CBE JU Call 2023
GAP timeline

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Call coordinator
06/02/2024
CBE JU: embedded in Horizon

Webinar on grant agreement preparation
GAP timeline

20/09/2023
Call deadline

24/01/2024
Invitation to grant preparation

22/05/2024
Grant signature

submission
Proposal Evaluation
Grant Agreement Preparation
Pre-financing

5 months maximum

8 months maximum

Accession to GA
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
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

New in Horizon Europe / CBE JU (⇔ H2020/BBI)
Horizon Europe novelties

- **New SyGMA tabs**
  - 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
  - EC GAP for coordinators’ webinar dd. 02/02/2023
  - AGA: Horizon Europe annotated model grant agreement
- CBE JU guidelines:
  - GAP actions list
  - Today’s webinar, which builds on the EC’s 02/02/2023 webinar + highlights CBE JU specifics

Grant preparation

Enter & submit grant data
Final legal checks
Table of contents

- Introduction
- Overview of the Grant Agreement Preparation process and its tasks
- Grant Agreement Data Preparation and Submission
- Documents
  - How to fill in the Key Performance Indicators - step by step
- Project Summary
- Beneficiaries screens
  - Partner Summary
  - Financial Information
  - Project Representatives
  - Bank account
  - Affiliated Entities (former linked third parties)
    - Affiliated Entities - Financial information
- General Information
- Reporting Periods
- GA Information
- GA Options
- Financial Information
  - JU Contributions
- LF Overview
- Associated Partners
- Recruitment (MSCA-DN & IF, RE-GRPF)
  - MSCA-DN Associate Networks (MSCA-DN)
  - MSCA-DN Associated Partnerships (MSCA-DN)
- Exchanges (MSCA-SE)
- Researchers
- Infrastructures
- Principal Investigator
  - Principal Investigators for ERC
- Work Packages
- Deliverables
- Milestones
- Critical Risks
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
  – EC ‘GAP for coordinators’ [webinar dd. 17/10/2023](#)
  – **AGA**: Horizon Europe annotated model grant agreement

• 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!)