

Detailed description of your H2020 project

Description of the action (Annex 1)

Estimated budget for the action (Annex 2)

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Contents

- > Overview
 - Objectives, timing, general aspects
- How to complete the 'description of the action' (Annex 1)
 - Part A (online forms)
 - Part B (narrative part, Word template)
- How to complete the 'estimated budget of the action' (Annex 2)
 - Online forms



Objectives of grant preparation

- > **Transfer** information from the proposal to the grant agreement
- Collect additional information not present in the proposal (e.g. budget details, third parties)
- > **Ensure** consistency between proposal and grant agreement

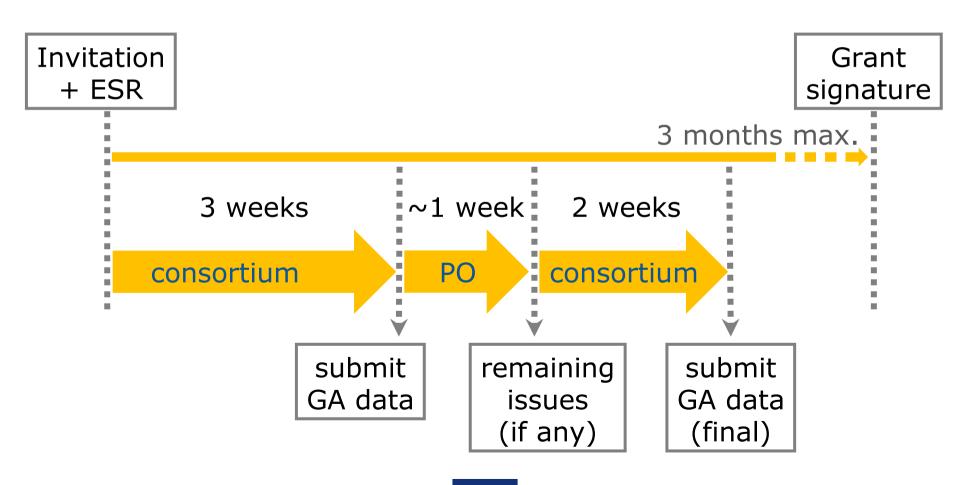
if applicable, also:

Implement any requirements from an ethics review or security scrutiny



Timing

grant agreement data (GA data)





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)



other annexes





Possible changes to your project

- Successful proposals are expected to be mature and ready to be implemented.
 - No substantial changes are allowed between your proposal and your project.
- > Optional changes:
 - Obvious errors or inconsistencies may be removed
 - You may correct shortcomings identified by the experts in the ESR (but you are not obliged to do so)
- > **Necessary** changes (can) follow from:
 - Ethics review or security scrutiny
 - Removal or replacement of a participant (if agreed)
 - Change of administrative aspects (e.g., the legal status of a participant can affect the budget)



Description of the Action (DoA)

- is a detailed description of how the project will be carried out
- follows the structure of the proposal, also comprising Parts A & B
 - Part A is partially pre-filled with proposal data. The remaining information is entered through online forms.
 - Part B is the narrative description of your project. Its sections are copied from the corresponding sections in Part B of the proposal. It is uploaded as a PDF.



DoA format - Part A

Complete online forms (Participant Portal)

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



DoA format - Part B

Complete Word-template, convert to PDF, upload

History of changes In this section you must record all changes implemented in comparison with the submitted proposal or previous DoA versions.

Table of Contents Generate a table of contents with page numbers)

2.1. Excellence

- **2.1.1. Objectives** (proposal section 1.1)
- **2.1.2.** Concept and Approach (proposal section 1.3)
- **2.1.3. Ambition** (proposal section 1.4) [not applicable for CSA type of actions]

2.2. Impact

- **2.2.1.** Expected impact (proposal section 2.1)
- **2.2.2.** Measures to maximise impact (proposal section 2.2)
 - 2.2.2.1. Dissemination and exploitation of results (proposal section 2.2.a)
 - 2.2.2.2. Communication activities (proposal section 2.2.b)



DoA format - Part B (cont.)

