





# Le Research Participant Portal de la Commission Européenne

Webinaire organisé conjointement par le PCN PME, le PCN Transport et le PCN Juridique & Financier 21/09/17











## **ANIMATION :**

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# Lucie VAUCEL Université de La Rochelle



## SUPPORT TECHNIQUE : Brice LAGUERODIE ASRC













## **AGENDA DU WEBINAIRE**

- Présentation générale du portail (F. Daveran)
  - Les appels à projet
  - Le manuel H2020 en ligne
  - L'espace des experts
  - Les liens vers les supports
- Espace Registered User du portail (L. Vaucel)
  - Compte ECAS, PIC, validation statut PME
  - Nominations LEAR, FSIGN, LSIGN, etc.
  - Financial viability check
- Contractualisation et gestion électronique des projets (F. Daveran)
- Modération des questions des participants (F. Daveran & L. Vaucel)





# Principales fonctionnalités du Portal

http://ec.europa.eu/research/participants/portal/desktop/en/home.html

- Interface unique pour la RDI Europe
- Information sur les appels à projets
- Manuel H2020 en ligne
- Espace pour les experts évaluateurs
- Comment trouver des supports
- Un accès à code (registered user) pour :
  - La soumission électronique de propositions
  - La gestion électronique de projets













### https://ec.europa.eu/research/participants/portal/desktop/en/opportunities/index.html

- H2020 et les autres programmes financés par la CE
- Les programmes partiellement financés par la CE : JTI, KIC, ERA-Net, Eurostars, etc.
- Les Financial Support to Third Parties
- Plusieurs façons d'accéder aux appels à projets :
  - La fonction Search Topic par mot clé
  - Le tri par sous-programme
  - Le tri par appel ouvert, fermé, à venir
- Le flux RSS
- A l'intérieur de l'appel : présentation
  - Référence, date, budget
  - Topic description
  - Topic conditions and documents
  - Partner search





| 11.                             | 1                   |  |  | (A-Z) Sitemap                       | About this site Con                    | itact Legal Notice Search                   | Englis          |
|---------------------------------|---------------------|--|--|-------------------------------------|--|---|-----------------|
| $\circ$                         | RI                  | ESEARCH & II   | NOVATION   |                                     |  |   |                 |
| European<br>Commission          | Pa                  | articipant Portal  |  |                                     |  |   |                 |
| an Commission                   | > Research & Innova | tion > Participant Portal >                                | Calls  |                                     |  |   |                 |
| HOME                            | FUNDING OPPORTU     | INITIES HOW TO PART  | CIPATE EXPERTS   | SUPPORT * Sea                       | irch Q                                 |   | 👗 REG           |
| U Programmes                    | 2014-2020           |  |  |                                     |  |   |                 |
| Search Topics                   |                     | The Grant Manag  | ement and Document M   | anagement service                   | s may not be access                    | ible on Wednesday, 15t                      | h ×             |
| Updates                         |                     | submission of pr   | posals will not be impa                                      | cted.                               | indiriteriarice is                     | peromet.                                    |                 |
| Calls                           |                     | we apologise for a   | ny inconvenience this n                                      | nay cause.                          |  |   |                 |
| H2020                           |                     | 206 Keyword  | Search: Find a topic   | C                                   | SEARCH                                 | )   |                 |
| 3rd Health Pri                  | ogramme             | Z90<br>Results If you do                                   | "t find your topic, you                                      | can also use the                    | free text search.                      |   |                 |
| Asylum, Migra<br>Integration Fi | ation and<br>and    | Select   | the Programme<br>to select several program                   | nmes.                               | FILTER                                 |   |                 |
| Consumer Pro                    | gramme              | H2020  | •  | <b>•</b>                            |  |   |                 |
| COSME                           |                     | 2rd Hoalth Program   |  |                                     |  |   |                 |
| Internal Secu                   | rity Fund - Borders | Status   | Forthcoming  | 🔊 Open                              | 0.0                                    | osied                                       |                 |
| Internal Secu                   | rity Fund - Police  | Sort by  | Planned) opening date  | ODeadline                           | ©Topic title                           | Topic identifier                            |                 |
| Justice Progra                  | smme                |  |  |                                     |  |   |                 |
| Promotion of<br>Products        | Agricultural        | CIP-01-2<br>Topic: combinat<br>Europe.<br>Publication date | 016-2017: Preventi<br>ion of physical and<br>14 October 2015 | on, detection, i<br>cyber threats t | response and mi<br>to the critical inf | itigation of the<br>frastructure of         | en]             |
| Research Fun                    | d for Coal & Steel  | Types of action:<br>DeadlineModel:                         | IA Innovation actio  | n                                   | -                                      |   |                 |
| Rights, Equali<br>Programme     | ty and Citizenship  | Opening date:  | 01 March 2017  |                                     | Deadline:                              | Z4 August 2017 17:00<br>Time Zone : (Brusse | :00<br>Is time) |
| Union Civil Pr<br>Mechanism     | otection            | Topic: CLEANAI<br>Publication date                         | R-01-2015: Horizon<br>16 April 2015                          | Prize – Materia                     | als for Clean Air                      | o   | ben]            |
| P7 & CIP Progra<br>D13          | ammes 2007-         | Types of action:<br>DeadlineModel:<br>Opening date:        | IPr Inducement Priz<br>single-stage<br>26 January 2017       | ze                                  | Deadline:                              | 23 January 2018 17:00                       | D:00            |
|                                 |                     |  |  |                                     |  | Time Zene / (Revee                          | In times        |

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|        | European<br>Commission         | Par                   | rticipa            | nt Portal   |                             |   |  |                               |   |                            |
| Europe | an Commission                  | > Research & Innovati | lon > Par          | ticipant Portal > Calls   |                             |   | 6  |                               |   |                            |
|        | HOME                           | FUNDING OPPORTUN      | ITIES              | HOW TO PARTICIPATE  | EXPERTS                     | SUPPORT *   | Search   | Q                             | LOGIN   | REGISTER                   |
| EL     | J Programme:                   | 5 2014-2020           |                    |   |                             |   |  |                               |   |                            |
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|        | H2020                          |                       |                    |   |                             |   |  |                               |   |                            |
|        | 3rd Health Pr                  | ogramme               | Ca                 | lls for Prop  | osa                         | s   |  |                               |   |                            |
|        | Asylum, Migra<br>Integration F | ation and<br>und      | e                  | Horizon 2020  |                             |   |  |                               | Advanced search f<br>Calls for tenders o  | or topics<br>in TED        |
|        | Consumer Pro                   | ogramme               |                    | Secure, clean and   | efficient o                 | energy  |  |                               |   |                            |
|        | COSME                          |                       |                    | <ul> <li>Climate action, en</li> <li>Europe in a changi</li> </ul>    | vironmen<br>ing world       | t, resource effic<br>- inclusive, inn                               | ciency and raw                                   | v materials<br>eflective soci | eties   |                            |
|        | Internal Secu                  | rity Fund - Borders   |                    | Secure societies -  | protecting<br>od widen      | g freedom and s   | security of Eur                                  | ope and its o                 | itizens   |                            |
|        | Internal Secu                  | rity Fund - Police    |                    | Science with and for So<br>The European Institute                     | ciety<br>of Innova          | ition and Techn   | ology (EIT)                                      |                               |   | -                          |
|        | Justice Progra                 | amme                  |                    |   |                             |   |  |                               |   |                            |
|        | Promotion of<br>Products       | Agricultural          | Stat               | us 🕑 Calls with fortho  | coming to                   | pics 🕑 Call   | s with open to                                   | pics 🗌 C                      | alls with only closed   | i topics                   |
|        | Research Fun                   | d for Coal & Steel    | Sort               | D Call title  | Call Id                     | entifier ® Pu   | blication date                                   | Filt                          | er a call   | FFER                       |
|        | Rights, Equal<br>Programme     | ity and Citizenship   |                    |   | -                           |   |  |                               |   |                            |
|        | Union Civil Pr<br>Mechanism    | otection              | Clea<br>H20        | etal Challenges<br>n Sky 2 Call for Proposals<br>20-CS2-CFP06-2017-01 | <b>06</b>                   | H2020-ECSEL-3<br>stage<br>H2020-ECSEL-<br>two-stage                 | dership<br>2017-2-RIA-two<br>2017-2-RIA-         | H20<br>H20<br>stag            | ustrial Leadership<br>20-ECSEL-2017-1-IA-<br>120-ECSEL-2017-1-I/<br>10                            | <b>two-stage</b><br>I-two- |
| FP     | P7 & CIP Progra                | ammes 2007-           | Publi              | cation date:15 March 2017   |                             | Publication date:2  | 2 February 2017                                  | Publi                         | ication date:22 February 2  | 2017                       |
|        | Calls                          |                       | Soci<br>FCH<br>H20 | etal Challenges<br>2 JU call for proposals 20<br>20-JTI-FCH-2017-1    | 17                          | Societal Challe<br>H2020-JTI-IMI<br>stage<br>H2020-JTI-IMI<br>stage | enges<br><b>2-2016-10-two</b> -<br>I2-2016-10-tw | - SES<br>and<br>0pe<br>H20    | ietal Challenges<br>AR 2020 Exploratory R<br>Very Large Scale Demo<br>in Call<br>120-SESAR-2016-2 | esearch<br>nstrations      |

