



FACT SHEET

N° 16 – PROJECT CHANGES

→ Background Information

As LP and project partners can not foresee, since the beginning, all concrete needs of the project during its real implementation, the Programme allows project changes in order to adapt project activities/budget to real context/situation the project partners have to deal with during the project development.

To this aim article 9 of the Subsidy Contract (SC) defines the following project changes and related procedures to be followed.

I. MAJOR CHANGES

Article 9 foresees that Programme Selection Committee approves them through formal written procedure.

However, in order to speed up formal procedures and to avoid as much as possible strong delays when major changes occur, in September 2010 Programme Selection Committee validated a simplified procedure for 2 specific cases of major changes (*Please see following Point I. B - Major changes requiring a formal approval only from Managing Authority/JTS*).

II. MINOR CHANGES

III. ADMINISTRATIVE CHANGES



→ Guidance

I. MAJOR CHANGES

Article 9 of the Subsidy Contract foresees the following **major changes**:

- ☞ **Budget changes**
- ☞ **Content related changes**
- ☞ **Partnership changes**

As already mentioned the Programme MED foresees **2 different procedures** to approve major changes according to specific cases of figure:

A. 1st PROCEDURE

MAJOR CHANGES REQUIRING AN APPROVAL FROM THE SELECTION COMMITTEE OF THE PROGRAMME THROUGH FORMAL WRITTEN PROCEDURE

Applies to the following cases of figure:

- ☞ **Budget changes:**
 1. redistributions between budget lines and/or components, for an amount exceeding 10% and up to a maximum amount of 30% of the total eligible budget (10% + additional 20%)
 2. redistribution of the ERDF amount between ERDF partners
- ☞ **Content related changes:**
 1. changes in the nature of the project, and more specifically the project objectives and expected results
 2. any extension of the deadline of project duration **except** for the specific case of figure described in *Point I. B - Major changes requiring a formal approval only from Managing Authority/JTS.*
- ☞ **Partnership changes:**
 1. Partner withdrawal without replacement with a new partner
 2. Partner withdrawal with replacement with a new partner **except** for the specific case of figure described in *Point I. B - Major changes requiring a formal approval only from Managing Authority/JTS.*



ADMINISTRATIVE STEPS:

Before the decision of the Programme Selection Committee, LP shall send to JTS:

1. **Decision of the project steering committee:** the LP can either send the minutes of the meeting during which the decision took place or, in case the decision has taken place via a written procedure, the emails of the launch and of the closure of the written procedure (only if this procedure is allowed by the Rules of Procedure of the Project Steering Committee) could be sent as well.

Please note that in the specific case of partnership change (new partner replacing a withdrawing one) the eligibility of expenses of the new partner starts from the date of the project steering committee decision (provided that the Selection Committee actually approves the partnership change).

2. **Model programme template “request for changes”** (available upon request, LPs shall ask to the JTS PO responsible).
3. **Model programme template “% budget reallocation”** in case of budget changes (available upon request, LPs shall ask to the JTS PO responsible).
4. **Revised Application Form (AF):** after having submitted the “request for changes” and “% budget reallocation” if it applies, and once the JTS has given the green light to proceed with the changes, LP will have to amend the AF directly in Presage. The LP will find in Presage “reprogrammed project: major”, the AF shall be amended and its pdf sent to the JTS.

Additionally to the mentioned documents, in the **specific case of change of the partnership**, the following documents shall be submitted as well:

5. Declaration of withdrawal of the partner(s) ;
6. Commitment Letter + Declaration on State Aid /de minimis + Pedagogic file of the new partner(s) in case the partnership decides that the withdrawing partner(s) shall be substituted;
7. Modified Partnership Agreement

Once the LP has sent to the JTS above listed documents in electronic version, they will be checked and transmitted to the Selection Committee for approval through written procedure.



After approval of the Selection Committee, the LP shall send to the JTS:

1. Original revised Subsidy Contract (2 copies): please use the model for the amendments
2. Original revised signed and stamped AF
3. Original revised Partnership Agreement
4. Commitment Letter + Declaration on State Aid /de minimis + Pedagogic file of the new partner(s), only in case the withdrawing partner is replaced by a new partner.

B. 2nd PROCEDURE

MAJOR CHANGES REQUIRING A FORMAL APPROVAL ONLY FROM MANAGING AUTHORITY/JTS

Applies to the following specific cases of figure:

👉 Content related changes:

1. extension of the deadline of project duration when project respects all following criteria:
 - ERDF implementation rate at the moment of the request of at least 75%;
 - respect of project timetable and related deliverables;
 - the prolongation is needed to implement only communication and/or capitalization activities;
 - prolongation of 6 months maximum

👉 Partnership changes:

1. Partner withdrawal with replacement with a new partner when replacing partner matches all following criteria:



- it is from the same country of the withdrawing partner;
- it has the same budget and it implements the same activities of the withdrawing partner;
- it is a public organization;
- it has identical or equivalent skills.

