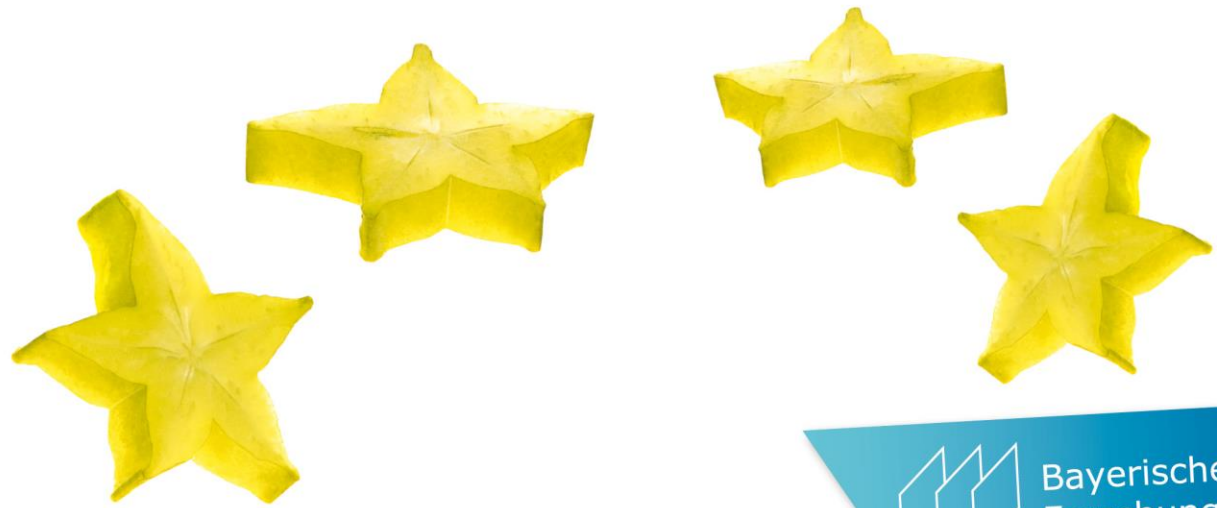




Grant Preparation & Participant Portal

Dr. Philip Pfaller

Phone: +49 (0)89 / 99 01 888 -164

Email: pfaller@bayfor.org





Inhaltsverzeichnis

1. Participant Portal
2. H2020 Online Manual
3. Erfolgreiches Projekt: Vergabe von Rollen im Participant Portal
4. Erstellung Grant Agreement
5. Consortium Agreement

1. Participant Portal



- In Horizon 2020 alles papierlos – einziges Tool ist das Participant Portal
- Alle Änderungen, Rollenverteilungen, Unterschriften werden über das Participant Portal vorgenommen!

1. Participant Portal



Bayerische
Forschungsallianz

(A-Z) Sitemap About this site Contact Legal Notice Search English ▾

European Commission

Öffentlich zugänglicher Bereich

Login & Erstregistrierung

European Commission > Research & Innovation > Participant Portal > Home

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search LOGIN REGISTER

Horizon 2020 Funding

Starting from 1/1/2014

On this site you can find and secure **funding** for projects under the following EU programmes:

- **2014-2020** Horizon 2020 - research and innovation framework programme
- **2007-2013** 7th research framework programme (FP7) and Competitiveness & Innovation Programme (CIP)
- 3rd Health Programme, Asylum, Migration and Integration Fund, Consumer Programme, COSME, Internal Security Fund Borders, Internal Security Fund Police, Justice Programme, Promotion of Agricultural Products Programme, Rights, Equality and Citizenship Programme and Research Fund for Coal & Steel

Non-registered users	Registered users
• search for funding • read the H2020 Online Manual & download the legal documents • check if an organisation is already registered • contact our support services or check our FAQs	• submit your proposal • sign the grant • manage your project throughout its lifecycle • register as expert advising the Commission

WHAT'S NEW?

FUNDING OPPORTUNITIES

HOW TO PARTICIPATE

WORK AS AN EXPERT

MY PERSONAL AREA

INFORMATION AND SUPPORT

1. Participant Portal: Login



EU Login

One account, many EU services

Where is
ECAS?



English (en)

research requires you to authenticate

Sign in to continue

Welcome

schuback@bayfor.org

(External)

[Sign in with a different e-mail address?](#)

Password

[Lost your password?](#)

Choose your verification method

Password



Sign in

1. Participant Portal: Übersicht



MY AREA | HOME | FUNDING OPPORTUNITIES | HOW TO PARTICIPATE | PROJECTS & RESULTS | EXPERTS | SUPPORT | PHILIP PFALLER

My Organisation(s)
My Proposal(s)
My Project(s)
My Audit(s)
My Notification(s)
My Formal Notification(s)
My Expert Area

The new Funding & Tenders Portal is now available.
[Try it out now!](#)

My Proposals [H2020 ONLINE MANUAL](#) [HOW TO](#)

This page provides a list of proposals where you participate:

- as a Coordinator/Principal Investigator, or
- as a project participant

But it does **not** include **successful proposals** that have become projects – these are in My projects list.

You can view, edit or download your draft or submitted proposals, depending on the proposal status and the deadline of the relevant call.

To start preparing a new proposal, go to [Funding Opportunities](#), to the page of the topic that you want to apply for, and enter the **submission system**.

Legend

- ED Edit Draft
- VD View Draft
- VS View Submitted
- DE Delete Proposal
- FO Follow-up
- PC Proposal Consortium

Show 10 entries

PROGRAM	CALL	FUND. SCH.	PROP. ID	ACRONYM	STATUS	REM. TIME	ACTIONS
H2020	H2020- MSCA- IF-2018	MSCA-IF-EF- ST			Final		PC VD VS FO

Showing 1 to 1 of 1 entries.

← PREVIOUS 1 NEXT →

HORIZON 2020 | RESEARCH ON EUROPA | HORIZON 2020 & FP7 PROJECTS & RESULTS | OLAF

© European Commission

Zugang zu den
unterschiedlichen
Tasks

1. Participant Portal: Übersicht



MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP CAROLIN SCHUBACK

My Organisation(s)
My Proposal(s)
My Project(s)
My Notification(s)
My Formal Notification(s)
My Expert Area

My projects FP7 REF. DOCS H2020 ONLINE MANUAL HOW TO

This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Prepare and sign your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

If you are LEAR and want to see the full list of your organisation projects, please go to **My Organisations** and click on the action button **VP**. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the [H2020 online manual](#).

