

GAP 4 EDIH



DIGITAL EUROPE



**Grant Agreement
Preparation (GAP)**

for

**the European Digital
Innovation Hubs for
Associated Countries
(EDIH)**

Helena Rodrigues
25th July 2024

#DigitalEuropeProgramme



The Grant Agreement Preparation process

You received the “Evaluation Summary Report” for your proposal and an invitation for “Grant preparation”.

Congratulations!

Now we have to prepare the **Grant Agreement**, which means going from a successfully evaluated proposal to a legally valid grant (or contract)



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How does it work?

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents;programCode=DIG

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

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

Digital Europe Programme (DIGITAL)

Due to a system deployment, Request for Specific Contract preparation workflow and Submission of tenders services applications will be unav

Programming period: 2021-2027

Digital Europe Programme (DIGITAL)

Clear filter

Reference Documents

Grants

This page includes reference documents of the programmes managed on the EU Fu agreements and guides for specific actions.

Please select the programme to see the reference documents.

Procurement

Reference Documents related to tendering opportunities are published on TED eTer

Filter

- Legislation
- Work programme & call documents

All the interactions happen through the participant portal.

The reference documents can be found [here](https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents;programCode=DIGITAL).

(<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents;programCode=DIGITAL>)



GAP: a time-bound process

EDIH call: 10/04/2024

Call deadline

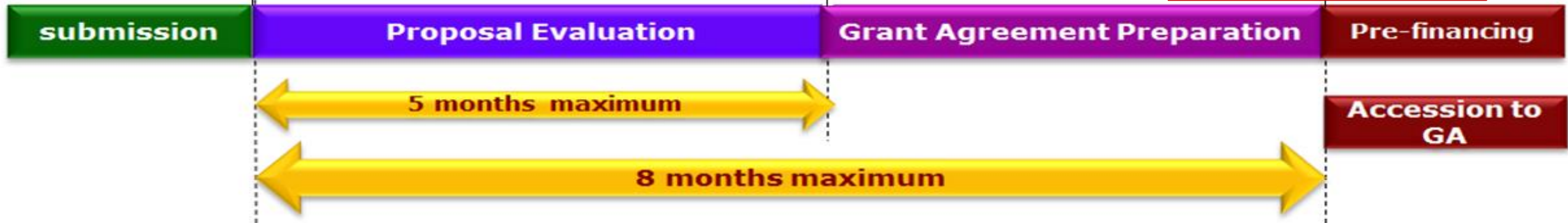
Invitation to grant preparation

Planned deadline:
24/10/2024

Grant signature

fully electronic process

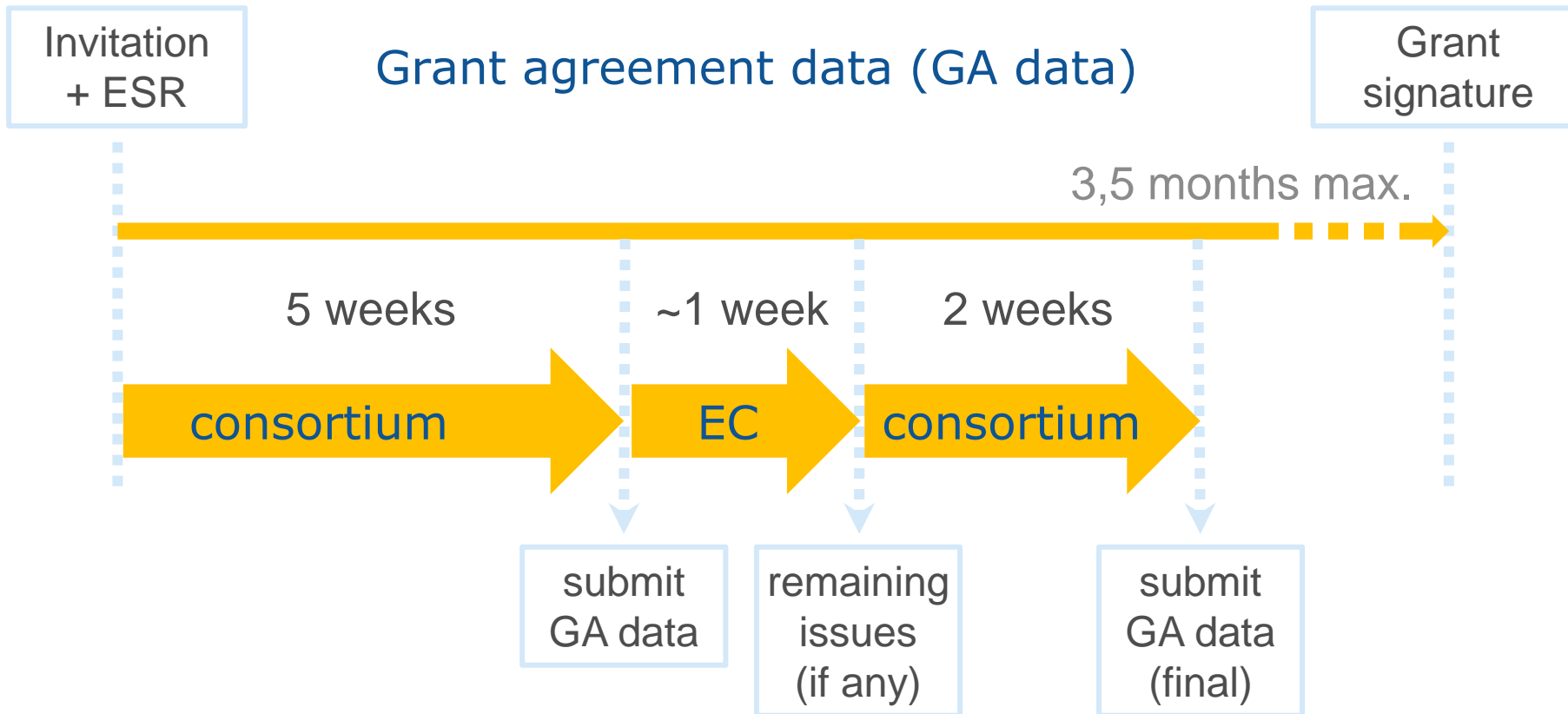
GA must be signed
before the end of 2024



- The GA preparation – the conclusion of the grant agreement is subject to time limits – **strict deadlines** (this is a regulatory requirement)
- The invitation letter specifies deadlines applicable for the GAP
 - Align yourself with the applicable deadlines and make diligent efforts to comply with the dates set
 - Notify the EU services if you encounter delays
 - The non-respect of the deadlines may lead to the termination of grant preparation (rejection).



GAP: Timing

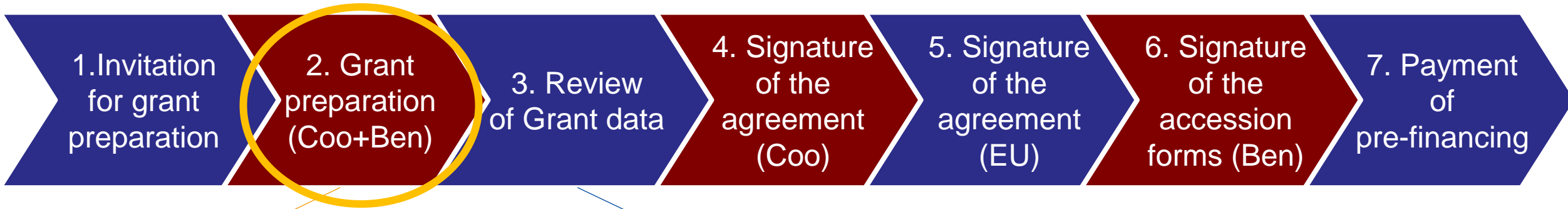




GAP: The steps in the process

Coo = coordinator
Ben = beneficiary

We are now at step 2



Validation of participants

Setting identity access management (IAM) roles
(each ben)

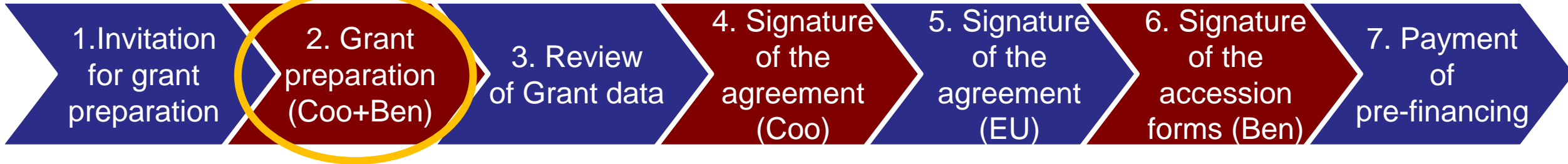
Signature of the 'Declaration of honour'
(e-signature, each ben)

Transforming proposal into Description of Action (DoA)

*** further iterations possible**
(completion/correction of grant data)

Ex-ante checks,
reservation of funds,
preparation of award decision

Steps 2 and 3 are the "heavy" ones



First principle: Changes should be limited

What if there are changes to the consortium?