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|--|---|---|--|---|--|------------------------|
| European<br>Commission Pa  | articipant Portal   |   |  |   |  |                        |
| ean Commission > Research & Innova   | tion > Participant Portal > Calls   |   |  |   |  |                        |
| HOME FUNDING OPPORTU   | JNITIES HOW TO PARTICIPATE  | EXPERTS SUPPORT   | - Search   | Q.  | LOGIN  | REG                    |
| II Programmes 2014-2020  |   |   |  |   |  |                        |
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| H2020  |   |   |  |   |  |                        |
| 3rd Health Programme   | Calls for Prop  | osals   |  |   |  |                        |
| and the second sec |   |   |  |   |  |                        |
| Asylum, Migration and<br>Integration Fund  | Horizon 2020  |   |  |   | Advanced search fo<br>Calls for tenders on   | r topi<br>TED          |
| Consumer Programme   | Secure, clean and ef  | fficient energy   |  |   |  |                        |
| COSME  | Climate action, envir   | ronment, resource e   | fficiency and raw  | materials   | -  |                        |
|  | Europe in a changing  | g world - inclusive,  | innovative and re  | enecuve societie  | 2  |                        |
| Internal Security Fund - Borders   | Becure societies - pr   | rotecting freedom an  | d security of Eur  | ope and its citize  | ens  |                        |
| Internal Security Fund - Borders   | <ul> <li>Spreading excellence and</li> <li>Science with and for Soci</li> </ul>   | rotecting freedom ar<br>d widening participa<br>iety  | d security of Eur  | ope and its citize  | ens  |                        |
| Internal Security Fund - Borders   | Spreading excellence and<br>Science with and for Soci<br>The European Institute of  | rotecting freedom ar<br>d widening participa<br>lety<br>f Innovation and Tec  | nd security of Eur<br>tion<br>chnology (EIT)   | ope and its citize  | ens  |                        |
| Internal Security Fund - Borders Internal Security Fund - Police Justice Programme   | Spreading excellence and<br>Science with and for Soci<br>The European Institute of  | rotecting freedom ar<br>d widening participa<br>iety<br>f Innovation and Tec  | nd security of Eur<br>tion<br>chnology (EIT)   | ope and its citize  | ens  |                        |
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## **Partner Search**

| COSME   | Horizon 2020<br>Pillar: Societal Challenges<br>Work Programme Year: H2020-2018-2020   | H2020 website   |
|---|---|-----------------|
| European Statistics Programme                 | Work Programme Part: Smart, green and integrated transport<br>Call : H2020-MG-2018-2019-2020 Cal  | budget overview |
| Hercule III Programme                         |   |                 |
| Internal Security Fund - Borders              | Topic Updates   | + More          |
| Internal Security Fund - Police               | • 25 July 2018 00:01  |                 |
| Justice Programme                             | Please note that the description of topic LC-MG-1-7-2019 has been updated further to the  |                 |
| Pilot Projects & Preparatory<br>Actions       | Topic Description   | + More          |
| Promotion of Agricultural<br>Products         | Specific Challenge:<br>This action is part of the Aviation International Cooperation Flagship called "Safer and Greener Aviation i  | n               |
| Research Fund for Coal & Steel                | a Smaller World" mentioned in the introduction to this work programme 2018-2020.  |                 |
| Rights, Equality and Citizenship<br>Programme | Topic conditions and documents  | + More          |
| Union Civil Protection<br>Mechanism           | <ol> <li>Eligible countries: described in <u>Annex A</u> of the Work Programme.</li> <li>A number of non-EU/non-Associated Countries that are not automatically eligible for funding have made<br/>specific provisions for makino funding available for their participants in Horizon 2020 projects. See the</li> </ol> |                 |
| a CIP Programmes 2007-<br>13                  | Partner Search  |                 |
| alls  | 9 Organisations are looking or collaborating partners for this topic VIEW/EDIT PART   | NER SEARCH      |
| ther Funding Opportunities                    | a. Dr. Account Administrators or self-registrants can publish partner requests for open and forthcoming to<br>logging into the Participant Portal.  | opics after     |

## **Financial Support to Third Parties**

Consumer Programme

COSME

**European Statistics Programme** 

Hercule III Programme

Internal Security Fund - Borders

Internal Security Fund - Police

Justice Programme

Pilot Projects & Preparatory Actions

Promotion of Agricultural Products

Research Fund for Coal & Steel

Rights, Equality and Citizenship Programme

Union Civil Protection Mechanism

#### FP7 & CIP Programmes 2007-2013

Calls





# Find the European Union funding opportunities and search for new or closed calls of the programmes described on this page.

See the full list of the Commission funding programmes.

### Horizon 2020

Horizon 2020 is the new EU funding programme for research and innovation running from 2014 to 2020 with a C80 billion budget. H2020 supports SMEs with a new instrument that runs throughout various funded research and innovation fields, enhances EU international research and Third Country participation, attaches high importance to integrate social sciences and humanities encourages to develop a gender dimension in project.