2.3. Implementation

2.3.1. Work Plan (proposal section 3.1)

Do NOT copy tables 3.1a, 3.1b, 3.1c, as they are included in Part A

- 2.3.2. Management structures and procedures (proposal section 3.2)
- 2.3.3. Consortium as a whole (proposal section 3.3)
- 2.3.4. Capacity of participants and links to third parties (proposal section 4)
 - 2.3.4.1. Participants (proposal section 4.1)
 - 2.3.4.2. Third parties involved (proposal section 4.2)
 - 2.3.4.3. [if applicable:] Financial support to third parties (proposal section 4.3)
- 2.3.5. Planned use of resources (proposal section 3.4)

Only copy tables 3.4b. Do NOT copy table 3.4a, as it is included in Part A



DoA format - Part B (cont.)

if applicable

2.3.6. Ethics and Security (proposal section 5)

2.3.6.1. Ethics (proposal section 5.1)

2.3.6.2. Security (proposal section 5.2)



Other points to watch

- > Avoid repetition of information
 - E.g., no duplication between work plan tables (Part A) and free text (Part B)
 - All information should appear in one, findable, place only
- > Ethics and security (see below)
- Communication (see below)



Ethics review and security scrutiny

- Your proposal may be subject to an ethics review and/or a security scrutiny procedure
 - For example, if you flagged such issues in your proposal or if specified in the relevant call for proposals
- > The **results must be implemented** in the grant agreement
 - 'Ethics requirements' are binding, they will be entered by the PO in Part A (DoA)
 - You need to update the ethics section in Part B (DoA) to ensure that any 'ethics requirements' are met
 - There may be 'ethics requirements' that you need to meet before the grant can be signed
 - Similarly for security scrutiny



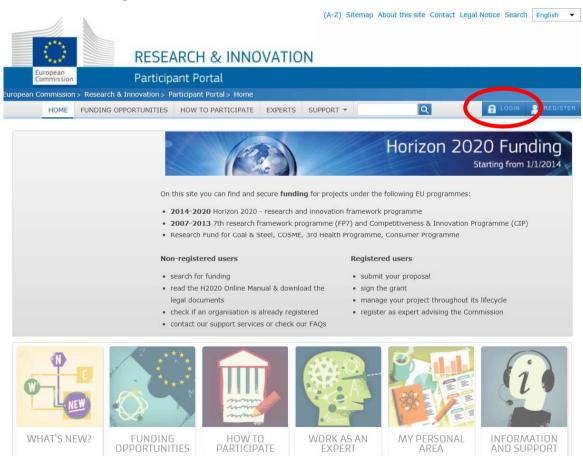
Communication

- ➤ Increased importance in Horizon 2020
 - Communication plan in the proposal and the grant agreement
 - Promote your project and its results beyond the project's own community
 - Communicate your research in a way that is understood by non-specialists, e.g. to the media and the public
 - Inform us in advance of communication activities expected to have a major media impact
- ➤ Communication ≠ dissemination
 - Dissemination is a separate obligation (e.g. through scientific articles and conferences)





Complete Annexes 1 and 2 at the Participant Portal





Start screen

RESEARCH & INNOVATION

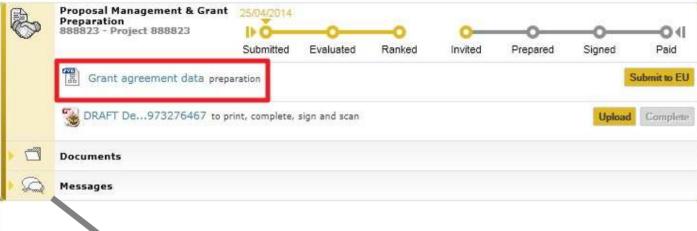
Participant Portal - Grant Management Services

