

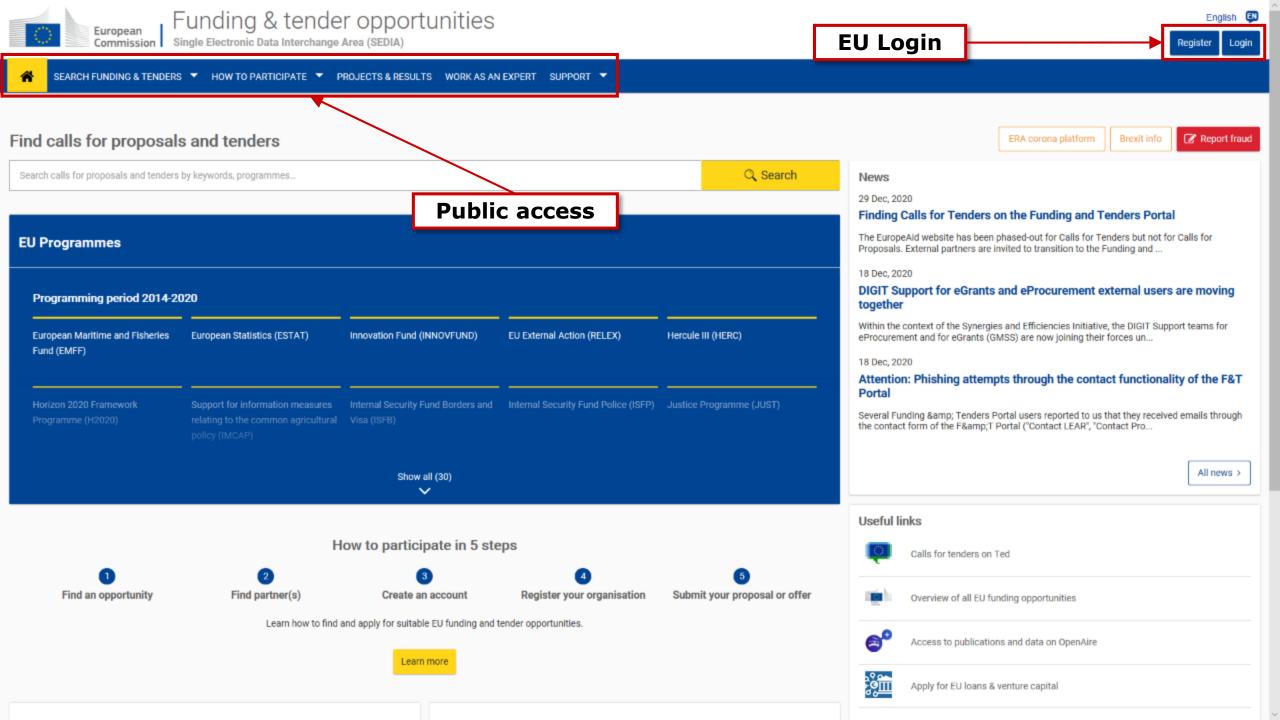
Using the Funding & Tenders Portal:

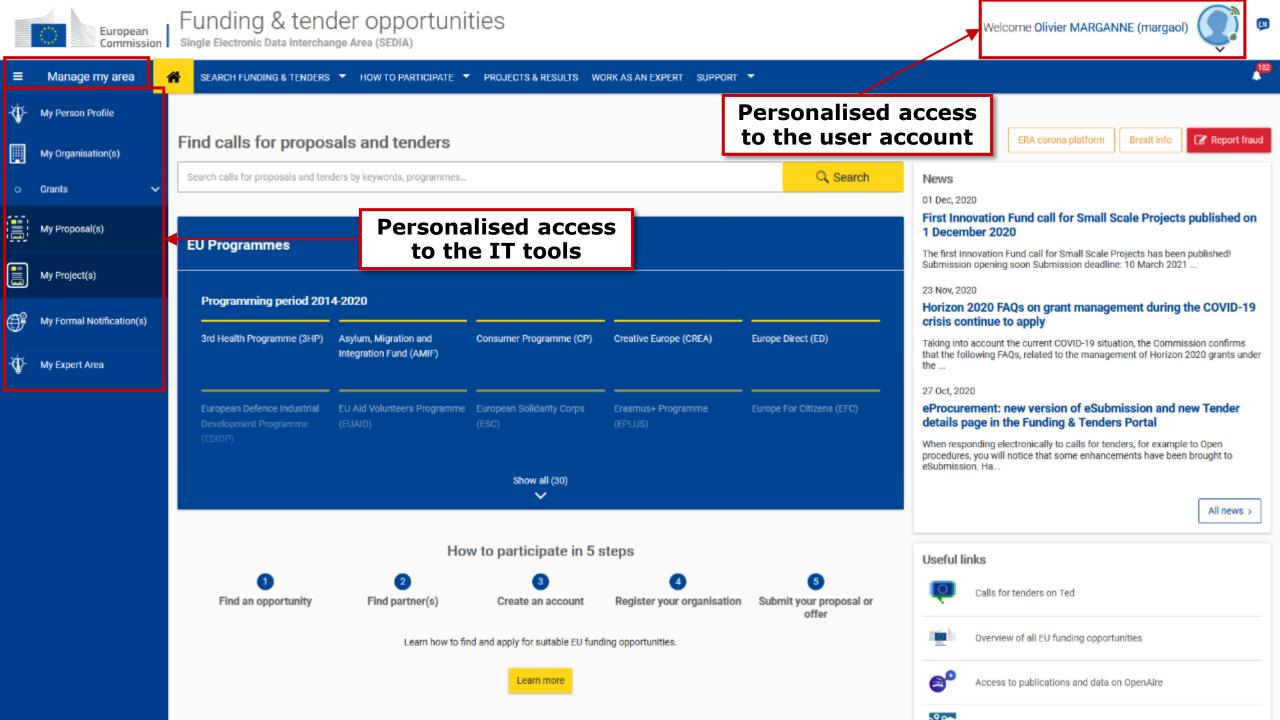
What you need to know

Olivier MARGANNE

olivier.marganne@ext.ec.europa.eu

Common Implementation Centre – Business Processes – RTD H3







Funding & Tenders Portal: principles

Single gateway for all exchanges, based on:

EU Login

Single sign-on

(1 EU Login account = 1 e-mail address = 1 person)



IAM

Access rights based on role authorisation



Brings homogeneity, transparency and better service integration for grant management.



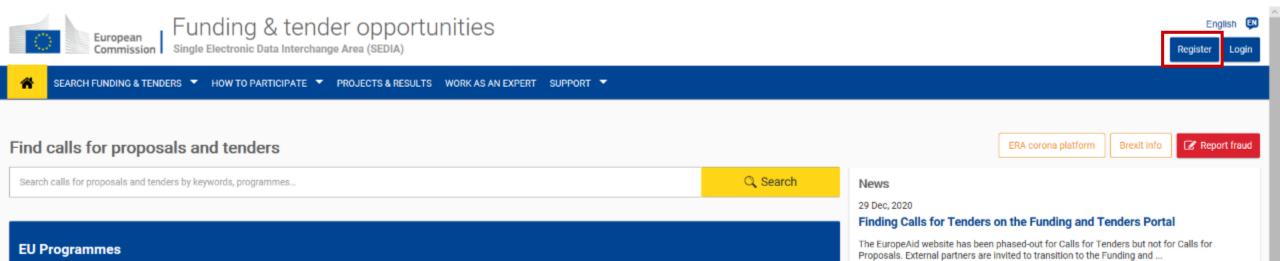
EU Login



Create a new EU Login account

Creating a new EU Login account is fast and easy:

- 1. Click on the "Register" button
- 2. Enter your information (name & e-mail address)
- 3. Click on the link you receive via e-mail
- 4. Set up your password







English (en)

Create an account

Create an account

Help for external users
First name
I
Last name
E-mail
Confirm e-mail
E-mail language
English (en)
Enter the code
○ ▶
The state of the s
☐ By checking this box, you acknowledge that you have read and understood the <u>privacy statement</u>
Create an account



Registering your organisation – Getting a PIC



How to Participate

1. Reference Documents

List of all useful reference documents, grouped by Programme

2. Participant Register

- PIC search: Check whether your organisation is already registered / Look for an existing PIC
- Access the organisation registration tool
 PICs are required in the proposal submission system

clear filter 8

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SEARCH FUNDING & TENDERS THOW T

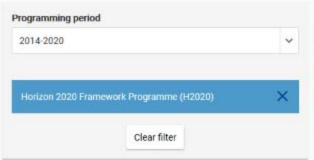
HOW TO PARTICIPATE ▼

PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT ▼

Horizon 2020 Framework Programme (H2020)



Reference Documents



Reference Documents

Grants

This page includes reference documents of the programmes managed on the EU Funding & Tenders portal starting with legal documents and the Commission work programmes up to model grant agreements and guides for specific actions.

Please select the programme to see the reference documents.

Procurement

Reference Documents related to tendering opportunities are published on TED eTendering in the calls for tenders.

