

Project changes

14 | 20

Munich | Germany | 3 May 2018

Anne-Séverine Lay
Nuno Madeira
Joint Secretariat



Project changes

What happens if my project needs to make changes in the AF?



Project changes



Content



Partnership



Duration



ERDF budget



Project changes



How to
handle it?

Minor change

Contact JS (via
email) or report it in
the project report

Major change

Contact JS (via
email) and submit a
request for change



Changes in content

Minor changes

Contact details of the project management team

New legal representative, changes in observers

Event location, deliverables

eMS under supplementary information

Email to the JS

LP monitors and justifies it in the project report



Changes in content

Major changes

Exceptional, well justified cases, such as outputs* or core activities

Request for change subject to approval by programme committee

* including equipment



Changes in partnership

Minor changes

Change in PP legal status

Contact JS officer in order
to change it in the AF

Major changes

Partner(s) withdrawal
New and/or replacement
partner(s)

Request for change subject
to approval by programme
committee



Changes in duration

Possible changes

Extension up to 6 months

Request for change subject to approval by the JS (on behalf of the MA)

~~Impossible changes~~

~~Extension beyond 6 months~~

~~Not possible!~~



Changes in ERDF budget

Minor changes

Up to €10,000 or 20%
of work package, budget line,
partner ERDF budget

LP monitors and justifies it
in project report

Major changes

Beyond those limits, only in
exceptional, well justified
cases

Request for change, subject
to approval by the JS (on
behalf of the MA)



Changes in ERDF budget

- **Useful tips**

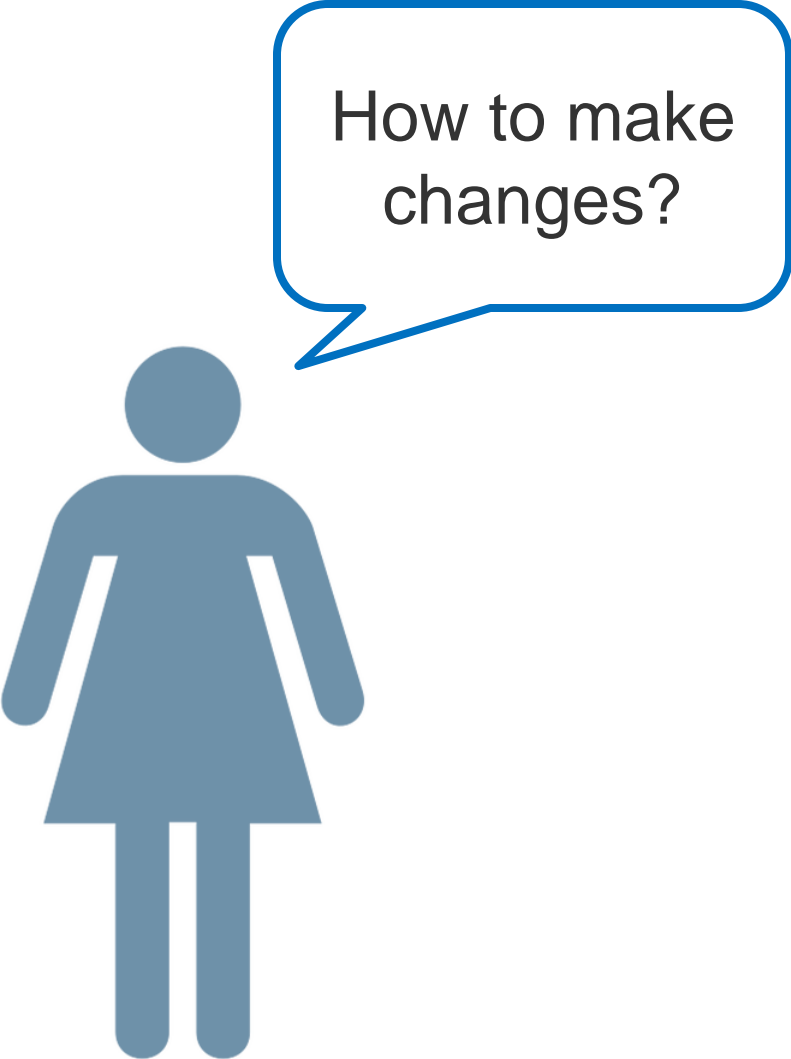
- Create a table in order to **monitor** spending per WPs, budget lines and PP within the **flexibility rules** of the programme
- Ensure that activity “project controlling” in WP Management serves its purpose in the best possible way

- **Practical exercise**

- Simulation: change in budget allocated to WPs, budget lines or partners



Request for change procedure




How to make changes?