Messages



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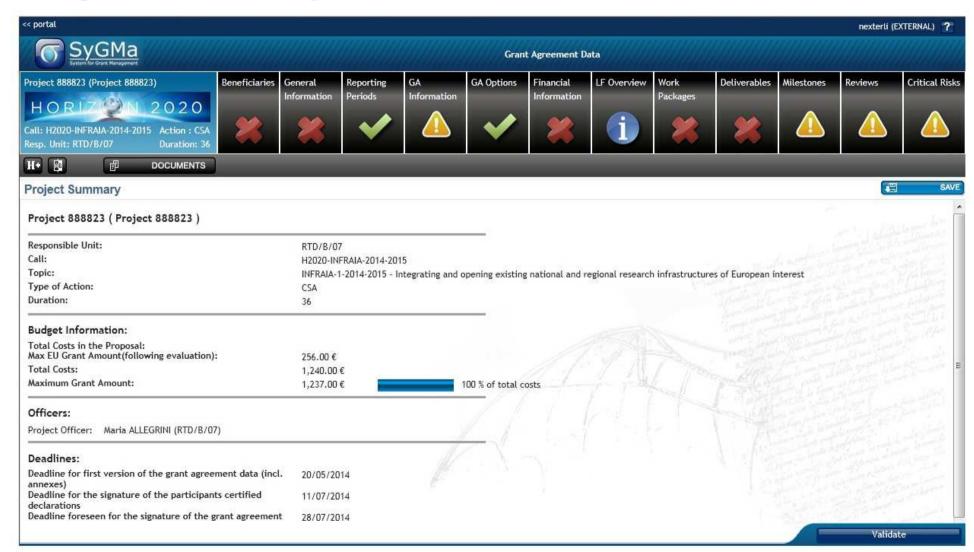
H2020 ONLINE MANUAL



