

# Grant Preparation

Andrea Reiter



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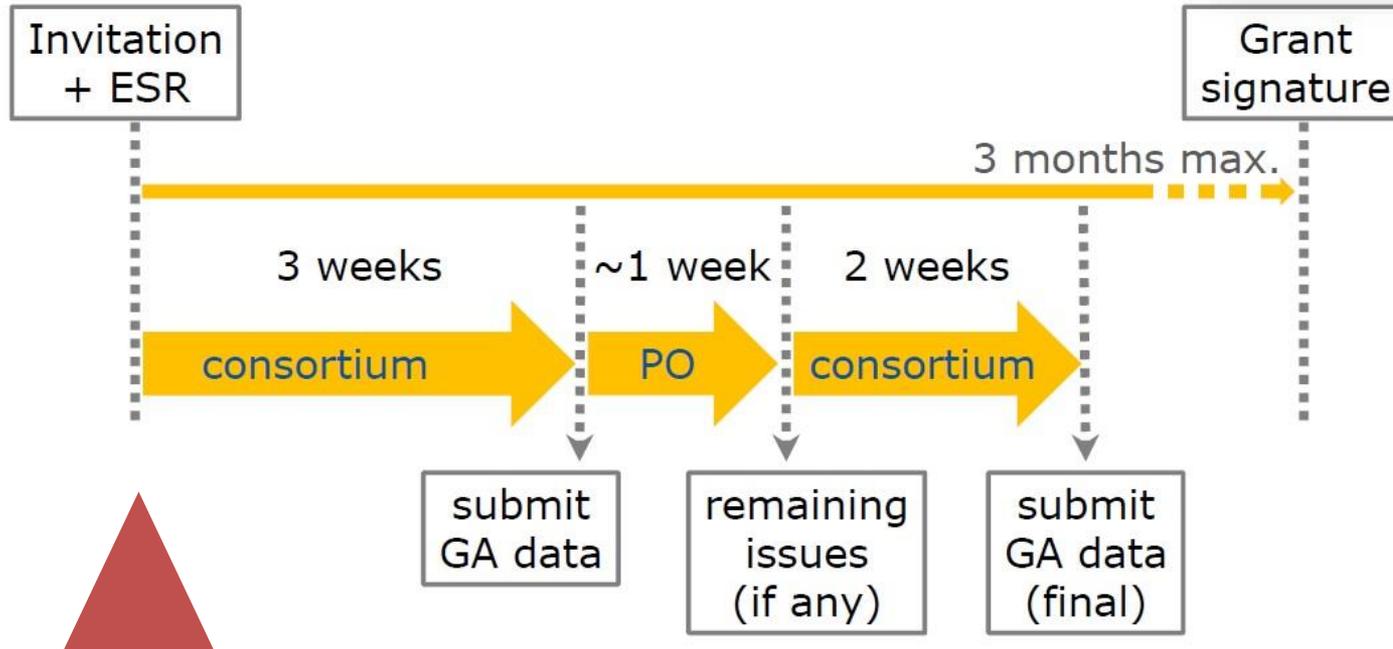
# Erfolgreiches Projekt

## - Der ideale Ablauf einer Grant Preparation



### Timing

grant agreement data (GA data)



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- In Horizon 2020 alles papierlos – einziges Tool ist das Participant Portal
- Alle Änderungen, Rollenverteilungen, Unterschriften werden über das Participant Portal vorgenommen
- Ausnahme: Benennung des LEAR (Legal Entity Appointed Representative)



**RESEARCH & INNOVATION**  
Participant Portal H2020 Online Manual

Search

My Area - User account & roles

**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

**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

[http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index\\_en.htm](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm)