### Cosme





### Consumer Programme

The Multiannual Consumer Programme 2014-2020 has a planned budget of 188 million EUR. It will support actions that ensure a high level of consumer protection, that empower consumers and that place the consumer at the heart of the internal market.

| Hercule III Programme<br>Internal Security Fund - Borders<br>Internal Security Fund - Police<br>Justice Programme | <ul> <li>Public-Private Partnerships ("Joint Technology Initiatives")</li> <li>Co-funded activities (ERA-NETs; European Joint Programmes)</li> <li>Competitive calls published by consortia of FP7 projects</li> <li>Funding opportunities for innovation in other EU or national programmes</li> <li>To learn more about the other EU funding opportunities, see A Beginner's Guide to EU Funding.</li> </ul> |
|---|--|
| Pilot Projects & Preparatory<br>Actions   | Disclaimer; This page does not provide a complete list of all other funding opportunities for research and innovation<br>activities.   |
| Promotion of Agricultural<br>Products   | Calls for tenders  |
| Research Fund for Coal & Steel  | Calls in ERANETs, JTIs, Public-Public Partnerships and other co-funded actions   |
| Rights, Equality and Citizenship<br>Programme   | Financial support to Third Parties and Competitive calls by on-going FP7 and H2020 projects  |
| Union Civil Protection  | European Institute of Innovation and Technology (EIT)  |
| Mechanism   | Connecting Europe Facility (CEF)   |
| FP7 & CIP Programmes 2007-  | EU-backed business loans and risk capital  |
| 2013  | EUREKA - funding for technology projects   |
| Calla   | COST - funding for R&I networking  |
|   | Funding for research and innovation at regional level  |
| Other Funding Opportunities   | Rural development funding for innovation   |







# Le Guide H2020 en ligne

### http://ec.europa.eu/research/participants/portal//desktop/en/funding/index.html

- Comment trouver un appel à projet
- Comment trouver des partenaires
- Comment créer votre compte (pour être « registered user »)
- Comment enregistrer votre entité
- Comment soumettre une proposition
- Financial viability self check
- SME participation







The Commission publishes on the Participant Portal all the Calls of its research and innovation programmes H2020, and you can search calls from previous programmes (FP7 and CIP). In addition you can find information about some additional calls in the Other Funding Opportunities section. If you apply for the first time and do not know yet the programmes, it is useful to read the H2020 Online Manual. It helps you choose the most suitable programme for your area and profile. Besides, you can search according to your research topic with key words and set filters in the calls list.

Your National Contact Point can also help you find the most suitable call for your profile. SMEs are in addition supported by the Enterprise Europe Network.

Step 2 - Find project partners or apply as an individual H2020 ONLINE MANUAL

## H2020 Online Manual

### **RESEARCH & INNOVATION**

European Commission

### Participant Portal H2020 Online Manual



Search

> H2O2O Online Manual > Grants > Applying for funding > Find a call >

Horizon 2020 structure and budget

What you need to know about Horizon 2020 calls

### 🚍 H2020 Online Manual

- 🚍 My Area User account & roles
  - EU Login
  - > Roles & access rights
  - > Terms and Conditions of Use

### 🚰 Grants

🚘 Applying for funding

### 🚘 Find a call

- Horizon 2020 structure and budget
- What you need to know about Horizon 2020 calls
- Find partners or apply as individual
- Register in the Beneficiary Register
  - Registration of your organisation
  - LEAR appointment
  - Validation of potential beneficiaries
  - Financial viability check
  - 🔈 Data update

Find a call
Horizon 2020 offers a large variety of funding opportunities for research a

**Horizon 2020** offers a large variety of funding opportunities for research and innovation activities through calls for proposals that are set out in the Horizon 2020 work programme. On the Participant Portal (PP) you can find call information under Funding opportunities.

### Already familiar with EU research funding?

You can go directly to the H2020 calls and filter calls that interest you in the relevant programme part, like ICT or Health.

### New to EU research funding?

Go to Search topics to find topics that belong to open or forthcoming calls. You can search in the text of the call and topic titles, call and topic identifiers, topic description and keywords and tags related to this topic.

You can also filter using the quick finder for topics related to **H2020 cross-cutting priorities**, like international cooperation, SME instrument, social sciences and humanities, etc.

You can also search for previous (closed) topics, as a guide.

In Horizon 2020 there are more **opportunities for cooperation** with and participation by researchers from non-EU countries.

For more extensive search in various fields of the call and topic pages, you find on the same page a link to the Europa

## H2020 Online Manual

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#### **RESEARCH & INNOVATION** European Participant Portal H2020 Online Manual Commission Search My Area - User account & roles 🚘 H2020 Online Manual Grants My Area - User account & roles > EU Login Applying for funding > Roles & access rights > Terms and Conditions of Use Register an organisation Submit a proposal Find a call Find partners 🖶 Grants Applying for funding Evaluation & Grant signature 📻 Find a call Horizon 2020 structure Eligibility check Evaluation of proposals Grant signature Grant preparation and budget > What you need to know Grant management about Horizon 2020 calls > Find partners or apply as Keeping records Reports & payment requests Deliverables Amendments individual Register in the Beneficiary Acknowledgement Checks, audits, reviews Dissemination Communicating Register & exploitation of EU funding & investigations your project > Registration of your organisation LEAR appointment > Validation of potential Working as an expert beneficiaries

## H2020 Online Manual



The Commission publishes on the Participant Portal all the Calls of its research and innovation programmes H2020, and you can search calls from previous programmes (FP7 and CIP). In addition you can find information about some additional calls in the Other Funding Opportunities section. If you apply for the first time and do not know yet the programmes, it is useful to read the H2020 Online Manual. It helps you choose the most suitable programme for your area and profile. Besides, you can search according to your research topic with key words and set filters in the calls list.

Your National Contact Point can also help you find the most suitable call for your profile. SMEs are in addition supported by the Enterprise Europe Network.

Step 2 - Find project partners or apply as an individual H2020 ONLINE MANUAL

## **Financial Viability Self-Check**

HOME FUNDING OPPORTUNITIES

TUNITIES HOW TO PARTICIPATE

PATE EXPERTS SUP

ERTS SUPPORT \* Search

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The Grant Management and Document Management services may not be accessible on Wednesday, 15th of March, between 19:50 and 21:10 (CET) while system maintenance is being performed. Submission of proposals will not be impacted. We apologise for any inconvenience this may cause.

### Financial Viability Self-Check

Before granting funding, the Commission may check your organisation's financial viability, depending on the type of organisation and various other criteria.

You can check your organisation's financial viability yourself using this Financial self-check tool. The tool uses the ratios described in the section of legal entity validation of the H2020 Grants Manual..

#### Read First!

Disclaimer: The results of this simulation provide only **non-binding indication**. If a formal financial viability check by the Commission is required for a participation in a project, either the LEAR of your organisation will be invited to submit data via the Portal or the Commission will inform you about the exact steps to follow.



## **Guide pour la participation des PME**



We apologise for any inconvenience this may cause.

SME Participation

H2020 ONLINE MANUAL

#### SME Instrument

The SME instrument has been designed specifically for **single or groups of highly innovative SMEs** with international ambitions, determined to turn strong, innovative business ideas into winners on the market. The instrument provides **full-cycle business innovation support** from the stage of business idea conception and planning (phase I) over business plan execution and demonstration (phase II) to commercialisation (phase III). Participants will be able to call on business innovation coaching for the duration of their project.

- Phase I (proof-of-concept): Explore the scientific or technical feasibility and commercial potential of your new idea in
  order to develop an innovation project, with the help of a € 50,000 grant, and receive more support in case of a positive
  outcome!
- Phase II (development & demonstration): Develop your sound, ground-breaking business idea further with the help
  of a grant in the order of € 500,000 to 2,5 million into a market-ready product, service or process!
- Phase III (go-to-market): Take advantage of additional EU support to enter the market successfully (no grants).

For more information about the SME instrument, please see the related FAQ.

Collaborative Projects (SME + partners)

Work with at least 2 international **partners** (separate legal entities) from different EU countries (at least 3 in total) and request EU project support! To find partners, you can use the assistance of various **partner search services**.

APPLY

### Access to Debt and Equity Financing

Discover where and how the EU can help your company to access finance for further business development.

For more information, please see the Work Programme part Access to Risk Finance.

You find additional guidance on how to apply for finance supported by EU on the Access to Finance web portal. It also helps

## **Guide pour la participation des PME**

### IPR (SME corner)

Useful information for managing intellectual property rights in your business and projects.