- A beneficiary wants to leave: Inform CNECT-DIH@ec.europa.eu and PO, propose an alternative, and if agreed implement the changes. The leaving beneficiary needs to write a withdrawal letter that should be uploaded to the portal (formal communication)
- Addition of affiliated entities is allowed, but a description should be added in the DoA including proof of link between beneficiary and affiliate

What if there are changes to the budget?

- Requested EU funding can not be higher than mentioned in invitation letter
- New budget distribution should be agreed with PO by writing to CNECT-DIH and PO

We recommend to avoid writing only to your PO, because she/he might be on holidays or busy on other things and the answer could be delayed

1. Invitation for grant preparation

2. Grant preparation (Coo+Ben)

3. Review of Grant data

4. Signature of the agreement (Coo)

5. Signature of the agreement (EU)

6. Signature of the accession forms (Ben)

7. Payment of pre-financing

First principle: Changes should be limited

Adapt deliverables and milestones to reporting periods and reviews

- 2 or 3 reporting periods – still to be decided
- Review meeting at the end of each reporting period
- Deliverables need to be ready well in time before the review – at least 3 weeks before

Implement suggestions of the ESR

- **ONLY IF** you do not agree with the recommendations, or you cannot implement them, **THEN** contact the functional mailbox CNECT-DIH@ec.europa.eu and PO

Correct clerical errors

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The first things to do are some **administrative** and **financial** checks.

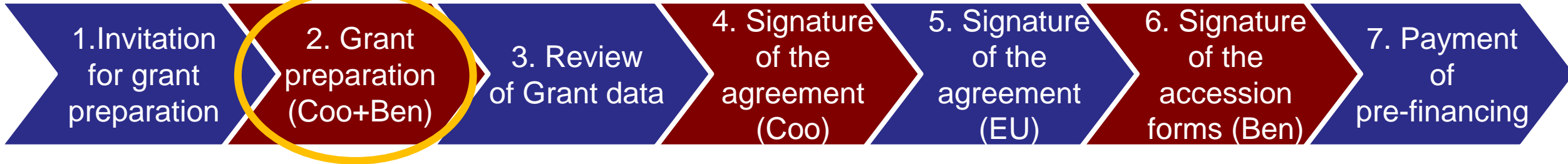
The **coordinator and other beneficiaries** (partners and affiliated entities) must be registered in the participant portal – this requires providing some documents and identifying a **Legal Entity**

Appointed Representative (LEAR)

If your organization has worked in another EU project, usually this is already done.

EC also needs to check financial stability of private organisations: the **“financial viability check”**

Colleagues from REA Central Validation Service explained this process in detail



The second thing to do is to **record in the Participant Portal all the data of the grant**, which includes transforming the **proposal** in the “**Description of Action**” (DoA), which is the part of the Grant Agreement describing the actions to be performed.

Proposal and DoA are very similar, but not exactly the same.

The official template of the DoA is here:

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/digital/template/gap/doa_digital_en.docx

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DoA has two sections

- Part A (structured)

- Part B (text)

Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Description of the action (DoA) — Annex 1 (DEP): V1.0 – 01.11.2021

IMPORTANT NOTICE

What is the Description of the Action (DoA)?


The Description of the Action (DoA) is the Annex of the Grant Agreement which contains the details of how the project will be carried out. For EU framework partnerships for grants (FPAs) this Annex is called Action Plan.

It consists of 2 parts, which must be generated from the submitted proposal:

- Part A contains structured tables with project information
- Part B is a narrative description on the work to be carried out.

Part A is generated by the IT system. It is based on the information which you enter into the Portal Grant Preparation screens.

Part B (+ annexes) must be uploaded on the Grant Preparation Documents screen.

 Make sure that Part B is synchronised with the information entered into the screens. Make sure that any changes are agreed with us.