# Participant Portal

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

Öffentlich zugänglicher Bereich

European Commission

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**

- 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

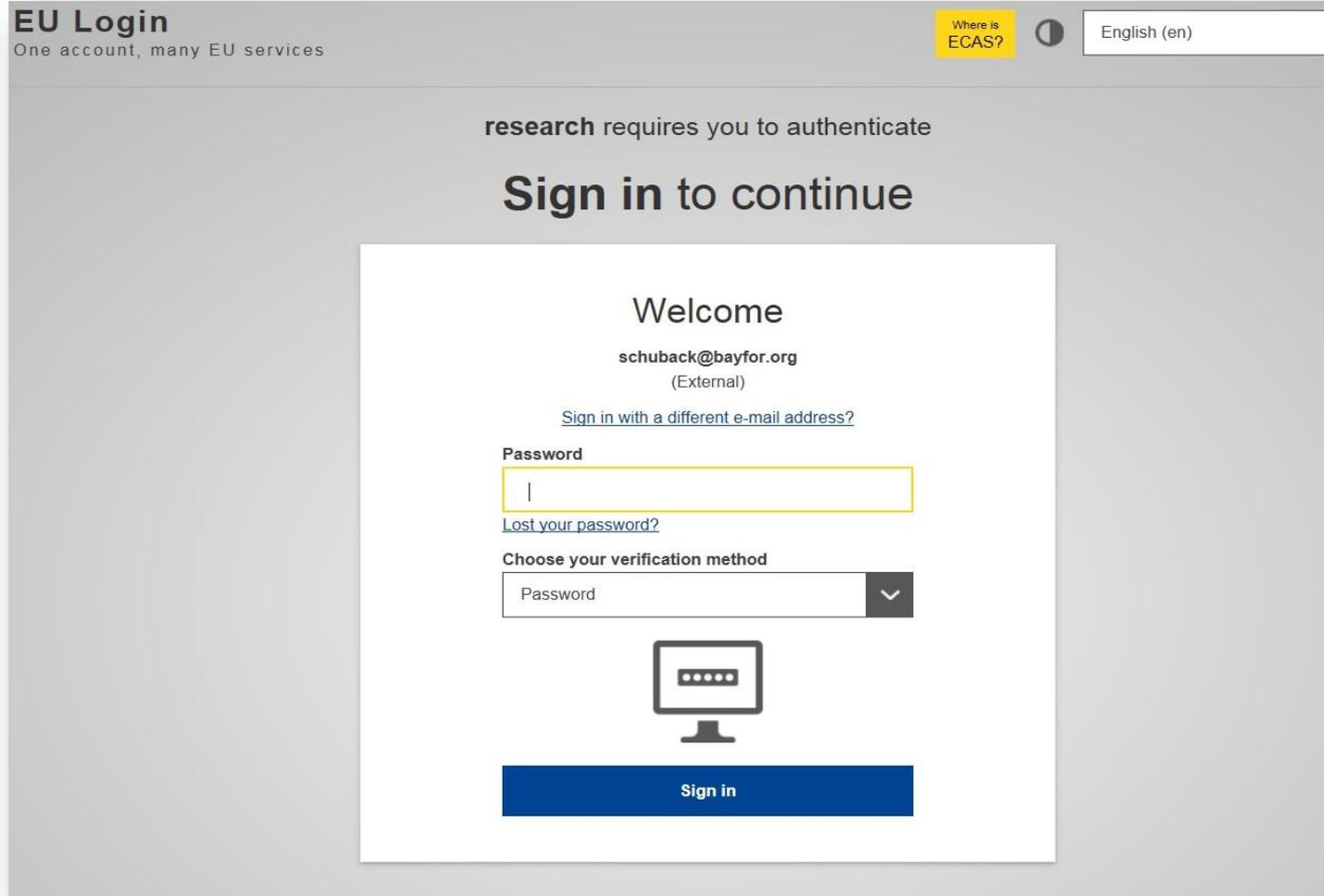
**Registered users**

- 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

<https://ec.europa.eu/research/participants/portal/desktop/en/home.html>

# 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**

<https://webgate.ec.europa.eu/cas>

# Participant Portal Übersicht



The screenshot shows the Participant Portal interface. At the top, there is a navigation bar with tabs: MY AREA, HOME, FUNDING OPPORTUNITIES, HOW TO PARTICIPATE, EXPERTS, and SUPPORT. A search bar labeled 'Search PP' and a user profile 'CAROLIN SCHUBACK' are also present. On the left, a dropdown menu is open, listing: My Organisation(s), My Proposal(s), My Project(s) (highlighted in blue), My Notification(s), My Formal Notification(s), and My Expert Area. The main content area is titled 'My projects' and includes buttons for 'FP7 REF. DOCS', 'H2020 ONLINE MANUAL', and 'HOW TO'. Below this, there is a text block explaining the page's purpose and a list of tasks: 'Prepare and sign your grant agreement', 'Submit amendments to your grant agreement', 'Manage your scientific and financial reports', and 'View or manage roles and access rights in your projects consortia'. A yellow warning box contains instructions for LEAR users. Below the warning box is a 'Legend' section with icons for: AA (Access Amendment), GP (Grant Preparation), MP (Manage Projects), FR (Financial Reporting), PR (Periodic Reporting), RD (Reporting & Deliverables), PC (Project Consortium), and VP (View Proposal). Below the legend is a table of projects with columns for ACRONYM, CALL, PROGRAM, PROJECT, PHASE, and ACTIONS. The table shows two entries: 'H2020-BBI-PPP-2015-1-1' (Grant Preparation) and 'H2020-SCC-2015' (Active). The ACTIONS column for each entry contains icons for PC, VP, and MP. At the bottom, there are navigation buttons for 'PREVIOUS', '1', and 'NEXT', and a footer with '© European Commission'.