© European Communities - Version 1.0.4



Project summary





Icons used



No missing information



Missing information: blocking



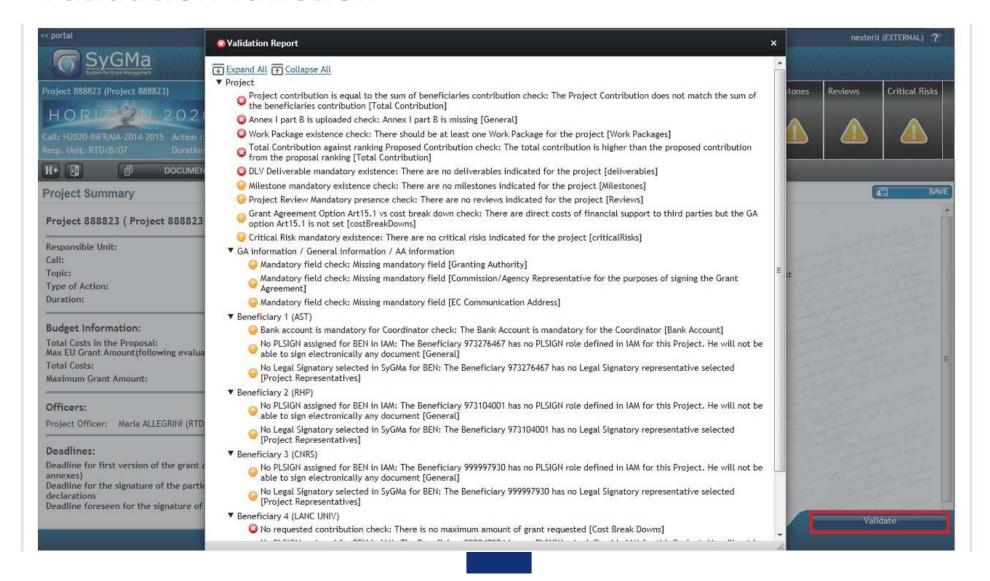
For information only



Missing information: not blocking at this point

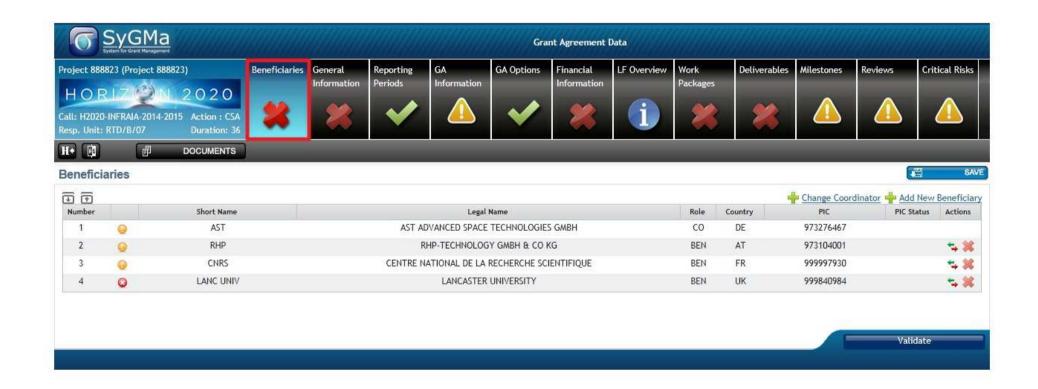


Validation function



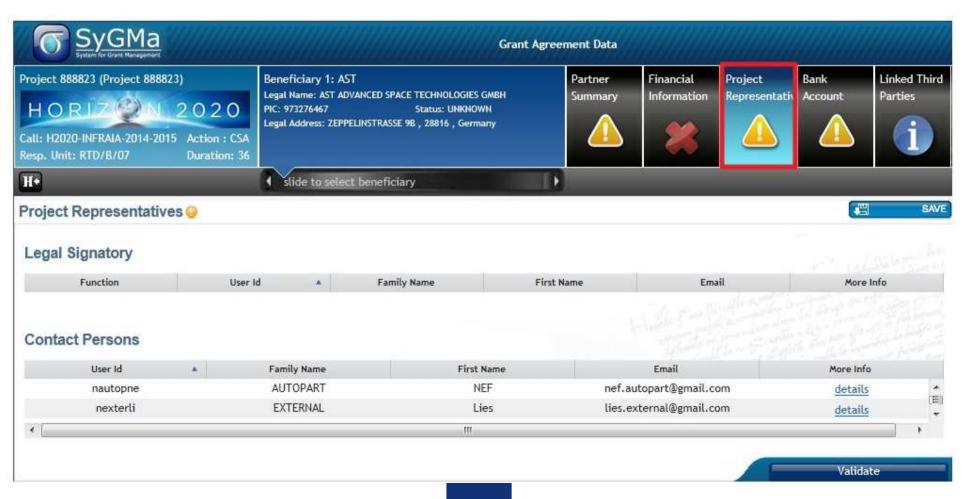


Beneficiary data are imported from your proposal



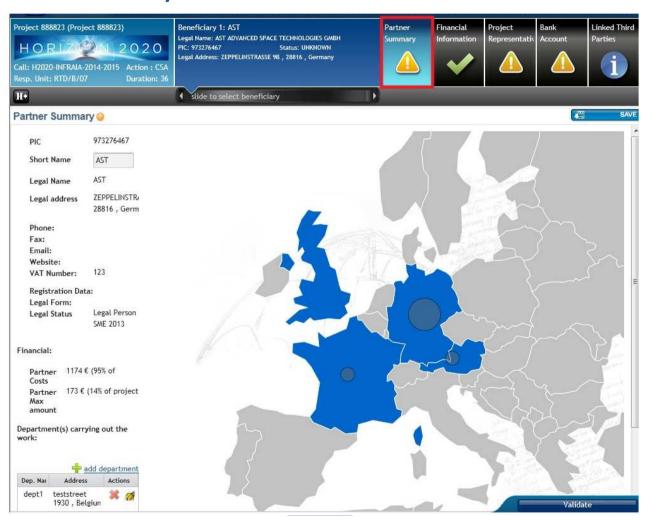


Project representatives are imported for each beneficiary: check and update if necessary