1. Invitation for grant preparation

2. Grant preparation (Coo+Ben)

3. Review of Grant data

4. Signature of the agreement (Coo)

5. Signature of the agreement (EU)

6. Signature of the accession forms (Ben)

7. Payment of pre-financing

Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Description of the action (DAA) — Annex 1 (DEP): V1.0 – 01.11.2021

DESCRIPTION OF THE ACTION (PART A) [for FPAs: ACTION PLAN (PART A)]

COVER PAGE

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

PROJECT	
Grant Preparation (General Information screen) — Enter the info.	
Project number:	[project number]
Project name:	[project title]
Project acronym:	[acronym]
Call:	[call ID]
Topic:	[topic ID]
Type of action:	[TGA ID]
Service:	[responsible unit, e.g. HOME/E/01]
Project starting date:	[dd/mm/yyyy]
Project duration:	[number of months]

TABLE OF CONTENTS

- Project summary
- List of participants
- List of work packages
- Staff effort
- List of deliverables (n/a for FPAs)
- List of milestones (outputs/outcomes) (n/a for FPAs)
- List of critical risks (n/a for FPAs)

These structured tables are filled automatically from the data you encode in the participant portal

Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Description of the action (DAA) — Annex 1 (DEP): V1.0 – 01.11.2021

PROJECT SUMMARY

Project summary

Grant Preparation (General Information screen) — Provide an overall description of your project (including context and overall objectives, planned activities and main achievements, and expected results and impacts (on target groups, change procedures, capacities, innovation etc)). This summary should give readers a clear idea of what your project is about.

Use the project summary from your proposal.

Insert text (same text as proposal abstract)

LIST OF PARTICIPANTS

PARTICIPANTS

Grant Preparation (Beneficiaries screen) — Enter the info.

Partner No	Role	Short Name	Legal Name	Country	PIC
1	COO				
2	BEN				
2.1	AE				
3	BEN				
4	AP				

1. Invitation for grant preparation

2. Grant preparation (Coo+Ben)

3. Review of Grant data

4. Signature of the agreement (Coo)

5. S ag

DESCRIPTION OF THE ACTION (PART B) [for FPAs: ACTION PLAN (PART B)]

Part B of the Description of the Action (DoA) must be uploaded on the Portal Grant Preparation Documents screen.

Follow the detailed instructions for the **Part B**

Avoid any duplications with Part A

HOW TO MAKE YOUR PART B

- Start from Part B of your proposal. Use the version that was submitted for evaluation.
 - ⚠ The version used should be the submitted version of the proposal (— unless you have been explicitly requested to make changes). All changes need to be discussed and agreed with the EU Project Officer. Substantial changes to the proposal are NOT allowed.
- Replace the cover page.
- Delete the footer (if any).
- Replace the header.
- Remove the project summary (already included in Part A).
- Remove the risk management section (to be encoded on the screens).
- Remove the work package tables, including milestones and deliverables (to be encoded on the screens).
- Remove the staff effort table (to be encoded on the screens).
- Cross-check all sections in order to implement changes required by/agreed with the EU. Ensure coherence with the information entered on the screens.
- Add a table with the history of changes.

Specify all changes compared to your proposal. Changes should be described concisely. You do not need to include minor changes that do not modify the substance of the DoA (e.g. correction of spelling and grammar, changes in formatting).
- Update the table of contents.
- Merge all parts of Part B and all required Annexes (except for the Ownership Control Questionnaire, which does not need to be re-submitted) into a single file, convert it into PDF and upload the PDF on the Grant Preparation Documents screen.

PROPOSAL SUBMISSION			GRANT PREPARATION	
Data entry Submission System	Proposal – Part A (automatically generated by the system)	→	Structured system data	Annex 1 – Part A (automatically generated by the system)
		↘	Data entry Grant Management System	
Part B Narrative	Proposal – Part B (uploaded as PDF; annexes separate, if allowed; detailed budget table as Excel or PDF)	↘	Part B Narrative	Annex 1 – Part B (uploaded as single PDF; detailed budget table as Excel or PDF)
Annexes to Part B (detailed budget table, etc.)		→	Annexes to Part B (detailed budget table, etc.)	

1. Invitation for grant preparation

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7. Payment of pre-financing

Very very important!

HISTORY OF CHANGES

VERSION	<u>PUBLICATION DATE</u>	CHANGE
1.0	01.11.2021	Initial version (new MFF).