Q Filter	1 Expand all
• Legislation	
Work Programmes	
Grant agreements, contracts and rules of contest	
• Guidance	
Templates & forms	
Expert names (annual lists)	



SEARCH FUNDING & TENDERS *

HOW TO PARTICIPATE ▼

PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT ▼

Participant Register

Participant Register

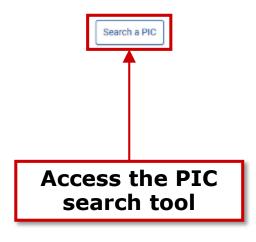


If you want to participate in a project proposal or in a call for tenders with eSubmission, your organisation needs to be registered and have a 9-digit Participant Identification Code (PIC). Please quote your PIC in all correspondence with the Commission.

The register contains all participants of EU programmes.

Is your organisation already registered? PIC search

Please check whether your organisation has already been registered. If so, no need to register it again.



Register your organisation

To register your organisation or as a natural person, you need to login into the Portal or, if you are a new user, create your account.

Check what information you need to register in the Online Manual - and keep it to hand during the registration procedure. To start registration, click on the button below.

Register your organisation

You can suspend the registration process at any time: the data entered can be saved as draft and you can continue your registration later. To return to your registration, please log in and get into My Organisation(s) in the My Area section. Incomplete, draft registrations are automatically deleted after one year.

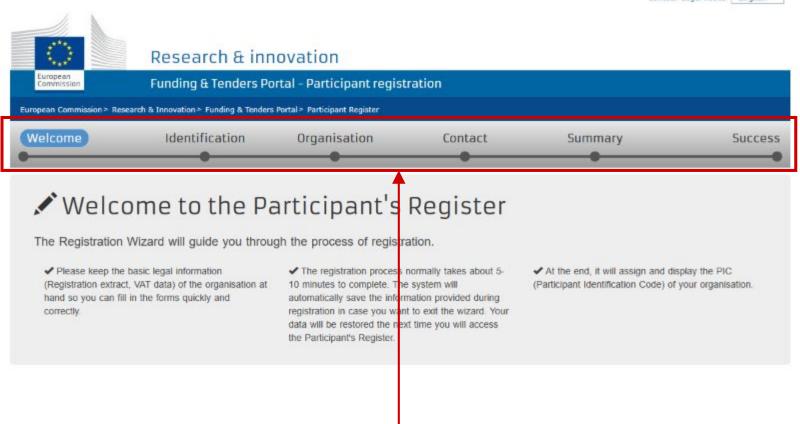
For H2020 programme, please make sure to fi status is an eligibility criterion (like, e.g. the SM

Should your project or tender be successfully

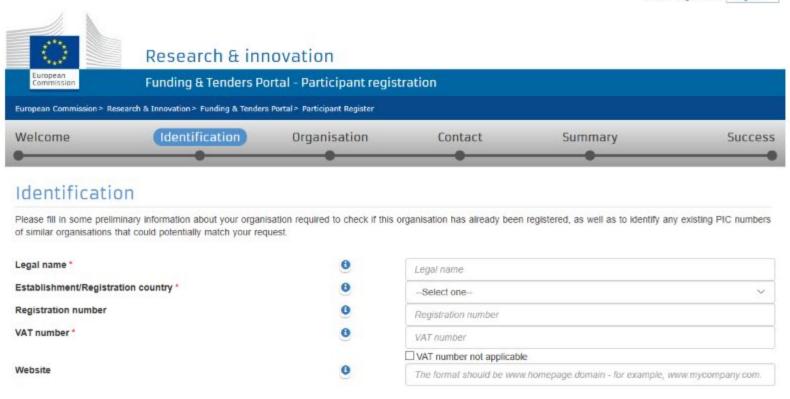
. Additionally, for actions where the SME Register an essment organisation

ation Service team before the signature of

the Grant Agreement or of the Framework Contract.



Complete all 6 steps to receive your PIC



A background check for duplicate PICs is taking place in parallel

@ European Commission



Participant Register

Important remarks:

- Registering an organisation requires an EU Login account
- The person who registers an organisation receives the Self-Registrant role: this person is the contact person with the Commission services for this organisation until a LEAR is appointed
- When the registration is completed, the PIC number is provisional, meaning that the submitted data then needs to be validated by the Validation Services
- The validation of the organisation is only triggered once the organisation is part of a successful proposal; it is then flagged in the system with the Grant Signature date for the Validation Services to operate
- All contact with the Validation Services must take place inside the Participant Register



Services after login:

The Identity and Access Management (IAM)



Personalised services

The Funding & Tenders Portal allows each user to have access to a personalised space, based on 3 main elements:

- Each user is supposed to have a unique EU Login account, which is the unique identifier for persons (linked to their professional email address).
- Each EU Login account is linked to one (or more) PIC number(s), which are the unique identifier for organisations.
- Each EU Login account is linked to all the roles that the user has in projects and/or organisations through IAM.
 - One user can have as many roles as necessary.





















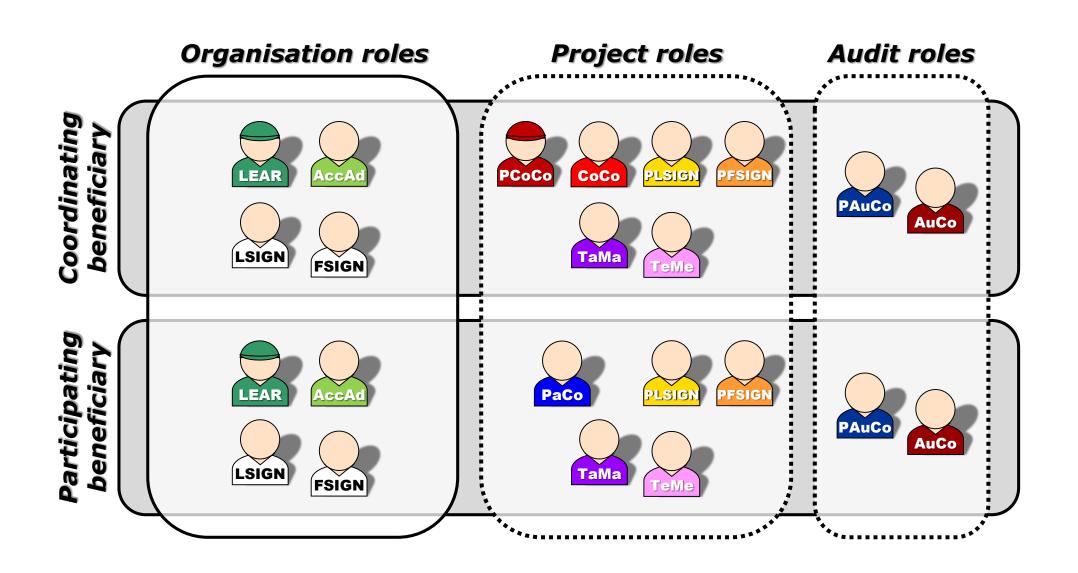




The Identity and Access Management

- The <u>I</u>dentity and <u>A</u>ccess <u>M</u>anagement allows us to define and/or manage changes of <u>access rights</u> of users of the <u>Funding & Tenders</u> <u>Portal</u>.
- It gives a personalised and secure access to the different services of the Funding & Tenders Portal.
- Minimum involvement by the Commission/Agency staff allowing for flexibility in the online management of the consortium.
- Any change in the roles of the users is saved to allow a monitoring & tracking service.

The Identity and Access Management





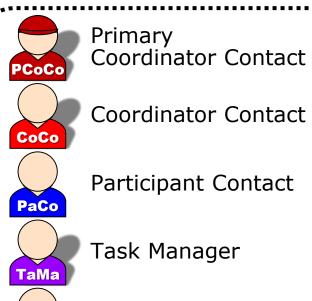
Nomenclature





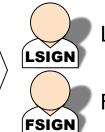


Account Administrator





Team Member



Legal Signatory





Legal Signatory assigned to a project



Financial Signatory assigned to a project

Project roles



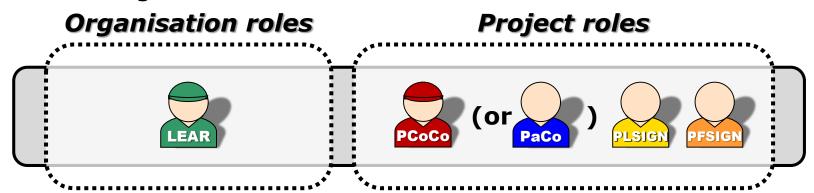
Important remarks

- Only the LEAR and Primary Coordinator Contact are defined/modified by the Commission.
- Only the LEAR and Primary Coordinator roles are unique.
 There is no technical limitation in the amount of other roles (you may appoint as many or as few as needed).





