Funding & Tenders Portal – What’s new for research administrators

EARMA annual conference 28th March 2019 Bologna

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DG.RTD. J3
Common service for business processes
The new Funding & Tenders Portal

- Replaces the Participant Portal
- Will become the **unique entry point** for fully electronic management of centrally managed grants and procurement contracts
- As a **corporate platform** for electronic data exchange, it delivers on the **Single Electronic Data Interchange Area (SEDIA)** as stipulated in the EU financial regulation.
Funding & Tenders Portal

https://www.youtube.com/watch?v=z5URvbgsYOQ
Funding & Tenders Portal: What's new

- New design, new search behaviour, multi-programme, new features
- Keeps all its functionalities and all current access rights for all users
Main features

- **All centrally managed EU funding opportunities**: calls for proposals and tenders issued by EU institutions and bodies.

- **Search for calls for tenders**, with linking to eTED for detailed tender documents.

- **A simple and powerful search functionality** providing easy access to funding and tender opportunities based on **keywords** and **full-text search**

- **Programme agnostic entry point**, but with possibility for **choosing one preferred programme**
  - **Landing page for each programme** for basic information, and related links to other Europa pages.
Search for all **calls for proposals** and **tenders** issued by EU institutions and bodies.

Whether you are an **organisation** (i.e. NGO) looking for an **EU grant** or an **SME** looking to bid for an **EU procurement contract**, it is just **one click** to get involved.
Simple and powerful search functionality

1. Providing easy access to funding and tender opportunities based on **keywords** and **full-text search**

2. Via the advanced search functions on the Search funding and tenders page

3. Via the **programme pages**, accessible from the Home page
2. Advanced search function

- Search by keywords
- Refine your search by using filters
- Click on a topic card to access the topic details
Programmes covered

- offering the possibility for choosing one preferred programme

- Programme-related pages for basic information and related links to other Europa pages.
Programme landing pages

Funding & tender opportunities

Asylum, Migration and Integration Fund

For the years 2014-20, the overall Home Affairs budget amounts to EUR 10.52 billion. The largest part of these resources consists of two big Home Affairs Funds and the remainder (EUR 2.36 billion) is reserved for the funding of the Home Affairs Agencies.

With an overall budget of EUR 6.9 billion, the Asylum, Migration and Integration Fund and the Internal Security Fund will finance actions supporting EU Home Affairs policies in the period 2014-20 and through these actions build a more open and secure Europe.

In the implementation of the actions in the fields of asylum, migration and integration and internal security and borders supported by these two Funds, the Commission will work closely together with EU States. For actions carried out at EU level, the Commission will also directly cooperate with international and civil society organisations via grants and public contracts that are awarded through calls for proposals and procurement procedures respectively. At times, also calls for experts are organised to provide opinions and advice on specific topics.

Find calls for proposals
Projects & Results
What's new

Keyword search
My Area menu items (after login)

- All access rights are kept on the new Portal.
- Following a login only those folders are shown that are relevant for the user.

Eg. if you do not have proposals, you do not see the My Proposals area.
1. Go to `My Projects` and select your project.

2. Click on `Actions` next to your project.

3. Select from the list of actions:

   **Project Consortium** - to manage access rights, or
   **Manage Projects** – to access the grant management system for reporting, amendments, all project documents and communications.
`Project Consortium`: Edit roles
• to manage access rights of colleagues in the project
• to manage Legal Entity Appointed Representative (LEAR) access to the project (NEW)

Names of colleagues identified with their e-mails and names.
Avoid using shared mailboxes, give individual access rights!

NEW: Now you may decide to give access to the LEAR to all your project details.
Roles for the organisation:

NEW: `ADD roles` or manage `LEAR access` to the project
Horizon Dashboard
Access statistics on Horizon 2020 proposals, success rates, funded projects and participants.

1. Statistics on proposals
2. Statistics on past projects
3. Success stories
4. Export to PowerPoint and PDF, "Storytelling view", etc
5. Currently available for H2020 only, will be extended to all programmes
1. Statistics for EIC Pilot eligible proposals in evaluated calls

2. H2020 EIC topics covered:
   - SME Instruments
   - Fast Track to Innovation
   - Future Emerging Technologies (FET)
Horizon Dashboard: Views on specific aspects (II)

1. Proposals awarded with the Seal
2. Applicants in Proposal awarded with the Seal
Horizon Dashboard: H2020 and FP7 Results

Intellectual Property Rights (IPRs) and Scientific Publications, within FP7 and H2020
Partner search
Partner Search

Search for potential partners for project proposals. The function enables to:

✓ **look for organisations which received funding in the past** (Partner Search via How to Participate section); by keywords, organisation type, geographical location