Legend AA Access Amendment GP Grant Preparation MP Manage Projects FR Financial Reporting PR Periodic Reporting RD Reporting & Deliverables PC Project Consortium VP View Proposal

Show 10 entries Hide closed projects Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
	H2020-BBI-PPP-2015-1-1	H2020		Grant Preparation	PC VP MP
	H2020-SCC-2015	H2020		Active	PC VP MP

Showing 1 to 2 of 2 entries. PREVIOUS 1 NEXT

HORIZON 2020 RESEARCH ON EUROPA CORDIS OLAF

© European Commission

Zugang zu den
unterschiedlichen
Tasks



2. H2020 Online Manual:

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

The screenshot displays the 'RESEARCH & INNOVATION Participant Portal H2020 Online Manual'. The interface includes a search bar, a left-hand navigation menu, and a main content area with various functional buttons.

Navigation Menu (Left):

- H2020 Online Manual
 - My Area - User account & roles
 - EU Login
 - Roles & access rights
 - Terms and Conditions of Use
 - Grants
 - Applying for funding
 - Find a call
 - Horizon 2020 structure and budget
 - What you need to know about Horizon 2020 calls
 - Find partners or apply as individual
 - Register in the Beneficiary Register
 - Registration of your organisation
 - LEAR appointment
 - Validation of potential beneficiaries
 - Financial viability check
 - Data update
 - Certifications
 - Submit a proposal
 - Get prepared
 - Electronic proposal submission
 - From evaluation to grant signature
 - Eligibility check
 - Evaluation of proposals
 - Eligibility and evaluation criteria
 - Evaluation process and results

Main Content Area:

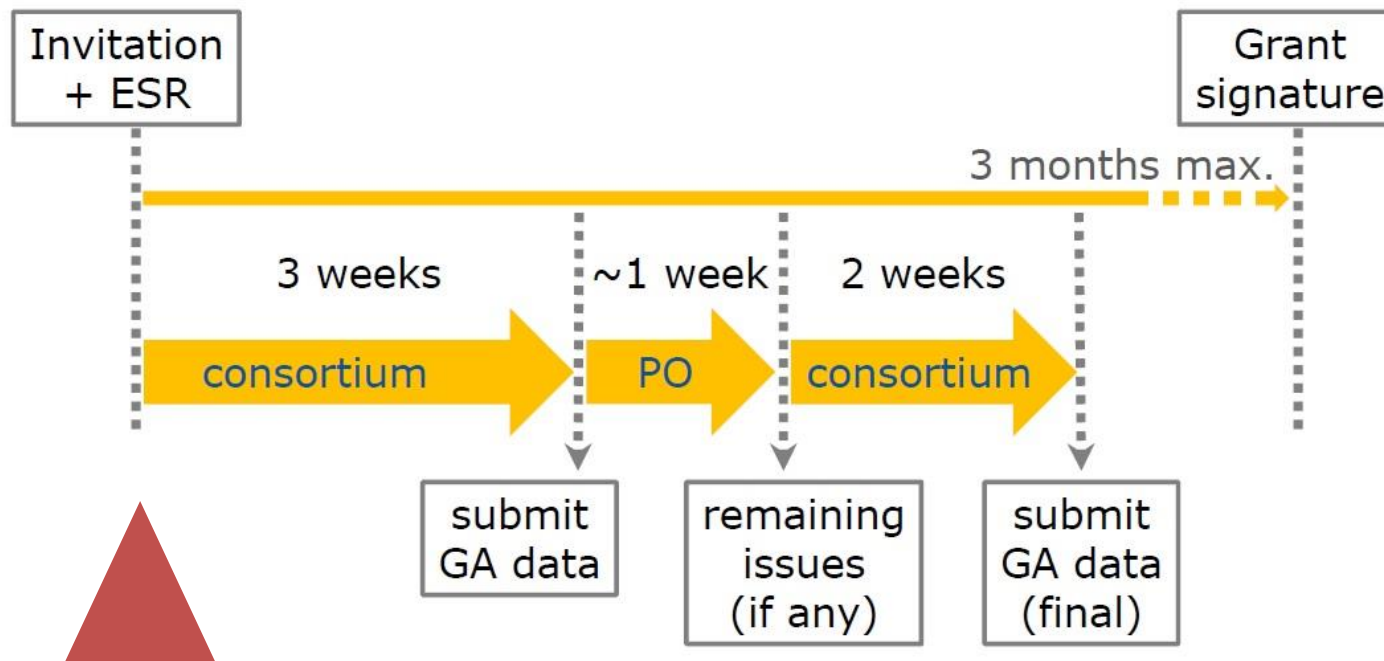
- Grants**
 - Applying for funding*
 - Find a call
 - Find partners
 - Register an organisation
 - Submit a proposal
 - Evaluation & Grant signature*
 - Eligibility check
 - Evaluation of proposals
 - Grant preparation
 - Grant signature
 - Grant management*
 - Keeping records
 - Amendments
 - Reports & payment requests
 - Deliverables
 - Dissemination & exploitation
 - Communicating your project
 - Acknowledgement of EU funding
 - Checks, audits, reviews & investigations
- Working as an expert**
 - Expert registration
 - Contracting & payment
 - Expert roles & tasks
- Cross-cutting priorities & issues**
 - International cooperation
 - Social Sciences & Humanities
 - Open access & Data management
 - Climate action & Sustainable development
 - Ethics
 - Gender
 - SMEs
 - ERA-NETs
 - Links to regional policy
 - Intellectual property
 - Innovation procurement



3. Erfolgreiches Projekt - Ablauf

Timing

grant agreement data (GA data)



© European Commission



3. Erfolgreiches Projekt - Administratives

2 Ebenen:

Organisation

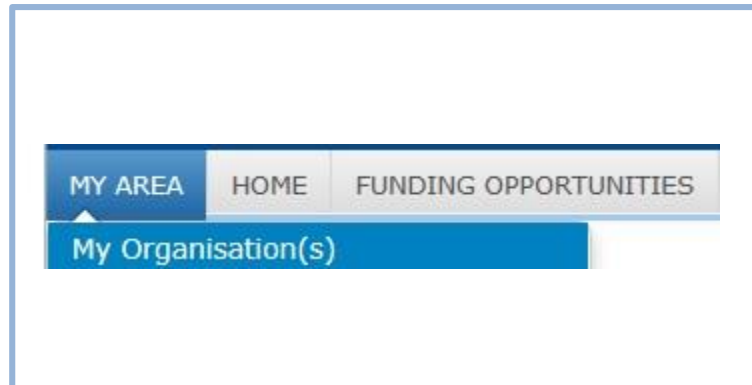


Projekt





3. Erfolgreiches Projekt - Organisationsebene





3. Erfolgreiches Projekt - Validierung der Partner

- Validierung durch REA – Research Executive Agency
- REA prüft, ob Organisation eine Rechtsform besitzt und den finanziellen Status (*Financial Capacity Check* nur bei Koordinatoren und Zuwendungen über 500.000€)
- Person, die die Institution registriert hat wird angeschrieben
- ➔ Achtung: liegt die Registrierung schon lange zurück und der Mitarbeiter ist evtl. nicht mehr da, muss bei nicht Erhalt der Email die REA kontaktiert werden
- Für die Validierung müssen folgende Dokumente im Portal hochgeladen werden:
 1. Auszug aus Gewerberegister
 2. VAT Document (Steuerauszug/offizielles Dokument vom Finanzamt)
 3. Legal Entity Form (Dokument der EU zum Download)