Include an history of the changes done to your Part B, explaining the differences with the proposal (if any)



This will be done by the Commission and might lead to further iterations with you. All the information stored in the system for your project is checked:

- **Summary**
- **Beneficiaries**
- **General information**
- **Reporting period**
- **GA information**
- **GA options**
- **Financial overview...**

1. Invitation for grant preparation

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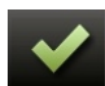
5. Signature of the agreement (EU)

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

Legend – icons used



No missing information



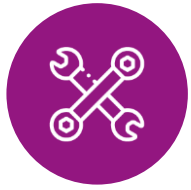
Missing information: blocking



For information only



Missing information: not blocking at this point



IT system for grant management - walkthrough



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



Manage my area | SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

My Project(s)

Results: 1

ACRONYM	CALL	PROGRAMME	PROJECT	PHASE	ACTIONS
N[REDACTED]T	H202[REDACTED]20	H2020	6[REDACTED]5	2	Actions Manage Consortium Manage Project View Proposal

1 / 10



Grant management service

The screenshot displays the 'RESEARCH & INNOVATION Grant Management Services' portal. The header includes the European Commission logo and a 'Help' dropdown menu. The main content area is divided into a left sidebar and a central workspace.

MY PROJECT sidebar (left):

- Call: HORIZON-CL6-2021-80001-02
- Type of Action: HORIZON-COFUND
- Acronym: [Redacted]
- Current Phase: Grant preparation
- Number: [Redacted]
- Duration: 84 months
- Start Date: [Redacted]
- Estimated Project Cost: €141,410,741.75
- Requested EU Contribution: €30,999,999.00
- Contact: Sofia [Redacted]

Process Flow (top right):

Timeline: Submitted (22 Jul 2021) → Informed → Invited → Prepared → Signed (23 Apr 2022, 188/275 days) → Paid

Task List (center):

- Grant agreement data preparation (highlighted with a red box)
- Grant Declaration signature by other beneficiaries

Navigation (bottom left):

- ONLINE MANUAL
- HOW TO

Footer (bottom center):

© European Communities - Version 12.7.3



Beneficiaries

Grant Management | Grant Agreement Data

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

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

DOCUMENTS

Beneficiaries

Number	Short Name	Legal Name	Role	Country	PIC	PIC Status	
1			CO		99	3	VALIDATED
2			BEN		91	5	VALIDATED
3			BEN		89	3	VALIDATED
4			BEN		89	5	VALIDATED
5			BEN		98	8	VALIDATED
6			BEN		99	0	VALIDATED
7			BEN		99	4	VALIDATED
8	F.R		BEN		99	1	VALIDATED
9			BEN		99	4	VALIDATED
10	SP		BEN		99	4	VALIDATED
11			BEN		99	7	VALIDATED
12			BEN		98	5	VALIDATED
13			BEN		90	3	VALIDATED
14			BEN		99	4	VALIDATED
15			BEN		91	0	VALIDATED
16	EES		BEN		94	8	VALIDATED
17			BEN		89	7	VALIDATED
18			BEN		92	2	VALIDATED
19			BEN		93	0002	VALIDATED

Validate



Partner summary

Grant Management Grant Agreement Data

HORIZON-...
Call: HORIZON-CL6-2021-BID0IV-02
Topic: HORIZON-CL6-2021-BID0IV-02-01

Beneficiaries
Legal Na
PIC: 9995
Legal Ad
Belgium

Partner Summary Financial Information Project Representa... Affiliated Entities

Partner Summary

PIC (PARTICIPANT IDENTIFICATION CODE) (REQUIRED)

Short Name
Legal Name
Legal address

VAT number:
Registration Data:
Legal Form:

Phone:
Fax:
Email:
Website:

Legal entity status: Legal person
Legal entity type: Public body
Legal entity qualification: Non-profit
SME: No (validated in 2010)

NGO
Civil society: No

Research organisation: No
Secondary/higher education: No

International organisation: No
Int. EU research org.:

Gender Equality Plan

Operating grants: No
Applicable Law:

Operating grants
Dispute Settlement: Standard

Financials:

Total Costs: 125.00 € (1% of project total costs)
Maximum grant amount: 10.00 € (20% of project max grant amount)

Department(s) carrying out the work:

Dep. Name	Address	Actions
new department	same as legal address	<input type="checkbox"/> <input type="checkbox"/>