Add the department(s) carrying out the work for each beneficiary





Add linked 3rd parties (if any)

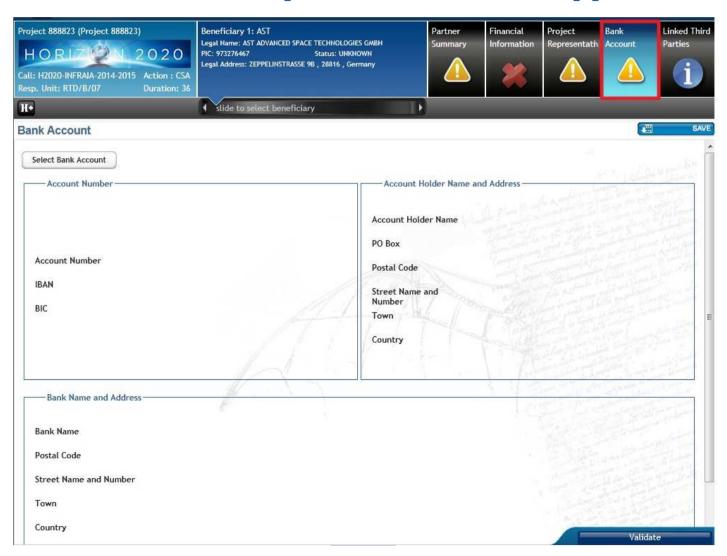
for each beneficiary



NB: Linked 3rd parties need to register and are validated like beneficiaries.

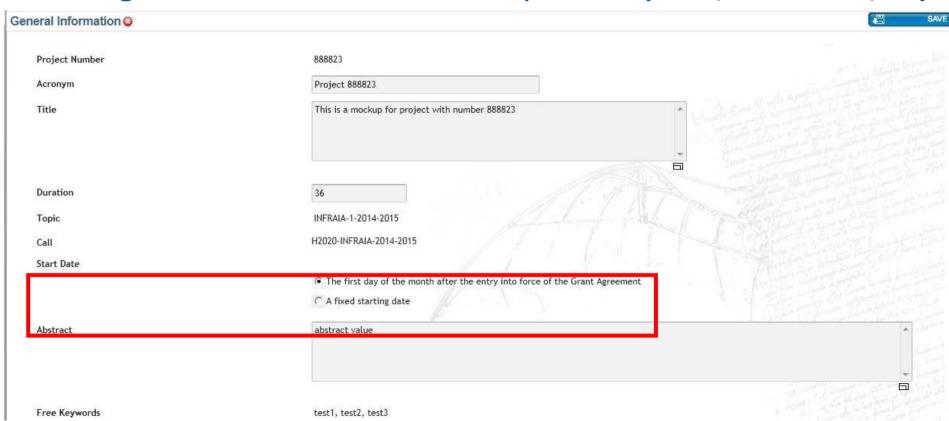


Select bank account (coordinator only)





Specify the project's start dateOther general information is imported (title, abstract, ...)