European
Commission

RESEARCH & INNOVATION



Participant Portal

European Commission > Research & Innovation > Participant Portal > My Organisations

MY AREA

HOME

FUNDING OPPORTUNITIES

HOW TO PARTICIPATE

PROJECTS & RESULTS

EXPERTS

SUPPORT ▾



CAROLIN SCHUBACK ▾

My Organisation(s)

My Proposal(s)

My Project(s)

My Notification(s) **137**

My Formal Notification(s)

My Expert Area

My Organisations

H2020 ONLINE MANUAL



HOW TO

To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.

My Registered Organisations

Legend

VO

View Organisation

MO

Modify Organisation

OR

View Roles

OP

Organisation Proposals

VP

Organisation Projects

CO

Contact Organisation

MR

Manage Roles

PS

Partner Search Profile

Show

10



entries

Search

LEGAL NAME	PIC	VAT	STATUS	ACTION
BAYERISCHE FORSCHUNGSALLIANZ BAVARIAN RESEARCH ALLIANCE GMBH	998139119	DE814814471	VALIDATED	



Research & innovation

Participant portal - Beneficiary registration

[European Commission](#) > [Research & Innovation](#) > [Participant Portal](#) > [Beneficiary Register](#)

Welcome [redacted] You can edit the data of organisation [redacted]

PIC: 9221

Activities

Organisation

LEAR **DR**

H2020 and FP7

SME

Financial viability

Messages **5**

Documents

[Submit changes](#)

Activities



H2020 online man



Requested data You have been requested to provide the following information: **LEAR**



New messages You have 5 unread messages. [View](#)

Organisation

Organisation data

Registration information

Legal name *



[redacted]



Business name



[redacted]



Describe the legal status of your organisation by selecting the appropriate options

Legal status



☐ a natural person ☒ a legal person



☐ non-profit ☒ for profit



☒ private entity ☐ public body



☐ NGO



Official language *



German (de)



Establishment/Registration country *



Switzerland (CH)



Legal form *



EINZELFIRMA



VAT number *



VAT number



☒ VAT number not applicable



Activities

Organisation

Organisation data

Legal Address

Contact information

LEAR DR

H2020 and FP7

SME

Financial viability

Messages 5

Documents

Submit changes

Registration authority

13-01-2016

Handelsregisteramt

Legal Address

Official registered address of the beneficiary

Street name and number *

P.O. Box

P.O. Box

Postal code

City *

Region/country

Main phone *

Fax

Secondary phone

Website

Contact information

Until the [LEAR of the organisation](#) has been validated, the Commission will use this information to contact you and send automatic e-mail notifications about the actions to do. You have the so-called [Self-Registrant role](#) on the Participant Portal.

Is the contact person?

☒ Yes ☐ No

Country *

Switzerland (CH)

Title

Dr.

Position in the organisation

director

Department

Department



H2020 and FP7

SME

Financial viability

Messages **5**

Documents

Submit changes

LEAR

Data Required

Enter information about the Legal Entity Appointed Representative (LEAR) of the Organisation.

Title		
Position in the organisation		
Department in the organisation		
Professional e-mail *		
Gender *		☐ Female ☐ Male
Last name *		
First name *		
Use the existing organisation's address?		☐ Yes ☒ No
Country *		--Select one--
Region/county		--Select one--
Street name and number *		
P.O. Box		
Postal code		
City *		
Use the existing Organisation's phone numbers?		☐ Yes ☒ No
Main phone *		Expected format: +CCCNXXXXXXXXXXXXXXXXxBBBBB
Fax		Expected format: +CCCNXXXXXXXXXXXXXXXXxBBBBB
Secondary phone		Expected format: +CCCNXXXXXXXXXXXXXXXXxBBBBB

H2020 and FP7

Please answer the following questions about the Research legal status of your organisation.

A participant organisation can only be registered for the 7th Framework Programme if it is a Legal Entity, any Natural Person, or any Legal Person.





Activities

Organisation

LEAR DR

H2020 and FP7

Legal Status

FP7 ICM

Certification

SME

Financial viability

Messages 5

Documents

Submit changes

For Horizon 2020 participation, an entity that does not have a legal personality under the applicable national law, will only be accepted as a legal entity on condition that its representatives have the capacity to undertake legal obligations on behalf of the entity and that they offer guarantees for the protection of the Union's financial interests equivalent to those offered by legal persons.

Legal Status

- | | | |
|--|--|---|
| Non profit | | ☐ Non profit ☐ For profit |
| Public body | | ☐ Private company ☐ Public entity |
| International organisation | | ☐ Yes ☐ No |
| International organisation of European interest | | ☐ Yes ☐ No |
| Higher or secondary education establishment | | ☐ Yes ☐ No |
| Research organisation | | ☐ Yes ☐ No |
| Is it a civil society organisation | | ☐ Yes ☐ No |

FP7 Indirect Cost Method (ICM)

If you are registering your organisation for Horizon 2020 participation, this information is not relevant and the 'Not Applicable' value defined by default can be left as such. If you are registering for FP7 participation, you can use the dropdown to define the relevant FP7 Indirect Cost Method for your organisation.

Indirect costs method *



Not applicable



Certification Data

Certifications of the organisation. [Find out more.](#)

There are no certifications for this organisation

SME

Use this section to provide information about your SME Status. You can carry out the SME Self-Assessment (questionnaire) or provide the SME Self-



Submit changes

Certifications of the organisation. [Find out more.](#)

There are no certifications for this organisation

SME

Use this section to provide information about your SME Status. You can carry out the SME Self-Assessment (questionnaire) or provide the SME Self-Declaration (Yes/No). In some Horizon 2020 calls, like the SME instrument topics, the Self-Assessment is mandatory. For more information see the [SME page](#) of the Participant Portal and the [SME definition](#) page. SME Information is optional if you apply for the Education Programmes

SME Self-Assessment

In some Horizon 2020 calls (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the [IT HOW TO wiki](#).

