

# PROJECT IMPLEMENTATION AND MANAGEMENT

# MANAGING THE PIC

## KEY ROLES



### LEAR

(LEGAL ENTITY APPOINTED  
REPRESENTATIVE)

Official representative for legal and financial matters

Manages the organization's data in the Participant Register



### ACCOUNT

ADMINISTRATORS

Assist in proposal submissions and grant management

Can invite new users to the organization's profile



TEAM MEMBERS  
(PARTICIPANTS)

- Access and edit project -specific details



## Register new participant?

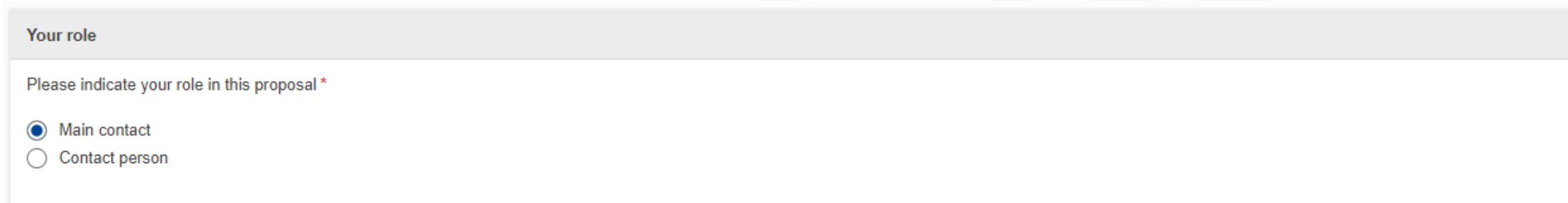
Go here: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>

## WHO CAN INITIATE THE REGISTRATION?

- Any Employee or Representative of the Organization
- A staff member, legal representative, or administrative officer can start the registration.
- No special role is required initially —just an EU Login account.



You would typically select the top -level role (Main Contact for most calls) for the Proposal coordinator organisation during the initial proposal draft creation. If you select the Contact person role (or another role if the call uses specific roles) for yourself, you will need to specify a top -level role (Main Contact) for your organisation in the next step . The person holding the Main Contact role will become the Coordinator of the proposal.



The screenshot shows a web form titled "Your role". Below the title is a text prompt: "Please indicate your role in this proposal \*". There are two radio button options: "Main contact" (which is selected) and "Contact person".

Most calls use the standard Main Contact and Contact person roles for the Proposal coordinator organisation. However, some calls may require more specific roles, such as Principal Investigator, Main Host Institution Contact, Researcher, Supervisor, Applicant, etc. Calls of this type are pre -configured accordingly and their proposal submission forms contain special sections to address the specific roles and the respective data as needed. Likewise, the [Proposal Submission Wizard](#) for these calls will display the respective role options, as configured for each call.



## Steps to Add a New Team Member

Access the Organization or Project Roles

Click on “My Area” > “My Organization(s)” (to manage the organization’s users).

OR go to “My Projects” (if adding a team member for a specific project).

Add a New Member

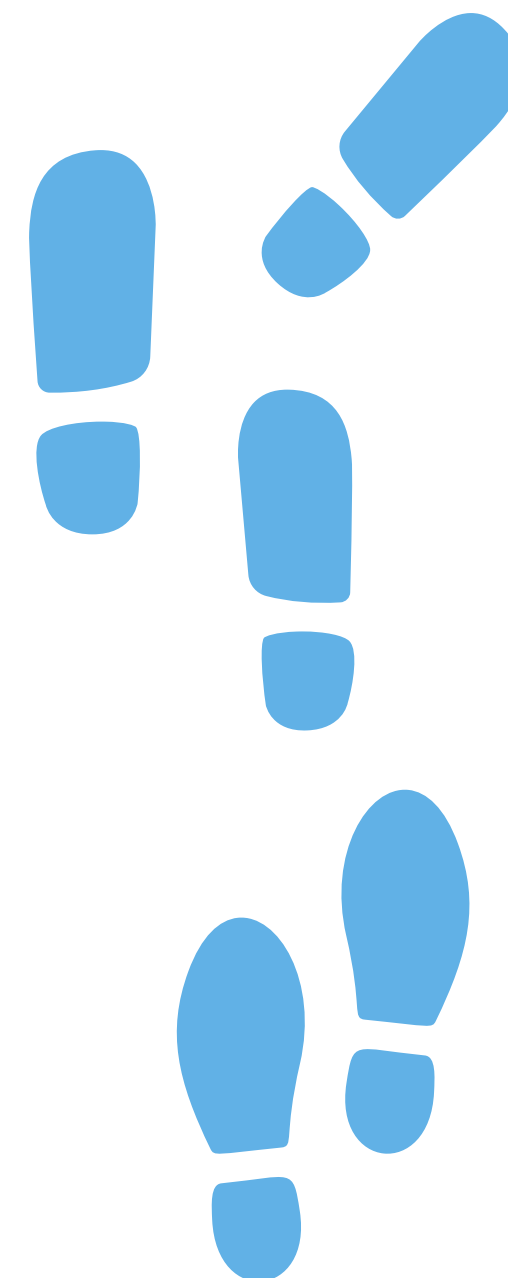
Click “Manage Roles”

Choose “Add a Role”

Enter the new member’s email (**MUST** be linked to an EU Login account).

Assign the appropriate role (e.g., Participant, Coordinator, Financial Signatory).

Click “Send Invitation” – the user will receive an email to accept the role.





#HorizonEU

# HORIZON EUROPE

THE EU RESEARCH &  
INNOVATION PROGRAMME  
2021 –2027

E-GRANTS  
GRANT AGREEMENT  
PREPARATION(GAP)

–AN OVERVIEW

Common Implementation Centre –CIC  
Business Process Unit DG R&I,  
European Commission

# Horizon Europe Grant Management Lifecycle



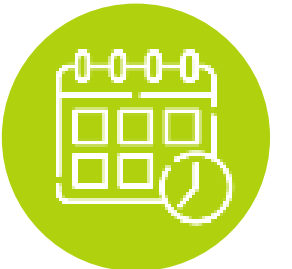
## GRANT AGREEMENT PREPARATION (GAP) IN HORIZON EUROPE

- Horizon Europe GAP: the process overview
- Key elements—highlights Hints –new items
- for Horizon Europe
- IT 'how-to'

# Principles

## Single gateway for all exchanges: Funding and Tenders Portal

- ☐ Deep integration of IT tools and services in the portal
- ☐ Uniform experience Common business processes



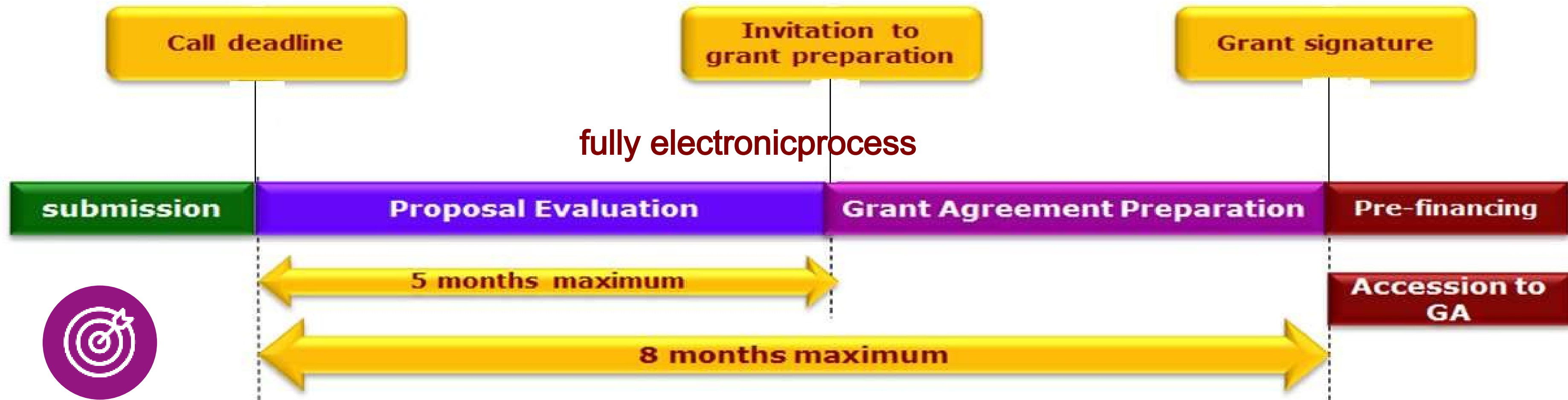
## Electronic-only paperless process flows

- ☐ Digital sealing of documents Digital signature on all formal documents replacing blue-ink signatures Single, common document repository Full traceability and audit trail ensured (who-what-when)



# Grant Agreement Preparation(GAP)

– a time - bound process –



The GA preparation –the conclusion of the grant agreement is subject to time limits – **strict deadlines**

(This is a regulatory requirement –Fin.Reg, HReg. –exceptions for actions managed by ERCEA)

☐ The invitation letter specifies deadlines applicable for the GAP

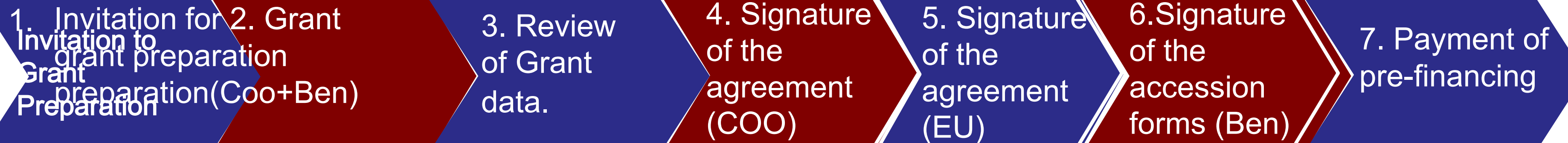
☐ Align yourself with the applicable deadlines and make diligent efforts to comply with the dates set  
Notify the EU services if you encounter delays. The non-respect of the deadlines may lead to the termination of grant preparation (rejection).

