

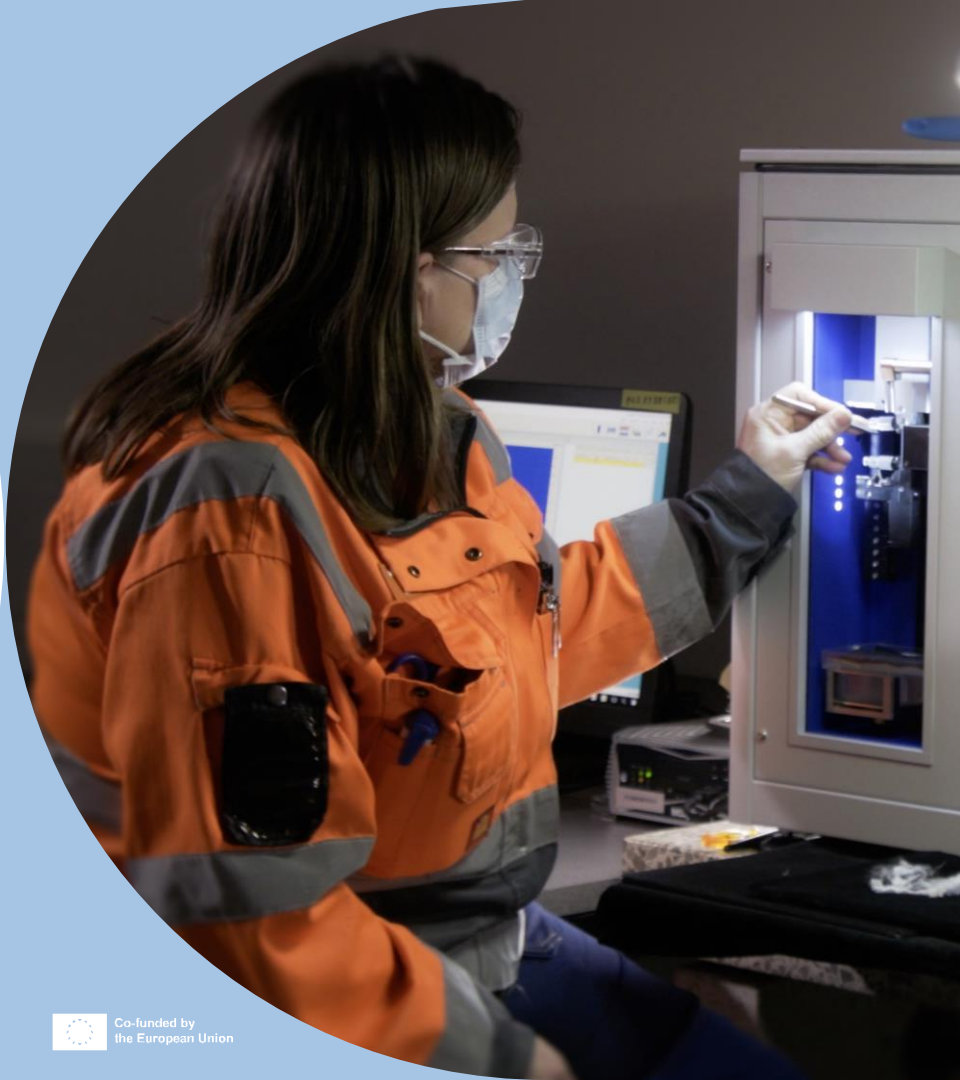
CBE JU Call 2023

GAP timeline

Dieter BRIGITTA

Call coordinator

06/02/2024



CBE JU: embedded in Horizon

20/09/2023

24/01/2024

22/05/2024

Call deadline

Invitation to
grant preparation

Grant signature

submission

Proposal Evaluation

Grant Agreement Preparation

Pre-financing

5 months maximum

8 months maximum

Accession to
GA

GAP: a step-by-step process

- Overview of main deadlines (cf. p.3 of your ‘GAP actions list’)
 - **Asap**: define *fixed* project start date
 - **End of February**:
 - Validations completed (PIC / Legal entity, LEAR, COO’s bank account)
 - Financial Capacity Assessment (FCA) of Coordinator
 - Submission via F&T Portal/SyGMA of first full DoA / GA
 - **End of March**
 - (P)LSIGNs appointed + e-signature of Declarations of Honour (DoH)
 - Consortium Agreement (CA) signed (*lesson learnt*)
 - **GA signature** (depends on envisaged project start date)
 - 15 May: latest possible e-signature by Coordinator
 - 22 May: latest possible e-signature by CBE JU Director

GAP: an obstacle course

- Main elements to consider
 - Holiday periods (Easter holidays in April, many public holidays in May,...)
 - New / not yet validated beneficiaries, LEARs and financial capacity
 - Consortium Agreement (CA)
 - Start date vs. GA signature vs. kick-off meeting vs. period timing
 - Horizon Europe novelties:
 - Gender Equality Plan (GEP), ‘Open Science’,...
 - New SyGMA tabs: Researchers, JU contributions,...
 - CBE specifics: IKOP/IKAA (mainly for Innovation Actions incl. Flagships)