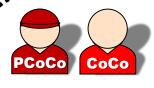
- One person can have several roles at the same time.
- Minimum configuration:





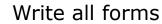
Access rights

Project roles





Read all forms



Submit all forms





Read forms

Write forms

Sign & submit financial forms





📆 Read forms

Write forms

Sign legal forms

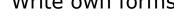




Read own forms

Write own forms





Submit own forms to coordinator (except financial forms)





Read forms

Write forms





Read forms

Organisation roles







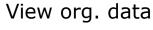
View org. data Modify org. data

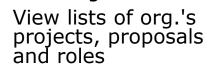
TView lists of org.'s projects, proposals and roles















The nomination process: "Original roles"

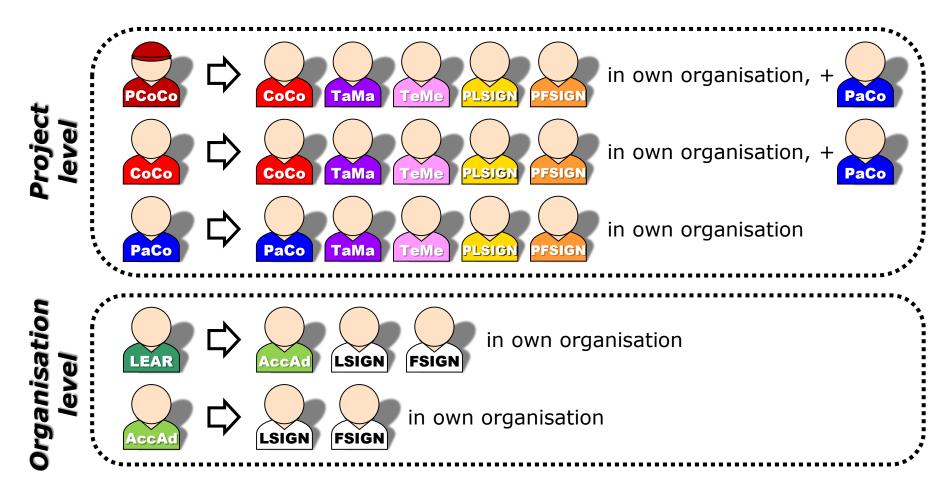
Some roles are automatically provisioned in the early stages of the Project ("original roles") as follows:

- The proposal initiator in the proposal submission phase will automatically be recognised by the Commission as the Primary Coordinator Contact.
- The "Main Contacts" of the participating organisations identified during proposal submission will become Participant Contacts at the beginning of the grant preparation.
- The **LEAR** is validated by the Commission during the validation process of his/her organisation.





The nomination/revocation process





The nomination/revocation process: how to nominate/revoke someone?

To grant a role, the e-mail address of the "new user" will have to be filled in; this e-mail address should be the same as the one used for the EU Login account of the "new user".

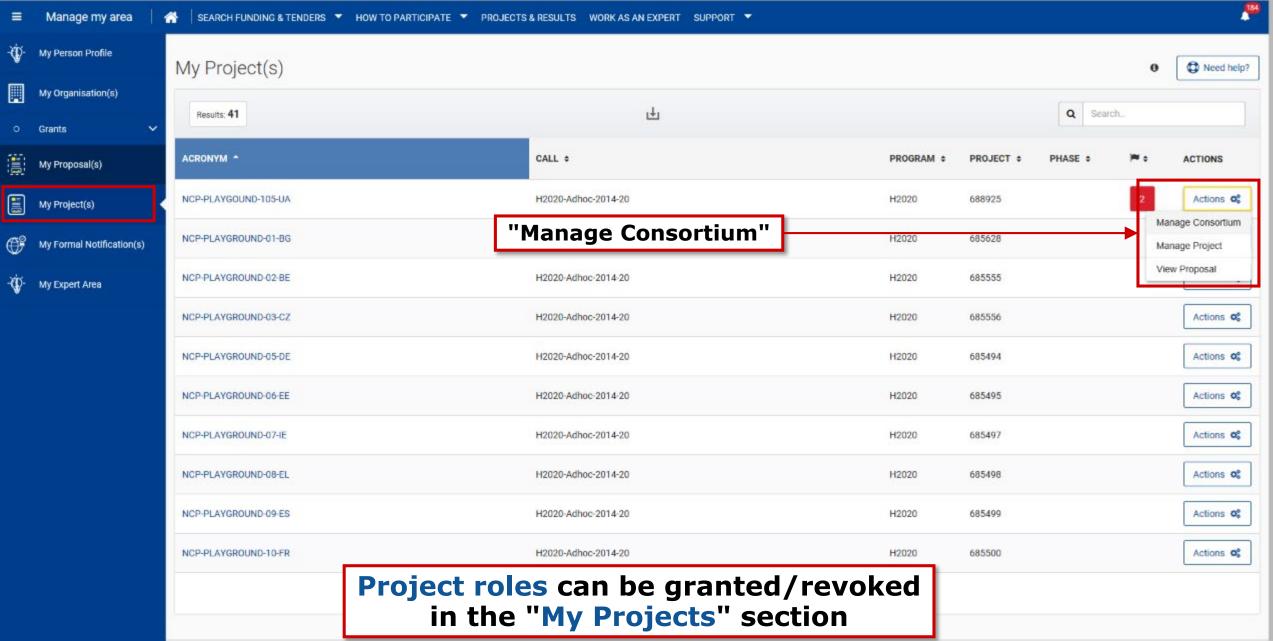
If this "new user" has no EU Login account, he/she will automatically receive an invitation to create his/her EU Login account.



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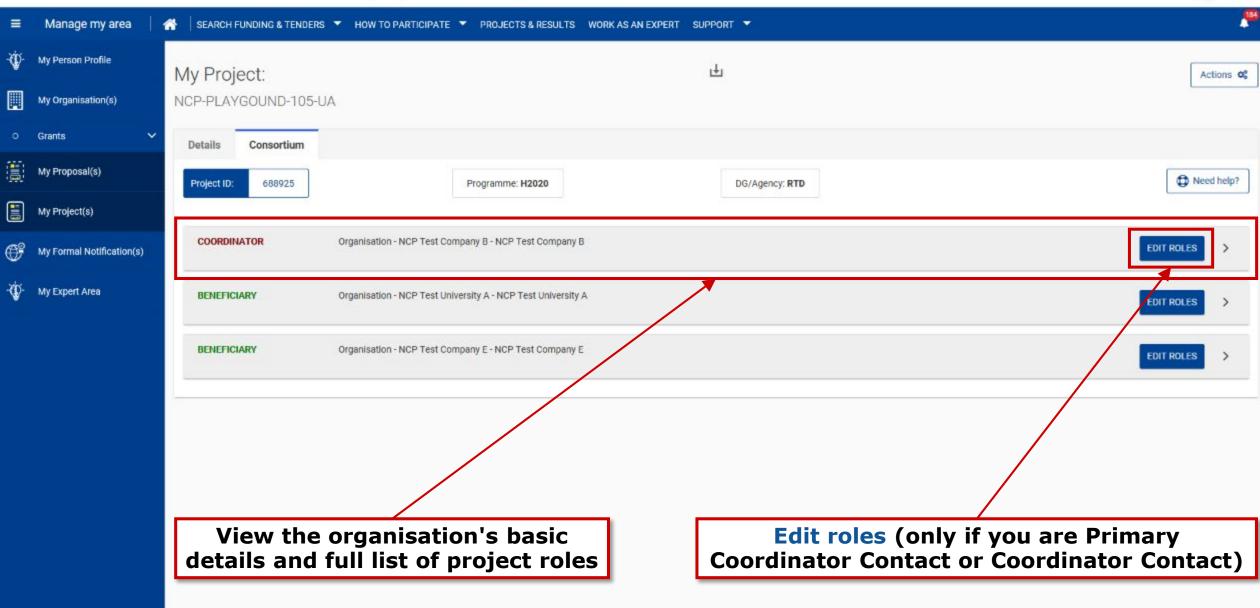






Welcome Olivier MARGANNE (margaol)

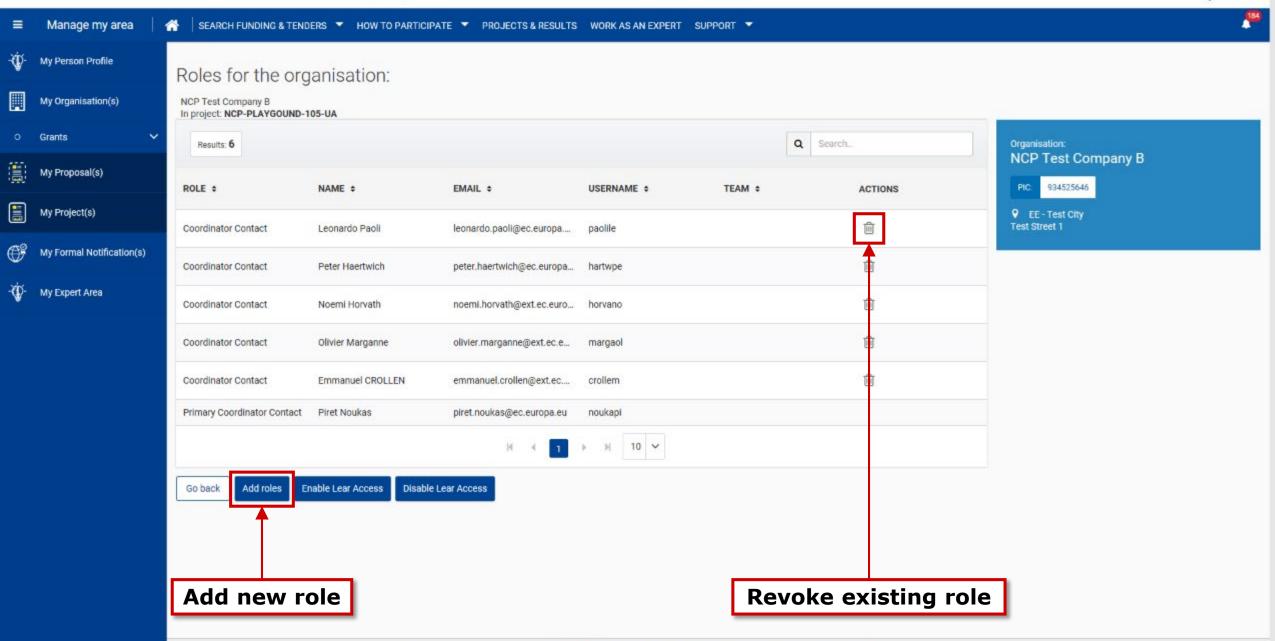




Welcome Olivier MARGANNE (margaol)