☐

☐

# Grant Agreement Preparation(GAP)

– the main process steps –



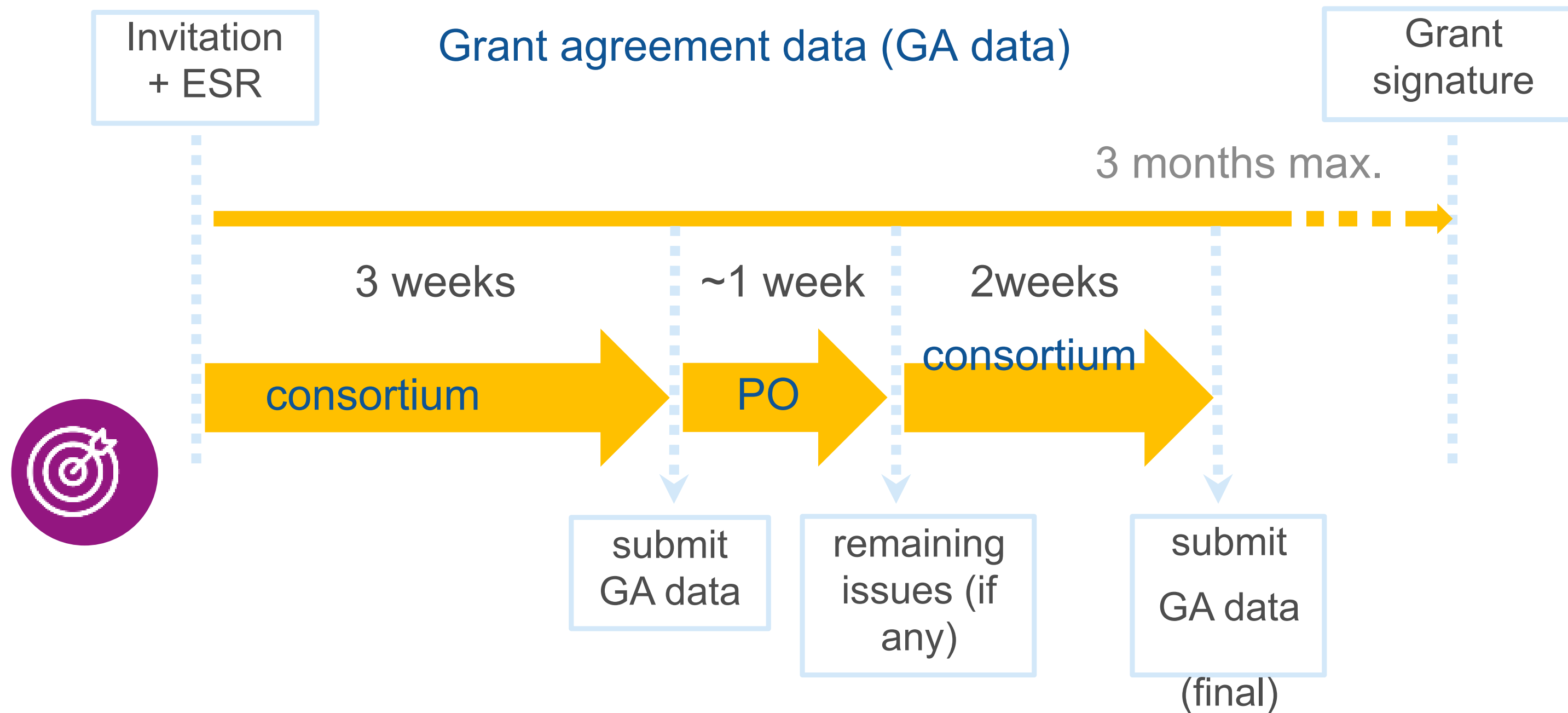
Validation of participants  
Setting identity access management (IAM) roles (each ben)  
Signature of the 'Declaration of honour' (e-signature, each ben)

\*further iterations possible  
(completion/correction of grant data) Ex - ante checks, reservation of funds, preparation of award decision

\*\* If and as defined in the grant agreement



# GAP and Timing



# Parts of the Grant Agreement

Consortium

Project Officer

sum of scientific/technical, budgetary, administrative, and legal information on your project

=

**GRANT AGREEMENT DATA**

core  
grant  
agreement

Annex 1, description of  
the action (project  
description)

Annex 2,  
budget

other  
annexes



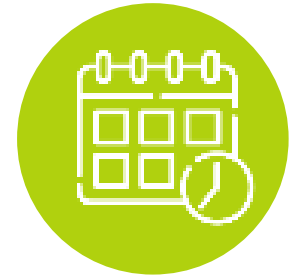
European  
Commission

# Grant agreement preparation(GAP)

'no - negotiation'

Your proposal is taken “as is”

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



BUT this does not mean “no change at all”

- ☐ Changes that may be necessary: Changes to meet legal and financial requirements, Requirements resulting from ethics review or security scrutiny, Due to removal of participant (if agreed by EU), Correction of clerical errors and obvious inconsistencies



No negotiation does not mean no control

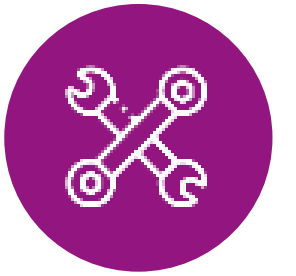
- ☐ Eligibility and viability checks, Anti-fraud measures and risk based controls are carried out
- ☐

*Non-compliance, serious breach or negligence of the applicable rules evokes the termination of grant preparation and the rejection of the proposal*

# Instructions for generating the Description of Action

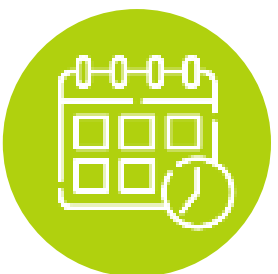
## Part A: Complete the following parts online

- ☐ The project summary
- ☐ The list of beneficiaries
- ☐ List of work packages (based on proposal table 3.1a)
- ☐ List of deliverables (based on proposal table 3.1c)
- ☐
- ☐ Work package descriptions (based on Proposal table 3.1b)
- ☐ List of milestones (based on Proposal table 3.1d)
- ☐
- ☐ Critical risks and mitigation actions (based on Proposal table 3.1e)
- ☐ Summary of project efforts in person months (based on Proposal table 3.1f)
- ☐



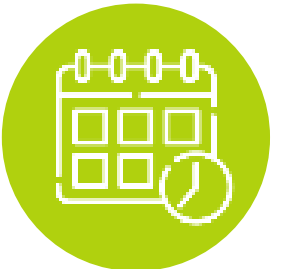
## Part B: generating the document (to be uploaded in the documents section)

- ☐ Start from Part B of your proposal. Use the version that was submitted for evaluation.
- ☐
- ☐ Remove the cover page, if any.
- ☐ Remove the list of participants. This is included in Part A.
- ☐
- ☐ Create a section 4 'ethics self-assessment' and copy into this section the ethics self-assessment you included in the proposal Part A.
- ☐
- ☐ Add a table with the history of changes; specify all changes from proposal
- ☐ Add a table of contents with page numbers



# Points of attention

- ☐ Avoid repetitions: i.e. no duplication between work plan tables (Part A) and free text (Part B)
- ☐ The results of the ethics review and security scrutiny must be implemented in the grant agreement
  - 'Ethics requirements' (if any) are binding
  - 'Ethics requirements' may necessitate changes in the DoA before the grant can be signed.
  - 'Ethics requirements' may ask for local/national certificates to be submitted after grant signature.
  - Similarly for security scrutiny



## Takeaway messages:

- ☐ Pay attention to deadlines; be proactive. Be transparent in case you face difficulties; try to come up with a plan (if needed). Collaborate with the Project Officer
- ☐ ☐



---

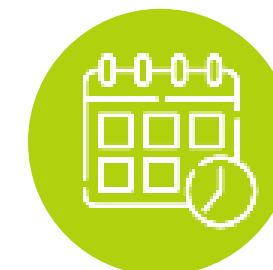
# Roles and Access Management



# Identity and Access Management

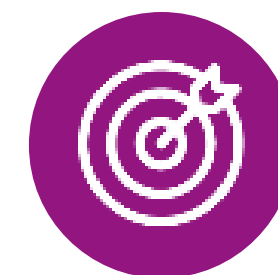
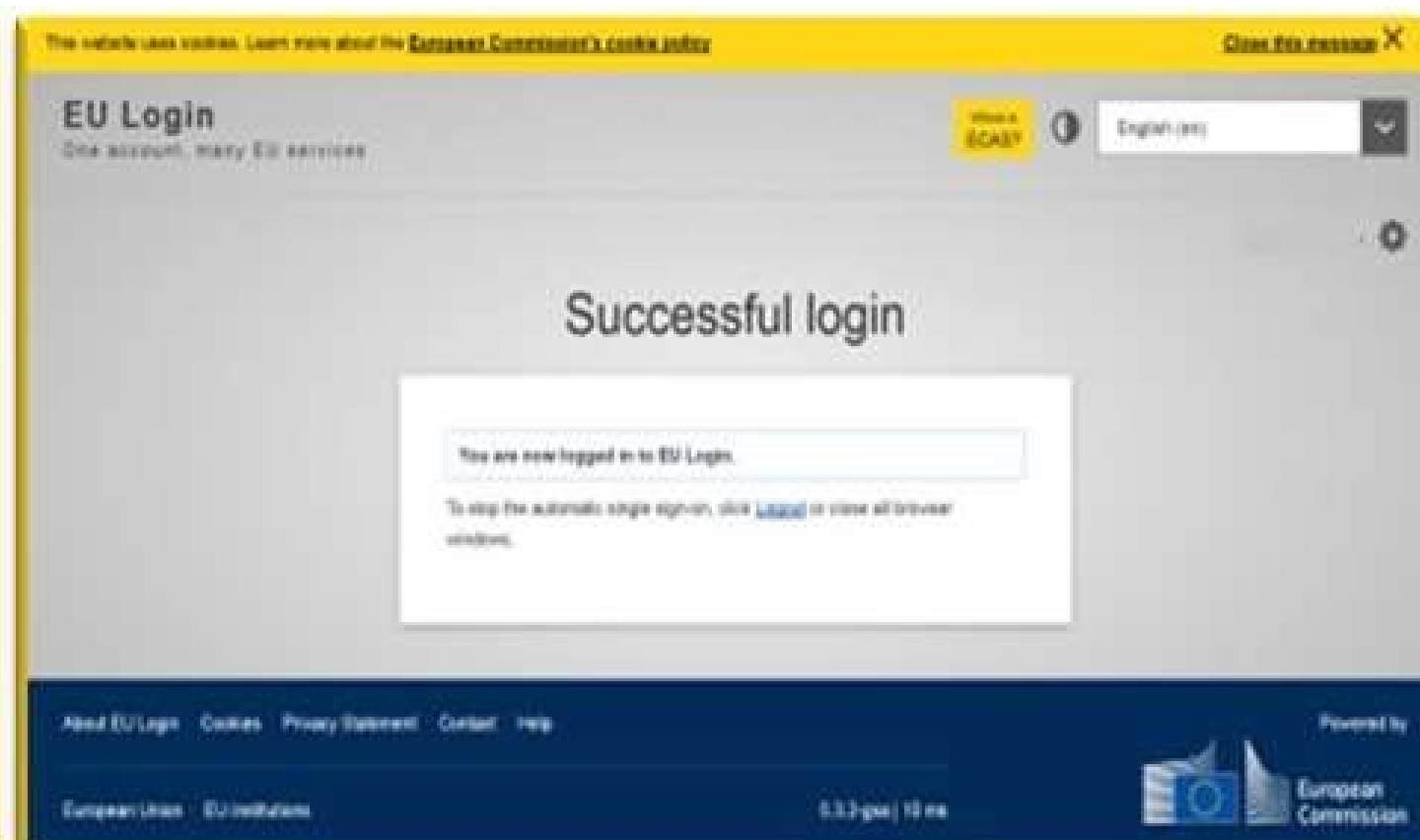
Based on a "chain of trust" enabling e-signature