Zugang zu den  
unterschiedlichen  
Tasks

# Administratives



2 Ebenen:  
Organisation



Organisationsebene

Projekt



Projektebene

# Validierung der Partner-Informationen zur Organisation



- 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 von der REA per Email angeschrieben
- ➔ **Achtung:** liegt die Registrierung schon lange zurück und arbeitet der entsprechende Mitarbeiter evtl. nicht mehr in der Organisation, muss bei Nichterhalt der Email die REA kontaktiert werden
- Für die Validierung müssen folgende Dokumente im Participant Portal hochgeladen werden (via My Organisations):
  1. VAT Dokument (Steuerauszug/offizielles Dokument vom Finanzamt, <6 Monate)
  2. Auszug aus Gewerberegister
  3. Legal Entity Form (Dokument der EU zum Download)

Organisationsebene

# Validierung 1/7

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

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 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

Show 10 entries Search

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

Organisationsebene

# Validierung 2/7

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: 9227

Activities

Organisation

LEAR **DR**

H2020 and FP7

SME

Financial viability

Messages **6**

Documents

Submit changes

**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

Organisationsebene

# Validierung 3/7



Activities

Organisation

- Organisation data
- Legal Address
- Contact information

LEAR **DR**

H2020 and FP7

SME

Financial viability

Messages **6**

Documents

Submit changes

13-01-2016

Registration authority  
Handelsregisteramt [redacted]

### Legal Address

Official registered address of the beneficiary

Street name and number *	[redacted]
P.O. Box	P.O. Box
Postal code	[redacted]
City *	[redacted]
Region/country	[redacted]
Main phone *	[redacted]
Fax	Expected format: +CCNXXXXXXXXXXXXxBBBBB
Secondary phone	Expected format: +CCNXXXXXXXXXXXXxBBBBB
Website	[redacted]

### 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 [redacted] the contact person?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Country *	Switzerland (CH)
Title	Dr.
Position in the organisation	director
Department	Department

Organisationsebene

# Validierung 4/7

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. Besides providing the data here, you must send to the Commission the signed [LEAR appointment letter and other requested forms](#) available on the Participant Portal.

<b>Title</b>	<input type="text"/>
<b>Position in the organisation</b>	<input type="text"/>
<b>Department in the organisation</b>	<input type="text"/>
<b>Professional e-mail *</b>	<input type="text"/>
<b>Gender *</b>	<input type="radio"/> Female <input type="radio"/> Male
<b>Last name *</b>	<input type="text"/>
<b>First name *</b>	<input type="text"/>
<b>Use the existing organisation's address?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Country *</b>	<input type="text" value="--Select one--"/>
<b>Region/county</b>	<input type="text" value="--Select one--"/>
<b>Street name and number *</b>	<input type="text"/>
<b>P.O. Box</b>	<input type="text"/>
<b>Postal code</b>	<input type="text"/>
<b>City *</b>	<input type="text"/>
<b>Use the existing Organisation's phone numbers?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Main phone *</b>	<input type="text" value="Expected format: +CCCNNNNNNNNNNNNNNxBBBBB"/>
<b>Fax</b>	<input type="text" value="Expected format: +CCCNNNNNNNNNNNNNNxBBBBB"/>
<b>Secondary phone</b>	<input type="text" value="Expected format: +CCCNNNNNNNNNNNNNNxBBBBB"/>