- PP sends the request to LP
- LP sends it to the JS via email
- Changes in the AF are done through the eMS
- Approval by programme body (PC or JS on behalf of MA)
- For further information please refer to [factsheet 4.6 “project changes”](#)



Request for change procedure



What should I keep in mind?

- Regular contact with PP, anticipate as much as possible and inform the JS
- Changes must be properly justified
- ERDF funding cannot be increased
- Changes to the budget allocation per period in the AF are not allowed
- Request must be approved before changes entry into force
- Once approved, changes are valid retroactively



Project changes: simulation

- **Useful tips**
 - Create a table in order to **monitor** spending per WPs, budget lines and PP within the **flexibility rules** of the programme
 - Ensure that activity “project controlling” in WP Management serves its purpose in the best possible way
- **Practical exercise**
 - Simulation: change in budget allocated to WPs, budget lines or partners



Project changes: simulation

Groups: A and B

	Purpose	Objective	Remark
Case 1	Budget shift from PP5 to PP2 in the amount of €13.000 ERDF	Understand how to determine the flexibility limit	Budget transfer from one partner to another is only possible if both are ERDF

Partner		Programme co-financing		Total budget	Flexibility limit based on ERDF		Budget shift requested
Partner	Country	ERDF	ERDF co-financing				
PP2	DE	€63,750	85%	€75,000	€76,500	€12,750	€13,000
PP5	IT	€153,000	85%	€180,000	183,600	€30,600	



Project changes: simulation

Groups: A and B

	Purpose	Objective	Remark
Case 2	Budget shift of €32,000 from staff to external expertise. ERDF contribution looks as follows: PP3 (€20,000), PP1 (€5,000) and PP5 (€7,000)	Understand how to determine both the flexibility and the ERDF limit	Changes in staff have an impact in the office and administration due to flat rate



Project changes: simulation

	Partner	Co-financing source	Staff costs	External expertise	Total budget
	PP1	ERDF	€96,000	€25,000	€140,000
	PP2	ERDF	€30,000	€30,500	€75,000
	PP3	ERDF	€129,000	€41,000	€200,000
	PP4	Non-ERDF	€0,00	€142,000	€150,000
	PP5	ERDF	€104,000	€51,400	€180,000
	Total		€359,000	€289,900	€750,000
	Total ERDF partners		€359,000	€147,900	€595,000
	Total ERDF amount		€305,150	€125,715	€505,750
	Flexibility limit based on ERDF		€366,180	€150,858	
			€61,030	€25,143	
	Change requested			€32,000	



Project changes: simulation

Groups: C and D

	Purpose	Objective	Remark
Case 3	Budget shift from PP5 to PP1 in the amount of €18.000 ERDF	Understand how to determine the flexibility limit	Budget transfer from one partner to another is only possible if both are ERDF

Partner		Programme co-financing		Total budget	Flexibility limit based on ERDF		Budget shift requested
Partner	Country	ERDF	ERDF co-financing				
PP1	FR	€119,000	85%	€140,000	€142,800	€23,800	€18,000
PP5	IT	€153,000	85%	€180,000	183,600	€30,600	



Project changes: simulation

Groups: C and D

	Purpose	Objective	Remark
Case 4	Budget shift of €10,000 from external expertise to travel and accommodation. ERDF contribution looks as follows: PP3 (€3,000) and PP5 (€7,000)	Understand how to determine the flexibility limit	-



Project changes: simulation

	Partner	Co-financing source	Travel and accommodation	External expertise	Total budget
	PP1	ERDF	€4,600	€25,000	€140,000
	PP2	ERDF	€5,000	€30,500	€75,000
	PP3	ERDF	€10,000	€41,000	€200,000
	PP4	Non-ERDF	€8,000	€142,000	€150,000
	PP5	ERDF	€9,000	€51,400	€180,000
	Total		€36,600	€289,900	€750,000
	Total ERDF partners		€28,600	€147,900	€595,000
	Total ERDF amount		€24,310	€125,715	€505,750
	Flexibility limit based on ERDF		€29,172	€150,858	
			€4,862	€25,143	
	Change requested		€10,000		



Project changes: simulation

Conclusions

- LP has to keep the overview: monitor with a well set table (with formula)
- We can support you, but you are the ones who better know what's happening in your partnership
- Keep contact with your partners



Do you have any questions?