Is my Company an SME ? To count as an SME, your organisation must be engaged in an economic activity and must have:

- fewer than 250 employees
  - and
- an annual turnover of no more than €50 million and/or an annual balance sheet of no more than €43 million.

Whether you count as an SME may depend on how you count your workforce, turnover or balance sheet. Please note that you must take account of any relationships you have with other enterprises. Depending on the category in which your enterprise fits you may then need to add some, or all of the data. For more details: Recommendation 2003/361/EC - see "Annex" for a full definition of an SME.

The Beneficiary Register on the portal includes a questionnaire that allows determining whether an organisation is an SME according to the EC rules and thus whether it is eligible to apply for the funding of certain H2020 actions.

### **Policy Questions**

#### Horizon 2020 - SME Techweb

Stay up-to-date with latest EU policy initiatives in the field of innovation in SMEs. Workshops, call news and more.







## L'espace des experts évaluateurs

http://ec.europa.eu/research/participants/portal//desktop/en/experts/index.html

- Rappel sur la fonction d'expert évaluateur
- Conditions et défraiement
- Evaluation à Bruxelles / Evaluation à distance
- S'enregistrer en tant qu'expert
- My expert area





#### News

The 3rd Health Programme and the Consumer Programme, managed by the Consumer, Health and Food Executive Agency (CHAFEA), and the Research Fund for Coal and Steel (RFCS) are now using the European Commission's experts database to select experts for assignments including the evaluation of proposals and monitoring of projects. If you are already registered as an expert and wish to also indicate your interest in these programmes, please update your profile by ticking "RFCS (Research Fund for Coal and Steel)" and/or " Third Health Programme (managed by Chafea)" ('Programme Selection' section). New experts registering can indicate their interest in working for any of the programmes listed in the 'Programme Selection' section.



### Experts

H2020 ONLINE MANUAL

Join the database of independent experts. The European Commission appoints independent experts to assist with assignments that include the evaluation of proposals, monitoring of projects, and evaluation of programmes, and design of policy.

Q.

#### New experts

#### Who can be an expert?

You have a chance of being selected as an expert if you:

- have high-level of expertise in the relevant fields (see calls for experts for details)
- can be available for occasional, short-term assignments.

#### REGISTER AS EXPERT

#### What do expert assignments involve?

Experts, as peer reviewers, assist in the:

- evaluation of proposals
- monitoring of actions

In addition, experts assist in the :

 preparation, implementation or evaluation of programmes and design of policies.

Business innovation coaches support SMEs funded via the SME instrument. An expression of interest for experts willing to become Business Innovation Coach for the SME instrument is available on the EASME website. Candidate coaches will also be asked to provide more detailed information on their competence and experience here.

In order to access the expert registration form, you are first asked to login with a valid Participant Portal (EU Login) account. If you do not have it yet, it easy to create your Portal (EU Login) account.

#### Registered experts

- Registered experts can complete or update their profile at any time by logging-in to their Portal account (EU Login) and accessing My Expert Area.
- Your profile is only available to the Commission for consideration once it is complete and valid.
- Should you get a contract as independent expert, please check that the Bank Account on which you want to be paid is still valid before you introduce a request for payment.
- innovation, social sciences and

Ouick Links

- Experts standard briefing slides
- FAQ for Experts
- Expert recommendations
- Lists of contracted experts

### FAQ on the evaluation of

## **Zone Experts**

### Quick Links

- Experts standard briefing slides
- FAQ for Experts
- Expert recommendations
- Lists of contracted experts
- FAQ on the evaluation of innovation, social sciences and humanities and other aspects of H2020 proposals

### Logistics for Brussels

- Map of evaluation area
- Info on hotels
- Metro map
- From airport to Brussels
- Reimbursement of Eurostar tickets

Business innovation coaches support SMEs funded via the SME instrument. An expression of interest for experts willing to become Business Innovation Coach for the SME instrument is available on the EASME website. Candidate coaches will also be asked to provide more detailed information on their competence and experience here.

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- Should you get a contract as independent expert, please check that the Bank Account on which you want to be paid is still valid before you introduce a request for payment.

### Other opportunities for experts

Besides the opportunities that we offer to experts via the Participant Portal experts database, see also other Commission calls for experts.







# Portail du participant : Services accessibles avec un compte ECAS

- Le système de soumission des propositions de projets
- Le registre des bénéficiaires (création PIC)
- Les services pour la signature électronique de la convention de subvention et la gestion des projets européens
- Le service dédié aux experts











# **Création d'un compte ECAS**

ECAS - *European Commission Authentification System* Il est notamment nécessaire de disposer d'un compte ECAS pour pouvoir **enregistrer son organisation**, **soumettre une proposition de projet, gérer un projet** ou encore **devenir expert**.

Etape 1 : se rendre sur la <u>page d'inscription ECAS</u> et y renseigner le nom d'utilisateur, prénom, nom et adresse mail Etape 2 : cliquer sur "Create an account" - Un mail contenant un lien d'activation sera envoyé à l'adresse renseignée. Il permet de poursuivre la procédure d'inscription Etape 3 : cliquer sur ce lien, définir puis confirmer un mot de passe Etape 4 : se rendre sur le portail du participant Etape 5 : cliquer sur "LOGIN" et renseigner le nom d'utilisateur et mot de passe ECAS









\* \*

HORIZON 2020

LE PROGRAMME DE RECHERCHE ET D'INNOVATION DE L'UNION EUROPÉENNE Juridique et Financier

## Créer son compte ECAS (1)

|                        | (A-Z) Sitem   | nap About this site Contact Legal Notice Search English 🔻  |
|------------------------|---|--|
| European<br>Commission | Participant Portal  |  |
| opean Commission > Re  | search & Innovation> Participant Portal> Home   |  |
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|                        |   | Horizon 2020 Funding<br>Starting from 1/1/2014   |
|                        | On this site you can find and secure <b>funding</b> for p   | projects under the following EU programmes:  |
|                        | <ul> <li>2014-2020 Horizon 2020 - research and innov</li> <li>2007-2013 7th research framework programme</li> <li>Research Fund for Coal &amp; Steel, COSME, 3rd H</li> </ul>   | vation framework programme<br>e (FP7) and Competitiveness & Innovation Programme (CIP)<br>Health Programme, Consumer Programme   |
|                        | Non-registered users  | Registered users   |
|                        | <ul> <li>search for funding</li> <li>read the H2020 Online Manual &amp; download<br/>the legal documents</li> <li>check if an organisation is already<br/>registered</li> <li>contact our support services or check our<br/>FAQs</li> </ul> | <ul> <li>submit your proposal</li> <li>sign the grant</li> <li>manage your project throughout its lifecycle</li> <li>register as expert advising the Commission</li> </ul> |
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| WHAT'S NEW?            | FUNDING HOW TO WORK OPPORTUNITIES PARTICIPATE   | AS AN MY PERSONAL INFORMATION<br>ERT AREA AND SUPPORT  |

HORIZON 2020

RESEARCH ON EUROPA CORDIS OLAF







| Help for external users   First name         |  |
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| Last name  Last name  E-mail  Confirm e-mail |  |
| E-mail Confirm e-mail                        |  |
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| E-mail language                              |  |
| English (en)                                 |  |
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## Transport + PCN - Horizon 2020 +