## 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

Organisationsebene

# Validierung 5/7



- 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

- |  |  |   |
|--|--|---|
| <b>Non profit</b>                                      |  | <input type="radio"/> Non profit <input type="radio"/> For profit         |
| <b>Public body</b>                                     |  | <input type="radio"/> Private company <input type="radio"/> Public entity |
| <b>International organisation</b>                      |  | <input type="radio"/> Yes <input type="radio"/> No                        |
| <b>International organisation of European interest</b> |  | <input type="radio"/> Yes <input type="radio"/> No                        |
| <b>Higher or secondary education establishment</b>     |  | <input type="radio"/> Yes <input type="radio"/> No                        |
| <b>Research organisation</b>                           |  | <input type="radio"/> Yes <input type="radio"/> No                        |
| Is it a civil society organisation                     |  | <input checked="" type="radio"/> Yes <input type="radio"/> 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 \***

## 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-

Organisationsebene

# Validierung 6/7



Activities  
Organisation  
LEAR **DR**  
H2020 and FP7  
**SME**  
Financial viability  
Messages **5**  
Documents

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

## 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
---------	---------	------	------

Organisationsebene

# Validierung 7/7



- Activities
- Organisation
- LEAR **DR**
- H2020 and FP7
- SME
- Financial viability

- Messages 5**
- Documents

Submit changes

## Messages **5**

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

New message

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

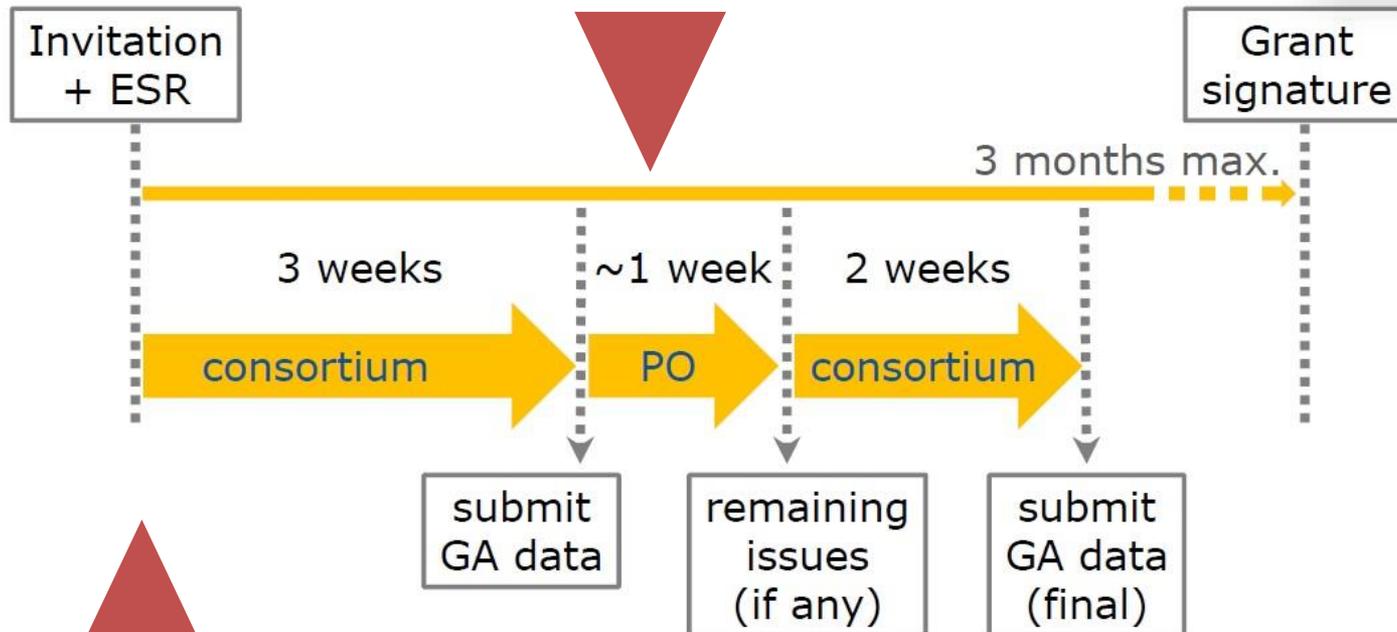
Add document

# Vergabe von Rollen im Participant Portal



## Timing

grant agreement data (GA data)



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# LEAR

## Legal Entity Appointed Representative



- Bestimmung des LEARs auf dem Postweg mit folgenden Dokumenten:
    - LEAR Appointment Letter
    - LEAR role & task document
    - Declaration of consent } unterschrieben (blau) & gestempelt
  - 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
  - Separat dazu 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