Start SME self assessment

SME Self-Declaration

If the SME Self-Assessment is not necessary in your case (e.g. for the Education, Audio-visual and Culture programmes), use the declaration below.

I declare my organisation as

☐ SME ☐ Non SME

as from

Registration date dd-MM-yyyy



Financial viability

You might be requested to provide additional financial information. In this case you are asked to upload the most recent closed financial statements of your organisation containing the balance sheet and profit & loss accounts and contingent explanatory notes. Note that if you are requesting more than 750K the financial statements must be fully audited (signed) by an approved (chartered) external auditor. [Find out more.](#)

No financial data has been requested.

Messages **5**

Read messages of your organisation and send messages to the EC ValidationServices.

New message

Subject ▾

Message

Date ▾

View ▾



Submit changes

Messages **5**

Read messages of your organisation and send messages to the EC ValidationServices.

Subject		Message	Date	View
* Document(s) requested - [REDACTED]		***** THIS IS AN AUTOMATED MESSAGE. DIRECT REPLIES...	09-06-2016 17:25:53	
acknowledgement of receipt/ Document(s) requested - [REDACTED]		Dear Sir, We acknowledge receipt of the LEAR docum...	07-06-2016 19:12:43	
* Marked as Sleeping		We would like to inform you that your organisatio...	02-06-2016 06:00:23	
* Last Reminder		We are contacting you since, despite our request a...	26-05-2016 06:00:43	
* Kind Reminder		We have recently contacted you with reference to ...	19-05-2016 06:00:48	

« 1 2 »

Documents

Read and upload documents of your organisation. Please ensure their quality. Maximum allowed document size is 6Mb. Updates take immediate effect after you have clicked on "Submit for processing"

[Find out more on how to submit a document.](#)

Registration Document	17-06-2016 Received
VAT Extract	17-06-2016 Received

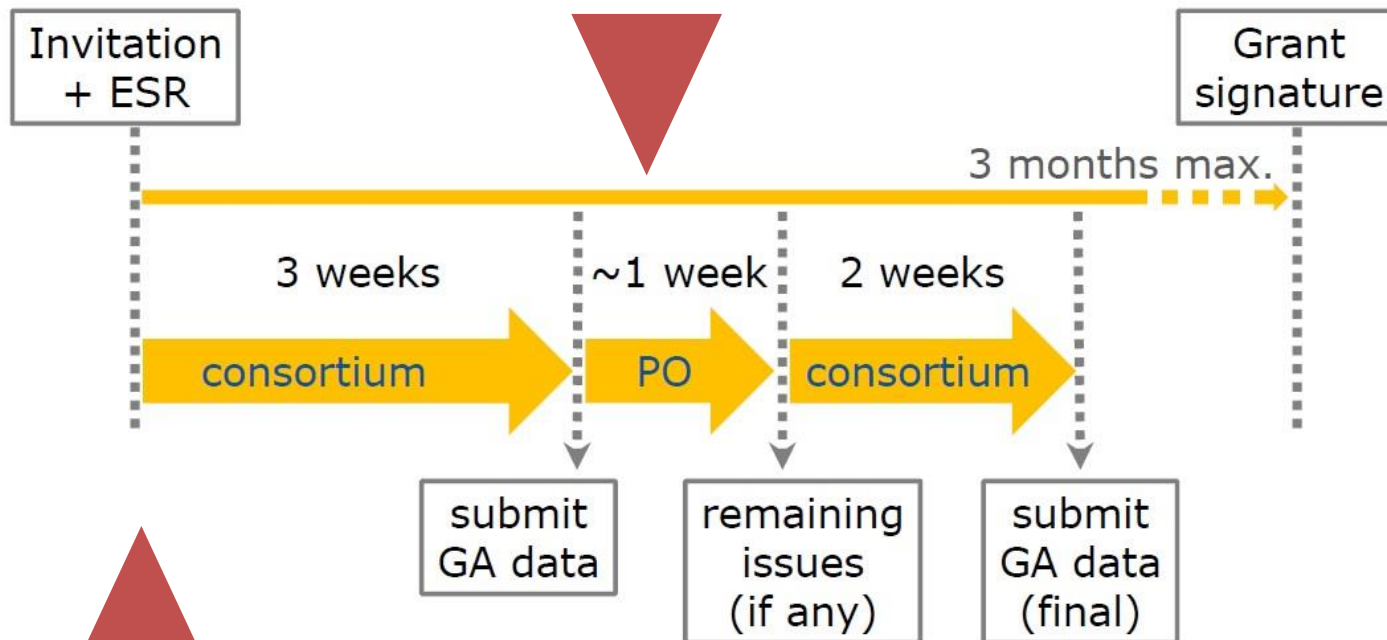
Add document



3. Erfolgreiches Projekt - Vergabe von Rollen im Participant Portal

Timing

grant agreement data (GA data)



© European Commission



3. LEAR- Legal Entity Appointed Representative

- Bestimmung des LEARs mit folgenden Dokumenten (Upload im Portal unter „Documents“):
 - LEAR Appointment Letter
 - LEAR role & task document
 - Declaration of consent
 - Kopie Personalausweis von LEAR & gesetzlichem Vertreter (z.B. Geschäftsführer)
 - Beweis/Berechtigungsschreiben, dass die Person, die den LEAR ernennt, dies tun darf
- Der LEAR bekommt nach erfolgreicher Benennung eine Email mit einem Link und einen Brief, oder eine SMS mit einem Passwort
- Wen benennen? Normalerweise jemanden aus der Administration - Überblick über Stammdaten und Abläufe, fester Vertrag, keine längeren Ausfälle

H2020 Online Manual: http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/register-an-organisation/lear-appointment_en.htm



3. Bestimmung LSign/FSign

- Nach erfolgreicher Validierung müssen für die Organisation noch folgende Rollen vergeben werden:
 - LSign (Legal Signatory)
 - FSign (Financial Signatory)
 - Es ist möglich, dass eine Person alle Aufgaben (LEAR, LSign, FSign, PLSign, PFSign) übernimmt
- Über Participant Portal „My Organisations“



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > My Organisations

MY AREA

HOME

FUNDING OPPORTUNITIES

HOW TO PARTICIPATE

EXPERTS

SUPPORT

Search



CAROLIN SCHUBACK

My Organisation(s)

My Proposal(s)

My Project(s)

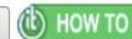
My Notification(s) 44

My Formal Notification(s)

My Expert Area

My Organisations

H2020 ONLINE MANUAL



To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.