- ❑ The role of the Legal Entity Authorized Representative (LEAR)
- ❑ Identity and Access Management (IAM) + EU Login
- ❑ Enacting e-signature: Legal Signatory (LSIGN) and Financial Signatory (FSIGN)



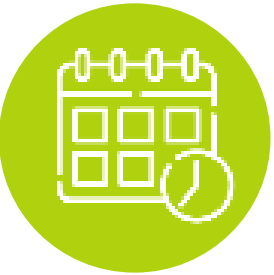
The **minimum configuration** is:

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



# Electronicsignature duringgrantagreement preparation

‘role configuration’

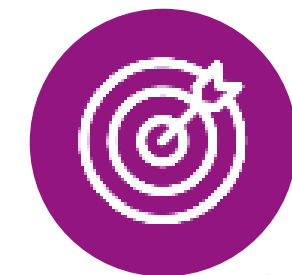


**Declaration of honour** The coordinator and each beneficiary, enacted by the LSIGN Grant Agreement

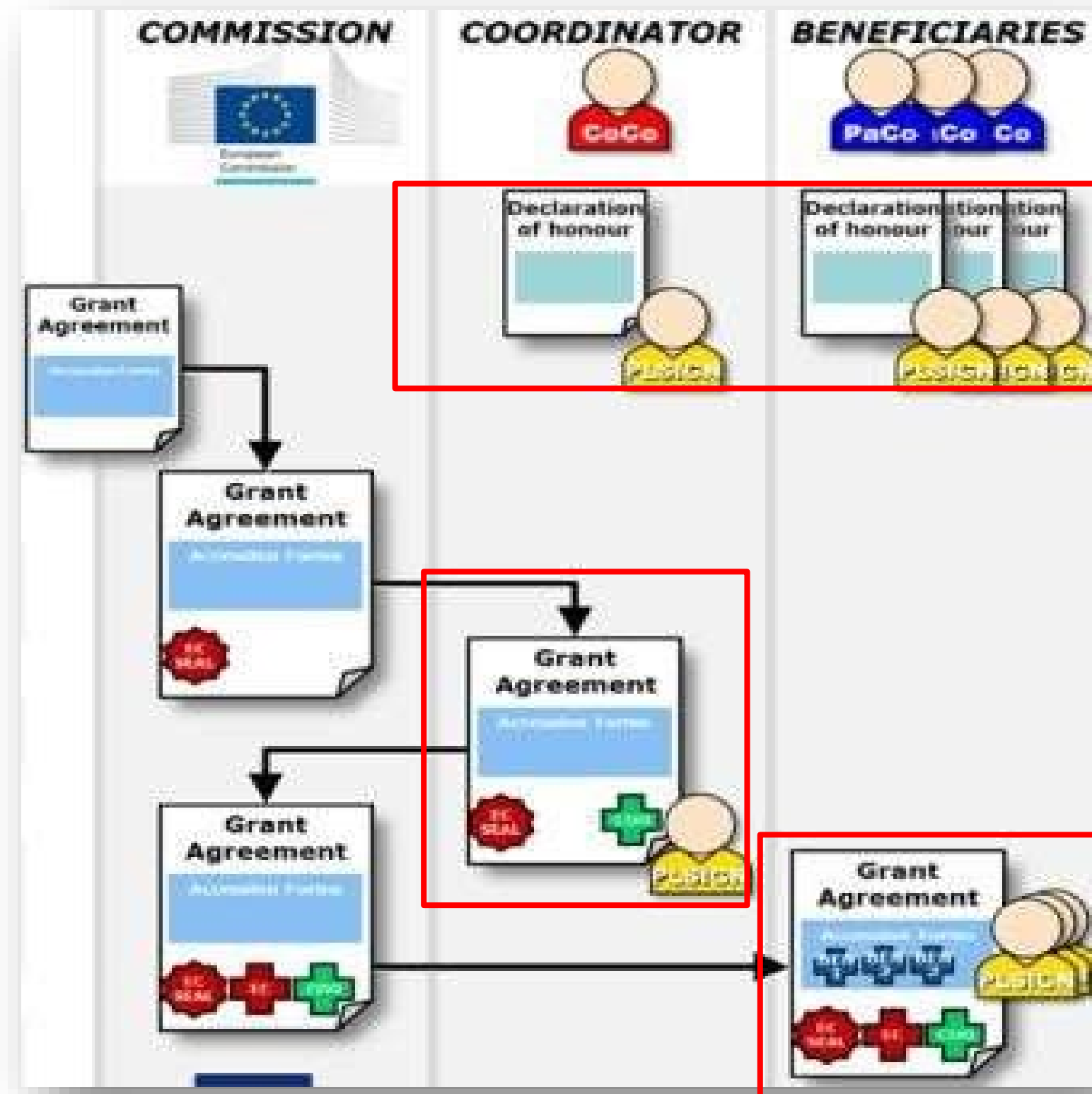
- Coordinator signs first, represented by the LSIGN
- EC/EC Agency signs next