# 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) übernimmt
  - Es macht manchmal Sinn, mehrere LSigns und FSigns in einer Organisation zu bestimmen (Ausfallsicherheit bei längeren Abwesenheiten)
  - Nur der LEAR kann diese Rollen vergeben
- Über Participant Portal „My Organisations“

Organisationsebene

# LSign/FSign bestimmen So geht's

RESEARCH & INNOVATION  
Participant Portal

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

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search

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 nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed as 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

Show 10 entries Search

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

Nur zugänglich für LEAR

Organisationsebene

# LSign/FSign bestimmen So geht's



## 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
<input type="checkbox"/>	Lear	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		
<input type="checkbox"/>	Legal Authorized Signatory	Martin Reichel	reichel@bayfor.org		
	<input type="button" value="EDIT COMMENT"/>				
<input type="checkbox"/>	Financial Signatory	Martin Reichel	reichel@bayfor.org		
	<input type="button" value="EDIT COMMENT"/>				
<input type="checkbox"/>	Financial Signatory	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		
	<input type="button" value="EDIT COMMENT"/>				
<input type="checkbox"/>	Account Administrator	Thomas Hans Wilhelm Eigner	eigner@bayfor.org		

Showing 1 to 5 of 5 entries

← PREVIOUS 1 NEXT →

Nur zugänglich für LEAR

Organisationsebene

# PLSign & PFSign



Jedes Projekt muss aus der Liste mit LSign(s) und FSign(s) wählen, welche Person für das Projekt zuständig sein soll (Änderungen jederzeit möglich)

- PLSign (Project Legal Signatory)
  - unterzeichnet Grant Agreement
- PFSign (Project Financial Signatory)
  - unterzeichnet Cost Statements während des Reporting

# Rollenvergabe im Projekt - So geht's

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
[redacted]	H2020-BBI-PPP-2015-1-1	H2020	[redacted]	Grant Preparation	PC VP MP
[redacted]	H2020-SCC-2015	H2020	[redacted]	Active	PC VP MP

Showing 1 to 2 of 2 entries. PREVIOUS 1 NEXT

HORIZON 2020 RESEARCH ON EUROPA CORDIS OLAF

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Projektebene

## Rollenvergabe im Projekt - So geht's



› **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

Projektebene

# Rollenvergabe im Projekt - So geht's



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
<input type="checkbox"/> Project Financial Signatory	Thomas Hans Wilhelm EIGNER	neigthom	Eigner@bayfor.org
<input type="checkbox"/> Project Legal Signatory	Martin REICHEL	nreimart	reichel@bayfor.org
<input type="checkbox"/> Participant Contact	Thomas AMMERL	nammerth	ammerl@bayfor.de
<input type="checkbox"/> Participant Contact	Natalie TUDMAN	ntudmana	tudman@bayfor.org
<input type="checkbox"/> Participant Contact	Carolin SCHUBACK	nsubacca	schuback@bayfor.org
<input type="checkbox"/> Participant Contact	Emmanuelle ROUARD	nrouarem	rouard@bayfor.org
<input type="checkbox"/> Participant Contact	Andrea REITER	nammetho	reiter@bayfor.org
<input type="checkbox"/> Participant Contact	Andreas BLUME	nblumean	blume@bayfor.org