My Registered Organisations

Legend



View Organisation



Modify Organisation



View Roles



Organisation Proposals



Organisation Projects



Contact Organisation



Manage Roles

Show 10 entries

Search

LEGAL NAME	PIC	VAT	STATUS	ACTION
BAYERISCHE FORSCHUNGSALLIANZ BAVARIAN RESEARCH ALLIANCE GMBH	998139119	DE814814471	VALIDATED	CO



RESEARCH & INNOVATION

Participant Portal

Roles for the Organisation : BAYERISCHE FORSCHUNGSALLIANZ BAVARIAN RESEARCH ALLIANCE GMBH PIC : 998139119

Street PRINZREGENTENSTRASSE 52

House Number

PoBox 000

City MUNCHEN

Postal Code 80538

Country DE

Show 10 entries

Search

	ROLE	FULL NAME	EMAIL	PROGRAM	PROJECT
☐	Lear	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		
☐	Legal Authorized Signatory	Martin Reichel	reichel@bayfor.org		
	EDIT COMMENT				
☐	Financial Signatory	Martin Reichel	reichel@bayfor.org		
	EDIT COMMENT				
☐	Financial Signatory	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		
	EDIT COMMENT				
☐	Account Administrator	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		

Showing 1 to 5 of 5 entries

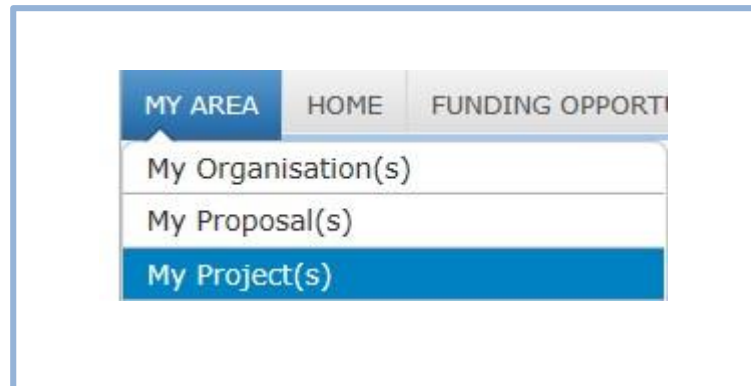
← PREVIOUS 1 NEXT →

ADD ROLES

REVOKE



3. Erfolgreiches Projekt - Projektebene





3. PLSign & PFSign im Projekt

- PLSign (Project Legal Signatory)
 - unterzeichnet Grant Agreement
- PFSign (Project Financial Signatory)
 - unterzeichnet Financial Statements während des Reporting; das Financial Statement gibt detailliert Auskunft über die förderfähigen Kosten.
- Minimum an Zugangsrechten in einem laufenden Projekt:
 - 1 Primary Coordinator Contact (CoCo) / 1 Participant Contact (PaCo)
 - 1 LEAR
 - 1 PLSign
 - 1 PFSign

3. Rollenvergabe im Projekt



MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP CAROLIN SCHUBACK

My Organisation(s)
My Proposal(s)
My Project(s)
My Notification(s)
My Formal Notification(s)
My Expert Area

My projects FP7 REF. DOCS H2020 ONLINE MANUAL HOW TO

This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Prepare and sign your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

If you are LEAR and want to see the full list of your organisation projects, please go to **My Organisations** and click on the action button **VP**. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the [H2020 online manual](#).

Legend

- AA Access Amendment
- GP Grant Preparation
- MP Manage Projects
- FR Financial Reporting
- PR Periodic Reporting
- RD Reporting & Deliverables
- PC Project Consortium
- VP View Proposal

Show 10 entries Hide closed projects Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
	H2020-BBI-PPP-2015-1-1	H2020		Grant Preparation	PC VP MP
	H2020-SCC-2015	H2020		Active	PC VP MP

Showing 1 to 2 of 2 entries. PREVIOUS 1 NEXT

HORIZON 2020 RESEARCH ON EUROPA CORDIS OLAF

© European Commission



3. Rollenvergabe im Projekt

➤ COORDINATOR Organisation - LYON CONFLUENCE	EDIT ROLES
➤ BENEFICIARY Organisation - DIN DEUTSCHES INSTITUT FUER NORMUNG E.V.	EDIT ROLES
➤ BENEFICIARY Organisation - CONCELLO DE SANTIAGO DE COMPOSTELA	EDIT ROLES
➤ BENEFICIARY Organisation - METROPOLE DE LYON	EDIT ROLES
➤ BENEFICIARY Organisation - TECHNISCHE UNIVERSITAET MUENCHEN	EDIT ROLES
➤ BENEFICIARY Organisation - MAGISTRAT DER STADT WIEN	EDIT ROLES
➤ BENEFICIARY Organisation - AIT AUSTRIAN INSTITUTE OF TECHNOLOGY GMBH	EDIT ROLES



3. Rollenvergabe im Projekt

Street and House Number: PRINZREGENTENSTRASSE 52

PoBox: 000 **City:** MUNCHEN

Postal Code: 80538 **Country:** DE

Please choose the role and enter the person's name and contact details or select a person from the provided list.

Role : *

Participant Contact

Project Legal Signatory

Project Financial Signatory

Task Manager

Team Member

First Name : *

Last Name : *

Email : *

* required field

OK CANCEL

3. Rollenvergabe im Projekt



Street and House Number: PRINZREGENTENSTRASSE 52

PoBox: 000

City: MUNCHEN

Postal Code: 80538

Country: DE

Show 10 entries

Search

Project Roles for the Organisation

	ROLE	FULL NAME	USERID	EMAIL
☐	Project Financial Signatory	Thomas Hans Wilhelm EIGNER	neigthom	Eigner@bayfor.org
☐	Project Legal Signatory	Martin REICHEL	nreimart	reichel@bayfor.org
☐	Participant Contact	Thomas AMMERL	nammerth	ammerl@bayfor.de
☐	Participant Contact	Natalie TUDMAN	ntudmana	tudman@bayfor.org
☐	Participant Contact	Carolin SCHUBACK	nsubacca	schuback@bayfor.org
☐	Participant Contact	Emmanuelle ROUARD	nrouarem	rouard@bayfor.org
☐	Participant Contact	Andrea REITER	nammetho	reiter@bayfor.org
☐	Participant Contact	Andreas BLUME	nblumean	blume@bayfor.org

