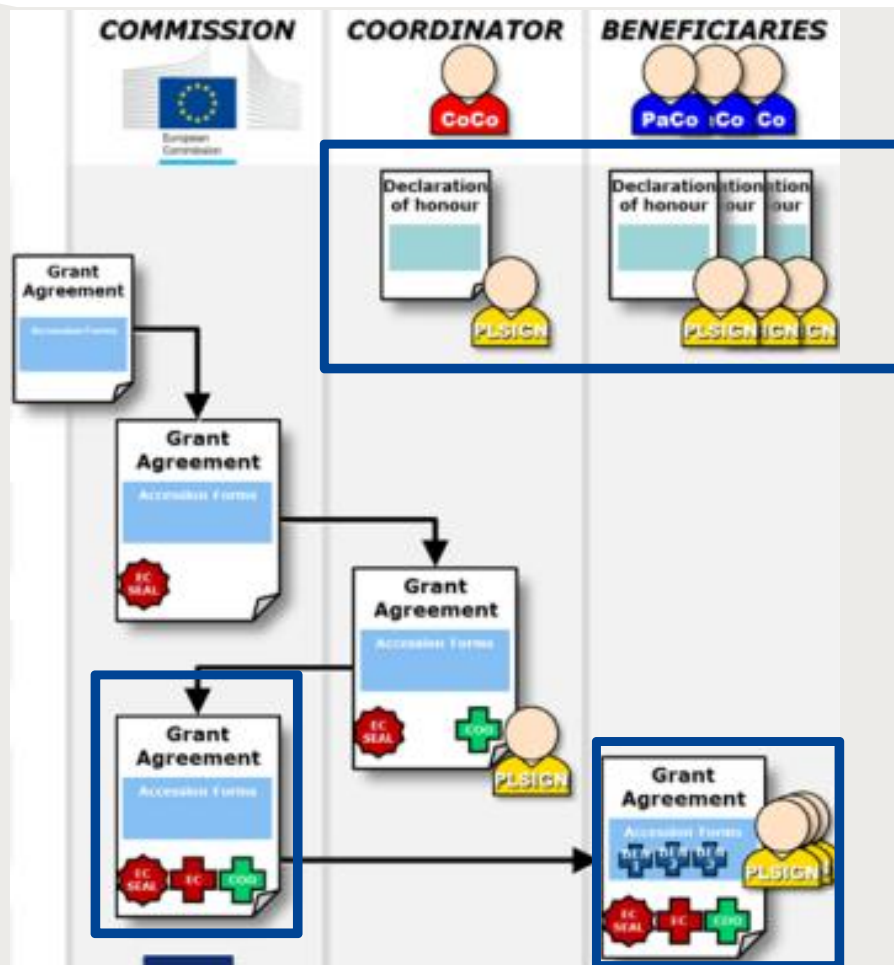
**Create an account**





# Electronic signature in the Grant Agreement Preparation (GAP)

Important signatures in GAP



## ■ Declaration of honour

04/11/2019

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

## ■ The Grant Agreement

23/12/2019

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

## ■ Accession Forms

23/01/2020

each beneficiary - by the **LSIGN**



# 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 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... Search

### 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**



Manage my area

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



## My Proposal(s)

Personalised access  
to the user account

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

Results: 0

Download excel list

Search..

PROGRAM	CALL	FUNDING SCHEME	PROPOSAL ID	ACRONYM	STATUS	REMAINING TIME	CLOSURE DATE	ACTIONS
---------	------	----------------	-------------	---------	--------	----------------	--------------	---------

No records found

Personalised access  
to the IT tools

1 10

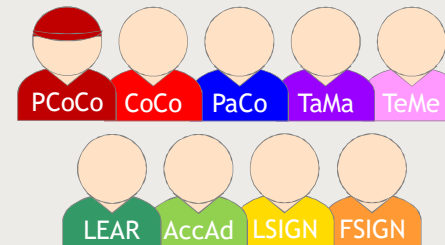


# Personalised services

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.**



# I have no EU Login

What should I do?



- Go to Participant Portal and create one

### Create an account

[Help for external users](#)

First name

Last name

E-mail

Confirm e-mail

E-mail language

Enter the code

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

Create an account



# Roles - Nomenclature

## Organisation roles



Legal Entity  
Appointed  
Representative



*Account  
Administrator*



Legal  
Signatory



Financial  
Signatory

## Project roles



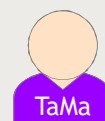
Primary  
Coordinator  
Contact



*Coordinator  
Contact*



Participant  
Contact



*Task Manager*



*Team Member*



## 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



# Roles – Right management - principles

## Chain of trust



- **LEAR** is formally nominated by the legal representative of the organization
- LEAR appoints on PP a list of persons authorised to **sign legal documents** (LSIGN) and **financial statements** (FSIGN)
- Only these persons get access to sign relevant documents on PP after Project contacts (PaCos and CoCos) have appointed them to a given project
- "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



# I have an EU Login, but no access to no proposals, projects or organisation data

What should I do?