Showing 1 to 8 of 8 entries

← PREVIOUS 1 NEXT →

ADD ROLES REVOKE

Projektebene

## Rollenvergabe im Projekt - So geht's



**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

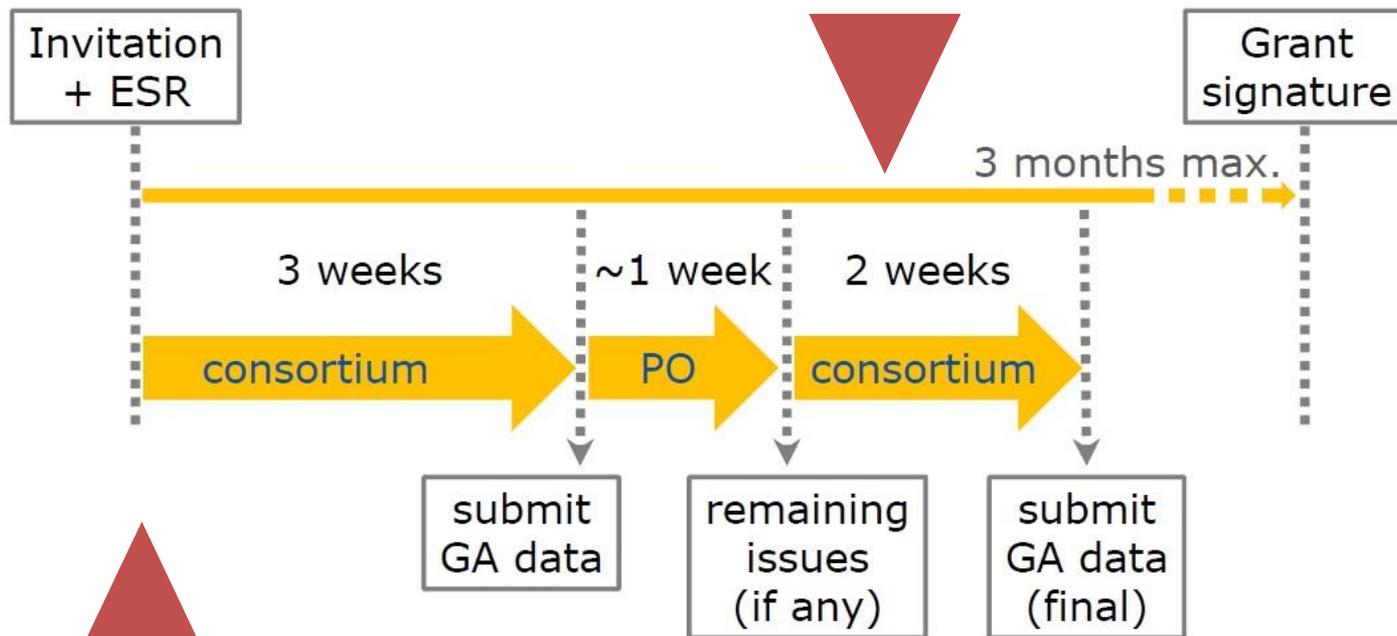
Projektebene





## Timing

grant agreement data (GA data)