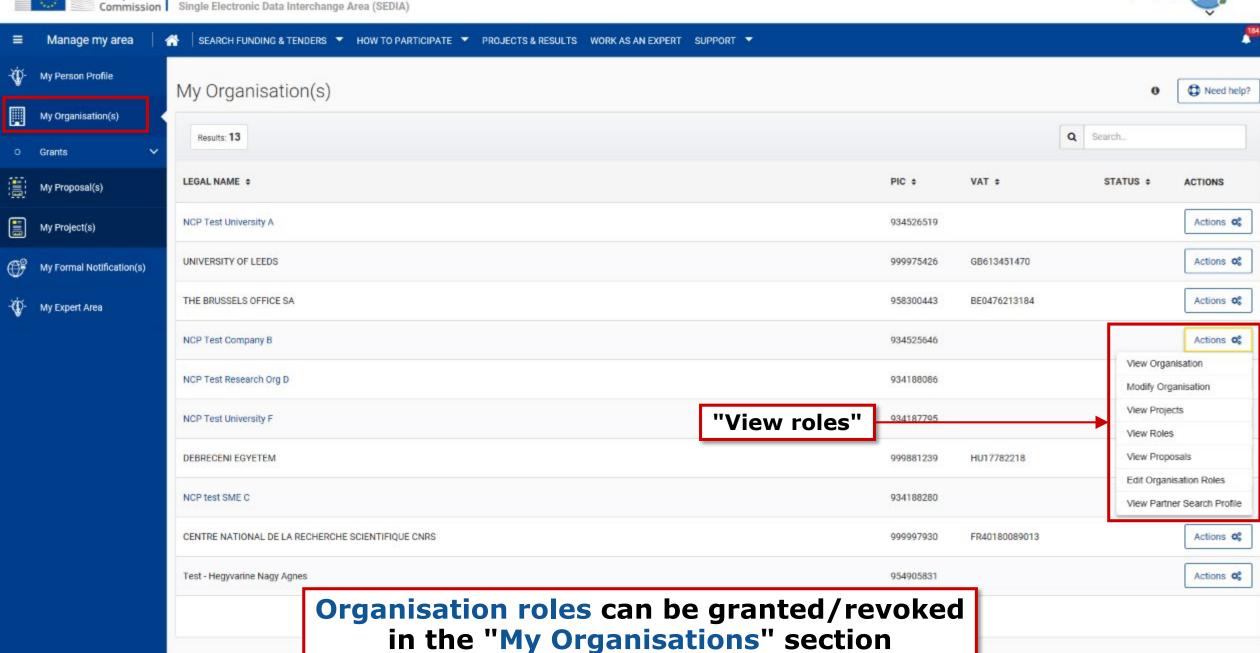


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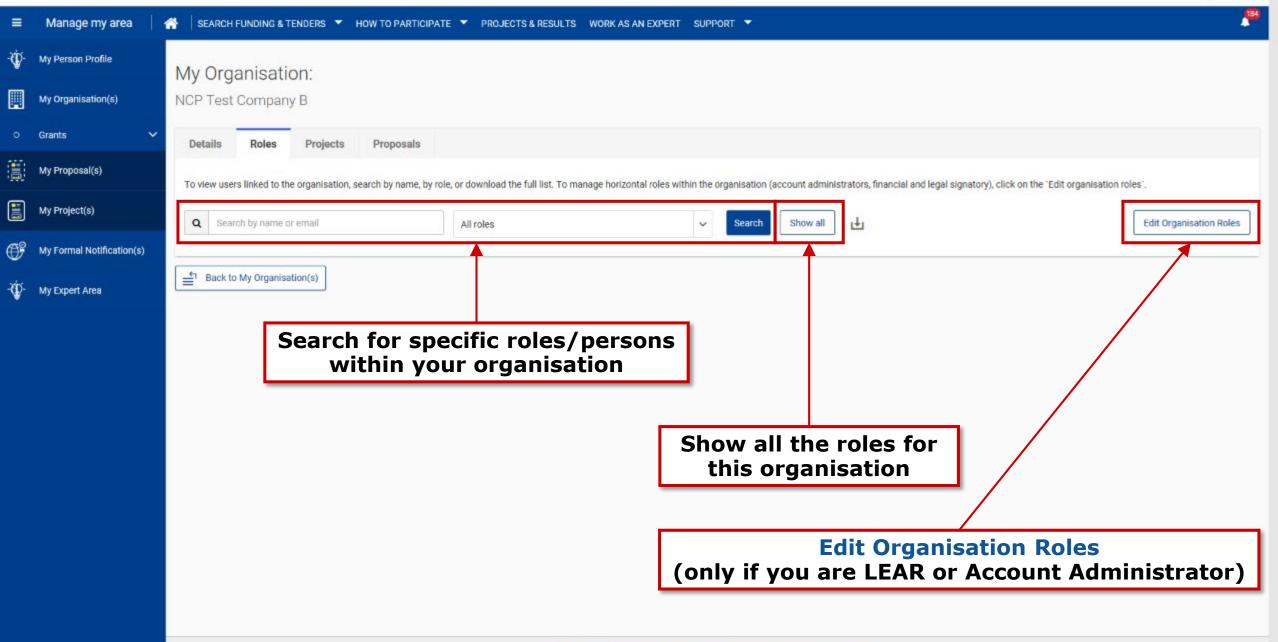
Welcome Olivier MARGANNE (margaol)