✓ **create and check partner search requests by call/topic** (via Topic search); “Expertise requests” and “Expertise offers”

✓ In planning: person-based search (using person profiles)
Partner Search: under How to Participate section on F&T Portal
**Most frequent collaborating organisations**

- commissariat a l énergie atomique et aux energies alternatives (207 funded projects)
- nederlandse organisatie voor toegepast natuurwetenschappelijk onderzoek tno (146 funded projects)
- fundacion tecnalia research & innovation (133 funded projects)
- consiglio nazionale delle ricerche (121 funded projects)
- centre national de la recherche scientifique cars (114 funded projects)
- teknologian tutkimuskeskus vtt (110 funded projects)
- teknologian tutkimuskeskus vtt oy (108 funded projects)
- interuniversitair micro-electronica centrum (107 funded projects)
- katholieke universiteit leuven (85 funded projects)
- danmarks tekniske universitet (84 funded projects)
- centro ricerca fiat sepa (84 funded projects)

**List of projects in which the organisation took part**

<table>
<thead>
<tr>
<th>Title</th>
<th>Acronym</th>
<th>Program</th>
<th>Project ID</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced real time services for an optimized multimodal mobility relying on cooperative networks and open data</td>
<td>TIMON</td>
<td>H2020</td>
<td>636220</td>
<td>Contact project</td>
</tr>
<tr>
<td>“2nd Generation Active Wing” – Active Flow-Loads &amp; Noise control on next generation wing</td>
<td>AFLoNext</td>
<td>FP7</td>
<td>565912</td>
<td>Contact project</td>
</tr>
<tr>
<td>“MPC45Ialgos”, Microbial F[...]</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Nanocomposite for building industrial application cases 20 percent efficiency on building,...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contact the Participant Contact of this organisation for this project (after login)**
### List of topic-related "partner search" requests

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>DESCRIPTION</th>
<th>REQUEST DATE</th>
<th>EXPERTISE REQUEST OR OFFER</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBS 2018.901.01</td>
<td>Find solutions to dilution, pollution and content diversity challenges to turn mixed urban bio-waste into sustainable feedstock for the bio-based industry</td>
<td>06-Jul-2018</td>
<td>Expertise offer</td>
<td>• Contact Organisation • Partner Search Details</td>
</tr>
<tr>
<td>BBS 2018.902.03</td>
<td>Valorize sugars from the cellulolytic and/or hemicellulosic fractions of lignocellulosic biomass</td>
<td>06-Jul-2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.902.04</td>
<td>Develop techniques and systems to improve the performance of biocatalysts</td>
<td>15-Jun-2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.902.05</td>
<td>Apply advanced biotechnology to bio-based technologies</td>
<td>2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.902.06</td>
<td>Develop innovative single-step processes</td>
<td>2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.902.07</td>
<td>Produce biopesticides or bio-based fertilizers as components of sustainable agricultural management plans</td>
<td>06-Jul-2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.903.01</td>
<td>Develop technologies and systems to produce bio-based aromatics that outperform fossil-based counterparts</td>
<td>2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.903.02</td>
<td>Nature provides a variety of valuable aromatic compounds, e.g., fragrances, flavors or nutraceuticals could be achieved. Lignin provides these compounds and the optimization of the isolation is one of our expertise.</td>
<td>06-Jul-2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>BBS 2018.903.03</td>
<td>Develop functional molecules for bio-based coatings outperforming existing products and meeting market requirements</td>
<td>06-Jul-2018</td>
<td>Expertise offer</td>
<td></td>
</tr>
</tbody>
</table>
Partner Search: via Topic search on F&T Portal

✓ In a call topic page, you may publish your request for or offer of expertise for creating/joining a proposal.

✓ All your published offers/interests will be visible on your organisation's page too.
**Topic-related Partner search**

Only available for LEAR and Account Administrators

**Possible actions:**
- Contact Organisation
- Partner Search Details
- Withdraw the "partner search" request

### Partner Search List

<table>
<thead>
<tr>
<th>Organisation Name</th>
<th>Request Date</th>
<th>Organisation Type</th>
<th>Country</th>
<th>Expertise Request or Offer</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opte B.V.</td>
<td>29-Dec-2017</td>
<td>Small or medium-size enterprise</td>
<td>NL</td>
<td>Expertise offer</td>
<td></td>
</tr>
<tr>
<td>JSE Ltd</td>
<td>10-Jan-2018</td>
<td>Private for profit organisation</td>
<td>BG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real Technologies di Sergio Lapenna</td>
<td>24-Jan-2018</td>
<td>Other</td>
<td>IT</td>
<td>Draft request</td>
<td></td>
</tr>
<tr>
<td>HRS-RDD Research Design Development</td>
<td>25-Jan-2018</td>
<td>Private for organisation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEM CONSULTING S.A.S. DI LEPORI EMMILIANO C.</td>
<td>29-Jan-2018</td>
<td>Small or medium-size enterprise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INBOUNDMUSE LTD</td>
<td>31-Jan-2018</td>
<td>Small or medium-size enterprise</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Contact the Legal Entity Appointed Representative (LEAR) of the Organisation