Today’s mantra: “You might need more time than you think → *start asap*”

Validation issues

- **PIC and LEAR validation**
 - At the start of GAP, high % of validated PICs and LEARs...
 - ...but please remain vigilant, if e.g. new organisations would need to be added to the consortium, if 'old' LEAR mandates need to be extended,...
 - Especially relevant for '**affiliated entities**' (ex-'linked third parties'), who might only be 'discovered' during GAP → need for new validations needs to be identified (and added to SyGMA) and communicated to CBE JU asap
- **Best practice:** identify new consortium members and LEARs (if any) asap!
 - **Tip:** ask consortium members if all involved staff is on the payroll of the legal entity (PIC) described in the proposal (→ need for new PIC additions / validation?)
 - **Tip:** ask beneficiaries to e-sign Declaration of Honour (DoH) asap → LEAR issues (if any) will become apparent very quickly...

FCA issues

- Financial Capacity Assessment (FCA)
 - In principle only requested for – some - coordinators...
 - ...but weak FCA can have negative / delaying effects on other beneficiaries as well

Consortium Agreement (CA)

- **What?**
 - A private agreement between the beneficiaries, to set out the rights and obligations amongst themselves.
 - Not signed by CBE JU (↔ Grant Agreement - GA)
 - Typically includes sensitive issues such as Intellectual Property Rights (IPRs), payment modalities,...
- **Effect on timing?**
 - CA to be signed **before** CBE JU will e-sign Grant Agreement
 - **THE** bottleneck in past BBI & CBE JU calls
 - **Lesson learnt:** aim for CA signature by end of March (=> issues will surface – and can be solved – sooner + early start dates remain realistic)
- **CA format?** Free to choose; [DESCA model](#) is often used
- **Best practice:** start CA discussions asap, with the right people in your organisations (often legal department)

3 interdependent dates

- **i) Project start date vs. ii) Grant Agreement (GA) signature by CBE JU**
 - Horizon rule: earliest project start date = day 1 of the month following countersignature of GA by CBE JU
 - Based on other variables (e.g. speed of PIC & LEAR validation, CA signature,...)
- **iii) Kick-off meeting**
 - Expected to be organised by the coordinator in the first project month
 - Organising an efficient kick-off meeting takes time (e.g. ensuring that all consortium members are available)
- **Best practices:**
 - Define a realistic start date asap, allowing you to plan ahead (and keep the consortium motivated to carry out all steps on time).
 - Once the start date is clear, (re)check the periods & review timing

Horizon Europe novelties

- Gender Equality Plan (GEP)
 - Eligibility criterion for all public bodies, higher education institutions and research organisations from Member States and Associated Countries
 - Status can be checked in SyGMA – tab ‘beneficiaries’ – subtab ‘partner summary’.
 - **Best practice:** ask relevant partners to internally check & update their F&T Portal profile accordingly

Horizon Europe novelties

Project Summary	Beneficiaries	General Information	Reporting Periods	GA Information	GA Options	Financial Information	LF Overview	Associated Partners

New in Horizon Europe / CBE JU (\Leftrightarrow H2020/BBI)

JU Contributio...	Researchers	Work Packages	Deliverio...	Milestones	Reviews	Critical Risks	Ethics Info	Security

Horizon Europe novelties

- **New SyGMa tabs**
 - New tabs in Horizon Europe for all programmes: ‘Associated partners’, ‘Researchers’, ‘Ethics info’, ‘Security’
 - New tabs for all JUs (incl. CBE JU): ‘JU contributions’
 - ***Best practice***: get acquainted with the guidelines (cf. GAP actions list) and update these tabs asap

Where to find more info?

- Horizon Europe info sources

- Horizon Europe online manual

- [Descriptive part](#)

- Via green 'IT How To' button: [IT support](#), incl. screenshots

Grant preparation

Enter & submit grant data

Final legal checks



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- EC 'GAP for coordinators' [webinar dd. 17/10/2023](#)

- [AGA](#): Horizon Europe annotated model grant agreement

Grant preparation

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Final legal checks



- **CBE JU guidelines**

- GAP actions list

- Today's webinar, which builds on the EC's 17/10/2023 webinar + highlights CBE JU specifics

Ensuring clear communication

- Know who (not) to contact
 - **Validation**-related questions (legal entity, LEAR, financial capacity assessment,...): use the F&T Portal to contact the REA validation team
 - **IT bugs**: F&T IT helpdesk via [contact form](#)
 - **Other questions**: 1-on-1 communication between coordinator (team) and CBE JU Project Officer (PO) → other consortium members: please always go through your coordinator, don't contact CBE JU directly
- Contact between Coordinator & PO
 - Use the 'GAP actions list' as a checklist, keeping track of finished items
 - Don't wait until 29/02 to get in contact again
- **Best practice**: communicate quickly & clearly between consortium members; your delays might affect other members and the project (and start date!)



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