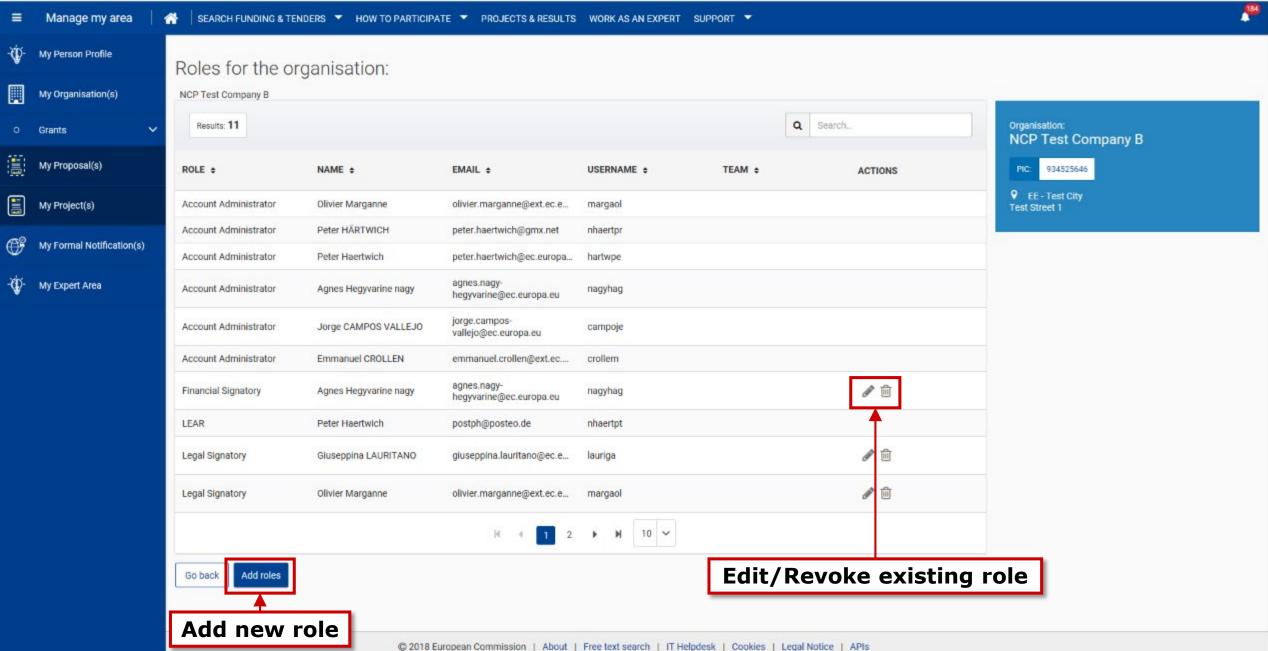




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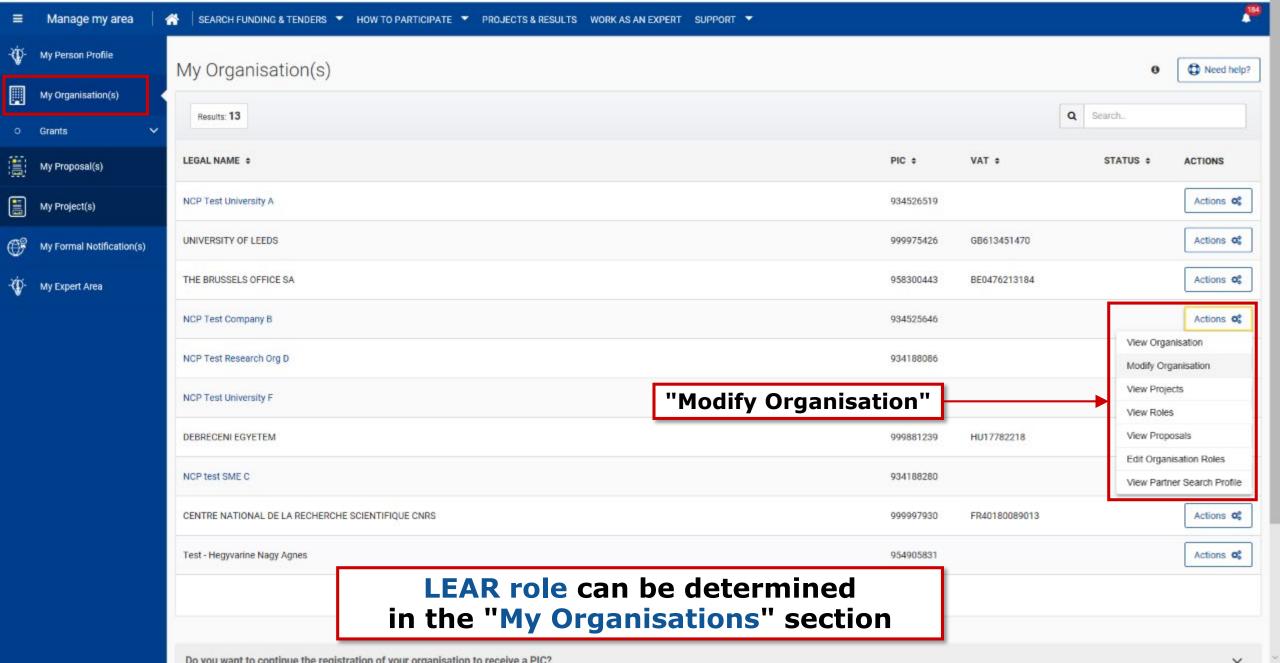




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Research & innovation

Funding & Tenders Portal - Participant registration

European Commission > Research & Innovation > Funding & Tenders Portal > Participant Register

Welcome Olivier MARGANNE. You can edit the data of organisation NCP Test Company B

PIC: 934525646

Activity log Organisation LEAR Bank Accounts Programme specific information

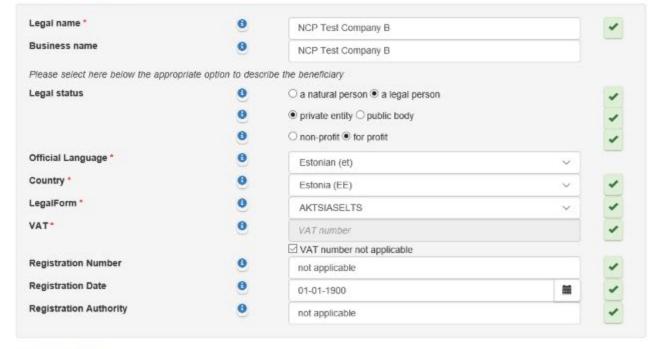
Financial capacity

Messages
Documents

SME

Submit changes



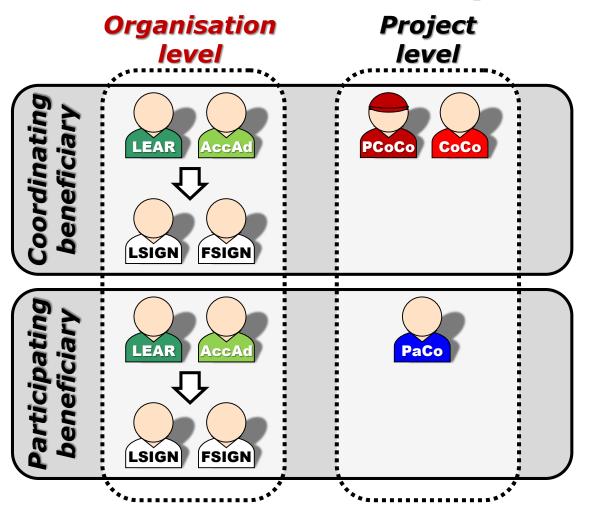


Legal Address

Beneficiary's legal address



The nomination process: LSIGN/FSIGN

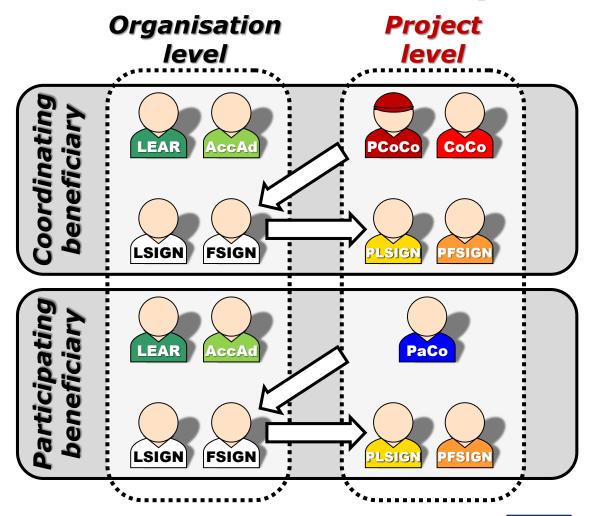


1. The **LEAR** (or **Account Administrators**) nominate as many LSIGNs / FSIGNs as they want.

At this stage, the FSIGN cannot do anything, while the LSIGN has read-only access to the organisation's data and lists of projects, proposals & roles.



The nomination process: LSIGN/FSIGN



2. The (Primary) Coordinator Contacts / Participant Contacts

need to assign to their project as many LSIGNs / FSIGNs for their own organisation as needed.

The PLSIGN and PFSIGN now have their own access to the tools.



Organisation roles: what can I do?

- 1. Manage the registration of the organisation
- 2. Update the organisation's data in the Participant Register
- 3. Read-only access to the organisation's list of all roles, proposals and projects
- 4. Nominate/revoke organisation roles
- 5. Manage public organisation profile and "partner search" requests



Funding & tender opportunities Commission | Single Electronic Data Interchange Area (SEDIA)

Partner search



Need help?

Register

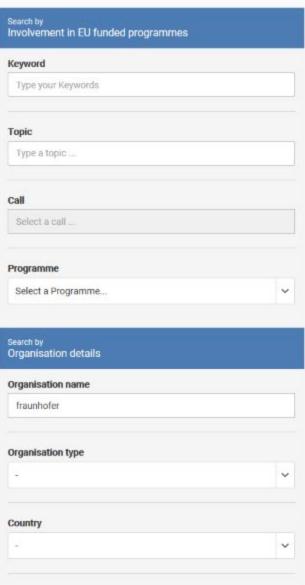


City

SEARCH FUNDING & TENDERS .

HOW TO PARTICIPATE .

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Partner Search

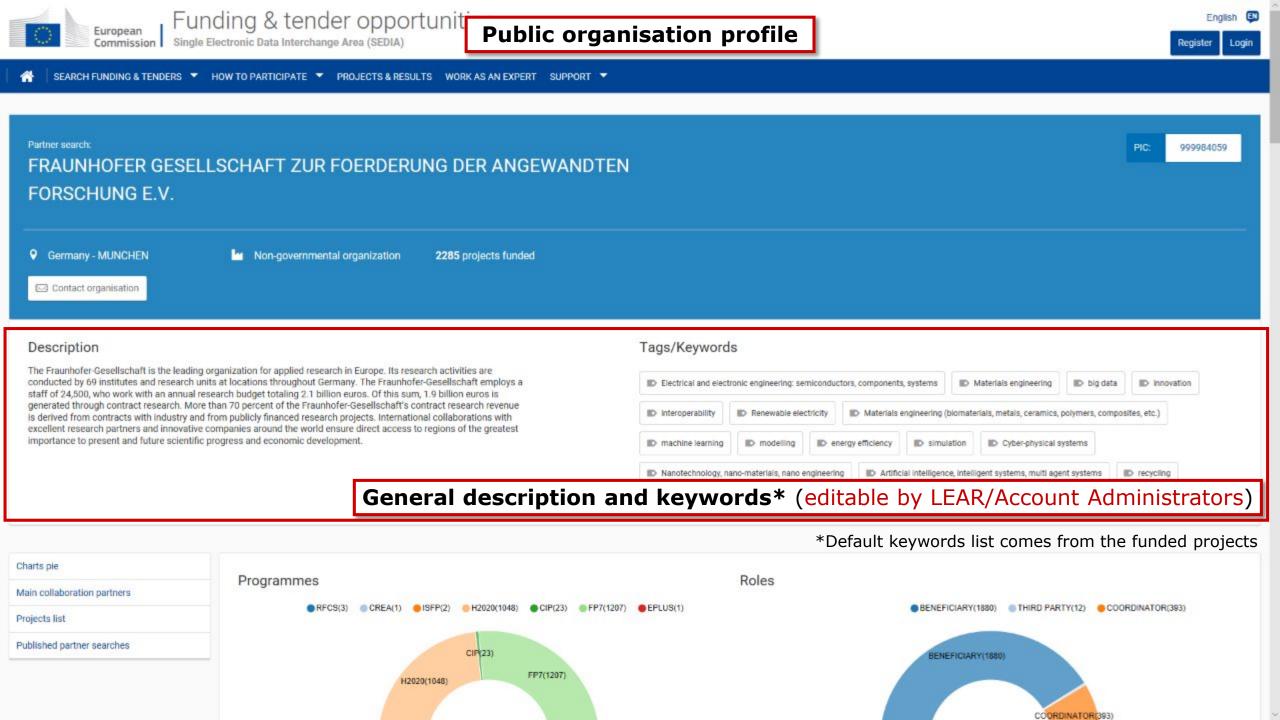


Any use of the Funding and Tenders Portal for a commercial purpose is forbidden. Any misuse of it will lead to the refusal of access to the Funding and Tenders Portal.

