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NEXT MED

PROJECT AMENDMENTS

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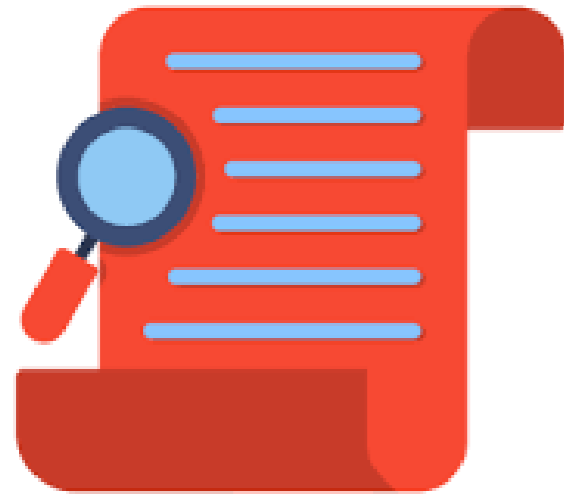
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THE NEED FOR AMENDMENTS



- During the execution period, projects may need to amend (modify) elements such as duration, partnership, budget, activities, outputs, and results, as described under **Art. 9 of the GC** on project amendments.
- The Lead Partner (LP) is responsible for the entire amendment procedure of the Grant Contract.
- It is not possible to initiate a modification request if a previous modification is not finalized (approved or rejected by JS/MA). It is always the last approved project description - Annex I to the GC - and project budget - Annex II to the GC - the ones subject to modification, not previous versions!



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CORE FINANCIAL RULES

The amendments involving budget changes must respect the specific financial requirements set by the Programme:

➤ **50% Minimum to MPCs**

The Programme's golden rule dictates that a minimum of 50% of the project budget must be allocated to Mediterranean Partner Countries.

➤ **35% Maximum per Partner**

A maximum of 35% of the total budget can be allocated to a single partner to ensure balanced participation.

➤ **40% Maximum for Staff Costs**

A maximum of 40% of the total budget can be allocated to the Staff cost category.



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BUDGET REALLOCATION: SPECIFIC CONSTRAINTS

Several rigidities and constraints apply to budget modifications

Fixed Flat Rates

Travel & Subsistence and Administrative costs are fixed at 15% of Staff costs. Their percentage cannot be amended, only their total amount as a result of staff cost changes.

Equipment

Modifications to the Equipment costs should be an exception.

Equipment is to be purchased at the beginning of the project, to allow for a proper implementation of the project activities.

No Equipment purchase is allowed in the last year of implementation, unless official prior authorization by the MA.

Infrastructure & Works

It is recommended to limit such amendments, as these costs are generally linked to pilot activities, which should not be put at risk.

No Past Reallocations

Costs from previous reporting periods are fixed and cannot be changed. Reallocation from the past to the future is not possible.



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MINOR AMENDMENTS

As stated in the GC, **an amendment is considered as Minor:**

If the changes of Budget, Partnership and Activities **do not affect the basic purpose of the Project** and the financial impact is limited to a transfer between the Budget Lines within the same cost category (including removal or introduction of a Budget Line), or a transfer between cost categories and/or among partners, involving a variation of 20% or less of the amount originally entered (or as modified by addendum).

The Lead Partner may amend the budget, the description of the project, or the partners' data, and inform the MA accordingly in writing, and at the latest in the following report, provided that admission and award criteria are respected.



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MINOR AMENDMENTS: KEY LIMITATIONS

- **A maximum of one minor amendment per year is allowed** under the Interreg NEXT MED grant contracts, except in case of special circumstances duly substantiated by the Lead Partner and accepted by the MA.
- Change of name, address, bank account, legal form or legal representative of the Lead Partner and/or Partners, **are not considered as minor amendments**, but only as adjustments/integration of project information.
- Under no circumstances the maximum fixed percentages of the travel and subsistence costs and the administrative costs may be modified by a minor amendment



MAJOR AMENDMENTS

In line with the GC, a change in the duration of the project implementation, and any other substantial modifications to the budget (beyond the 20% flexibility rule), partnership and activities, outputs, results and indicators (not affecting the basic purpose of the Project), are considered as Major amendments which shall be subject to the approval of the MA upon submission of a duly justified request by the Lead Partner.



MAJOR AMENDMENTS: KEY LIMITATIONS

- **Only one major amendment** is allowed during the implementation period of the project, unless duly justified circumstances emerge (e.g.: the withdrawal of a partner).
- The project EU contribution share (89%) and co-financing percentage (11%) cannot change.
- Under no circumstances, the criteria for the grant award shall be modified by a major amendment.
- The limitations from the specific Call of proposals (concerning budget and partnership and any other rule) remain applicable throughout the project lifetime.
- Major changes cannot introduce any aspects that have already been rejected during the negotiation phase.



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MAJOR AMENDMENTS: RECAP



*Request for modification detailing and justifying each proposed modification (cost-activity-deliverable), **with emphasis on maintaining the eligibility of costs and the added value of the amendment, the overall positive impact on the project.**

Any relevant document in support of the justification on the requested modification needs to be added.



MAJOR AMENDMENTS: SUBMISSION DEADLINES

Note! Major amendments enter into force after the signature of the Addendum to the GC by both LP and MA.

30

General Amendments: new activities, outputs, results, new budget allocations, change in partnership

The request must be submitted at least 30 days before the date on which the amendment should enter into force.

60

Project Duration Extension

Requests for extending the project implementation period must be submitted at least 60 days before the project's closing date.



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CHANGES IN ACTIVITIES, OUTPUTS, AND RESULTS KEY LIMITATIONS

- The proposed change should aim at improving the project performance and/or to achieve the expected results.
- Decreases of planned and already reported output and result indicators are not possible.
- All major amendment requests must comply with State Aid requirements.



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CHANGE IN PARTNERSHIP : REQUIRED DOCUMENTATION

The request submitted by the LP must be duly documented. The following documents are required for a new partner:

- Letter of withdrawal of the old partner.
- Proof of the shared decision of the consortium on the new partner
- Partner declaration for the new partner.
- Document proving the identity and role of the legal representative.
- Documents proving legal status and geographical eligibility (e.g., statute).
- State-Aid self-assessment grid (if applicable).
- Financial Capacity Form and Balance sheets (if applicable).
- Documents on Environmental screening (if applicable).
- Information on the new partner's previous experience in EU projects and relevant topics must also be included for assessment.



KEY REMINDERS



- ✓ **Plan ahead!** Remember the limits (1 minor amendment/year, 1 major amendment/project lifetime).
- ✓ **Consult the JS!** If in doubt about the type of amendment, contact the JS the earliest.
- ✓ **Preserve the purpose!** The general, specific objectives and expected results cannot be affected.
- ✓ **No budget increase!** The total EU contribution cannot be increased.
- ✓ **Respect the deadlines!** Submit requests at least 30 days in advance (60 for extensions).
- ✓ **Respect the requirements of the Call for Proposals!** The specific financial requirements set in the specific call for proposals, cannot be affected by the amendment.
- ✓ **Update contacts anytime!** Contact data of the partners can be modified at any time.
- ✓ **Fixed costs are fixed!** Travel & subsistence and Administrative cost % cannot be changed.
- ✓ **Past is past!** Costs already reported and authorized cannot be reallocated and an amendment cannot introduce any aspect that has already been rejected during the negotiation phase.
- ✓ **Wait for the signatures!** Major amendments are only effective after the Addendum is signed by both parties.



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Thank you

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