NB: If you choose a fixed start date you will need to provide a justification

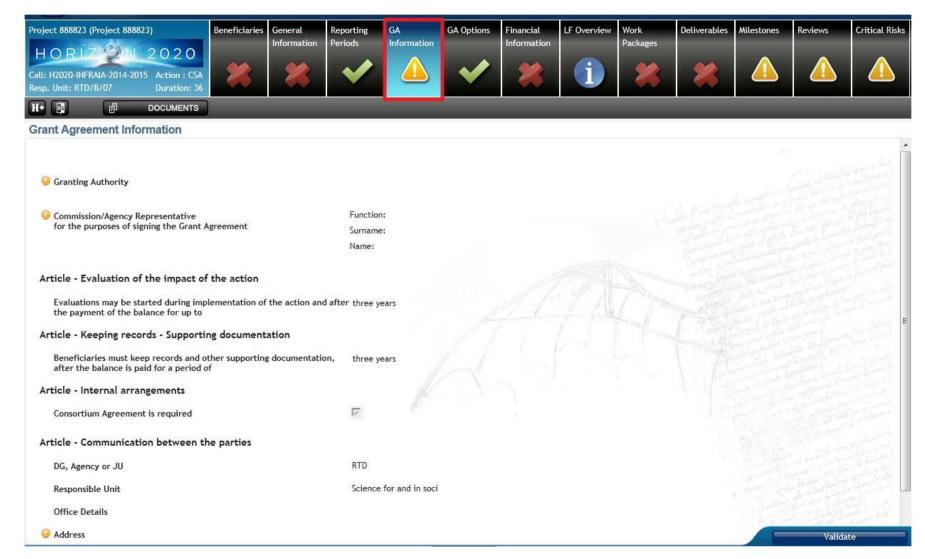


Reporting periods will be completed by the project officer





Grant agreement information (read only)

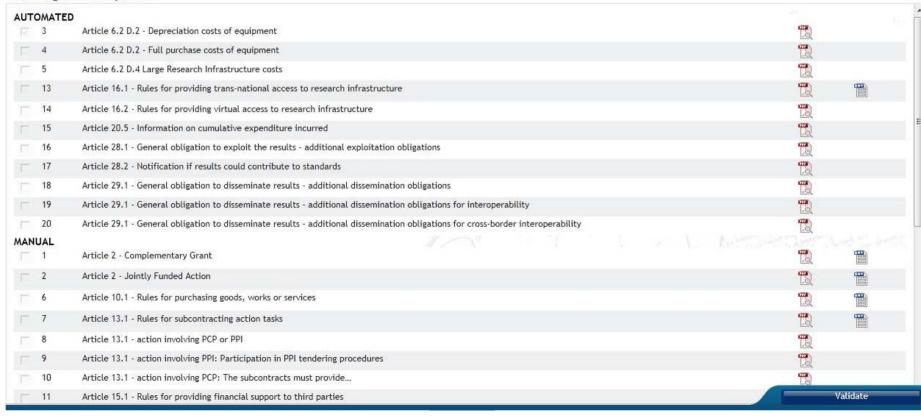




Grant agreement options (read only)



Grant Agreement Options





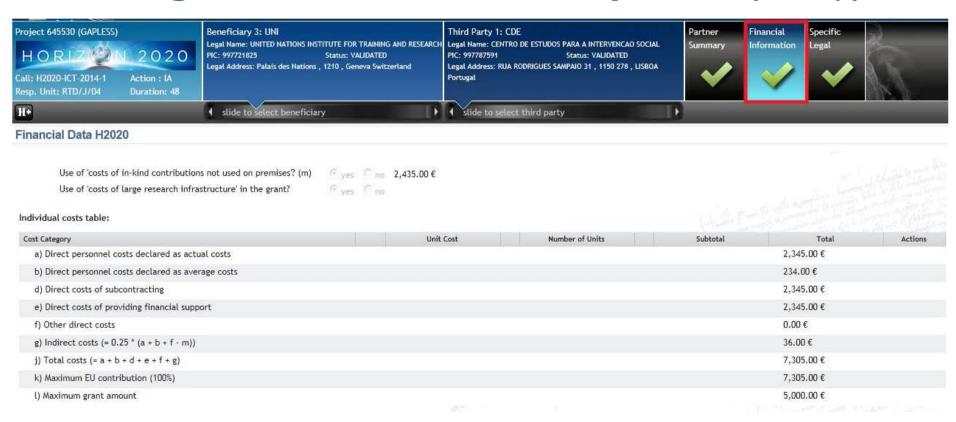
Budget tables are imported:

check and update if needed





Add budget details of linked 3rd parties (if any)