Find partners for your project ideas among the participants in past EU projects.

- . Enter a keyword or a topic of a past call for proposals for finding related organisations.
- · Search by geographical criteria or by types of organisation.
- For more specialised partner search service see Online Manual.

RGANISATION NAME \$	ORGANISATION TYPE \$	ORGANISATION STATUS ¢	COUNTRY \$	CITY \$	#PROJECTS ↓
FRAUNHOFER GESELLSCHAFT ZUR FOERDERUNG DER ANGEWANDTEN FORSCHUNG E.V.	Non-governmental organization	VALIDATED	Germany	MUNCHEN	2285
Fraunhofer Austria Research GmbH	Research Organisation	VALIDATED	Austria	Vienna	5
STIFTELSEN FRAUNHOFER- CHALMERS CENTRUM FOR NDUSTRIMATEMATIK	Small or medium-size enterprise	VALIDATED	Sweden	GOETEBORG	5
ASSOCIACAO FRAUNHOFER PORTUGAL RESEARCH	Research Organisation	VALIDATED	Portugal	PORTO	4
RAUNHOFER UK RESEARCH IMITED	Research Organisation	VALIDATED	United Kingdom	GLASGOW	4
RAUNHOFER ITALIA RESEARCH	Research Organisation	VALIDATED	Italy	BOLZANO	3





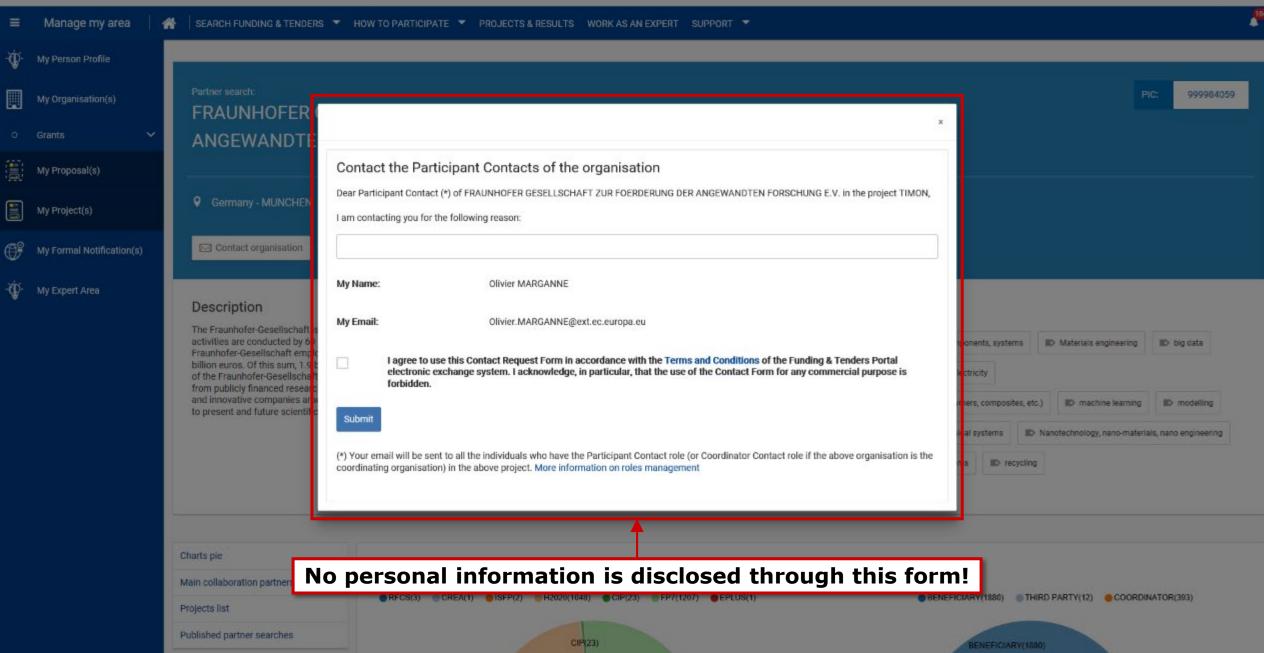
European Commission

Funding & tender opportunities

Commission | Single Electronic Data Interchange Area (SEDIA)

Welcome Olivier MARGANNE (margaol)







What to do in case of spam and phishing related to the Funding & Tenders Portal?

From time to time spam and phishing occur. Several types of spam and phishing can be distinguished:

- 1. phishing attempts pretending to come from the Funding & Tenders Portal, asking for vital personal and financial data such as ID or bank account details. Such e-mails may also ask you to click on a link or download an attachment to update your pertinent information there;
- 2. spam looking identical to Funding & Tenders Portal notifications but not actually stemming from the Funding & Tenders Portal;
- 3. inappropriate use of the Funding & Tenders Portal contact function to send unsolicited messages regarding commercial services. Your first action against spam and phishing is to be vigilant. Protect yourself by keeping the following in mind:
- 1. The Funding & Tenders Portal will never ask you to send important personal and financial information via email. When logging on to the Funding & Tenders Portal, check that you use the default URL address https://ec.europa.eu/info/funding-tenders/opportunities/portal/ as the starting point and the page links where you introduce the personal and financial data start with https://ec.europa.eu/research/
- 2. Ignore phishing messages. Do not be coerced into following their instructions simply because they have threatened you that something will happen to your account or to your application for EU funding if you do not respond.
- 3. Exercise caution when opening attachments or downloading files. These may contain viruses or software that may pose security threats to your computer.
- 4. Update your user password regularly. Do not use passwords that can be easily attributed to you such as your name or birthday. Report any suspicion of a phishing incident to us via our <u>IT Service Desk</u>.

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq/7942



More functionalities



My Project(s)

- 1. Access to the list of projects the user is involved in
- 2. Access to the project-related services:
 - Grant preparation / Grant signature
 - Amendments
 - Reporting tools
- 3. View of the consortium's roles for a given project
- 4. Grant/revoke roles for a given project (provided the user has the authorisation to do so)



Paperless submission

- LEAR nominates a list of persons authorised to sign legal & financial statements
- Only these persons get access to the "Sign and submit" function in the tool
- "Sign and submit" triggers the creation of an eReceipt that is stored in the electronic project archive
- All persons needing to know (including the LEAR) are notified on the transaction and have access to the eReceipt



Value of the eReceipt

- Electronic receipt = **digitally signed PDF version of the submitted document**.
- Both the content of the document and a set of metadata (time stamp, EU Login credentials of submitter) are digitally sealed.
- The digital signature mechanism, using a public-private key pair mechanism, uniquely binds the eReceipt to the transaction and ensures its full integrity.
 Therefore a complete digitally-signed trail of the transaction is available both for the beneficiaries and the Commission.
- Any attempt to modify the content will lead to a break of the integrity
 of the electronic signature, which can be verified at any time by clicking
 on the signature in the PDF document.
- The eReceipt is stored in the project archive where it can be downloaded
 at any time by any actor in the project and stored on other electronic media.



My Notification(s)

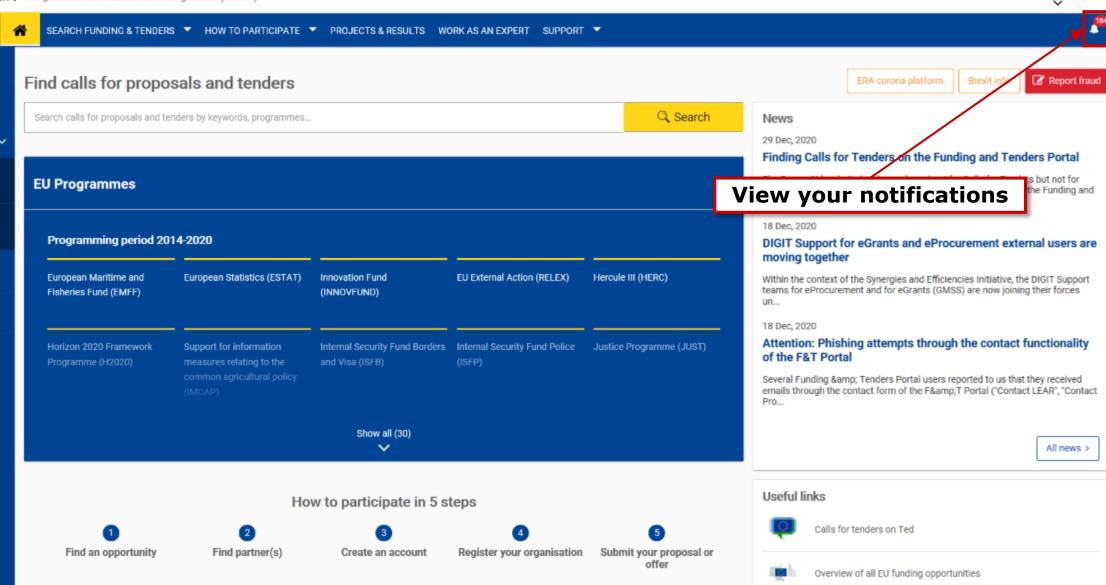
1. View all personal notifications for the services of the Funding & Tenders Portal

 Examples: change of roles, forms ready to be signed, availability of e-receipts, etc.