### Juridique et Financier

PCN - Horizon 2020

## Se connecter avec son compte ECAS

| (A-Z) Sitemap About this site  | Contact Legal Notice Search English -                        |  |   | (A-Z) Sitemap Abou                  | t this site Contact Legal M                                | Notice Search English 🔻           |
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| 2007-2013 7th research framework programme (FP7) and Compe     Research Fund for Coal & Steel, COSME, 3rd Health Programme,          | itiveness & Innovation Programme (CIP)<br>Consumer Programme |  | Non-registered users  | Registered (                        | isers  |                                   |
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| read the H2020 Online Manual & download     sign the grant     the legal documents     manage your                                   | project throughout its lifecycle                             |  | <ul> <li>legal documents</li> <li>check if an organisation is already region</li> </ul>             | manage y     stered     register as | our project throughout its I<br>s expert advising the Comr | litecycle<br>nission              |
| • check if an organisation is already • register as ex   | pert advising the Commission                                 |  | contact our support services or check   | our FAQs                            |  |                                   |
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- My Project(s)
- My Notification(s)
- My Expert Area







**Création d'un PIC** 



PIC – Participant Identification Code Chaque entité participant à un projet H2020 doit être enregistrée auprès de la Commission (condition nécessaire pour déposer une proposition)

- Vérification de l'enregistrement de l'entité sur le Registre des bénéficiaires
- Si ce n'est pas le cas, procéder à l'enregistrement de l'entité

=> Attribution d'un PIC qui sera validé en cas de succès à un projet HORIZON **2020** 



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ET DE LA RECHERCHE







**Enregistrement d'une entité** 

Durée : 5 à 10 mn

Possibilité d'interrompre l'enregistrement et de le reprendre plus tard

Documentation de base nécessaire, notamment :

- Copies des certificats d'enregistrement (organisations privées) ou des lois/décrets (organisations publiques)
- Données sur la TVA
- Copies des statuts (si l'entité déclare un statut à but non lucratif), etc.









Juridique et Financie PCN - Horizon 20

## **Enregistrement d'une PME**

Pour les actions où le statut de PMF est un critère d'éligibilité (Instrument-PME), un questionnaire d'autoévaluation est à compléter en ligne.

Le statut de PME doit être validé à l'issue du questionnaire. Cette validation doit

dater de moins de 2 ans.



Research & Innovation

SME SELF-ASSESSMENT

ropean Commission > Research & Innovation > Participant Portal > SME Self-Assessment

Welcome to the SME self-assessment questionnaire

### Objective

The objective of this questionnaire is to determine whether your organisation qualifies as a small and medium sized enterprise as defined in the EU Recommendation 2003/361/EC

Before Starting

### → What's next?

Before starting the online questionnaire it is strongly recommended that you:

· Carefully read through both the SME recommendation and the SME user quide

· Prepare the relevant financial documents of the last closed accounting period (Balance Sheet, Profit and Loss Accounts, Staff Headcount) of your organisation and any other organisation that might be directly or indirectly related to it.

Once you have completed the SME self-assessment wizard, a statement summarising the data and result of the SME assessment will be issued and transmitted to the relevant EC services. Please note that the Commission reserves the right to perform expost checks on organisations declared as an 'SME' on the basis of

this questionnaire. Your organisation might therefore be required in that case to submit the financial documents justifying the figures introduced in the questionnaire.

Once you have read and understood the SME Recommendation and collected the relevant financial documents, you will be ready to start the SME questionnaire

### A Need help?

Most types of corporate structures can be easily encoded in the system. Please contact our helpdesk if your organisation's corporate structure is not supported by the wizard.

If you encounter any difficulty while going through the steps of the SME self-assessment, please contact the following helpdesks:

- For IT related matters, please submit your question to the Participan Portal IT helpdesk
- All other queries can be addressed to the Research Enquiry Service "Horizon 2020 helpdesk"

The SME Self Assessment Wizards's User manual is available at this link SME Self Assessment User Manual

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# Validation des entités légales (PIC)

- Validation unique Pour toutes les entités Valable pour tout le programme H2020 Commence uniquement lorsque la 1<sup>ère</sup> proposition est positivement évaluée
- Lors de la validation l'agence exécutive vérifie :
- ✓ Existence légale
- ✓ Le statut H2020
- ✓ Le mandat du LEAR
- ✓ La viabilité financière (si nécessaire)







# **Documentation à fournir pour la validation (1)**

• <u>Pour les individus</u> :

- copie carte identité ou passeport et document TVA

Pour les entités publiques

- copie résolution, loi ou décret de création et document TVA

• Pour les entités privées :

- document officiel prouvant le nom, l'adresse et le n° d'enregistrement national)

- Document TVA







• <u>Pour les PME (si le statut de PME est un critère d'éligibilité)</u> :

- Bilan, compte de profits et pertes, effectifs exprimés en unités de travail annuel

- Une auto-déclaration (sous la forme d'un business plan) effectuée au cours de l'exercice financier dans le cas où il s'agit d'une entreprise nouvellement créée (start-up) qui n'a pas encore clos ses comptes

- Une déclaration de l'investissement effectué et le rendement probable attendu pour démontrer que malgré le manque de chiffre d'affaires, l'entreprise est engagée dans une activité économique (s'il s'agit d'une entreprise dont l'activité implique un marché à long terme).











# Les différents rôles

(à attribuer en cas de succès d'un projet)

Les rôles sont divisés en 2 sections :

- Les rôles au niveau de l'entité : liés à l'entité et les données de l'entité (déconnecté des projets)
- Les rôles au niveau des projets : propres à chaque projet, ils définissent des droits d'accès sur le portail dans la gestion des projets.

 $\rightarrow$  Un utilisateur peut cumuler plusieurs rôles.









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# Entité : le rôle du

## LEAR (Legal Entity Authorised Representative)

|      | European<br>Commission         | Participant Portal   |
|------|--------------------------------|--|
| -    | ronean Commission > Resea      | rch & Innovation - Darticipant Port - Reference Documents  |
|      | ropean Commission's Resea      |  |
|      | HOME FUNDI                     | NG OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP  |
|      |                                |  |
| -    | H2O2O Online Manual            | Reference Documents  |
|      | Reference Documents            |  |
|      |                                |  |
|      | Beneficiary Register           | This page includes all the H2020 & FP7 reference documents starting with legal documents and the   |
|      | Financial Viability Self-Check | Commission work programmes for research and innovation up to model grant agreements and guides<br>for specific actions and horizontal issues. The documents are grouped by categories. It also includes<br>response documents of other EU encourance are and Haalth Consumer COSME and Research Europe |
|      | SME Participation              | for Coal and Steel programmes. To access a document:   |
|      |                                |  |
|      |                                | Click on a folder  |
|      |                                | <ul> <li>Click on ARROW to have more information about the document and its available translations</li> </ul>  |
|      |                                | You can search a specific H2020 or FP7 document on the Europa Search service.  |
|      |                                |  |
|      |                                |  |
|      |                                |  |
|      |                                | H2020 Other EU programmes FP7  |
|      |                                |  |
|      |                                | 🖀 Legal basis 🚯  |
|      |                                | Framework programmes (EC-Euratom)  |
|      |                                | 🖀 Rules for participation  |
|      |                                | 🕋 Specific programme   |
|      |                                | European institute of Innovation and Technology (EIT)  |
|      |                                | Model grant agreement  |
|      |                                | General Grant Agreement  |
|      |                                | European Research Council (ERC)  |
|      |                                | Marie-Skiedowska-Curie (MSC)   |
|      |                                | ERANET Cofund  |
|      |                                | Encourse 1 of online<br>Pro-Commercial Procurement (PCP)/Public Procurement of Innovative Solutions (DPI)  |
|      |                                |  |
|      |                                | European Joint Programme Cofund  |
|      |                                | Framework Partnerships   |
|      |                                | H2020 Grants Manual  |
|      |                                | Section on beneficiary registration, validation and financial viability check  |
|      |                                | Guide for beneficiary registration, validation and financial viability check >   |
|      |                                | LEAR appointment letter >  |
|      |                                | LEAR role and tasks 🔉  |
|      |                                | Terms and conditions of use of the Participant Portal electronic exchange system 🕻   |
|      |                                | Declaration of consent to the terms and conditions of use of the Participant Portal  |
|      |                                | electronic exchange system 💊   |
|      |                                | Section on proposal submission and evaluation  |
|      |                                | Guidance on evaluation of some H2020 aspects   |
|      |                                | Section on grant agreement preparation   |
|      |                                | Annotated Model Grant Agreement  |
| OR17 |                                | Horizontal Issues  |
|      |                                |  |