- Coordinator/beneficiary Partner Summary is automatically listed after receiving the invitation letter.
- The **department** needs to be added (mandatory for all beneficiaries, except for Affiliated Entities)



Financial information

Grant Management | Grant Agreement Data

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

Beneficiary: HORIZON-...
Legal Ni: ...
PIC: 999
Legal Ac: ...
Belgium

Partner Summary ✓
Financial Information ✓
Project Representa... ✓
Affiliated Entities ✓

Financial Data

Partner is exempted from CFS Yes No

Individual costs table:

Category	Form of Funding	Total Amount
▼ Estimated eligible costs (per budget category)		
▼ Direct costs		
▼ A. Personnel costs		
(a1) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	actual	1,379,529.00 €
(a2) A.1 Employees (or equivalent), A.2 Natural persons under direct contract, A.3 Seconded persons	unit (usual accounting practices)	0.00 €
▼ B. Subcontracting costs		
(b) Subcontracting	actual	0.00 €
▼ C. Purchase costs		
(c1) C.1 Travel and subsistence	actual	25,963.00 €
(c2) C.2 Equipment	actual	18,545.00 €
(c3) C.3 Other goods, works and services	actual	24,727.00 €
▼ D. Other cost categories		
(d1) D.1 Financial support to third parties	actual	0.00 €
(d2) D.2 Internally invoiced goods and services	unit (usual accounting practices)	0.00 €
▼ Indirect costs		
▼ E. Indirect costs		
(e) E. Indirect costs (25% * (a1 + a2 + c1 + c2 + c3))	flat-rate	362,191.00 € 🚩
(f) Total costs (a1 + a2 + b + c1 + c2 + c3 + d1 + d2 + e)		1,810,955.00 €
▼ Estimated EU contribution		
▼ EU contribution to eligible costs		
(g) Maximum EU contribution (30% * f)		543,286.50 €
(h) Requested EU contribution		526,082.00 €
(m) Maximum grant amount (h)		526,082.00 €

Validate

- Coordinator/beneficiary financial information is automatically listed after receiving the invitation letter (from proposal).



Project representatives

Grant Management | Grant Agreement Data

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

Benefici Legal Ni
PIC: 999
Legal Ad
Belgium

Partner Summary ✓
Financial Information ✓
Project Representa... ✓
Affiliated Entities ✓

Project Representatives

Legal Signatory

Function	User Id	Family Name	First Name	Email
<input type="checkbox"/>				...en.be

Contact Persons

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

Validate

- If no Project Representatives are listed, please complete in the **roles management section of the Funding & Tenders Portal**.
- Check all information and update, if necessary, in the **roles management section of the Funding & Tenders Portal**.
- Both Coordinators and beneficiaries should, as soon as they have been invited, nominate in the Funding & Tenders Portal, their Legal Entity Appointed Representative (LEAR) and Project Legal Signatory (PLSIGN). Once this has been done, the PLSIGN who will appear in the Grant Agreement has to be selected in this screen. Please note that all other PLSIGNS can sign the Grant Agreement.



Affiliated entities

Grant Management | Grant Agreement Data

Beneficiary: IBH
Legal N: ...
PIC: 97
Legal A: German...

Partner Summary: ⚠️
Financial Information: ✅
Project Represent...: ⚠️
Bank Account: ⚠️
Affiliated Entities: ✅

Affiliated Entities

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

+ Add new Affiliated Entity

Grant Management | Grant Agreement Data

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

Affiliated Entity 1: ...
Legal Name: ...DUESSELDORF
PIC: 97XXXXX Status: VALIDATED
Legal Address: ...DUESSELDORF
Germany

Partner Summary: ✅
Financial Information: ✅

Financial Data

Amount	Guarantee Required	Guarantee Amount
...