Showing 1 to 8 of 8 entries

← PREVIOUS

1

NEXT →

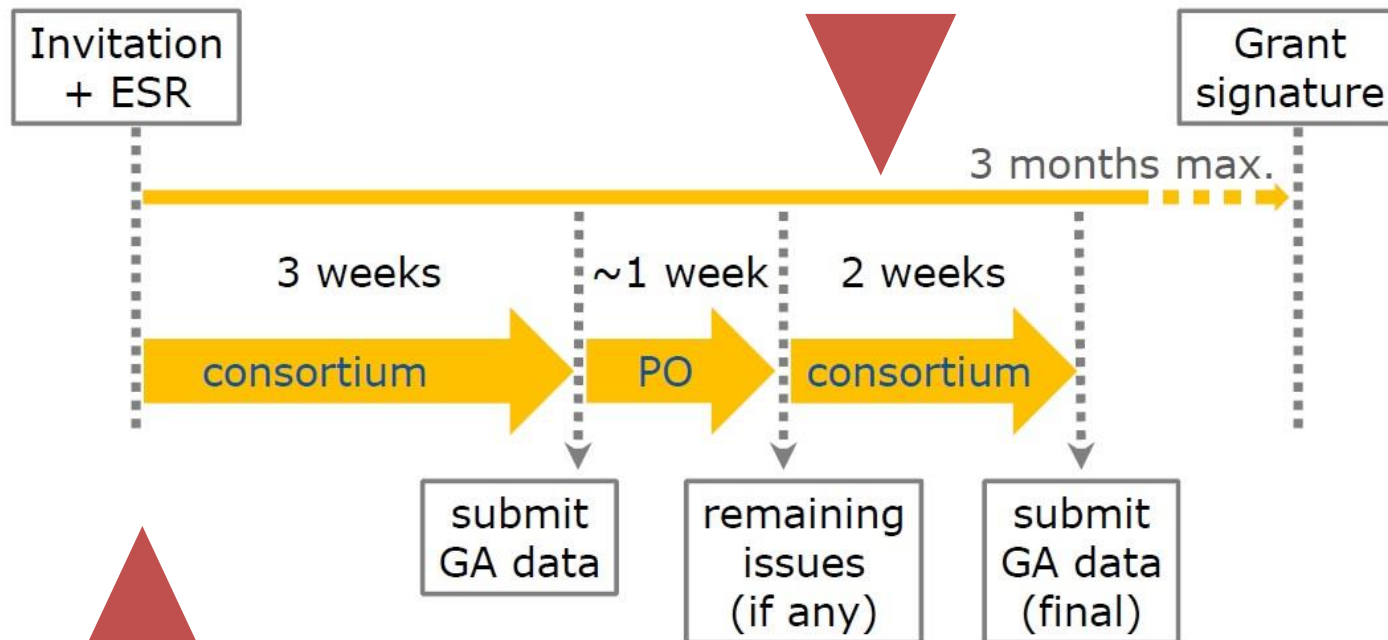
ADD ROLES

REVOKE

4. Erstellung Grant Agreement (hauptsächlich Koordinator)

Timing

grant agreement data (GA data)



© European Commission

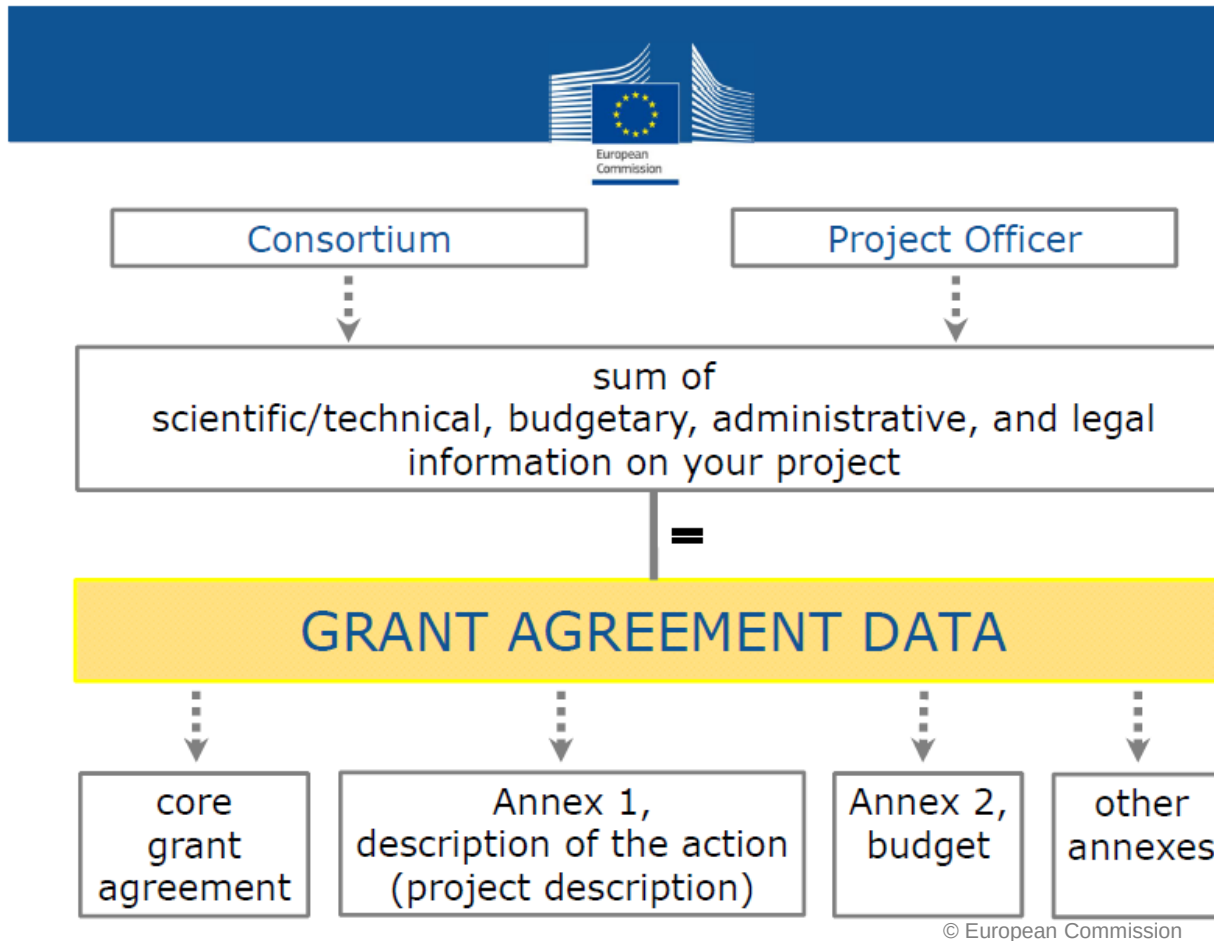


4. Erstellung Grant Agreement

- Übertragung der **Informationen aus dem Projektantrag** in das zukünftige Grant Agreement
- Angaben müssen mit dem Projektantrag übereinstimmen
- Einfügen von zusätzlich geforderten Informationen, z.B. bei ethischen oder sicherheitsrelevanten Fragen (Work Package „Ethik“, Umverteilen/-deklarieren von Budget)
- Der Vorbereitungsprozess wird über das **Participant Portal** abgewickelt