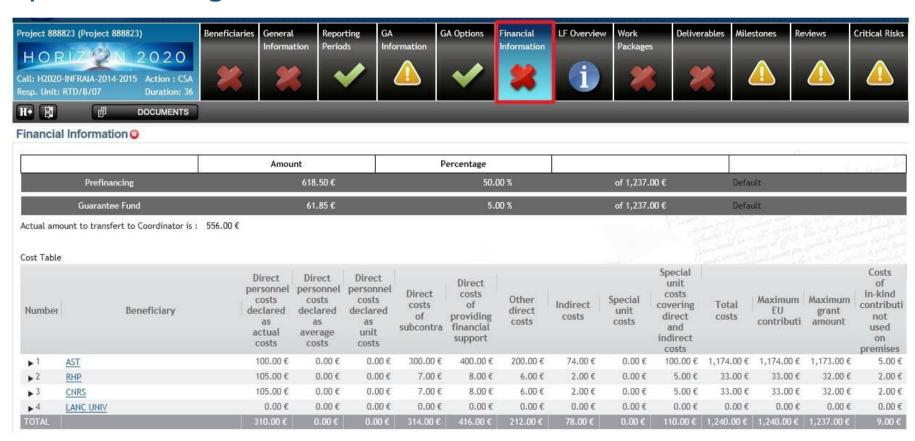


NB: In the proposal, you specified a cumulative budget for each beneficiary and its linked 3rd parties. In the grant agreement, this must be resolved into separate budgets. The sum remains unchanged.



Financial information

- check budget table
- prefinancing amount is for information



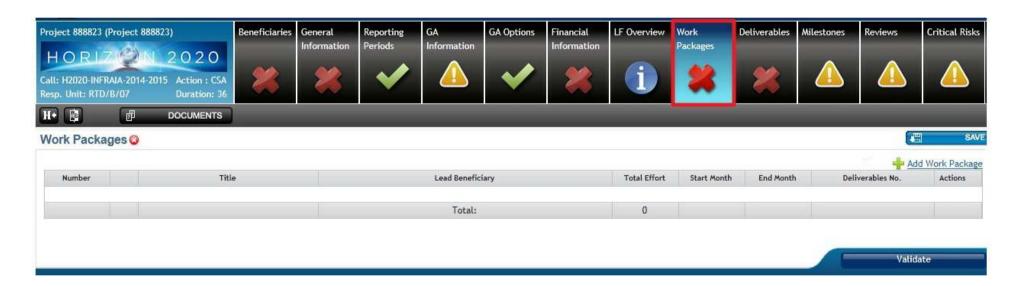


Legal & financial overview (read only)