Partner is exempted from CFS: Yes No

Individual costs table:

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

Validate

- Affiliated entities Financial Information is automatically listed after receiving the invitation letter (from proposal)
- It is possible to add new AE



Associated partners

Grant Management

Grant Agreement Data

XXXXXXXXXX HORIZON-IA

Call: HORIZON-CL5-2021-04-02
Topic: HORIZON-CL5-2021-04-02-01

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

DOCUMENTS

Associated Partners

Number	Short Name	Legal Name	Country	PIC	Actions
					+ Add new Associated Partner

Validate

- Data prefilled with proposal information
- Associated partners do not sign the grant agreement and cannot declare costs
- It is possible to add new AP



Bank account (coo only)

Grant Management Grant Agreement Data

Beneficiary 1: AET GmbH
Legal Name: AET GmbH
PIC: 00000000000000000000000000000000 Status: VALIDATED
Legal Address: Z...
Germany

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

Bank Account

Is a coordinator you must indicate your organisation's bank account, which will be part of the grant agreement information. Please do so by entering its last four digits in the search field (only available whilst editing grant or amendment information). Note that only accounts already validated will be displayed and available for selection. Therefore, if the one you intend to use is not listed, you must contact your organisation's LEAR (or the self-registrant in case of a non-validated PIC) and ask them to [request the validation of the bank account](#) via the Participant Register. Once the bank account will be validated (the process may take a few days), it will appear listed below and you will be able to select it.

Select Bank Account

Account Number

Account Name and Address

Account Name
PO Box
Postal Code
Street Name and Number
Town
Country

Bank Name and Address

Bank Name
Postal Code
Street Name and Number
Town
Country

Validate

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



Work Packages

Grant Management Grant Agreement Data

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

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

DOCUMENTS

Work Packages

Number		Name	Lead Beneficiary	Total Effort	Start Month	End Month	Deliverables No.
1	✓	Promote projects a	AL	61.25	1	84	1, 2, 3 ...
2	✓	Promote and support	M	1186.07	1	84	10, 11 ...
3	✓	Promote a	M	30.25	1	84	17, 18 ...
4	✓	Connectin	SE	28.5	1	84	24, 25 ...
5	✓	Intern	DI	26.25	1	84	30, 31 ...
6	✓	Commun	F	15.5	1	84	36, 37 ...
7	⚠	Sta	F	0	1	84	42, 43 ...
8	✓	Develop and	BEL	10.5	1	84	49, 50 ...
9	✓	Coordination and Management	BI	190.6	1	84	56, 57 ...
Total:				1548.92			

Validate

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



Deliverables

Grant Management Grant Agreement Data

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

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

DOCUMENTS

Deliverables

Number	Relative Number in WP		Name	Lead Beneficiary	Type	Dissemination Level	Due Date (in months)
D1	D1.1	✓	CALL 01 Call announcement of opportunity including all call	A	R	SEN	1
D2	D1.2	✓	ng all call	A	R	SEN	12
D3	D1.3	✓	observer's commitments	A	R	SEN	16
D4	D1.4	✓	[C] ults, and the	A	R	PU	21
D5	D1.5	✓		A	R	SEN	21
D6	D1.6	✓	on data	A	R	PU	21
D7	D1.7	✓	evaluate	A	R	SEN	19
D8	D1.8	✓	[C] ation among	A	R	SEN	22
D9	D1.9	✓	observer's commitments	A	R	SEN	28
D10	D2.1	✓	Re th (i) development of new tools, technologies and approaches for	I	R	SEN	6

Validate

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



Milestones

Grant Management Grant Agreement Data

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

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

DOCUMENTS

Milestones

Number	Name	Lead Beneficiary	Due Date (in months)	Means of Verification	Work Package No.
M1	FCM 11 Set-up of the Call Secretariat, CSC and	A	1	The Call MoU is drafted and the emergency bodies of the call (Call Secretariat, CSC and FCP) are well	1
M2		A	1	The Call is la	Funding & Tender 1
M3	[C	A	1	The Part	to applicants 1
M4		TA	1	At least one i	the launch of the 1
M5	[C	A	1		ents 1
M6		A	2		osed 1
M7		A	3		ivC 1
M8	[C	A	4	The CSC fin	ive are informed 1
M9	tem	A	4	A Working gro be used to asse	ysis framework to of best practices / 1
M10		A	5		1
M11	[C	A	5	Applicants are	invited to submit a 1
M12		A	7	Flu...	closed

Validate

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



Critical risks

Grant Management Grant Agreement Data

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

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

DOCUMENTS

Critical Risks For Implementation

Number	Description	Risk Mitigation Measures	Work Package No.
1	Risk associated with on commo	is or of difficulties to agree severity: medium A large pe the prepa for all materia mitigal partners	1, 2, 3 ...
2	Partners do not re	level of severity: medium Buildi reasonable and WP lea due time; r activities a	1, 2, 3 ...
3	Risk of budget/res	artner; Level of likelihood: Any pote Team Biodiv	1, 2, 3 ...
4	Risk of integrati Biodiv	be interested in joining severity: low New partn potential consorciu	1, 2, 3 ...
5	Risk of conflict In a	conflicts between partners. It will be t partners detailed in the consortium agreement (and based on procedures that have proved efficient in biodivERSA)	1, 2, 3 ...