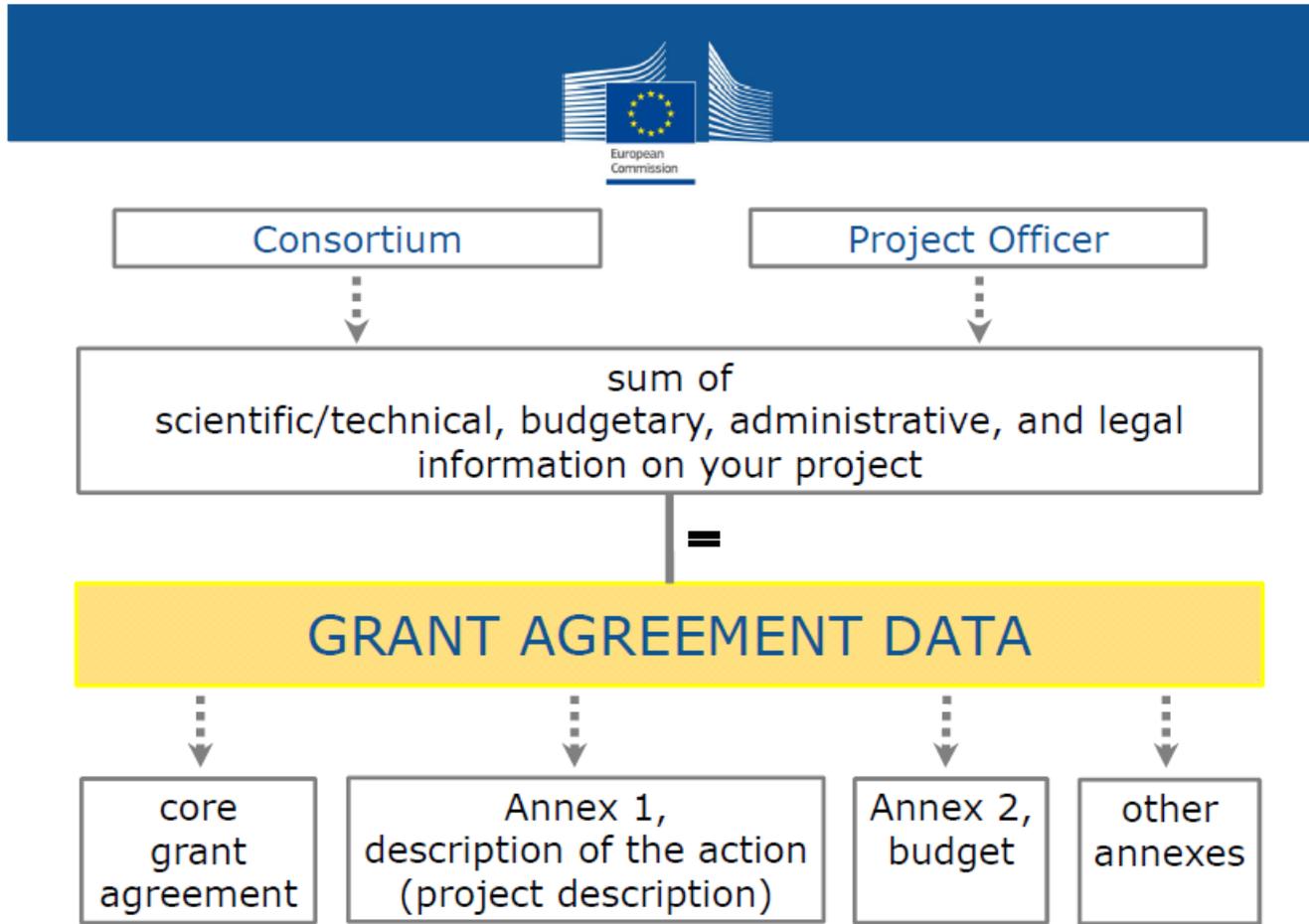


© European Commission



- Übertragung der **Informationen aus dem Projektantrag** in das zukünftige Grant Agreement
- Angaben müssen mit dem Projektantrag übereinstimmen (Ausnahmen in Absprache mit dem Project Officer)
- Einfügen von zusätzlich geforderten Informationen, z.B. bei ethischen oder sicherheitsrelevanten Fragen
- Der komplette Vorbereitungsprozess wird über das **Participant Portal** abgewickelt
- Ist hauptsächlich Ausgabe des Koordinators

# Grant Agreement



© European Commission

Projektebene

# Welche Daten werden in das Grant Agreement 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)

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# Grant Preparation So geht's



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
<input type="text"/>	H2020-BBI-PPP-2015-1-1	H2020	<input type="text"/>	Grant Preparation	  
<input type="text"/>	H2020-SCC-2015	H2020	<input type="text"/>	Active	  

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# Grant Preparation So geht's



## Start screen

**RESEARCH & INNOVATION**  
Participant Portal - Grant Management Services

European Commission

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 ALLEGRINI

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

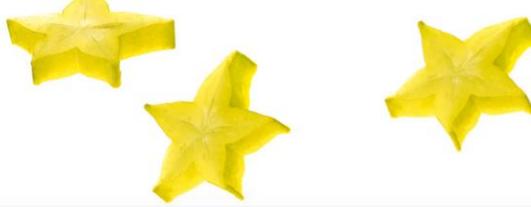
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# Grant Preparation – SyGmA

## So geht's



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## Project summary

<< portal nextstep (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 SAVE

### Project Summary

**Project 888823 ( Project 888823 )**

Responsible Unit: RTD/8/07  
 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:	
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 Officer: Marla 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

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# Symbole in SyGMA (**S**ystem for **G**rant **M**anagement)



## Icons used



No missing information



Missing information: blocking



For information only



Missing information: not blocking at this point



## Validation function

**Validation Report**

Expand All Collapse All

- Project
  - 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]
  - DLY 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 [costBreakDowns]
  - 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]

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# Aufgabe für die Partner (Beneficiaries): Ein regelmäßiger Blick ins SyGMA

**Beneficiaries**

Number	Short Name	Legal Name	Role	Country	PIC	PIC Status	Actions
1	AST	AST ADVANCED SPACE TECHNOLOGIES GMBH	CO	DE	973276467		
2	RHP	RHP-TECHNOLOGY GMBH & CO KG	BEN	AT	973104001		
3	CNRS	CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE	BEN	FR	999997930		
4	LANC UNIV	LANCASTER UNIVERSITY	BEN	UK	999840964		