- L'interface entre l'entité et la Commission européenne
- Nommé par le représentant légal de l'entité à travers une procédure dédiée
- Responsable de la mise à jour de toutes les informations concernant son entité, il procède aux nominations sur le portail des personnes ayant les droits pour signer électroniquement les conventions de subvention (LSIGNs) et les états financiers (FSIGNs)

http://ec.europa.eu/research/participants/portal/ desktop/en/funding/reference\_docs.html#h2020grants-manual-lev







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# Entité : les droits d'accès du LEAR



To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.



- Vision d'ensemble sur les **projets soumis** par l'entité – OP
- Vision d'ensemble des
   projets en cours de
   négociation ou de
   mise en oeuvre par
   l'entité VP
- Gestion des rôles OR











## Gérer les rôles en tant que LEAR (1)

| MY AREA HOME FUNDING OPPOR | TUNITIES                | HOW TO PARTICIPATE      | EXPERTS SUPPORT -                   | Search     | Q                           | LUCIE VAUCEL 🔻      |
|----------------------------|-------------------------|-------------------------|-------------------------------------|------------|-----------------------------|---------------------|
| My Organisation(s)         |                         |                         |                                     |            |                             |                     |
| My Proposal(s)             | Organis                 | sation File             |                                     |            |                             |                     |
| My Project(s)              |                         |                         |                                     |            |                             |                     |
| My Notification(s) 13      | Details                 | Roles Projects P        | roposals                            |            |                             |                     |
| My Formal Notification(s)  |                         |                         |                                     |            |                             |                     |
| My Expert Area             | Organisa                |                         | ROCHELLE Pic: 9998                  | 46804      |                             |                     |
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|                            | Legal Auth<br>Signatory | norised Jean-Marc Ogier | president.larochelle@u<br>niv-lr.fr | nogiejea   | ▲ 02-06-2016                |                     |
|                            | Coordinate<br>Contact   | or Charles ILLOUZ       | charles.illouz@univ-lr.fr           | nillouch   | n.a.                        | (SEP-210093580<br>) |
|                            | Coordinate<br>Contact   | or Lucie Vaucel         | europe@univ-lr.fr                   | nvaucluc   | n.a.                        | (700556)            |
|                            | Coordinate<br>Contact   | or Eric MONTEIRO        | eric.monteiro@univ-lr.f<br>r        | nmonteie   | n.a.                        | (SEP-210093580<br>) |
|                            | Coordinate<br>Contact   | or paco<br>BUSTAMANTE   | paco.bustamante@uni<br>v-lr.fr      | nbustapa   | n.a.                        | (618433)            |
|                            | Coordinate<br>Contact   | or Paco Bustamante      | pbustama@univ-lr.fr                 | nbustapo   | n.a.                        | (SEP-210114272<br>) |
|                            | Coordinate<br>Contact   | or Paco Bustamante      | pbustama@univ-lr.fr                 | nbustapo   | n.a.                        | 631203              |
|                            | Coordinate<br>Contact   | or Lucie Vaucel         | lucie.vaucel@univ-lr.fr             | nbelaraf   | n.a.                        | (637155)            |
|                            | Coordinate<br>Contact   | or Lucie Vaucel         | lucie.vaucel@univ-lr.fr             | nbelaraf   | n.a.                        | (647463)            |
|                            | Coordinate<br>Contact   | or Lucie Vaucel         | lucie.vaucel@univ-lr.fr             | nbelaraf   | n.a.                        | (715794)            |
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## Gérer les rôles en tant que LEAR (2)

|                                   |  |  | - |
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|                                   | Street Avenue Albert-Einstein 23   | House Number   |   |
|                                   | <b>PoBox</b> 33060   | City LA ROCHELLE   |   |
|                                   | Postal Code 17031  | Country FR   |   |
|                                   | Show 10 v entries  | Search   |   |
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|                                   | Lear Lucie   | Vaucel europe@univ-lr.fr   |   |
|                                   | Legal Authorized Signatory Jean-M  | Vaucel europe@univ-lr.fr Marc Ogier president.larochelle@univ-lr.fr  |   |
|                                   | Lear Lucie<br>Legal Authorized Signatory Jean-P<br>EDIT COMMENT<br>EDIT COMMENT  | Vaucel     europe@univ-lr.fr       Marc Ogier     president.larochelle@univ-lr.fr       Marc Ogier     president.larochelle@univ-lr.fr   |   |
|                                   | Lear Lucie<br>Legal Authorized Signatory Jean-M<br>EDIT COMMENT<br>Financial Signatory Jean-M<br>EDIT COMMENT<br>Showing 1 to 3 of 3 entries | Vaucel     europe@univ-lr.fr       Marc Ogier     president.larochelle@univ-lr.fr       Marc Ogier     president.larochelle@univ-lr.fr   |   |
|                                   | Lear Lucie<br>Legal Authorized Signatory Jean-M<br>EDIT COMMENT<br>Financial Signatory Jean-M<br>EDIT COMMENT<br>Showing 1 to 3 of 3 entries | Vaucel europe@univ-lr.fr Marc Ogier president.larochelle@univ-lr.fr Marc Ogier president.larochelle@univ-lr.fr  ADD ROLES REVOKE   |   |
|                                   | Lear Lucie<br>Legal Authorized Signatory Jean-F<br>EDIT COMMENT<br>EDIT COMMENT<br>EDIT COMMENT<br>Showing 1 to 3 of 3 entries               | Vaucel       europe@univ-lr.fr         Marc Ogier       president.larochelle@univ-lr.fr         Marc Ogi |   |

\* \*







Juridique et Financier + PCN - Horizon 2020 +

# Entité : le rôle du/des LSIGNs et du/des FSIGNs

# LSIGN

- Nommé(s) par le LEAR
- Personne(s) autorisée(s) pour la signature des conventions de subvention et amendements (Legal Signatories)
- Affecté à un projet par le CoCo ou le PaCo

# **FSIGN**

- Nommé(s) par le LEAR
- Personne(s) autorisée(s) pour la signature des états financiers (Financial Signatories)
- Affecté à un projet par le CoCo ou le PaCo











# Projet : le rôle du CoCo et du PaCo

### **Coco - Coordinator's contact**

- Contact principal de la CE pour le projet
- Nomme et révoque les PaCos dans toutes les entités du consortium
- Attribue un ou des LSIGNs et FSIGNs de son entité au projet
- Modifie les documents du projet sur le portail
- Soumets la proposition et les documents à la CE

## PaCo - Participant contact

- Représentants des bénéficiaires dans le cadre du projet
- Chaque bénéficiaire peut en avoir plusieurs par projet
- Nomment et révoquent d'autres PaCos au sein de leur entité
- Attribuent un ou des LSIGNs et FSIGNs de leur entité au projet
- Soumettent ses travaux au coordinateur
- Modifie les documents du projet sur le portail