Validate

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



Ethics

Grant Management

HORIZON-...

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

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

DOCUMENTS

Ethics

Ethics Issues:
HESC and/or HE:
Ethics Opinion: Pending

Ethics categories/issues identified during the Ethics Review

- HEF- HUMAN EMBRYONE...
- H- HUMANS
- HCT- HUMAN CELLS / ...
- POPD- PERSONAL DATA
- A- ANIMALS
- NEC- NON-EU COUNTRI...
- EPQ- ENVIRONMENT PR...
- AI- ARTIFICIAL INT...
- OEI- OTHER ETHICS I...

Ethics requirements

Number	Ethics Issues Category	Description	Before Signature	Compliance Date	Status
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Ethics Reports

Title	ARES Ref	Date	Type	Doc
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Validate

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



Part B of DoA

The screenshot shows the 'Grant Management' interface for 'Grant Agreement Data'. The top navigation bar includes 'Project Summary', 'Beneficiary...', 'General Information', 'Reporting Periods', 'GA Information', 'GA Options', 'Financial Information', 'LF Overview', 'Associated Partners', 'Researchers', 'Work Packages', 'Deliverables', 'Milestones', 'Reviews', 'Critical Risks', 'Ethics Info', and 'Security'. The 'DOCUMENTS' tab is highlighted in red. Below the navigation bar, the 'Documents' section is visible, showing a list of documents under the 'Grant Agreement' category. The document 'Annex 1 - Description of the action (part B)' is highlighted in red. Other documents include 'Grant Agreement Core', 'Annex 1 - Description of the action (part A)', 'Annex 2 - Estimated budget for the action', 'Annex 2a - Additional information on unit costs and contributions', 'Annex 3 - Accession forms', 'Annex 4 - Model for the financial statements', and 'Annex 5 - Specific rules'. A 'Validate' button is located at the bottom right of the interface.

Check instructions on slide 14 of this presentation

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

1. Invitation for grant preparation

2. Grant preparation (Coo+Ben)

3. Review of Grant data

4. Signature of the agreement (Coo)

5. Signature of the agreement (EU)

6. Signature of the accession forms (Ben)

7. Payment of pre-financing

When all the data (DoA, legal data, financial data) is OK,

- The **Coordinator** signs the grant
- Then the representative of the **European Commission** signs the grant
- All the **beneficiaries** sign the “accession form” which is the legal basis for their participation to the project

This part of the process is quite straightforward, but keep in mind that, if you have a large consortium, you may have to chase all the involved people and remind them to put their signature in the system!

1. Invitation
for grant
preparation

2. Grant
preparation
(Coo+Ben)

3. Review
of Grant data

4. Signature
of the
agreement
(Coo)

5. Signature
of the
agreement
(EU)

6. Signature
of the
accession
forms (Ben)

7. Payment
of
pre-financing

At this point, the European Commission transfers the prefinancing amount on the bank account of the coordinator.

Note that:

- **The project can start on the date of the signature, or on a fixed date, even before the grant agreement is signed (at your risk!)**
- **The consortium must have a Consortium Agreement. The European Commission is not involved in it. You can find a model agreement and documentation here:**

https://intellectual-property-helpdesk.ec.europa.eu/news-events/news/horizon-europe-projects-updated-desca-model-consortium-agreement-now-available-2022-01-11_en



What is special for EDIH?

The EDIH projects are co-funded from the European Commission and from the Country.

This means that typically there will be **one grant between the project and the EC**, and **another grant between the project and the Country**.



In case of questions

FAQ - [FAQ: European Digital Innovation Hubs | European Digital Innovation Hubs Network \(europa.eu\)](#)

Funding & Tenders Portal - [Guidance & Manuals | EU Funding & Tenders Portal \(europa.eu\)](#) - guidance documents and some very simple videos on 'how to'

Send your question to CNECT-DIH@ec.europa.eu and to your Project Officer



Thank you!



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