4. Erstellung Grant Agreement



© European Commission



4. Erstellung Grant Agreement

- Annex I: "Description of the action"; Zusammengestellt aus dem ursprünglich eingereichten Antrag, inkl. der Work Packages, Deliverables und Milestones
- Annex II: "Estimated Budget for the action"
- Annex III: "Accession Forms"; wird von den Projektteilnehmern unterzeichnet, die dem Grant Agreement beitreten. Annex IIIa für Projektteilnehmer die keine Zuwendungsempfänger des Grant Agreements sind, wie z.B. "Linked Third Parties", etc.
- Annex IV: "Model financial statements"
- Annex V: "Model on the certificate of the financial statement"
- Annex VI: "Model for the certificate on the methodology"

© European Commission



4. Welche Daten werden übertragen?



DoA – Part A

Complete online forms (Participant Portal)

- **1.1** – The project summary (automated, proposal table A1)
- **1.2** – The list of beneficiaries (automated, proposal table A2)
- **1.3** – Work plan tables – Detailed implementation
 - 1.3.1 WT1 List of work packages (based on Proposal table 3.1b)
 - 1.3.2 WT2 List of deliverables (based on Proposal table 3.1c)
 - 1.3.3 WT3 Work package descriptions (based on Proposal table 3.1a)
 - 1.3.4 WT4 List of milestones (based on Proposal table 3.2a)
 - 1.3.5 WT5 Critical risks and mitigation actions (based on Proposal table 3.2b)
 - 1.3.6 WT6 Summary of project efforts in person months (based on Proposal table 3.5a)
 - 1.3.7 WT7 Tentative schedule of project reviews (set by project officer)
- **1.4** – Ethics requirements (if any, set by project officer)

© European Commission



4. Grant Preparation im Participant Portal

Legend

AA

Access Amendment

GP

Grant Preparation

MP

Manage Projects

FR

Financial Reporting

PR

Periodic Reporting

RD

Reporting & Deliverables

PC

Project Consortium

VP

View Proposal

Show

10

▼

entries

X

Hide closed projects

☐

Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
	H2020-BBI-PPP-2015-1-1	H2020		Grant Preparation	PC VP MP
	H2020-SCC-2015	H2020		Active	PC VP MP



Start screen



European
Commission

RESEARCH & INNOVATION

Participant Portal - Grant Management Services

Lies EXTERNAL

MY PROJECT

 **HORIZON 2020**

Call: H2020-INFRAIA-2014-2015
Type of Action: CSA
Acronym: Project 888823
Current Phase: Grant preparation
Number: 888823
Duration: 36 months
Start Date:
Estimated Project Cost: €1,240.00
Requested EU Contribution: €1,237.00
Contact: Maria ALLEGRIINI

See all data ...



Proposal Management & Grant Preparation
888823 - Project 888823

25/04/2014

Submitted Evaluated Ranked Invited Prepared Signed Paid

 Grant agreement data preparation

Submit to EU

 DRAFT De...973276467 to print, complete, sign and scan

Upload Complete

Documents

Messages



Messages







































H2020 ONLINE MANUAL

HOW TO



Project summary

portal nexterli (EXTERNAL) ?

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
HORIZON 2020 Call: H2020-INFRAIA-2014-2015 Action: CSA Resp. Unit: RTD/8/07 Duration: 36	✗	✗	✓	⚠	✓	✗	i	✗	✗	⚠	⚠	⚠

DOCUMENTS

Project Summary

Project 888823 (Project 888823)

Responsible Unit: RTD/8/07
Cell: 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:
Max EU Grant Amount (following evaluation): 256.00 €
Total Costs: 1,240.00 €
Maximum Grant Amount: 1,237.00 € 100 % of total costs

Officers:
Project Officers: Maria ALLEGRIINI (RTD/8/07)

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

© European Commission

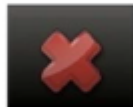


4. Symbole

Icons used



No missing information



Missing information: blocking



For information only



Missing information: not blocking at this point



Validation function

The screenshot displays the SyGMA (Syndicalized Grant Management) interface. On the left, a sidebar shows project details for Project 888823 (Project 888823), including call information (H2020-INFRAIA-2014-2015), call number (RTD/8/07), and a project summary. The main area is titled 'Validation Report' and contains a list of validation errors. The errors are categorized by expand/collapse buttons and include:

- Project contribution is equal to the sum of beneficiaries contribution check: The Project Contribution does not match the sum of the beneficiaries contribution [Total Contribution]
- Annex I part B is uploaded check: Annex I part B is missing [General]
- Work Package existence check: There should be at least one Work Package for the project [Work Packages]
- Total Contribution against ranking Proposed Contribution check: The total contribution is higher than the proposed contribution from the proposal ranking [Total Contribution]
- DLV Deliverable mandatory existence: There are no deliverables indicated for the project [deliverables]
- Milestone mandatory existence check: There are no milestones indicated for the project [Milestones]
- Project Review Mandatory presence check: There are no reviews indicated for the project [Reviews]
- Grant Agreement Option Art15.1 vs cost break down check: There are direct costs of financial support to third parties but the GA option Art15.1 is not set [costBreakDown]
- Critical Risk mandatory existence: There are no critical risks indicated for the project [criticalRisks]
- GA Information / General Information / AA Information
 - Mandatory field check: Missing mandatory field [Granting Authority]
 - Mandatory field check: Missing mandatory field [Commission/Agency Representative for the purposes of signing the Grant Agreement]
 - Mandatory field check: Missing mandatory field [EC Communication Address]
- Beneficiary 1 (AST)
 - Bank account is mandatory for Coordinator check: The Bank Account is mandatory for the Coordinator [Bank Account]
 - No PLSIGN assigned for BEN in IAM: The Beneficiary 973276467 has no PLSIGN role defined in IAM for this Project. He will not be able to sign electronically any document [General]
 - No Legal Signatory selected in SyGMA for BEN: The Beneficiary 973276467 has no Legal Signatory representative selected [Project Representatives]
- Beneficiary 2 (RHP)
 - No PLSIGN assigned for BEN in IAM: The Beneficiary 973104001 has no PLSIGN role defined in IAM for this Project. He will not be able to sign electronically any document [General]
 - No Legal Signatory selected in SyGMA for BEN: The Beneficiary 973104001 has no Legal Signatory representative selected [Project Representatives]
- Beneficiary 3 (CNRS)
 - No PLSIGN assigned for BEN in IAM: The Beneficiary 999997930 has no PLSIGN role defined in IAM for this Project. He will not be able to sign electronically any document [General]
 - No Legal Signatory selected in SyGMA for BEN: The Beneficiary 999997930 has no Legal Signatory representative selected [Project Representatives]
- Beneficiary 4 (LANC UNIV)
 - No requested contribution check: There is no maximum amount of grant requested [Cost Break Downs]

On the right side of the interface, there are tabs for 'Milestones', 'Reviews', and 'Critical Risks', each with a warning icon. A 'Validate' button is visible at the bottom right.