## Juridique et Financier

PCN - Horizon 2020

## Gérer les rôles en tant que Coco ou PaCo (1)

| My Project(s)<br>My Project(s)<br>My Formal Notification(s)<br>My Expert Area | <ul> <li>The following Participant Portal services will be under maintenance Wednesday 15th of March as follows:</li> <li>EU Login service between 18:00 and 20:00. During this period users might encounter problems accessing the Participant Portal services and will have to relogin.</li> <li>Grant Management and Document Management services, between 19:50 and 21:10. During this period the services will not be available.</li> <li>We apologise for any inconvenience this may cause.</li> </ul>  |
|---|---|
|   | My projects FP7 REF. DOCS H2020 ONLINE MANUAL (b) HOW TO  |
|   | This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.   |
|   | Depending on your roles, you can view or manage the following project-related tasks:  |
|   | Prepare and sign your grant agreement   |
|   | <ul> <li>Submit amendments to your grant agreement</li> <li>Manage your scientific and financial reports</li> </ul>   |
|   | View or manage roles and access rights in your projects consortia   |
|   | Legend AA Access Amendment CP Grant Preparation MP Manage Projects FR Financial Reporting<br>RP Periodic Reporting RD Reporting & Dervesor Project Consortium VP View Proposal  |
|   | Show 10 • entries   |
|   | ACRONYM A CALL O PROGRAM PROJECT O PHASE O M O ACTIONS O  |
|   | JUPITER H2020-Galileo- H2020 641500 Active PC VP MP<br>2014-1   |
|   | PERSEUS         H2020-MG-         H2020         640211         Active         PC         VP         MP           2014_SingleStage         A |
|   | Liberé - Écalité - Fratemit<br>Liberé - Écalité - Fratemit  |
| D'INNOVATION DE L'UNION EUROPÉENNE  | RÉPUBLIQUE FRANÇAISE ET DE LA RECHER  |







# Configuration minimale des rôles pour un projet

- ✓ 1 Primary Coordinator Contact (CoCo)
- ✓ 1 Participant Contact (PaCo) par bénéficiaire
- ✓ 1 LEAR par entité
- ✓ 1 Legal Signatory (LSIGN) par entité
- 1 Financial Signatory (FSIGN) par entité

Une personne (= un compte ECAS) peut cumuler autant de rôles que nécessaire

Le propriétaire d'une PME, dont il est le seul employé, pourra cumuler les rôles de PaCo, LEAR, LSIGN and FSIGN







HO





Vérification de la capacité financière :

Uniquement en cas de succès à un projet

|   | and the second on the second back which and the second second second second second second second second second   |                                |                            |
|---|--|--------------------------------|----------------------------|
| ← https://ec.europa.eu/research/participants/portal/c P ▼ 🔒 C | G participant portal 🖬 Financial Viabili 🗙 🖬 LEAR appointment 💽 What is an SME? 📕 ENT - Environnem   | Souvel onglet                  |                            |
| R   | (A-Z) Sitemap About this site Contact Legal Notice Search Engli  | sh 🔻                           |                            |
| European<br>Commission P                                      | articipant Portal  |                                |                            |
| European Commission > Research & Innov                        | ation > Participant Portal > Financial Capacity Self-Check   |                                |                            |
| HOME FUNDING OPPORT   | INITIES HOW TO PARTICIPATE EXPERTS SUPPORT - Search Q BLOGIN & RE  | GISTER                         |                            |
| Reference Documents   | Financial Viability Self-Check   |                                |                            |
| Beneficiary Register  |  |                                |                            |
| Financial Viability Self-Check                                | Before granting funding, the Commission may check your organisation's financial viability, depending on the type   |                                |                            |
| SME Participation   | of organisation and various other criteria.  |                                |                            |
|   | You can check your organisation's financial viability yourself using this Financial self-check tool. The tool uses the<br>ratios described in the section of legal entity validation of the H2020 Grants Manual.   |                                |                            |
|   | Read First!<br>Disclaimer: The results of this simulation provide only <b>non-binding indication</b> . If a formal financial viability<br>check by the Commission is required for a participation in a project, either the LEAR of your organisation will<br>be invited to submit data via the Portal or the Commission will inform you about the exact steps to follow. |                                |                            |
|   | START SELF CHECK   |                                |                            |
|   | HORIZON 2020 RESEARCH ON EUROPA HORIZON 2020 & FP7 PROJECTS & RESULTS  | OLAF                           |                            |
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RÉPUBLIQUE FRANÇAISE ET DE LA RECHERCHE



financière







# Vérification de la capacité financière : Evaluation

La capacité financière sera évaluée par la CE sur la base de : Liquidités (capacité à honorer ses engagements à court terme) Autonomie financière Solvabilité (capacité à honorer ses engagements à moyen et long terme) Profitabilité (capacité à générer des profits, ou à minima capacité à s'autofinancer)

Résultats : Ratios **Good** – pas d'impact **Acceptable** – pas d'impact **Insuffisant** – il sera demandé un changement de coordinateur **Weak** – le bénéficiaire ne peut normalement pas participer NB : La décision finale revient toujours à l'ordonnateur











# Vérification de la capacité financière : L'auto-évaluation

- Un outil permettant tester la capacité financière de son organisation en amont de la soumission du projet est mis à disposition des participants, le « *Financial self-check tool* ».
- Lorsque que l'organisation coordinatrice est identifiée comme étant assujettie à une vérification de sa capacité financière, il lui est fortement recommandé de vérifier sa capacité à piloter le projet avant la soumission en utilisant « <u>Financial</u> <u>self-check tool</u> », mis à disposition par la CE à cet effet.











# La gestion électronique d'un projet gagné

http://ec.europa.eu/research/participants/portal//desktop/en/funding/index.html

- La contractualisation électronique
  - Signatures
  - Work Packages, Deliverables, Milestones
- Les amendements du Grant Agreement
- La communication avec le Project Officer
- Les livrables
- Le reporting contractuel





### My Proposal(s) My Project(s)

My Notification(s) 231

My Formal Notification(s)

My Expert Area

The following Participant Portal services will be under maintenance Wednesday 15th of March as follows:

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- Prepare and sign your grant agreement
- · Submit amendments to your grant agreement
- Manage your scientific and financial reports
- · View or manage roles and access rights in your projects consortia

| Legend    | A Access Amendment<br>Periodic Reporting | GP Grant Pre | paration<br>  & Deliverables | MP Manage Pr<br>PC Project Co | rojects 🖪 | Financia<br>View Pro | I Reporting |               |
|-----------|--|--------------|------------------------------|-------------------------------|-----------|----------------------|-------------|---------------|
| Show 10 • | entries                                  | ×            | Hide close                   | d projects                    | S         | iearch:              |             |               |
| ACRONYM A | CALL 🗘                                   | PROGRAM 🗇    | PROJECT                      | O PHASE                       | w o       | $\diamond$           | ACTIONS     | $\diamond$    |
| JUPITER   | H2020-Galileo-<br>2014-1                 | H2020        | 641500                       | Active                        |           |                      | WP MP       |               |
| PERSEUS   | H2020-MG-<br>2014_SingleStage<br>A       | H2020        | 640211                       | Active                        |           | P                    | C VP MP     | $\mathcal{D}$ |
|           | 27                                       |              |                              |                               |           |                      |             |               |