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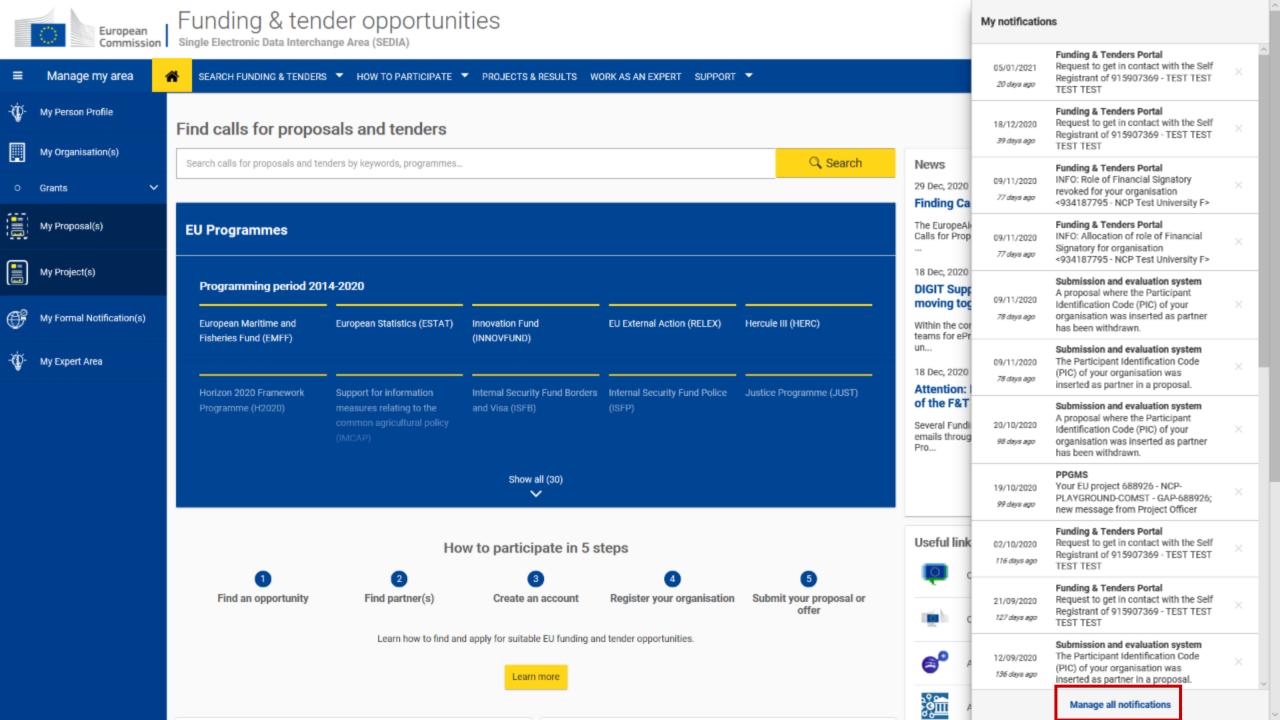


Learn how to find and apply for suitable EU funding and tender opportunities.

Learn more

Apply for EU loans & venture capital

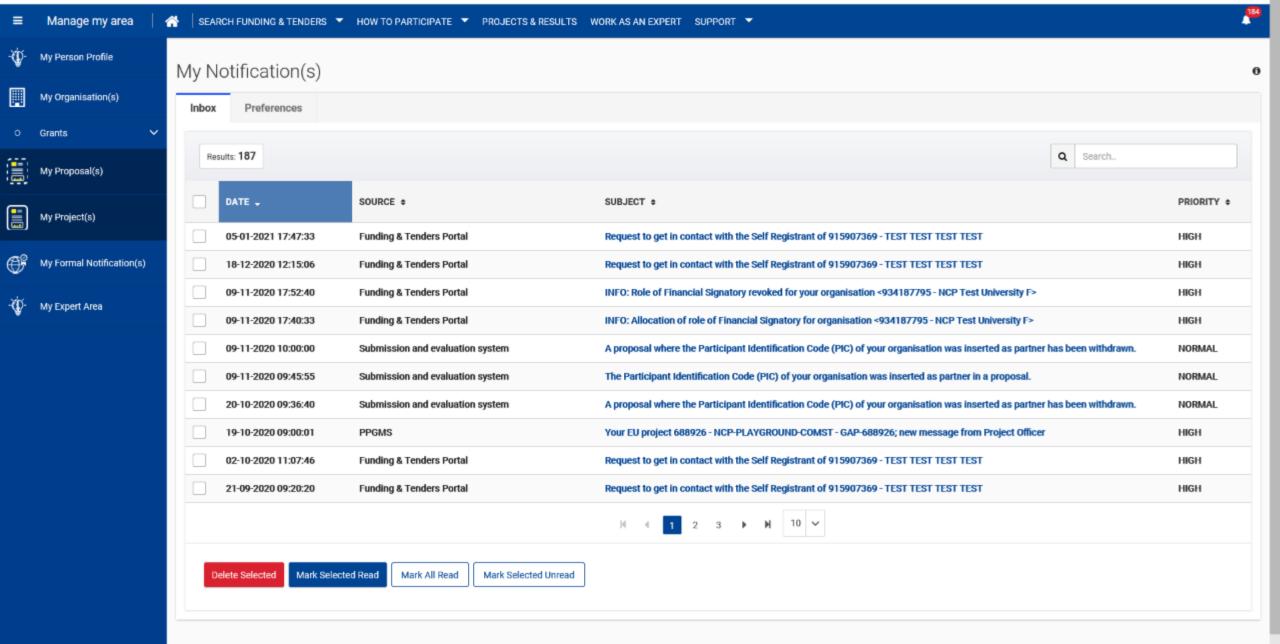
Access to publications and data on OpenAire



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My Formal Notification(s)

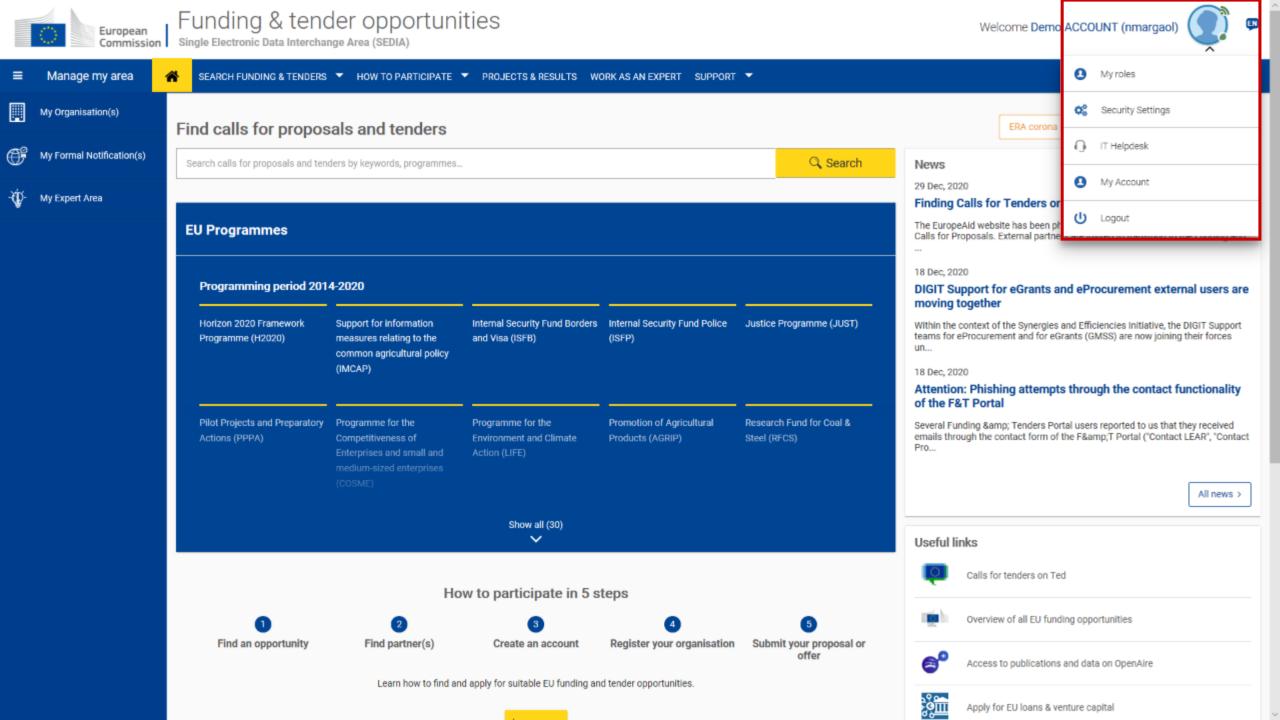
- 1. View all formal notifications for the services of the Funding & Tenders Portal
 - Can be used ONLY for correspondence requiring acknowledgement of receipt

Examples: termination of a grant, etc.