**Accession Forms**

Each beneficiary –by the LSIGN



European  
Commission

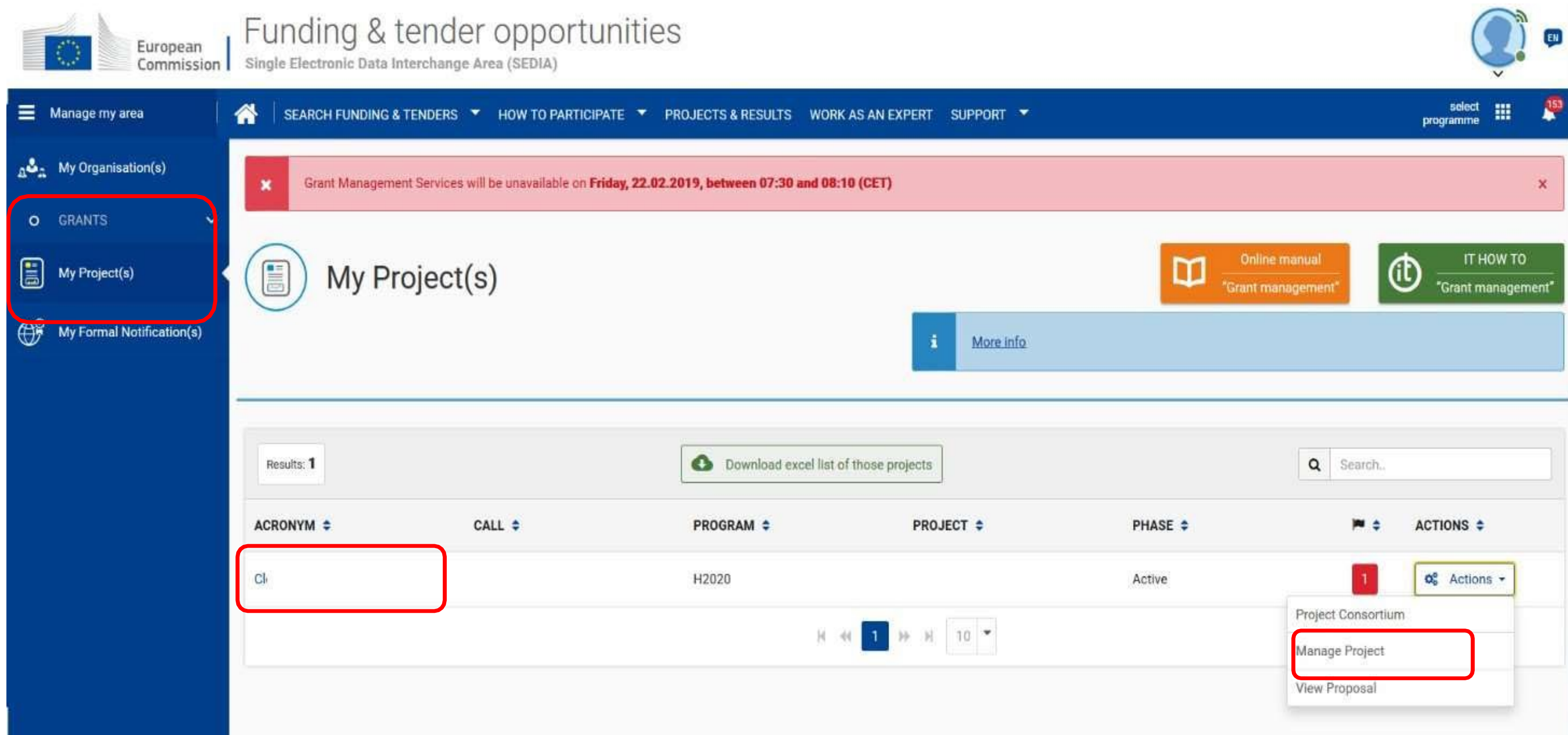


# GRANT AGREEMENT PREPARATION –TECHNICAL ASPECTS



# IT system for grantmanagement

- Fully integrated into the Funding & Tender Portal -



The screenshot displays the 'Funding & tender opportunities' portal by the European Commission. The left sidebar contains navigation links: 'Manage my area', 'My Organisation(s)', 'GRANTS', 'My Project(s)' (highlighted with a red box), and 'My Formal Notification(s)'. The main content area is titled 'My Project(s)' and includes a red banner about service unavailability on Friday, 22.02.2019. Below this, there are links for 'Online manual' and 'IT HOW TO'. A table lists project results, with the first row showing 'CI' in the 'ACRONYM' column (highlighted with a red box), 'H2020' in the 'PROGRAM' column, and 'Active' in the 'PHASE' column. An 'Actions' dropdown menu is open, showing options: 'Project Consortium', 'Manage Project' (highlighted with a red box), and 'View Proposal'. A red circle with a white wrench icon is positioned to the right of the screenshot.

European Commission

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

Manage my area

My Organisation(s)

GRANTS

My Project(s)

My Formal Notification(s)

Grant Management Services will be unavailable on **Friday, 22.02.2019, between 07:30 and 08:10 (CET)**

My Project(s)

Online manual  
"Grant management"

IT HOW TO  
"Grant management"

More info

Results: 1

Download excel list of those projects

Search..

| ACRONYM | CALL | PROGRAM | PROJECT | PHASE  | ACTIONS   |
|---------|------|---------|---------|--------|-----------|
| CI      |      | H2020   |         | Active | 1 Actions |

Project Consortium

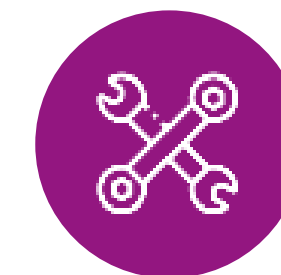
Manage Project

View Proposal

European Commission

# IT system for grantmanagement

-Portal Grant Management Service -



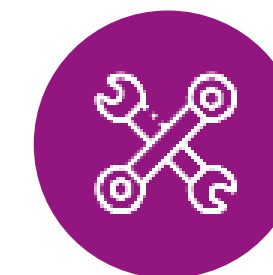
The screenshot displays the 'RESEARCH & INNOVATION Grant Management Services' portal. The header includes the European Commission logo and the user 'Generic DEVUSERCOORDINATOR'. The main content area is divided into several sections:

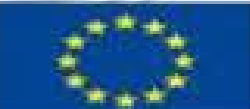
- MY PROJECT**: A sidebar on the left containing project details such as 'Call: HORIZON-HLTH-2021-CORONA-01', 'Type of Action: HORIZON-RIA', 'Acronym: XXXXXXXX', 'Current Phase: Grant preparation', 'Number: 219850', 'Duration: 24 months', 'Start Date:', 'Estimated Project Cost: €54,096,75', 'Requested EU Contribution: €50,00', and 'Contact:'. Below this is a navigation menu with 'Latest Legal Data', 'Active Processes', 'Document Library', 'Communication Centre', and 'Archived Processes'.
- Proposal Management & Grant Preparation**: A central section for the project '219850 - 219850 OIID - Horizon-RIA'. It includes a 'caution!' warning, a 'Terminate' button, and a 'process overview' timeline showing stages: Submitted (01 Jun 2021), Informed, Invited, Prepared, Signed (125/275 days), and Paid. A 'Launch new interaction with the EU' button is also present.
- Grant agreement data preparation**: A section with a 'hyperlink to the IT system'.
- GA Declaration - GAP-219850 - 973276467 signature**: A section for the 'declaration of honour template'.
- Process documents, Process communications, Process history**: A section for 'history linked to the specific process'.
- Submit to EU**: A prominent yellow button labeled 'submit to EU'.

At the bottom, there is an 'ONLINE MANUAL' link labeled 'online manual' and a green 'HOW TO' button labeled 'IT how-to'.

# Affiliated entities-declaration of honour

- Previously called linked 3rd parties -





RESEARCH & INNOVATION  
Grant Management Services

Help

Generic DEVUSERCOORDINATOR

Launch new interaction with the EU +

**MY PROJECT**

Call: HORIZON-CL5-2021-D4-02  
Type of Action: HORIZON-IA  
Acronym: 229491 OId - LE Rate  
Current Phase: Grant preparation  
Number: 229491  
Duration: 36 months  
Start Date:  
Estimated Project Cost: €60.00  
Requested EU Contribution: €50.00  
Contact: [REDACTED]

Latest Legal Data  
Active Processes  
Document Library  
Communication Centre  
Archived Processes

ONLINE MANUAL

HOW TO

**Proposal Management & Grant Preparation**  
229491 - 229491 OId - LE Rate

01 Nov 2021

Submitted Informed Invited Prepared Signed Paid

03 Aug 2022 (17/275 days)

Terminate

Grant agreement data preparation

Submit to EU

GA Declaration of Honour for Affiliated Entity - GAP-229491 - 973276467 - 999840984 to print, complete, sign and scan

Upload Complete

Grant Declaration signature by other beneficiaries

Process documents  
Process communications  
Process history

# Grant management screens

username jn

SyGMA System for Grant Management

Grant Agreement Data

| 223621 (223621 TEST)          | HORIZON...                        | 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 |
|-------------------------------|-----------------------------------|-----------------|---------------|---------------------|-------------------|----------------|------------|-----------------------|-------------|---------------------|-------------|---------------|--------------|------------|---------|----------------|-------------|----------|
| Call: HORIZON-CL6-2021-000002 | Topic: HORIZON-CL6-2021-000002-01 | i               | ✓             | ✓                   | ✓                 | ✓              | ✗          | ✓                     | i           | ✓                   | ✓           | ✓             | ✓            | ✓          | ✓       | ✓              | ✓           | ✓        |

DOCUMENTS

## Project Summary ?

### Project 223621 (223621 TEST)

Responsible Unit: RTD/B/03  
Call: HORIZON-CL6-2021-000002 submitted for HORIZON-CL6-2021-BIODIV-02 / 01 Jul 2021  
Topic: HORIZON-CL6-2021-000002-01 - European  
Type of Action: HORIZON-COFUND  
Duration: 36  
Submission Stage:

### Budget Information:

Total Costs (proposal): 60.00 €  
Total Costs (Annex 2): 160,000.00 €  
Maximum grant amount (after evaluation): 50.00 €  
Maximum Grant Amount (Annex 2): 50.00 €  
Maximum Grant Amount (award decision): 50.00 €

0.03 % of total costs

### Officers:

Financial Officer: (RTD/A/02)  
Project Officer:  
Legal Officer:

### Deadlines:

Deadline for first version of the grant agreement data (incl. annexes): 20/08/2021  
Deadline for the signature of the participants certified declarations: 10/09/2021  
Deadline foreseen for the signature of the grant agreement: 30/10/2021

# Beneficiaries management

Grant Management

Grant Agreement Data

226... (226647 F...) HORIZON-..

Call: HORIZON-ERC-2021-VICECHAIRS-IBA  
Topic: HORIZON-ERC-2021-VICECHAIRS-IBA

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

Beneficiaries

[Change Coordinator](#) [Add New Beneficiary](#)

| Number | Short Name | Legal Name                                  | Role | Country | PIC       | PIC Status | Actions |
|--------|------------|---------------------------------------------|------|---------|-----------|------------|---------|
| 1      | ✓          | ADVANCED SPACE TECHNOLOGIES GMBH            | CO   | DE      | 9...76467 | VALIDATED  |         |
| 2      | ✓          | INSTITUT NATIONAL DE RECHERCHE SCIENTIFIQUE | BEN  | FR      | ...797930 | VALIDATED  | ✗       |

## Legend –icons used



No missing information



Missing information: blocking



For information only



Missing information: not blocking at this point



European  
Commission

# Partner summary

- 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) For HE calls
- (from 2022 onwards) having a Gender Equality plan is necessary (for public bodies, research organizations and higher education institutions) before signing the GA (existence of the plan has to be declared in the portal organizational data)

Grant Management

Grant Agreement Data

Beneficiary 3: [redacted]  
Legal Name: [redacted]  
PIC: 93 [redacted] Status: VALIDATED  
Legal Address: [redacted]

Partner Summary

Financial Information

Project Representa...

Affiliated Entities

Partner Summary

International organisation: No

Int. EU research org.

Int. org. of EU interest

Gender Equality Plan: Yes

Operating grants

Dispute Settlement: Standard

Financial:

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 | X [icon] |

add department

Validate



# Financial information

Coordinator/beneficiary Financial Information is automatically listed after receiving the invitation letter.

Grant Management

Grant Agreement Data

2195P5 (2195P5) SOCPL-2021-INFO-REPR  
Call: SOCPL-2021-INFO-REPR  
Topic: SOCPL-2021-INFO-REPR

Beneficiary 2: [REDACTED]  
Legal Name: CCNTE NATIONAL DE A REPR  
SCIENTIFIQUE  
PIC: 9995 [REDACTED] Status: VALIDATED  
Legal Address: [REDACTED]

Partner Summary

Financial Information

Project Representa...