Add work packages from Part B of your proposal



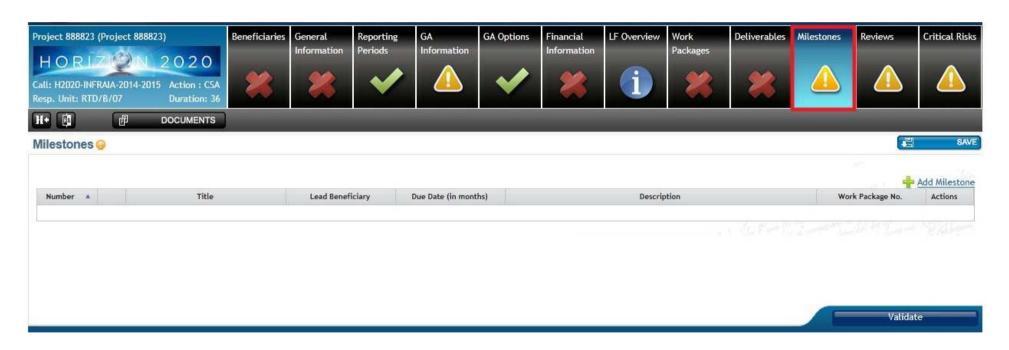


Add deliverables from Part B of your proposal





Add milestones from Part B of your proposal





Project reviews will be completed by the project officer



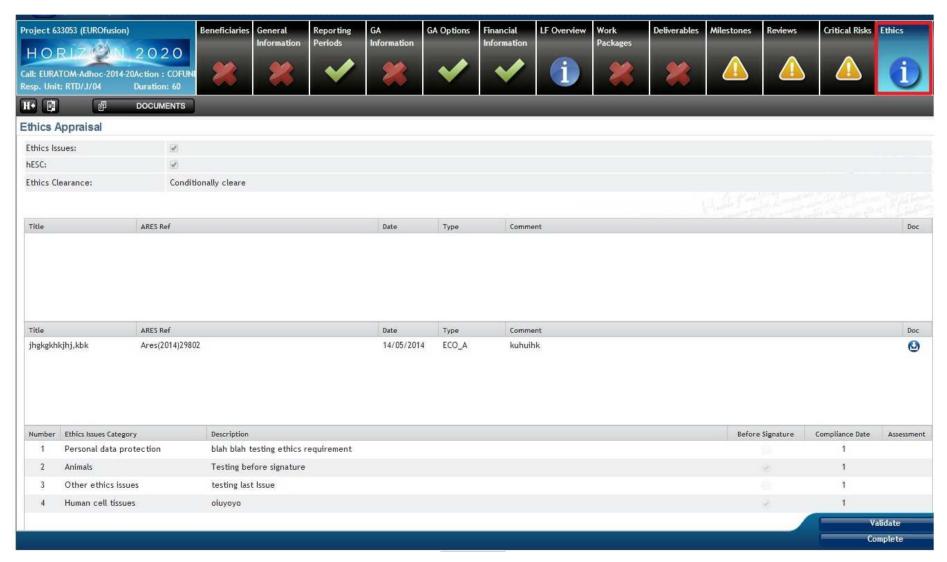


Risks and mitigation measures from Part B of your proposal





Ethics screen (read only)



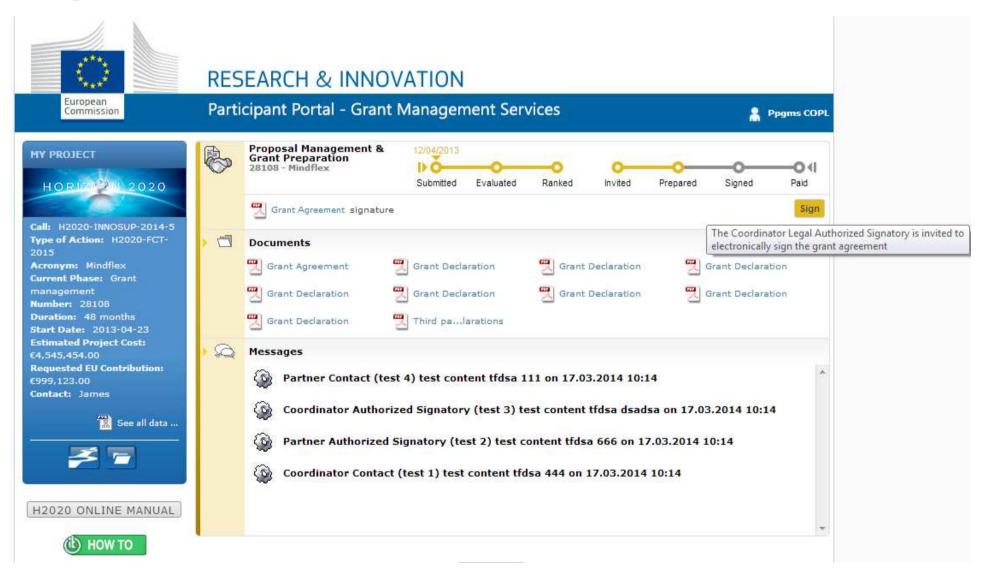


Upload Annex 1, Part B (pdf)





Signature





More information available at the Participant Portal

Guide for Grant Agreement Preparation

http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/gap/h2020-guide-gap_en.pdf

> H2020 ONLINE MANUAL

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/from-evaluation-to-grant-signature/grant-preparation_en.htm



https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchG MS/1.+Grant+Management+Services+tool

