

INFO DAY ON PROJECT IMPLEMENTATION 1ST CALL FOR PROJECT PROPOSALS

Thessaloniki, 20th September 2017

PROJECT ADJUSTMENTS/ MODIFICATIONS

- 1. Project Adjustments**
- 2. Modifications approved directly by the Managing Authority**
- 3. Modifications approved by the Monitoring Committee**

Project Adjustments

Notification of modification directly to the Managing Authority/ Joint Secretariat, requiring confirmation of the JS:

- Administrative adjustments (changes on contact details, bank accounts, legal representatives)
- Minor adjustments in the project content
- Minor timetable adjustments (rescheduling of activities and/ or WPs)

Modifications approved by the Managing Authority

- Budget reallocation *between project partners* (same country & EU contribution) *equal to or less than the reallocation limit of 10% of the project budget* (EU + National Funding);
- Only if it does not involve an increase in the EU contribution of the project.

*compared to the Application Form annexed to the Subsidy Contract.



Modifications approved by the Managing Authority

- Budget reallocation *between work packages and/or budget lines up to 20%* of the project budget (EU + National Funding);
- *compared to the Application Form annexed to the Subsidy Contract.
- Cumulatively for the whole project duration
- Prolongation of the project duration.

When is project prolongation permitted?

- a) Prior **written request** to the MA/ JS with proper justification;
- b) **Not affecting** the achievement of the **target** set by the **n+3 rule**;
- c) the total duration does **not exceed the 50%** of the project initial lifecycle;
- d) the total duration does **not exceed the 31st December 2023**.

Prolongation of the project duration means the *extension of the eligibility time* and, if relevant, the *revision of the spending forecast* of the project.

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II. Modifications approved by the Managing Authority

Main character of the modification	
Budget reallocation between project partners (from the same participating country at the same EU rate of contribution) equal to or less than the reallocation limit of 10% of the project budget (EU + National Funding);	<input type="checkbox"/>
Budget reallocation between work packages and/ or budget lines up to the reallocation limit of 20% of the project budget (EU + National Funding);	<input type="checkbox"/>
Prolongation of the project duration.	<input type="checkbox"/>

Description and justification of the modification request
1. Short description of the modification:
2. What are the reasons for the modification request?
3. How will the project modification improve the situation?
4. Specify the sections of the Application Form that are affected by the modification:
5. Has the Partnership already approved the modification requested?

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Budget reallocation between project partners (from the same participating country at the same EU rate of contribution) equal to or less than the reallocation limit of 10% of the project budget (EU + National Funding);

Percentages of the amounts to be shifted

% in reference to the total project budget:

Budget reallocation between work packages and/ or budget lines up to the reallocation limit of 20% of the project budget (EU + National Funding);

Percentages of the amounts to be shifted:

Budget categories % in reference to the total project budget:

Work packages % in reference to the total project budget:

Prolongation of the project duration. (To be filled in, in case it is relevant)

Extension of the project duration (no. of months):

New end date of the project:

Justification:

Modifications approved by the Monitoring Committee

- Budget reallocation between project partners (same country) over 10%
- Budget reallocation between work packages and/ or budget lines over 20% of the project budget
- Changes in the composition of the partnership
- Changes in the content of the project

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III. Modifications approved by the Joint Monitoring Committee

Main character of the modification	
Reallocation between the respective budget categories for amounts greater than 20% of the total budget of the project.	<input type="checkbox"/>
Reallocation of resources between beneficiaries from the same Country at the same EU rate of contribution, which may result in a change greater than 10% of the project budget (EU + National Co-financing). Reallocation of funds between beneficiaries may be accepted only if it does not involve an increase in the IPA II contribution of the project.	<input type="checkbox"/>
Changes to the nature of the project and in particular to the objectives and the expected results. These changes must be fully Justified and described as soon as they become evident.	<input type="checkbox"/>
Modification to the composition of the partnership. In order to replace a beneficiary from the already established project partnership, or add a new beneficiary, an important precondition is the agreement of all remaining beneficiaries. The new proposed beneficiary should carry at least the same	<input type="checkbox"/>

Partner Change

- LP to inform the JS immediately in written
- Ensure the Call & Programme minimum requirements are met
- Responsibility of outputs
- Eligibility of expenditure of withdrawing partner
- Reported by the LP
- Return of funds
- Involvement of National CP
- 30 days (+15) to find a new suitable partner

Partner Change

Changes in the composition of the partnership (To be filled in, in case it is relevant)

Is the withdrawn project beneficiary going to be replaced?