Affiliated Entities

Financial Data

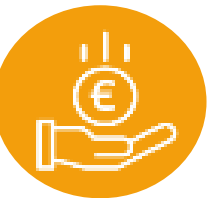
SAVE

|                          | Amount  | Guarantee Required       | Guarantee Amount |
|--------------------------|---------|--------------------------|------------------|
| Prefinancing 1 (initial) | 10.00 € | <input type="checkbox"/> |                  |

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          | 200.00 €     |
| (a4) A.5 Volunteers                                                                                 | unit            | 100.00 €     |
| ▼ B. Subcontracting costs                                                                           |                 |              |
| (b) Subcontracting                                                                                  | actual          | 0.00 €       |
| ▼ C. Purchase costs                                                                                 |                 |              |
| ▼ C.1 Travel and subsistence                                                                        |                 |              |
| (c1a) Travel                                                                                        | unit or actual  | 50.00 €      |
| (c1b) Accommodation                                                                                 | unit or actual  | 0.00 €       |
| (c1c) Subsistence                                                                                   | unit or actual  | 0.00 €       |
| (c2) C.2 Equipment                                                                                  | actual          | 50.00 €      |



# Assigning Project representatives

Coordinator/beneficiary Financial Information is automatically listed after receiving the invitation letter.

Grant Management

Grant Agreement Data

/19585 (219585 OGD - S...)

SOCPL-PJG

Beneficiary 2:  
Legal Name: CENTRE NATIONAL DE RECHERCHE  
S...IQUE  
PIC: 999...ED  
Legal Address: ...

Partner Summary  


Financial Information  


**Project Representa...**  


Affiliated Entities  




Project Representatives

Legal Signatory ?

| Function | User Id | Family Name | First Name | Email |
|----------|---------|-------------|------------|-------|
|----------|---------|-------------|------------|-------|

Contact Persons

| User Id | Family Name | First Name | Email                     |
|---------|-------------|------------|---------------------------|
| XXXXXX  | PARTNER     | TestOne    | test1.partner@outlook.com |

Validate

# Specifying the Bank account (COO only)

Grant Management

Grant Agreement Data

Beneficiary 1: ACT GERM

Legal Name: [REDACTED]

PIC: 03-64 [REDACTED] Status: VALIDATED

Legal Address: [REDACTED]

Germany

Partner Summary

Financial Information

Project Represent...

Bank Account

Affiliated Entities

Bank Account

As 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 Number

IBAN

BIC

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



## 1

2

# Financial information for affiliated entities

| Grant Management   |                      | Grant Agreement Data                                                                                                                                                                                                                                          |                                                                                                                                                                                                                        |
|--------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2195500000 - S...) | SOCPL-2021-INFO-REPR | Beneficiary I: 157 G 111<br>Legal Name: A. C. P. O. E. S. T. R. U. K. T. I. O. N. G. M. B. H.<br>PIC: 97 99 99 XXXXX Status: VALIDATED<br>Legal Address: A. C. P. O. E. S. T. R. U. K. T. I. O. N. G. M. B. H., D. U. S. S. E. L. D. O. R. F., Germany XXXXXX | Affiliated Entity I: I.O.N.<br>Legal Name: I.E.S.T.R.U.K.T.I.O.N.G.M.B.H. DUSSELDORF<br>PIC: 99 99 99 XXXXX Status: VALIDATED<br>Legal Address: I.E.S.T.R.U.K.T.I.O.N.G.M.B.H., D. U. S. S. E. L. D. O. R. F., Germany |
|                    |                      | Partner Summary ✓                                                                                                                                                                                                                                             | <b>Financial Information</b> ✓                                                                                                                                                                                         |

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



# Verify financial information

**SyGMa** System for Grant Management Grant Agreement Data

Call: ERC-2021-STG  
Topic: ERC-2021-STG

Project Summary Beneficiaries General Information Reporting Periods Progress Reporting Periods GA Information GA Options **Financial Information** LF Overview Associated Partners Principal Investigator Researchers Work Packages Deliverables Ethics Info Security

Financial Information ?

Prefinancing and guarantee

[+ add prefinancing](#)

| Name                                                              | Amount  | Percentage |            | Action  |
|-------------------------------------------------------------------|---------|------------|------------|---------|
| ▼ Prefinancing 1 (initial)                                        | 20.00 € | 40.00 %    | of 50.00 € | Default |
| Mutual Insurance Mechanism (MIF) / Guarantee Fund (MIF 2014-2020) | 4.00 €  | 8.00 %     |            | Default |

Maximum grant amount(award decision) 50.00 €

Budget table

| Estimated eligible costs (per budget category) |             |                                        |                                        |                                       |                         |                            |               |                                     |                                         |                            |                        |
|------------------------------------------------|-------------|----------------------------------------|----------------------------------------|---------------------------------------|-------------------------|----------------------------|---------------|-------------------------------------|-----------------------------------------|----------------------------|------------------------|
| Direct costs                                   |             |                                        |                                        |                                       |                         |                            |               |                                     |                                         |                            |                        |
| A. Personnel costs                             |             |                                        |                                        |                                       | B. Subcontracting costs | C. Purchase costs          |               |                                     | D. Other cost categories                |                            |                        |
| Number                                         | Beneficiary | A.1 Employees (or equivalent), A.2 ... | A.1 Employees (or equivalent), A.2 ... | A.4 SME owners and natural person ... | Subcontracting          | C.1 Travel and subsistence | C.2 Equipment | C.3 Other goods, works and services | D.2 Internally invoiced goods and se... | D.8 ERC additional funding | D.9 ERC additional fun |
| 1                                              |             | 15.00 €                                | 10.00 €                                | 277.42 €                              | 6.00 €                  | 7.00 €                     | 8.00 €        | 30.00 €                             | 12.00 €                                 | 100.00 €                   |                        |
| 2                                              |             | 150.00 €                               | 0.00 €                                 | 0.00 €                                | 60.00 €                 | 70.00 €                    | 80.00 €       | 300.00 €                            | 120.00 €                                | 0.00 €                     |                        |
| 3                                              |             | 1,500.00 €                             | 0.00 €                                 | 0.00 €                                | 600.00 €                | 700.00 €                   | 800.00 €      | 3,000.00 €                          | 1,200.00 €                              | 0.00 €                     |                        |



# Managing Associated partners

The screenshot shows the SyGMA (System for Grant Management) interface for 'Grant Agreement Data'. A horizontal menu at the top contains various tabs: Project Summary, Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners (highlighted with a red box and a green checkmark), Researchers, Work Packages, Deliverables, Milestones, Reviews, and Critical Risks. Below the menu, a 'DOCUMENTS' button is visible. The main area is titled 'Associated Partners' and features a table with columns: Number, Short Name, Legal Name, Country, PIC, EDES, and Action. A '+ Add new Associated Par' link is located at the bottom right of the table area.

- ☐ You can enter an associated partner, then select the partner by clicking it and enter the details screen, where you can associate with an existing beneficiary from the available list
- ☐ Associated partners cannot declare costs (very limited exceptions can apply)
- ☐ They will be allowed to be WP leaders (currently not foreseen)
- ☐ Budget table in GA (Annex 2) will not include any information of the budget of AP. Information is included in the proposal and if needed, some information can also be included in DoA - part B
- ☐ Coordinator will be able to enter researchers in the researcher table for AP

# Managing Researchers (new in HE)

- Listing the researchers funded by the action is obligatory under HE; each beneficiary enters their own
- Option A: Complete manually all the mandatory data fields
- Option B: Retrieve the researcher's personal data (the ones made public, using the information provided by the researcher in the My Person Profile section of the F&T Portal)
- Removal of researchers listed in proposal only conditional (subject to EU agreement)

The screenshot displays the 'Add Researcher data' form within the Grant Management interface. The form is divided into several sections:

- Partner\* :** A dropdown menu.
- Email\* :** A text input field with an 'Import Profile' button.
- Role\* :** A dropdown menu.
- Person Profile Data**
  - Title:** A text input field.
  - First name\* :** A text input field.
  - Surname\* :** A text input field.
  - Gender\* :** A dropdown menu.
  - Nationality\* :** A dropdown menu.
  - Career stage\* :** A dropdown menu.
- Personal Identifiers**
  - A table with columns: Type, Id, Actions.
  - An 'Add Identifier' button.
  - A 'Clear Identifiers' button.

At the bottom, there is a legend indicating that fields marked with an asterisk (\*) are mandatory. The form also includes 'Add' and 'Cancel' buttons.

# Deliverables/Milestones/Risks

- Deliverables, Milestones and Risks are not automatically listed
- All deliverables need to be completed Please select appropriate Dissemination status (Public, Sensitive (limited under conditions in GA), EU classified (EU-restricted/EU-confidential/EU-secret)
- 

The screenshot displays the 'Grant Management' interface. At the top, there's a header with the European Union flag and the text 'Grant Management'. Below this, a navigation bar contains various tabs: Project Summary, Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners, Researchers, Work Packages, Deliverables, Milestones (highlighted with a red border), Reviews, and Critical Risks. Each tab has a corresponding icon: a blue 'i' for Project Summary, a yellow warning triangle for Beneficiaries, General Information, Reviews, and Critical Risks, a green checkmark for Reporting Periods, GA Information, GA Options, Financial Information, Associated Partners, and Researchers, a red 'X' for Work Packages and Deliverables, and a blue 'i' for LF Overview. Below the navigation bar, there's a section titled 'Milestones' with a yellow warning triangle icon. Underneath, there's a table with columns: Number, Title, Lead Beneficiary, Due Date (in months), Means of Verification, and Work Package No. The table is currently empty. At the bottom right, there's a 'Validate' button.

| Number | Title | Lead Beneficiary | Due Date (in months) | Means of Verification | Work Package No. |
|--------|-------|------------------|----------------------|-----------------------|------------------|
|--------|-------|------------------|----------------------|-----------------------|------------------|

# Ethics

- Ethics are 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'
- 

Grant Management

Project Summary: **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: ☐ NESC and/or HE: ☐ Ethics Opinion: Cleared

Ethics categories/issues identified during the Ethics Review

- HEP- HUMAN EMBRYONS...
- POP- PERSONAL DATA
- EPO- ENVIRONMENT PR...
- BL- HUMANS
- A- ANIMALS
- AI- ARTIFICIAL INT...
- HCT- HUMAN CELLS...
- NEC- NON-EU COUNTR...
- OET- OTHER ETHICS...