Dear Legal Entity Appointed Representative (LEAR) / Account Administrator / Self Registra(*) of Cappe B.V.,

I am contacting you for the following reason:

I would be grateful for a reply to my e-mail address below:

My Name: Olivier Marganne
My Email: Olivier.MARGANNE@ext.ec.europa.eu

Submit

(*) Your email will be sent to all the individuals who have the Legal Entity Appointed Representative (LEAR), Account Administrator or Self Registrator in the above organisation. More information on roles management

"Contact Organisation" form
Calls for tenders
Calls for tenders

- Now **integrated in the search for opportunities**: currently the new Portal gives access to the calls for tenders, with the relevant linking to the e-TED site for submission service.

- **Keywork search**: works on the titles, metadata

- **Separate page on tenders** for basic information

- **Procurement section** is being implemented in view of a fully integration of procurement service (**paperless handling as for grant**).
Expert area
New Expert Area: new layout, navigation, simplified profile

Check the new video or IT HOW TO
My Expert Area

- Available **only** if the **expert** has created a **profile**!
- Provides a quick overview on the work and administrative tasks.

**Work** related access (Evaluation)

**Administrative tasks**, access to the profile, contracts, payment

**Delegation** to the profile (to assist with admin. tasks)
- Moved to the top right corner: Look for the bell...for a quick preview, or `View all notifications` to manage notifications.

- Set Preferences: frequency of e-mails
Two-step verification for log-in
Increase the security by opting for 2-step verification: to access the MY AREA, you will then have to **login with something you know** (your password) and **something you own** (e.g. mobile phone or device).

You will have to **register your mobile phone or device** as a second authentication factor before you can activate the 2-step verification for your account.
Ex-post audit
New features

➢ New roles linked to Audits

➢ New section 'My audit " available under My Area .
➢ New role ‘Audit Contact“ – by default give to LEAR

➢ Expert profile delegation under "My expert Area"

Experts will be now able to:

• delegate the administration of their expert profile
• manage their delegations via the F&T Portal
“My audits”

- **H2020 Grant agreement provides for the use of the Portal for all procedures related to grants**
  - All other grant lifecycle processes pass via the PP
  - Ex-post audits is the last one to be incorporated

- **New features required for audits**
  - **Audit scope is beneficiary centric** (\& multiple projects)
    - new Portal scope: Participant Portal Audit Management System (PPAMS)
  - **Provisions of communication mode in MGA**
    - Update made in MGA v4 to extend the use of the portal for closed projects
    - IT solution for acknowledgement and explicit agreement
  - **Audits outsourced by EC has 3 interlocutors/roles**
    - EU service responsible for managing audits: Common Audit Service for H2020
    - Audited organisation: new role created “Audit Contact” (AUCO)
    - Appointed External Audit Firm: new role created (EXAF)
Who has access?

Audit Contacts (AuCo)
- nominated by the LEAR of an audited organisation
- will carry out all audit related tasks for the audited organisation

Auditors
- EU services own audit staff assigned to the audit ("in-house audits")
- External auditor firms appointed to carry out the audit ("outsourced audits")

How does it work?
All formal audit steps covered (announcement to closure)
All communication via Portal formal and informal channel
Extension of audit findings process will also be followed via a Portal process
* features work in similar way as in other grants processes
  ECAS authentication for all actors; formal tasks are notified;
  audit documents stored together; view of the status of process
« My Audits »

- Entry point for the beneficiary (AUCO)
- Entry point for the External Audit Firm (EXAF)
My Audits

Key Audit Data

Process description and reference

Process timeline

Open the task (available to you when in a yellow box)

Perform and complete the task (enabled when available to you)
Tasks for the AUCO during an audit

1. Upload and submit the audit supporting documents described in the letter of announcement
Tasks for the AUCO during an audit

2. Access the Draft Audit Report and upload and submit observations
An audited beneficiary may also send any additional/missing audit supporting documents by Formal Notification.
AUCO – accessing formal audit letters

1. Select letter

2. ECAS authentication

3. Download letter

Acknowledgement of receipt of letter complete
Extension of audit findings

AUCO Tasks

- Where errors found in an audit are considered systemic the audited beneficiary will be notified in the audit letter of conclusion (LoC)
- The Extension of audit findings is triggered when the LoC is sent
- 90 day process clock where beneficiary must submit the necessary information
Thank you for your attention!