Yes

No

Date of withdrawal (until the expenditures of the leaving partner are eligible):

Justification of the relevance of the new beneficiary for the partnership (if applicable):

Documents for budget reallocations

- Overview of the costs already reported/validated/reimbursed and to see from which budget lines it is possible to move funds.
- **Request for Project Modification**, to verify the project modification procedure to follow and if the planned changes are possible and in line with its needs.

Documents for budget reallocations

The JS will request the electronic version of the following documents:

- **Request for Project Modification**, defining each modified part of the original AF affected by the change;
- **Revised Application Form** - modifying the budget and the activities accordingly;
- **New Co-financing Statement** of the affected partner, if relevant.

Partner withdrawal with replacement by a new Partner

- New partner to Comply with eligibility criteria of the BMP
- Equal Relevance & Capacity
- ERDF by ERDF and IPA-II by IPA-II
- Same country


*Special cases of partners based in other ERDF or IPA-II countries or activities taken over by existing partners or distributed among partners

Partner withdrawal with replacement by a new Partner

Introduction of new activities & deliverables
only if necessary

EQUIVALENT QUALITY

If not, Reduction of budget by the not used
amount/ the amount of products not able to
be delivered



Change of the Lead Partner


- New LP always within the Consortium & similar capacity
- New Subsidy Contract (withdrawing LP, new LP & MA)
- Liability of initial LP until the date the new LP takes over

Documentation for Partner Change

*30 days from the JS communication

- Request for Project Modification
- Budget change table
- Declaration of withdrawal from the partnership (withdrawing PP) & Steering Committee written decision (all PPs)
- Declaration of commitment to join the partnership (new PP) & Steering Committee written decision (all PPs)
- New PP supporting documents
- New PP Legal Entity Form & Financial Identification Form
- Revised Application Form
- new Co-financing Statement of the affected partner(s), if necessary;

Content Changes

- Objectives, outputs, results (AF) regardless of budget modification
 - Related eligible expenditure only after MC approval of the modification
 - Validation of costs only after the SC amendment is signed
 - Revision of non-delivered activities budget
- 

Documentation for Project Modifications

- Request for Project Modification (signed by LP, scanned and hard copy, if requested)
- Any other document requested by the JS/MA
- In case requested by a PP, attach the Official Letter to the LP
- No later than 40 days (MA) and 60 days (MC) before becoming effective

Addendum to the Subsidy Contract

- Signed by the LP and sent to MA within 20 days
 - If new LP: New SC within 20 days (withdrawing LP)
- + 20 days (new PP)
- Addendum to the Partnership Agreement: Signed by all PPs and sent to the JS within 15 days

Important Documents

- Project Implementation Manual
- **Project Modification Summary table**
- Request for Project Modification

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Type of project change	Project Modification Procedure	
	No previous approval; No change of Subsidy Contract	Previous approval; Addendum to Subsidy Contract
Partnership change	-	- Always need MA or MC decision
Project content change	- In case of minor content change, JS to be informed the latest in the due periodic Project Progress Report	- Significant content change always needs MC decision
Budget reallocation among PPs	-	- Amounts of reallocation below reallocation limit of 10% needs MA decision - Amounts of reallocation exceeding reallocation limit of 10% needs MC decision
Budget reallocation among WP/BL	- Until amount of reallocations remain below the defined limit (20%)	- Amounts of reallocation below reallocation limit of 20% needs MA decision - Amounts of reallocation exceeding reallocation limit of 20% needs MC decision
Project prolongation	- In case of minor timetable change, JS to be informed the latest in the due periodic in Project Progress Report	- Need MA decision
Administrative changes	- JS to be informed the latest in the due periodic Project Progress Report	-

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Thank you for your Attention!

BalkanMed Website

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