Ethics requirements

| Number | Ethics Issues Category | Description | Before Signature | Compliance Date | Status |
|--------|------------------------|-------------|------------------|-----------------|--------|
|--------|------------------------|-------------|------------------|-----------------|--------|

Ethics Reports

| Title | AKIS Ref | Date | Type | Doc |
|-------|----------|------|------|-----|
|-------|----------|------|------|-----|

Validate

# Security (new)

**Information regarding Security Constraints will be displayed in the corresponding tab if Security data is imported the IT system as a result of Security Evaluation**

SyGMa  
System for Grant Management

Grant Agreement Data

1010687-CL2-2021-GIB-PRES-01-IBA  
Call: HORIZON-CL2-2021-GIB-PRES-01-IBA  
Topic: HORIZON-CL2-2021-GIB-PRES-01-01-IBA

HORIZON-CL2-2021-GIB-PRES-01-01-IBA

Deliverables

Milestones

Reviews

Critical Risks

Ethics Info

Security

H+

DOCUMENTS

Security

Security Issues:

☐

Security Classification:

☒ NSC

No security concern

☐ REC

Security recommendations

☐ R-UE/EU-R

RESTREINT UE/EU RESTRICTED

☐ C-UE/EU-C

CONFIDENTIEL UE/EU CONFIDENTIAL

☐ S-UE/EU-S

SECRET UE/EU SECRET

☐ NOF

Proposal too security-sensitive to be funded

Security Classification Reason:

The Security Appraisal is not foreseen. The proposal was automatically cleared by the system.

Validate





# Declaring a gender equality plan

Gender equality plan (GEP)

Do you have a gender equality plan? \*

☒ Yes ☐ No

Please provide answers to all the questions below. This is an obligation for all types of organisations.

For the Gender Equality plan to be considered compliant you must be able to answer 'yes' to all the questions below.

Please note that for public bodies, research organisations, and higher and secondary education institutions the existence of a Gender Equality Plan is an eligibility criterion, meaning that without it an organisation of this type will not be allowed to submit a grant proposal.

This is a self-assessment and you are not required at this stage to upload the Gender Equality Plan document. The declaration will be considered an official statement and by selecting 'yes' you are formally confirming that your organisation has a gender equality plan and that this document is signed by senior management and available on the organisation's website.

Filing the questionnaire is based on self-assessment. You will not be required at this moment to upload the document, however your answers to the questions below will be considered as official statement; failure to provide the Gender Equality Plan if/when requested, may lead to exclusion from the list of successful applicants, or - in case of signed grant - may lead to grant termination and/or recoveries of amounts paid.

It must cover at least the following building blocks:

Failure to provide the Gender Equality Plan if/when requested, may lead to exclusion from the list of successful applicants, or - in case of signed grant - may lead to grant termination and/or recoveries of amounts paid.

Public GEP: the GEP is a formal document published on the institution's website and signed by the top management \*

☒ Yes ☐ No :-)

Dedicated resources: commitment of resources and gender expertise to implement it \*

☒ Yes ☐ No

Data collection and monitoring: gender disaggregated data on personnel and students / and annual reporting based on indicators \*

☐ Yes ☒ No :-)

Training: Awareness raising/trainings on gender equality and unconscious gender biases for staff and decision-makers \*

☒ Yes ☐ No

Minimum areas to be covered and addressed via concrete measures and targets:

Work-life balance and organisational culture \*

☒ Yes ☐ No

Gender balance in leadership and decision-making \*

☒ Yes ☐ No

Gender equality in recruitment and career progression \*

☒ Yes ☐ No

Integration of the gender dimension into research and/or teaching content \*

☒ Yes ☐ No

Measures against gender-based violence including sexual harassment \*

☒ Yes ☐ No

Cancel OK

## Declaring a Gender Equality Plan in participant register

- In the wizard that opens, you need to select yes to the first question: **does your organization have a gender equality plan?**
- Then you need to carefully read all the required criteria and answer the **subsequent questions**
- Failure to fulfil one of the required criteria (at least the top 4 ones) is equivalent to not having a gender equality plan - > the initial question (if you have a GEP) will be automatically set to 'No'.
- Please read all the relevant information and answer carefully; Failure to provide the Gender Equality Plan if/when requested, may lead to exclusion from the list of successful applicants, or - in case of signed grant - may lead to grant termination and/or recoveries of amounts paid.



# Declaring a gender equality plan

My Person Profile

My Organisation(s) 1

Grants

My Proposal(s)

My Formal Notification(s)

Data management of the organizations, search functions under the 'My organisations'

Grant Management Services will be unavailable on Thursday, 09.12.2021, between

### My Organisation(s)

Results: 2

| LEGAL NAME            | STATUS   | ACTIONS                                                                                              |
|-----------------------|----------|------------------------------------------------------------------------------------------------------|
| My organization       | Declared | 2 Actions                                                                                            |
| NCP Test University A |          | 3 View Organisation<br>Modify Organisation<br>Edit Organisation Roles<br>View Partner Search Profile |

Organisation Data Legal information 4 Authorized users / LEAR Bank Accounts Financial capacity Messages Documents SME

5 Edit Legal Information

Legal entity status ☐ a natural person ☒ a legal person

Legal form

VAT number

Legal register

Registration number

Registration date

Legal entity type ☒ private entity ☐ public body

Legal entity qualification ☐ non-profit ☒ for-profit

Is it a civil society organisation? ☐ Yes ☒ No

International organisation ☐ Yes ☒ No

International Organisation of European Interest (IOEI) ☐ Yes ☒ No

International Organisation of European Interest for Digital Europe (IOEI Digital Europe) ☐ Yes ☒ No

International European Research Organisation for Horizon Europe (IERO Horizon Europe) ☐ Yes ☒ No

Research organisation ☐ Yes ☒ No

Secondary/higher education establishment ☐ Yes ☒ No

Gender equality plan

6 Change GEP

Gender equality plan ☒ Yes ☐ No

In HE, organizations (beneficiaries or their affiliated entities) that are of type: **Public Body, Research Institutions (public and private), Higher and Secondary Education (public and private) from MS or Associated Countries** need to have a **Gender Equality Plan (eligibility criterion)**. The requirement applies also for Affiliated Entities.

## How to declare having a Gender Equality Plan in participant register:

If you are from a **concerned organization that requires a GEP** to participate, then:

- you log in the F&T portal
- Select My Organization (step 1)
- Select actions (Step 2) -> Modify organization (step 3)
- Select the tab-> legal information (step 4)
- Select edit legal information (step 5) -> change GEP (Step 6)

# Validations



Project 8823 (Project 8823)

HORIZON 2020

Call: H2020-INFRAIA-2014-2015 Action:

Resp. Unit: RTD/B/07 Duration:

DOCUMENT

Project Summary

Project 8823 (Project 8823)

Responsible Unit:

Call:

Topic:

Type of Action:

Duration:

Budget Information:

Total Costs in the Proposal:

Max EU Grant Amount(following evaluation):

Total Costs:

Maximum Grant Amount:

Officers:

Project Officers: (RTD)

Deadlines:

Deadline for first version of the grant (annexes):

Deadline for the signature of the participants' declarations:

Deadline foreseen for the signature of the grant agreement:

**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]
- 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 [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 92276467 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 92276467 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 (RHP)

- No PLSIGN assigned for BEN in IAM: The Beneficiary 977930 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 977930 has no Legal Signatory representative selected [Project Representatives]

▼ Beneficiary 4 (RHP)

- No requested contribution check: There is no maximum amount of grant requested [Cost Break Downs]

Milestones

Reviews

Critical Risks

SAVE

Validate



# Documents upload (part B)

- 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**

The screenshot displays the Horizon 2020 application interface. At the top, a navigation bar includes tabs for Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Work Packages, Deliverables, Milestones, Reviews, Critical Risks, and Ethics Info. Below this, a 'DOCUMENTS' tab is highlighted with a red box. The main area shows a list of documents to be uploaded, including 'Grant Agreement', 'Annex 1 - Description of the action (part A)', 'Annex 1 - Description Of Action (part B)', 'Annex 2 - Estimated budget of the action', 'Annex 3 - Accession Forms', 'Annex 4 - Model for the Financial statement', 'Annex 5 - Model for the certificate on the financial statements', and 'Annex 6 - Model for the certificate on the methodology'. The 'Annex 1 - Description Of Action (part B)' row is selected, and the 'Upload' button is highlighted with a red box. The interface also shows a 'Title' field and a 'SAVE' button.

| Document                                                        | Status/Action |
|-----------------------------------------------------------------|---------------|
| Grant Agreement                                                 | ZIP           |
| Annex 1 - Description of the action (part A)                    | PDF           |
| Annex 1 - Description Of Action (part B)                        | PDF           |
| Annex 2 - Estimated budget of the action                        | PDF           |
| Annex 3 - Accession Forms                                       | PDF           |
| Annex 4 - Model for the Financial statement                     | PDF           |
| Annex 5 - Model for the certificate on the financial statements | PDF           |
| Annex 6 - Model for the certificate on the methodology          | PDF           |
| Grant Agreement Summary                                         | ZIP           |
| Grant Agreement Data Sheet                                      | PDF           |

# Submission to EU

MY PROJECT

Call: HORIZON-ERC-2021-  
VICECHAIRS-IBA

Type of Action: **XXXXXXXXXXXX**

Acronym: **XXXXXXXXXX**

Current Phase: Grant  
preparation

Number: **XXX**

Duration: 24 months

Start Date:

Estimated Project Cost:  
€24,762.50

Requested EU Contribution:  
€50.00

Contact: **XXXXXXXXXX**

Latest Legal Data

Active Processes

Document Library

Communication Centre

Archived Processes

Launch new interaction with the EU

01 Oct 2021

Submitted

Informed

Invited

Prepared

03 Jul 2022  
(3/275 days)

Signed

Paid

Terminate

Grant agreement data preparation

GA Declaration - GAP-227136 - 973276467 signature

Sign

Process documents

Evaluation Result Letter (1)

Evaluation Summary (1)

Security Scrutiny (1)

Process communications

Process history

Submit to EU

Expand All

Collapse All

ONLINE MANUAL

HOW TO

© European Communities - Version 11.13.2





# Thank you!

## # HorizonEU

<http://ec.europa.eu/horizon-europe>



© European Union 2021

Unless otherwise noted the reuse of this presentation is authorised under the CC BY 4.0 license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

Image credits: © iVector #235536634, #249868181, #251163013, #266009682, #273480523, #362422833, #241215668, #244690530, #245719946, #251163053, #252508849, 2020. Source: Stock.Adobe.com. Icons © Flaticon – all rights reserved.