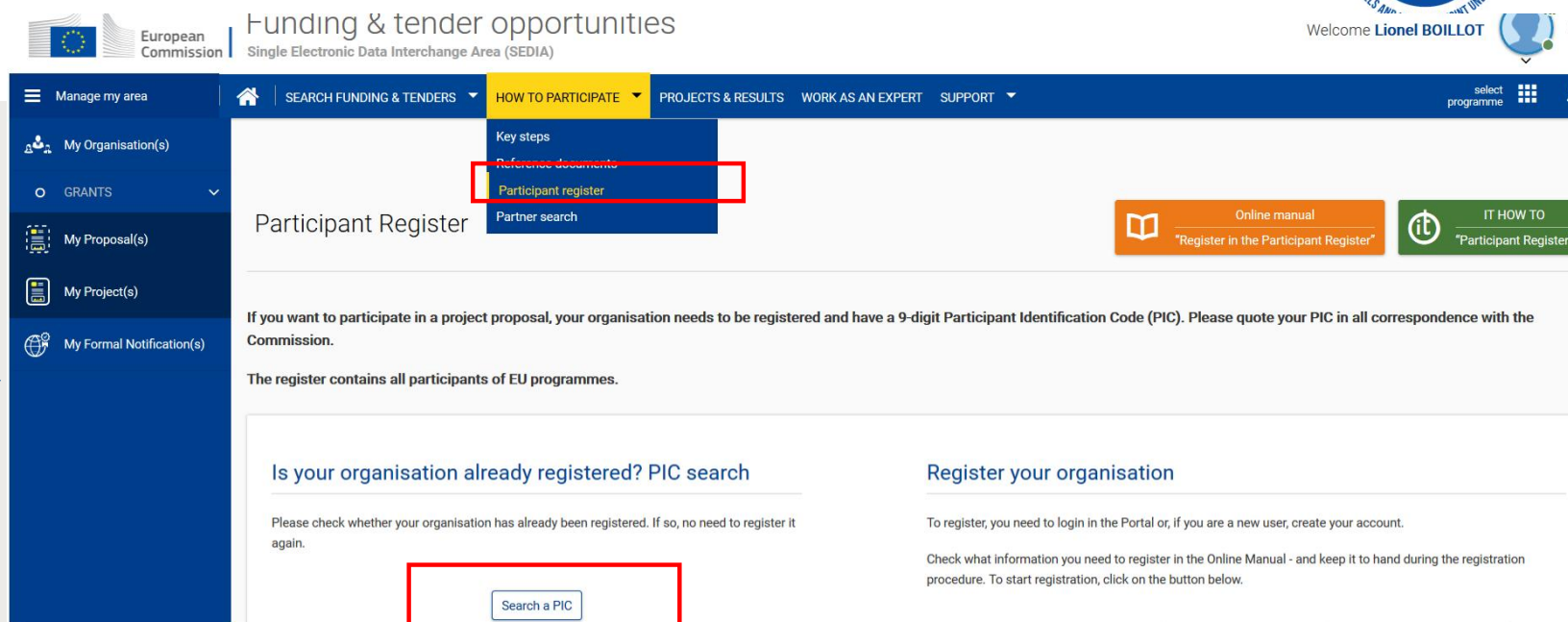
Ask persons having access to the respective data for granting you access:

- **Proposals** – person who created the proposal on PP
- **Projects** – any Participant Contact or Coordinator Contact [PaCo] or [CoCo]
- **Organisation data** – the LEAR of your organisation



# 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



The screenshot shows the 'Funding & tender opportunities' portal. The left sidebar contains navigation links: 'Manage my area', 'My Organisation(s)', 'GRANTS', 'My Proposal(s)', 'My Project(s)', and 'My Formal Notification(s)'. The main header includes the European Commission logo and the text 'Single Electronic Data Interchange Area (SEDIA)'. The top navigation bar has links for 'SEARCH FUNDING & TENDERS', 'HOW TO PARTICIPATE' (highlighted), 'PROJECTS & RESULTS', 'WORK AS AN EXPERT', and 'SUPPORT'. A dropdown menu under 'HOW TO PARTICIPATE' shows 'Key steps', 'Reference documents', 'Participant register' (highlighted with a red box), and 'Partner search'. The main content area is titled 'Participant Register' and contains a message: '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.' Below this, there are two sections: 'Is your organisation already registered? PIC search' with a 'Search a PIC' button (highlighted with a red box), and 'Register your organisation' with instructions on how to register.

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

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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

Manage Consortium

Manage Project

View Proposal

**Takes you back to your sealed proposal**



# Notifications system



- **E-mail** notifications about all the actions that you are to carry out for grant preparation and signature.
- Notifications alert you while the **full information** about the action is provided in the PP My Area after you have logged in – choose the menu **My Projects** and click on the action button **MP**.
- All the notifications that you receive by e-mail are also available in **My Notifications inbox** on PP.
- Notifications are addressed to the role that is to carry out the action. The roles that may need to be aware of this action, receive it in CC. TASK/INFO notifications

The full list of **grant preparation and management Notifications** with the addressee roles on IT HOW TO wiki



# Documentation and Guidance

Where to find help?



**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**

- Online manual, sections on [roles](#), [grant signature](#) and [LEAR appointment](#)
- [Terms and conditions of use](#)
- [Video on e-signature](#)
- [Video on LEAR appointment](#)