## La mise en place du Grant Agreement

|   | Grant<br>Management                  |                     | Amendments of Grant Agreement Data |               |  |   |                                     |                                    |                                    |                                |                  |                 |               |                 |                      |
|---|--------------------------------------|---------------------|------------------------------------|---------------|--|---|-------------------------------------|------------------------------------|------------------------------------|--------------------------------|------------------|-----------------|---------------|-----------------|----------------------|
| 89325 (SPACE2ID)  | COSME-GA                             | Project<br>Sur mary | Amendment<br>Information           | Beneficiaries | General<br>Information   | Reporting<br>Periods                                | GA<br>Information                   | GA Options                         | Financial<br>Information           | LF Overview                    | Work<br>Packages | Deliverables    | Milestones    | Reviews         | Critical Risks       |
| rference: AMD-689325-3<br>ipe: CR (Consortium Requi   | COSME                                |                     | ~                                  | ✓             | ~  | ~   | ~                                   | ~                                  | ~                                  | i                              | ~                | ✓               | ~             | 4               | <ul> <li></li> </ul> |
| • 😰 🗹   |                                      |                     |                                    |               |  |   |                                     | _                                  | -                                  |                                |                  |                 |               |                 |                      |
| roject Summary  |                                      |                     |                                    |               |  |   |                                     |                                    |                                    |                                |                  |                 |               |                 |                      |
| Project 689325 ( SPAC   | E2ID) - SIGNED                       | (IN FORCE)          |                                    |               |  |   |                                     |                                    |                                    |                                |                  |                 |               |                 |                      |
| Responsible Unit:<br>Call:<br>Topic:<br>Type of Action:<br>Duration:  |                                      |                     |                                    |               | EASME<br>COS-CI<br>COSME<br>COSME<br>14  | /A/01<br>LUSTER-2014-3-<br>2-2014-3.1 - Clu<br>2-GA | -03 submitted f<br>uster Go Interna | for COS-CLUSTEF<br>ational: Strand | R-2014-3-03 / 2<br>1: Supporting p | 21 Apr 2015<br>preparatory act | ions for establ  | ishment and sha | ping of new E | European Starte | egic                 |
| mportant Dates:<br>Intry into force of the G<br>Project Start Date:<br>Project End Date:                                | rant:                                |                     |                                    |               | 04/12<br>01/01<br>28/02  | /2015<br>/2016<br>/2017                             |                                     |                                    |                                    | -                              |                  |                 |               |                 |                      |
| Amendment Informati<br>Rumber:<br>Reference:<br>Type:   | ion:                                 |                     |                                    |               | 1<br>AMD-6<br>CR (Co   | 89325-3<br>Insortium Requi                          | ested)                              |                                    |                                    | -                              |                  |                 |               |                 |                      |
| Budget Information:<br>Proposal overall costs :<br>Aaximum grant amount a<br>total costs (including not<br>btal costs : | after evaluation :<br>n-EU funded) : |                     |                                    |               | <ul> <li>24</li> <li>18</li> <li>24</li> <li>24</li> <li>24</li> <li>24</li> </ul> | 9,971.26 €<br>7,469.25 €<br>9,971.26 €              |                                     |                                    |                                    | -                              |                  |                 |               |                 |                      |
| Aaximum Grant Amount:   | :                                    |                     |                                    |               | 18   | 7,468.91 €  |                                     | 75.00 % of to                      | otal costs                         |                                |                  |                 |               |                 |                      |

## **Reporting et Communication avec le PO**



## Livraison des deliverables



#### **Deliverables**

#### I For each Deliverable, a single file (max 52MB) can be uploaded

| WP N | Del Rel. No | Del No | Title                   | Lead Beneficiary | Nature | Dissemination Level    | Est. Del. Date (annex I) | Receipt Date  | Approval Date | Status   |   |            |
|------|-------------|--------|-------------------------|------------------|--------|------------------------|--------------------------|---------------|---------------|----------|---|------------|
| WP1  | D1.1        | D1     | Kick-off Meeting Repo   | nt AV            | Report | Confidential, only for | rr 31 Jan 2016           | 05 Apr 2016 🦲 | 13 Apr 2016   | Approved | ۵ | 9          |
| WP1  | D1.2        | D2     | 1st Internal Progress / | M AV             | Report | Confidential, only for | rr 31 Jul 2016           | 31 Jul 2016   | 29 Aug 2016   | Approved | ۵ | >          |
| WP1  | D1.3        | D3     | 6M Project Progress Re  | n, AV            | Report | Confidential, only for | rr 31 Jul 2016           | 31 Jul 2016   | 29 Aug 2016   | Approved | ۵ | $\sim$     |
| WP1  | D1.4        | D4     | 2nd Internal Progress   | N AV             | Report | Confidential, only for | r 30 Nov 2016            | 06 Dec 2016 🦲 | 11 Jan 2017   | Approved | ۵ | $\bigcirc$ |
| WP1  | D1.5        | D5     | Final Project Report    | AV               | Report | Confidential, only for | r 28 Feb 2017            |               |               | Pending  | Ω | $\sim$     |
| WP2  | D2.1        | D6     | International Markets   | ; TeRN           | Report | Confidential, only for | r 29 Feb 2016            | 05 Apr 2016 🦲 | 13 Apr 2016   | Approved | ۵ | $\bigcirc$ |
| WP2  | D2.2        | D7     | Diversification Worksh  | K TERN           | Report | Confidential, only for | rr 31 Mar 2016           | 14 Jun 2016 🦲 | 23 Jun 2016   | Approved | ۵ | , Sec. 19  |
| WP2  | D2.3        | D8     | MELCA Market Opport     | J TERN           | Report | Confidential, only for | rr 30 Jun 2016           | 27 Jun 2016   | 28 Jun 2016   | Approved | ۵ | $\bigcirc$ |
| WP3  | D3.1        | D9     | Space Assets and Supp   | SKYWIN           | Report | Confidential, only for | rr 30 Jun 2016           | 30 Jun 2016   | 01 Jul 2016   | Approved | ٨ | $\sim$     |
| WP3  | D3.2        | D10    | New Competences of 9    | S SKYWIN         | Report | Confidential, only for | r 31 Jul 2016            | 31 Jul 2016   | 29 Aug 2016   | Approved | ۵ | $\bigcirc$ |
| WP3  | D3.3        | D11    | Recommendations to S    | SKYWIN           | Report | Confidential, only for | r 31 Aug 2016            | 31 Aug 2016   | 01 Sep 2016   | Approved | ۵ | $\sim$     |
| WP3  | D3.4        | D12    | Dual Communities Wo     | r SKYWIN         | Report | Confidential, only for | r 30 Sep 2016            | 17 Oct 2016 🦲 | 24 Oct 2016   | Approved | ۵ | >          |
| WP4  | D4.1        | D13    | Profiles of External St | r. TeRN          | Report | Confidential, only for | r 31 Aug 2016            | 06 Sep 2016 🦲 | 13 Sep 2016   | Approved | ۵ | $\sim$     |
| WP4  | D4.2        | D14    | Internationalisation S  | t CORALLIA       | Report | Confidential, only for | r 31 Jan 2017            | 15 Mar 2017 🦲 |               | Submi    | ۵ | i 💭 🗐      |
|      |             |        |                         |                  |        |                        |                          |               |               |          |   |            |







# **Documentation et guides**

- Introduction aux services proposés sur le portail
- <u>H2020 manual</u> : sections sur les rôles, l'enregistrement d'une entité, la nomination du LEAR, la validation du PIC
- <u>Rôles et accès sur le portail</u>
- <u>Comment créer un compte ECAS</u>
- Introduction au service de soumission des propositions
- <u>Présentation générale de la section dédiée aux experts</u>
- <u>Guide pour l'auto-évaluation des PME sur le registre du</u> <u>bénéficiaire</u>
- Définition de PME pour la Commission européenne





# Merci pour votre attention!