In the context of EU Horizon (Horizon Europe), deliverables are the specific, measurable outputs and results expected from projects funded under the program. These deliverables are usually defined in the project proposal and must be delivered within the agreed -upon time frame. The key deliverables in Horizon Europe can vary depending on the project, but generally, they include:

- 1. Project Reports** : These can be periodic reports (e.g., every six months or annually) to provide updates on the project's progress, achievements, and any challenges faced.
- 2. Publications** : Many Horizon Europe projects aim to publish research findings in peer-reviewed journals, conferences, or on platforms like open-access repositories.
- 3. Prototypes, Models, or Tools:** Some projects aim to develop prototypes, new technologies, models, or innovative tools that are tested and showcased as part of the project deliverables.
- 4. Data Sets** : As part of the research, projects may produce large data sets, which are made available for public use or shared with relevant stakeholders.

5. **Dissemination and Communication Materials**<sup>S</sup>: This includes brochures, websites, social media content, or reports to communicate the project's progress and outcomes to the public, stakeholders, and policymakers.
6. **Training and Capacity Building** : Deliverables may include training programs or workshops aimed at building skills among stakeholders, such as researchers, policy -makers, or the public.
7. **Policy Recommendations**: Some projects are aimed at influencing policy or guiding decision -making. Deliverables can include reports or documents with recommendations for policymakers.
8. **Final Project Report**: At the end of the project, a comprehensive final report is required, summarizing the entire project's findings, achievements, challenges, and contributions to the field.
9. **Demonstrators and Pilots** : In innovation -driven projects, demonstrators or pilot initiatives might be created to showcase how the project's results can be implemented or applied in real -world scenarios.

# Deliverable

There are a variety of deliverables in Horizon Europe projects, ranging from management handbooks and technical reports to data management plans and dissemination strategies.

## Example 6G -SANDBOX Project:

- Deliverable D1.1: 6G -SANDBOX Management Handbook
  - Work Package: WP1
  - Lead Beneficiary: KEYB
  - Type: Report
  - Dissemination Level: Sensitive
  - Due Date: Month 2
  - Link: <https://6g-sandbox.eu/dissemination/deliverables/>

# REA: CENTRAL VALIDATION SERVICE

Legal validation documents  
Requests in Participant Register

PIC 904615308

Organisation Data   Legal Information   Authorised users / LEAR    Bank Accounts   Financial capacity

Messages   Documents 3   SME

[+ New message](#)

Messages

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

|                                                                                     | Subject ↕                                                                 | Message                                            | Context ↕ | Date ↕     | Actions              |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------|----------------------------------------------------|-----------|------------|----------------------|
|  | PIC No 904615308 - LEAR appointment - Supporting documents                | Dear Participant, We understand that you have r... | Other     | 08/07/2021 | <a href="#">View</a> |
|  | PIC No 904615308 - Validation and LEAR appointment - Supporting documents | Dear Participant, Following the registration of... | Other     | 08/07/2021 | <a href="#">View</a> |

# REA: CENTRAL VALIDATION SERVICE

## Legal validation documents

Please provide the requested documents

Please upload the supporting documentation as requested by the Central Validation Service

 Documents + Add document

| Document type                                                                                                          | Document name | Upload date | Status    | Actions                                                                                      |
|------------------------------------------------------------------------------------------------------------------------|---------------|-------------|-----------|----------------------------------------------------------------------------------------------|
|  REGISTRATION DOCUMENT               |               |             | REQUESTED |  Upload  |
|  VAT EXEMPTION                      |               |             | REQUESTED |  Upload |
|  LEGAL ENTITY FORM (PRIVATE ENTITY) |               |             | REQUESTED |  Upload |

If you are not able to provide all required documentation at this time please say why and, if possible, indicate when it will be available

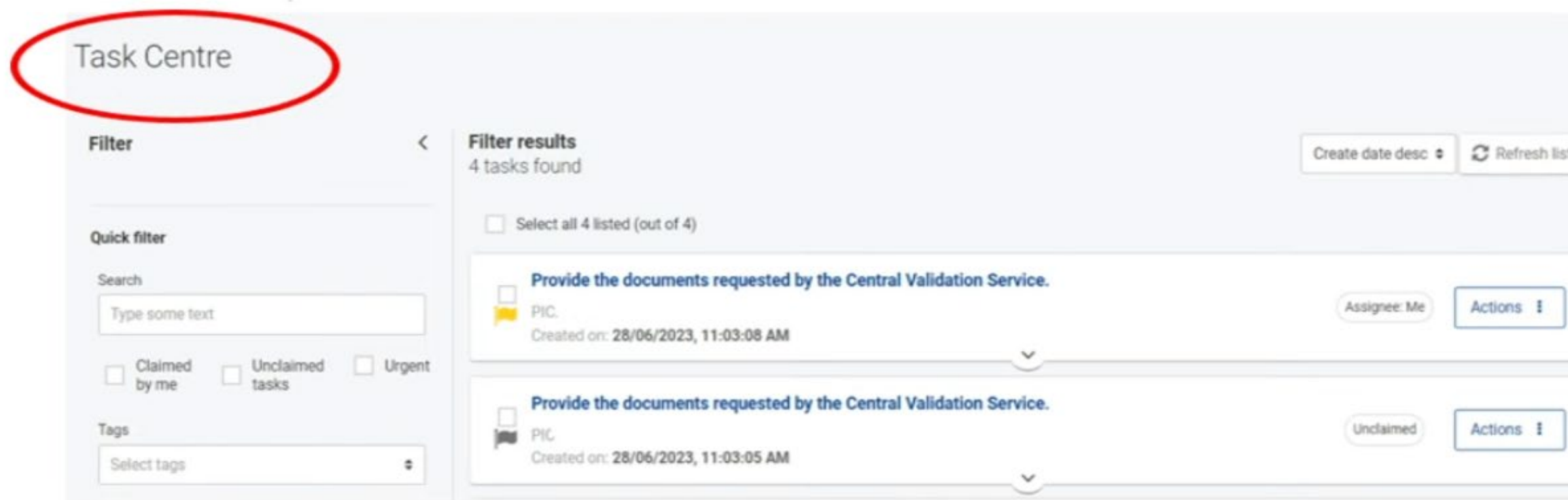
☐ I confirm, that provided documents cover all required attributes

Cancel Submit

# REA: CENTRAL VALIDATION SERVICE

## Legal validation documents

Please use *My Tasks* section to provide the Legal Entity documents



The screenshot shows the 'Task Centre' interface. The title 'Task Centre' is circled in red. The interface includes a 'Filter' section on the left with a 'Quick filter' search bar and checkboxes for 'Claimed by me', 'Unclaimed tasks', and 'Urgent'. Below this is a 'Tags' section with a 'Select tags' dropdown. The main area displays 'Filter results' showing '4 tasks found'. At the top right of the results area are buttons for 'Create date desc' and 'Refresh list'. A checkbox 'Select all 4 listed (out of 4)' is present. Two task entries are listed, both with the title 'Provide the documents requested by the Central Validation Service.' and created on '28/06/2023, 11:03:08 AM'. The first task is assigned to 'PIC' and shows 'Assignee: Me' and an 'Actions' button. The second task is also assigned to 'PIC' but shows 'Unclaimed' and an 'Actions' button.

# REA: CENTRAL VALIDATION SERVICE

## Legal validation documents

- ✓ **Legal entity form** ([template](#) to be completed, dated, stamped and signed)
- ✓ **VAT extract** (< 12 months)
  - *If not registered for VAT – proof of VAT exemption*
- ✓ **Registration extract** (< 12 months) – for private law bodies
- ✓ **Law/decree/decision** – for public law bodies
- ✓ **Treaty** – for international organisations
- ✓ **Statutes** – for non-profit organisations

# MARIE SKŁODOWSKA- CURIE ACTIONS (MSCA)



# Marie Skłodowska -Curie Actions (MSCA)



MSCA is part of **Pillar I: Excellent Science**, alongside:

- European Research Council (ERC) – funding frontier research.
- Research Infrastructures – supporting world -class scientific facilities.

## Key Objectives of MSCA:

- Enhance skills and career development for researchers at all career stages.
- Promote international, intersectoral, and interdisciplinary mobility.
- Strengthen Europe's research and innovation capacity.
- Foster collaboration between academia and industry.
- Encourage knowledge exchange and innovation.

# Marie Skłodowska -Curie Actions (MSCA)



## MSCA Funding Schemes:

MSCA funds different types of projects, each with a specific focus:

- **MSCA Doctoral Networks (DN)**

Supports PhD training networks across Europe and beyond.

Promotes structured doctoral programmes with academic and non-academic partners.

- **MSCA Postdoctoral Fellowships (PF)**

Provides individual funding for postdocs to conduct research in another country.

Supports both European Fellowships (for researchers moving within the EU) and Global Fellowships (for researchers going outside the EU and returning).

- **MSCA Staff Exchanges (SE)**

Funds short-term exchanges of research and innovation staff.

Promotes collaboration between academic, industrial, and non-academic sectors.

- **MSCA COFUND**

Co-funds regional, national, and international PhD and postdoc programmes.

Supports institutions in launching their own MSCA-style funding schemes.

- **MSCA and Citizens**

Funds science outreach activities, such as European Researchers' Night, to engage the public with science.

# Marie Skłodowska -Curie Actions (MSCA)



## Why is MSCA Important?

- One of the most prestigious and competitive EU funding programmes for researchers.
- Focuses on researcher mobility, helping individuals gain **international** experience.
- Encourages **collaboration** between academia, industry, and society.
- **Promotes open science and innovation** .