My Account

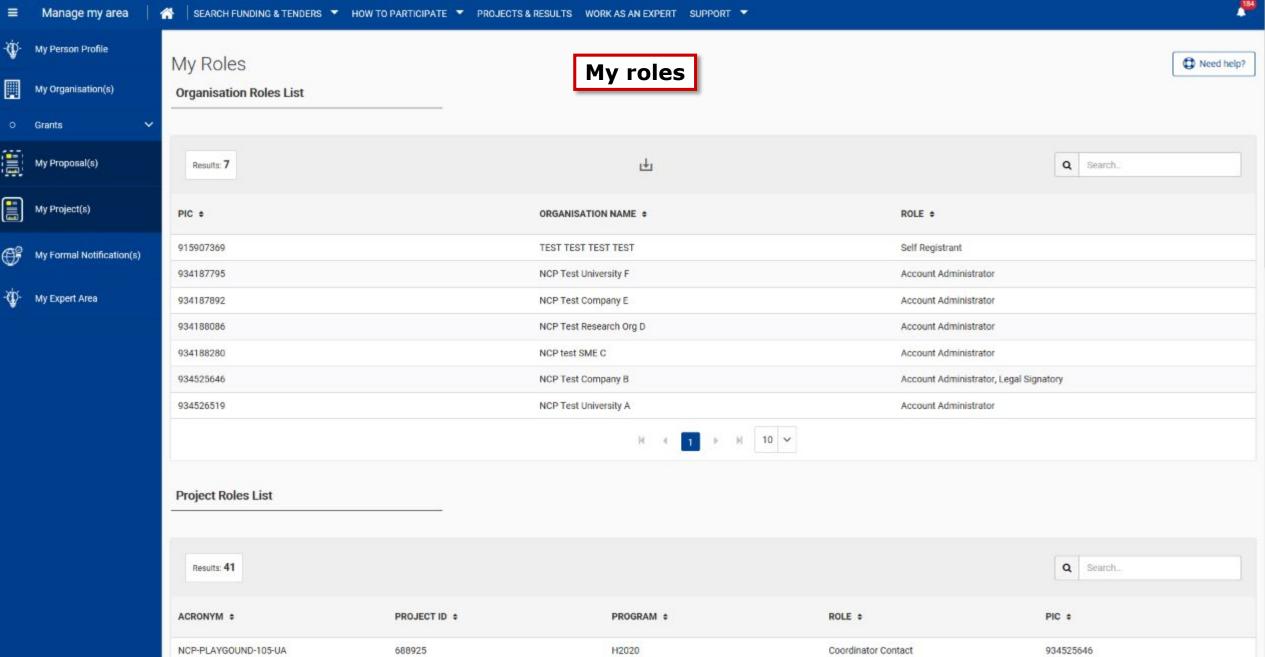
- 1. My roles: list of all the roles linked to the EU Login account
- 2. Security Settings: you can activate the 2-step verification by registering your mobile device
- 3. IT Helpdesk
- 4. My Account: information about your EU Login account
- 5. Logout



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English (en)



My Account



My account details



Modify my personal data



Delete my account



Manage my mobile devices



Manage my Security Keys and Trusted Platforms



Manage my mobile phone numbers



Link my eID

You can link your eID to your EU Login account.



Display my sessions

You can view the sessions opened for visited applications.

Click on the gear icon if you want to change your EU Login password



Need help?



Need help?

Support

1. Guidance & Manuals

- Access the <u>Online Manual</u> (guide for business processes)
- Access the <u>IT How To</u> wiki (guide for **IT processes**)

2. FAQ

3. Helpdesks

The support section is also **Programme-based**; some specific helpdesks & guidance documents will only be available for a dedicated Programme.



Find guidance, process by process (drill-down approach)

Online Manual

- > My Area User account and roles
- > Participant Register Register your
- > Grants

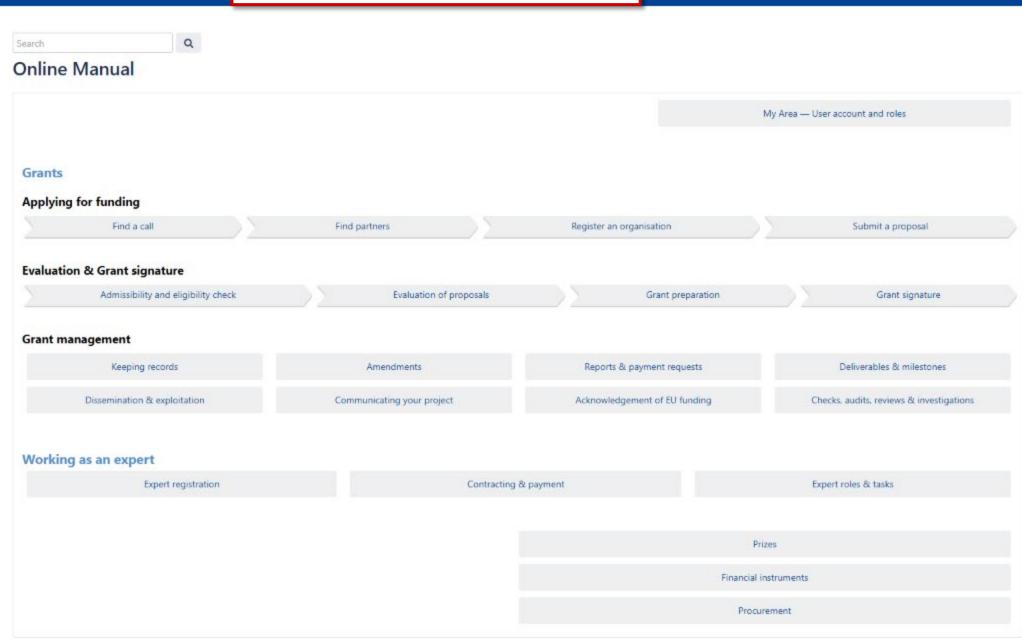
Procurement

Prizes

Financial instruments

> Working as an expert

Help





Pages

IT How To

Detailed guidance of all IT tools

IT How To

On this site you will find all the information on HOW TO USE the services available in the Funding & Tenders Portal.

This portal is used for funding programmes and tenders managed by the European Commission, Executive Agencies and other EU bodies, as well as some actions for Education, Audio-visual. Culture, Citizenship and Volunteering projects managed by National Agencies under the programmes Creative Europe / Erasmus+ / Europe for Citizens / EU Aid Volunteers.

See an introduction to your personalised area within the Portal in Manage my area.

Click an icon below to access the information about specific business processes / sections in It How To.

See IT Support if you need support using the Portal.





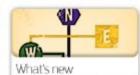












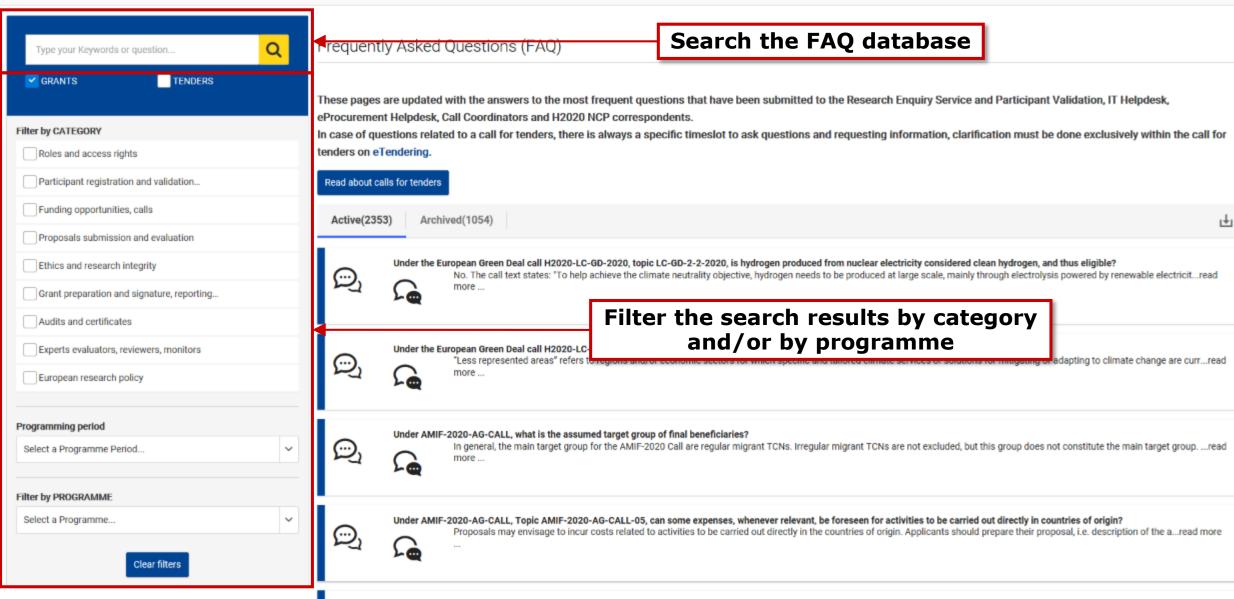




Single Electronic Data Interchange Area (SEDIA)

English EN

SEARCH FUNDING & TENDERS THOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT T





Thank you!

Any questions?

Olivier MARGANNE

olivier.marganne@ext.ec.europa.eu

Common Implementation Centre – Business Processes – RTD H3