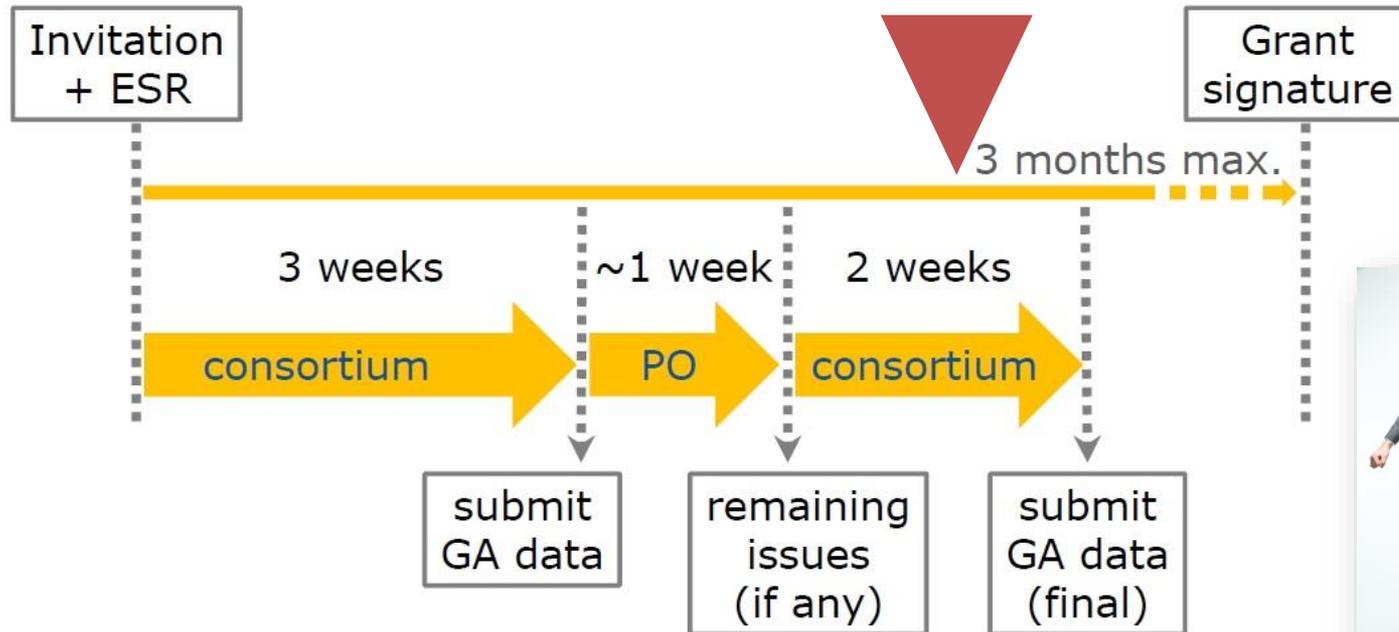
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## Timing

grant agreement data (GA data)



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# Auf der Zielgeraden: 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<sup>(1)</sup> 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;

# Auf der Zielgeraden: Unterschrift Grant Agreement



Nach Unterzeichnung der Declaration of Honour:

- Vorbereitung Grant Agreement GA durch EC
- EC gibt GA zur Unterzeichnung für den Koordinator frei
- Koordinator (**PLSign**) unterzeichnet
- EC unterzeichnet, ab sofort kann EC Prefinancing an Koordinator überweisen
- EC bittet alle Partner, dem GA beizutreten („Accession to the GA“, Aufgabe der PLSigns), 30 Tage Zeit

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Auf der Zielgeraden:  
Unterschrift Grant Agreement



**Process**

RESEARCH & INNOVATION  
Participant Portal - Grant Management Services

Stephane NDONG

MY PROJECT  
HORIZON 2020

Call: H2020-  
MSCA-NIGHT-2014  
Type of Action: CSA  
Acronym: EPICNIGHT  
Current Phase: Grant preparation  
Number: 633236  
Duration: 15 months  
Start Date:  
Estimated Project Cost:  
€139.825,00  
Requested EU Contributions:  
€132.775,00  
Contact: Colette RENIER

30/04/2014

Submitted Evaluated **Ranked** Invited Prepared Signed Paid

Grant Agreement: signature **Sign**

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

Messages

**View Grant Agreement**

**SIGN Grant Agreement**

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

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- 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/>



Zu kompliziert?  
Wir helfen Ihnen!

## Bayerische Forschungsallianz

**Andrea Reiter**

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Umwelt, Energie & Bioökonomie

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