# Marie Skłodowska -Curie Actions (MSCA)



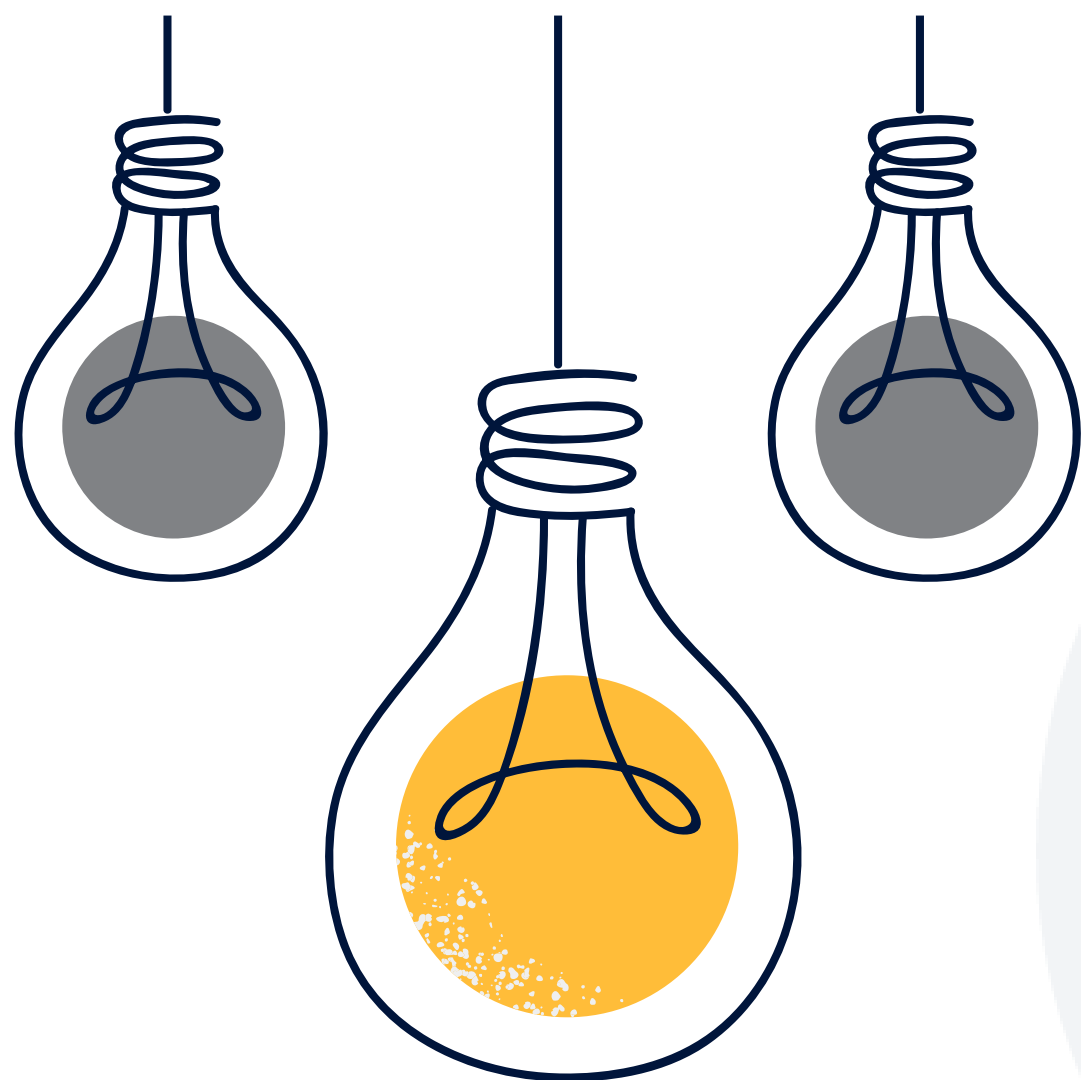
| Feature       | MSCA (Pillar I)                                       | Pillar II Funding (Thematic Clusters, Missions)                            |
|---------------|-------------------------------------------------------|----------------------------------------------------------------------------|
| Objective     | Train researchers and support their mobility          | Solve societal challenges and enhance industrial competitiveness           |
| Approach      | Bottom-up, open to all research fields                | Top-down, challenge-driven (aligned with EU policy goals)                  |
| Funding Model | Supports individual researchers and research networks | Supports large collaborative consortia from academia, industry, and policy |
| Eligibility   | Open to individuals and institutions                  | Requires multi-partner consortia (universities, companies, NGOs, etc.)     |
| Impact        | Strengthens research capacity and career prospects    | Delivers tangible solutions, policies, and market-driven innovations       |

# SOURCES



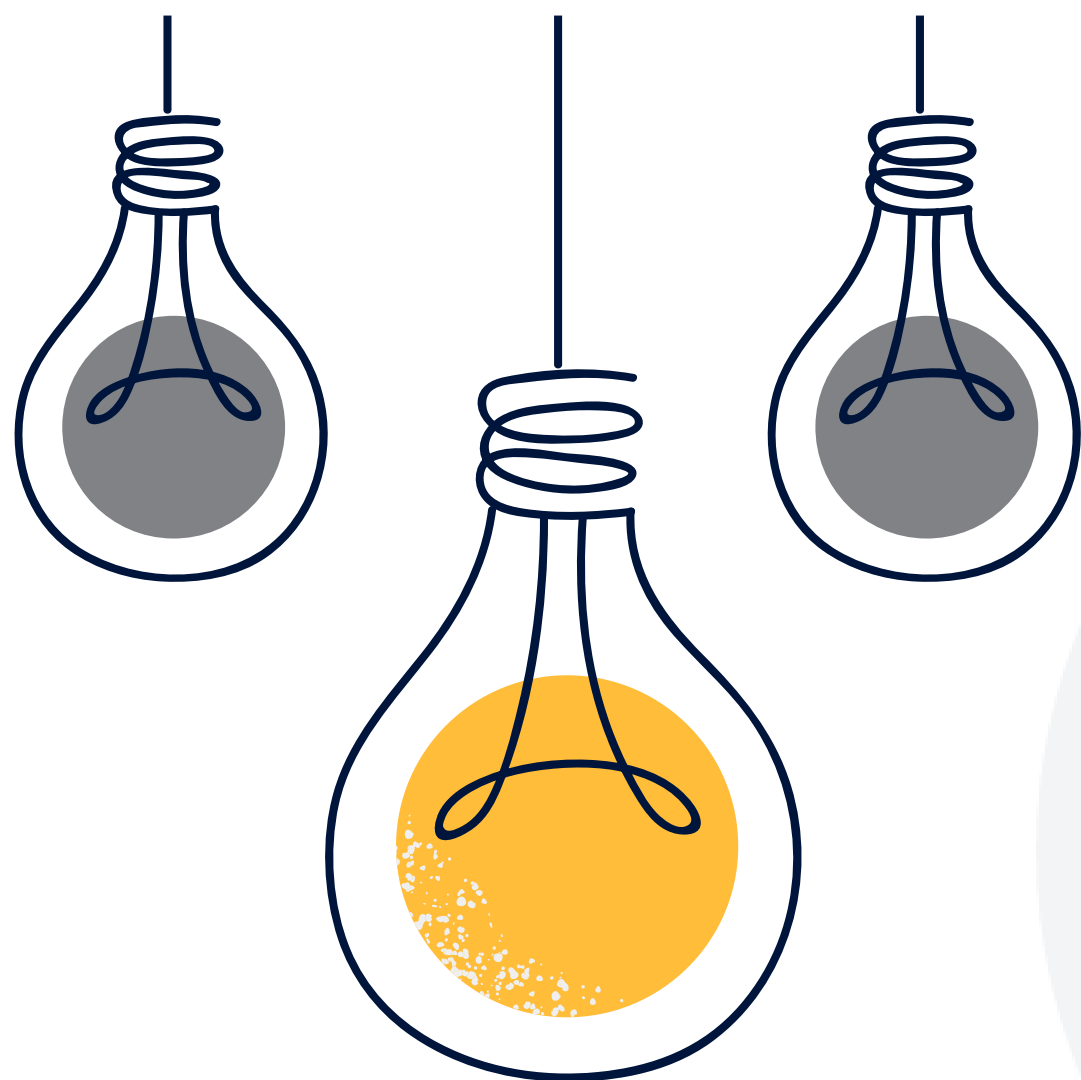
- EU Grants. AGA – Annotated Grant Agreement EU Funding Programmes 2021 -2027, Version 1.0, 01 May 2024
- “Do no (significant) harm” principle in Horizon Europe NCP webinar - 13 November 2023
- Antoaneta Victoria Folea (coord .), Daniela Dragomir, Laura Chirilă, Sabina Olaru, Dragoș Sandu, Adina Stănculea, IMPACT IN HORIZON EUROPE PROPOSALS, Unitatea Horizon Europe NCP din cadrul UEFISCDI ©. Martie 2022.
- <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home> (03.2025)

# SOURCES



- <https://eufunds.me/what-exploitation-plan-in-horizon-europe/> (02.2023)
- [https://rea.ec.europa.eu/dissemination-and-exploitation\\_en](https://rea.ec.europa.eu/dissemination-and-exploitation_en)
- [https://www.youtube.com/watch?v=VsSO\\_s1Ec84&list=P\\_LvpwljZTs-Lhwt-nnS4FYRaHwpmhkQ3Z5](https://www.youtube.com/watch?v=VsSO_s1Ec84&list=P_LvpwljZTs-Lhwt-nnS4FYRaHwpmhkQ3Z5)
- <https://eufunds.me/what-exploitation-plan-in-horizon-europe/>
- [https://rea.ec.europa.eu/dissemination-and-exploitation\\_en](https://rea.ec.europa.eu/dissemination-and-exploitation_en)
- <https://unite4horizon.eu/wp-content/uploads/2022/05/Write-a-winning-proposal.pdf>

# SOURCES



- <http://ec.europa.eu/horizon> -europe