ADMINISTRATIVE STEPS:

👉 Content related changes:

The LP shall produce the following documents:

1. **Decision of the project steering committee:** the LP can either send the minutes of the meeting during which the decision took place or, in case the decision has taken place via a written procedure, the emails of the launch and of the closure of the written procedure (only if this procedure is allowed by the Rules of Procedure of the Project Steering Committee) could be sent as well.
2. **Model programme template “request for changes”** (available upon request, LPs shall ask to the JTS PO responsible).
3. **Revised Application Form (AF):** after having submitted the “request for changes” and once the JTS has given the green light to proceed with the changes, LP will have to amend the AF directly in Presage. The LP will find in Presage “reprogrammed project: major”, the AF shall be amended and its pdf sent to the JTS.
4. **Revised Subsidy Contract:** the model for the amendments shall be used (available upon request, LPs shall ask to the JTS PO responsible).

Once the LP has sent to the JTS above listed documents in electronic version, they will be checked. Once the JTS has given the green light the documents shall be sent in original version. 2 original copies of the revised subsidy contract are requested.

👉 Partnership changes:

The LP shall produce the following documents:

1. **Decision of the project steering committee:** the LP can either send the minutes of the meeting during which the decision took place or, in case the decision has taken place via a written procedure, the emails of the launch and of the closure of the written procedure (only if this procedure is allowed

FACT SHEET N° 16 –PROJECT CHANGES





by the Rules of Procedure of the Project Steering Committee) could be sent as well.

Please note that the eligibility of expenses of the new partner starts from the date of the project steering committee decision (provided that the Selection Committee actually approves the partnership change).

2. **Model programme template “request for changes”** (available upon request, LPs shall ask to the JTS PO responsible)
3. **Revised Application Form (AF):** after having submitted the “request for changes” and “% budget reallocation” if it applies, and once the JTS has given the green light to proceed with the changes, LP will have to amend the AF directly in Presage. The LP will find in Presage “reprogrammed project: major”, the AF shall be amended and its pdf sent to the JTS
4. **Declaration of withdrawal of the partner**
5. **Commitment Letter + Declaration on State Aid /de minimis + Pedagogic file of the new partner(s)**
6. **Revised Subsidy Contract:** the model for the amendments shall be used (available upon request, LPs shall ask to the JTS PO responsible).
7. **Original revised signed and stamped AF**
8. **Revised Partnership Agreement**

Once the LP has sent to the JTS above listed documents in electronic version, they will be checked. Once the JTS has given the green light the documents shall be sent in original version. 2 original copies of the revised subsidy contract are requested.

Please note that in this specific case of partnership change, JTS will previously seek for the approval of the concerned national coordination.

II. MINOR CHANGES REQUIRING A WRITTEN COMMUNICATION TO THE MA/JTS JUSTIFYING THE CHANGES

Article 9 of the Subsidy Contract foresees the following **minor changes**:

- ☞ Budget changes **up to 10%** of the total budget:

FACT SHEET N° 16 –PROJECT CHANGES





Redistribution between budget lines and/or components, for an amount **up to 10% of the total eligible budget**: for this typology of change, the LP shall submit to the JTS the specific programme template “*10%budget reallocation*”. After a quick coherence check from the JTS, the latter will give the possibility to the LP to modify in Presage the AF.

- ☞ Minor **content related** changes:
All content related changes that are not resulting in outputs and results changes and/or the total project duration shall be communicated and justified through the Progress Reports

III. ADMINISTRATIVE CHANGES REQUIRING A WRITTEN NOTIFICATION TO THE MA/JTS:

Any change of the LP/PP contact information or change of LP’s bank account. These changes shall be regularly communicated together with the submission of the Progress Report. Change of bank account must be specified in the payment claims

+ TIPS



Budget changes up to 10% and 30% are cumulative for the whole duration of the project thus the base to calculate the **overall %** of budget changes remains, for the whole duration of the project, the Application Form (AF) as **firstly** approved



To calculate the 10% / 30% of the total eligible budget that is possible to redistribute between budget lines and components, the Lead Partner shall consider the budget per budget lines and components as defined in approved AF and cumulate the positive (+) reallocations.



For more details, please see guidance “budget reallocation”