© European Commission

Three bright yellow star-shaped flowers, likely Gasterocheilus, are arranged in a triangular pattern. Each flower has five distinct, pointed petals and a central star-like pattern on its face. The background is a solid, light cream color.

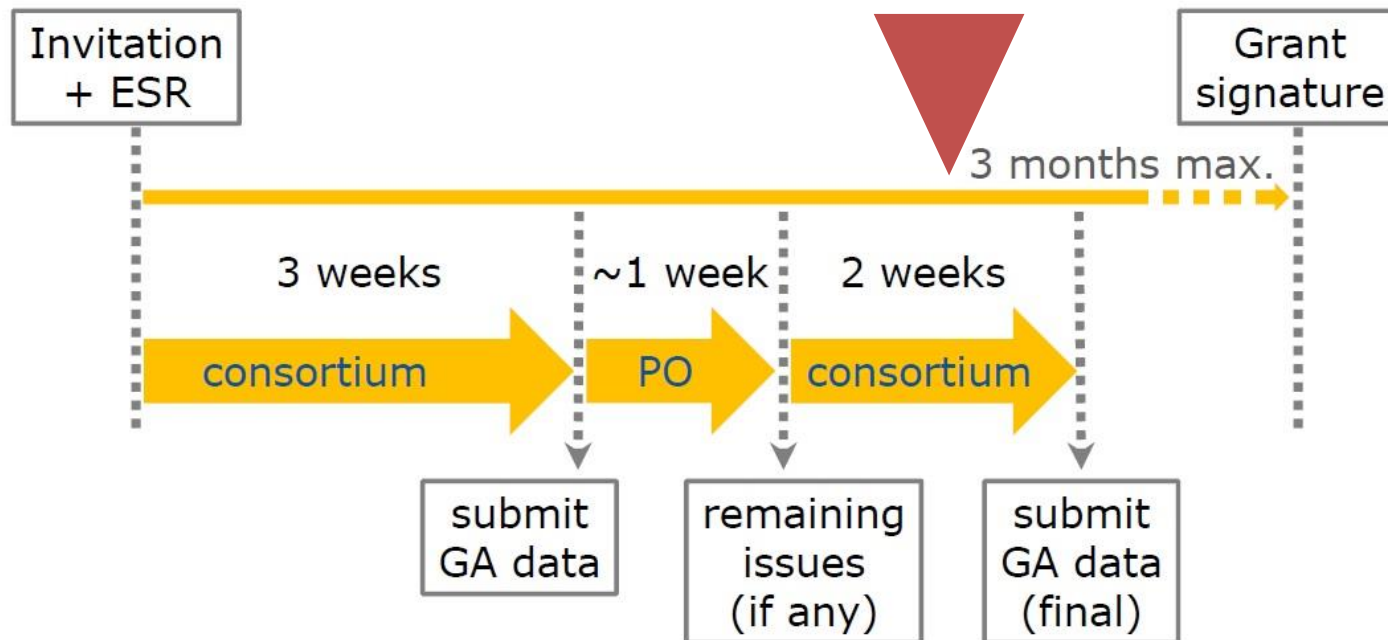
© European Commission



4. Declaration of Honour

Timing

grant agreement data (GA data)



© European Commission



4. Declaration of Honour

- Im Prozess der Grant Preparation muss jeder Partner eine „Declaration of Honour“ unterzeichnen
- Elektronisch über das Participant Portal (**PLSign**)

Declaration of Honour by legal representative of applicant organisation

To be completed by the person legally authorised to sign on behalf of the applicant organisation, as defined in Part A.3 of the Application Form.



I, the undersigned, certify that all information contained in the application [Title of the project], including the description of the project, is correct to the best of my knowledge and that I am aware of the content of the annexes to the application form.

I confirm that my institution/organisation has the financial and operational capacity to carry out the proposed project.]

I take note that under the provisions of the Financial Regulation applicable to the general budget of the European Communities, grants⁽¹⁾ may not be awarded to applicants who are in any of the following situations:

- a) are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;



4. Unterschrift Grant Agreement

RESEARCH & INNOVATION
Participant Portal - Grant Management Services

European Commission

Stephane NDONG

MY PROJECT
HORIZON 2020

Call: H2020-
MSCA-NIGHT-2014
Type of Action: CSA
Acronym: EPICNIGHT
Current Phase: Grant preparation
Numbers: 633236
Duration: 19 months
Start Date:
Estimated Project Cost: €139.825.00
Requested EU Contribution: €132.775.00
Contact: Colette RENIER

Proposal Management & Grant Preparation
633236 - EPICNIGHT

30/04/2018

Submitted Evaluated **Ranked** Invited Prepared Signed Paid

Grant Agreement: signature **Sign**

Documents
633236-EPICNIGHT-ESR Evaluati...EPICNIGHT GA Decla...999659691

Messages

Process

View Grant Agreement

SIGN Grant Agreement

Exchange messages with PO (available only for CoCos but all others can view)

H2020 ONLINE MANUAL

HOW TO

© European Commission



5. Consortium Agreement

- Konsortialvertrag zwischen den Partnern – EU Kommission nicht involviert
- Punkte die enthalten sein sollten:
 - Regeln zur Vertraulichkeit/Geheimhaltung
 - Schutzrechte
 - Interne Regelungen wie Abstimmungsprozesse, Häufigkeit von Treffen etc.
 - Ausscheiden/Aufnahme von Partnern
 - Budgetverteilung
- Konsortialvertrag muss mit den allgemeinen Regeln von Horizon 2020 übereinstimmen
- Als Grundlage dient häufig: DESCA H2020 Model Consortium Agreement
<http://www.desca-2020.eu/>



Vielen Dank für Ihre Aufmerksamkeit!

Bayerische Forschungsallianz



Standort München

Prinzregentenstraße 52
D-80538 München

Tel.: +49 (0)89 99 01 888-0
E-Mail: info@bayfor.org
Internet: www.bayfor.org

Foto: © Bayerische Forschungsstiftung,
Christine Reeb



Standort Nürnberg

Am Tullnaupark 8
D-90402 Nürnberg

Tel.: +49 (0)911 507 15-900
E-Mail: info@bayfor.org
Internet: www.bayfor.org

Foto: © Bayern Innovativ GmbH, Verena Kaister