

AMENDMENTS

1. General Communication with the Agency

CBHE project will be supervised by the Agency throughout its contractual period and even beyond it. In order to implement this supervision and to provide the necessary assistance to the projects, a Project Officer (PO) in the Agency has been assigned to each CBHE project. This PO will be the primary contact person of the project in the Agency.

In this context:

- all project contacts with the Agency must take place through the contact person of the coordinating institution who represents the whole partnership; only in exceptional and/or duly justified circumstances, the Agency will enter into correspondence with other beneficiaries;
- only written contacts (through letters or emails) may be taken into account for contract management purposes; this applies **to amendment and/or special authorisation** requests introduced by the project, as well as to the response given by the Agency;
- electronic messages must always be sent to the email address of the PO in charge AND to the functional mailbox (EACEA-EPLUS-CBHE-PROJECTS@ec.europa.eu). The purpose of this functional mailbox is to ensure a centralised monitoring of the project correspondence, as well as a follow-up of the message in the absence of the PO.

2. Amendments to the Agreement

An amendment is an act modifying the grant conditions initially agreed and established in the Agreement. The amendment procedure is initiated via a modification request which most frequently originates from the beneficiary. However, it is not excluded that a modification is made at the initiative of the Agency.

The Agreement may be amended only in writing. Oral arrangements for modifications cannot legally bind the parties.

The beneficiaries should try to limit, as far as possible, the number of requests for amendments and only submit such requests when necessary. Amendments should always be requested before any changes are implemented, and not retroactively.

In order to be admissible the amendment requests must be submitted at least one month before the end of the eligibility period as detailed in the Agreement.

Any amendment, including those aiming at adding or removing a beneficiary, shall not have the purpose or the effect of putting in question the grant award decision (including the eligibility criteria) and/or be contrary to the equal treatment of applicants.

2.1 How to proceed ?

As soon as changes are envisaged by the Partnership (to the project and/or the partnership composition), the coordinator should contact the Project Officer in charge and ask for his/her advice on the proposed changes.

Depending on the nature of the modification, amendments have to be made following the specific dealings presented in the summary table below. Any related requests or notifications from the coordinator must be sent to the following email address: EACEA-EPLUS-CBHE-PROJECTS@ec.europa.eu.

The Agency will examine the justification for the modification(s) proposed and will decide whether or not to approve the requested change(s). The modification will enter into force once the Agency has sent a signed letter by email or a notification email to the coordinator. Once the amendment is made, it becomes an integral part of the initial Agreement.

When changes affect the legal commitment and the working modalities **defined and endorsed by the partnership in its Partnership Agreement(s)**, the latter must be amended accordingly and this amendment must be officially endorsed by all the beneficiaries concerned.

2.2 Modifications that require an official change of contract (amendment)

1. The legal status of the coordinating institution and/or beneficiaries
2. The legal name of the coordinating institution and/or beneficiaries
3. The address of the coordinating institution
4. The address of a beneficiary (that is not the coordinating institution)
5. The contact person of the coordinating institution
6. The deadline for submission of reports
7. Contact details of the legal representative of the coordinating institution or of the contact person of the beneficiaries
8. The coordinating institution
9. The eligibility period
10. The budget breakdown
11. The partnership composition
12. The legal representative of the coordinating institution
13. The bank account of the coordinating institution
14. Major changes to the work programme

In case there is a request **with multiple changes**, the relevant instruction for each individual change must be followed by all the parties and all the changes combined **in one single request**.

Change Nb	Change of/in	Amendment Request via	Required Supporting Documents & Information
1	Legal status of the coordinating institution and/or beneficiaries	<u>Participant Portal:</u> <ul style="list-style-type: none"> ▪ Change via the Participant Portal by the LEAR 	<ul style="list-style-type: none"> ▪ Official document proving the change (new statutes, official journal, etc.) attached to the email and uploaded in the Participant Portal ▪ Short explanation ▪ PIC number ▪ Date of change
2	Legal name of the coordinating institution and/or beneficiaries	<u>Participant Portal:</u> <ul style="list-style-type: none"> ▪ Change via the Participant Portal by the LEAR 	<ul style="list-style-type: none"> ▪ Official document proving the change (new statutes, official journal, etc.) attached to the email and uploaded in the Participant Portal ▪ Old & new name ▪ Date of the name change ▪ PIC number
3	Address of the coordinating institution	<u>Participant Portal:</u> <ul style="list-style-type: none"> ▪ Change via the Participant Portal by the LEAR 	<ul style="list-style-type: none"> ▪ Official document proving the change (new statutes, official journal, etc.) attached to the email and uploaded in the Participant Portal ▪ PIC number ▪ New address
4	Address of a beneficiary (that is not the coordinating institution)	<u>Participant Portal:</u> <ul style="list-style-type: none"> ▪ Change via the Participant Portal by the LEAR 	<ul style="list-style-type: none"> ▪ Official document proving the change (new statutes, official journal, etc.) attached to the email and uploaded in the Participant Portal ▪ Name & email of beneficiary's contact person ▪ PIC number ▪ New address
5	Contact person of the coordinating institution	<u>Email to EACEA:</u> <ul style="list-style-type: none"> ▪ Amendment request by email (to the Functional Mailbox CBHE in Cc PO) from the legal rep of the coordinating institution, or at least with the legal rep in copy (Cc) 	<ul style="list-style-type: none"> ▪ Full details of the new contact person (Name, Address, Telephone, Email) ▪ C.V. ▪ Name of previous contact person
6	Deadline for submission of reports	<u>Email to EACEA:</u> <ul style="list-style-type: none"> ▪ Amendment request by email (to the Functional Mailbox CBHE in Cc PO) from the legal rep of the coordinating institution, or at least with the legal rep in copy (Cc) 	<ul style="list-style-type: none"> ▪ Justification ▪ Due date (as specified in GA) ▪ Requested new date

Change Nb	Change of/in	Amendment Request via	Required Supporting Documents & Information
7	Contact details of the legal rep of the coordinating institution OR Contact details of the contact person of the beneficiaries	<p>Email to EACEA:</p> <ul style="list-style-type: none"> Amendment request by email (to the Functional Mailbox CBHE in Cc PO) from the legal rep of the coordinating institution, or at least with the legal rep in copy (Cc) 	<ul style="list-style-type: none"> New contact details (name, address, phone, number, e-mail)
8	Coordinating institution	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> Amendment request by email (to the Functional Mailbox cc. PO) sent by the legal rep or contact person of the coordinating institution or at least with the legal rep in copy (Cc) Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> Explanatory letter from the legal rep of the withdrawing coordinating institution Explanatory and acceptance letter from the legal rep of the new coordinating institution Endorsement letter from the legal reps of former and the new coordinating institution Revised budget allocation per beneficiary (detailed excel table or budget per beneficiary and per budget heading) Revised distribution of tasks Date at which the new coordinating institution takes over A financial identification form of the new coordinating institution Updated and signed mandates from all beneficiaries Declaration of honour signed by legal rep Name of new coordinating institution A validated PIC number Name and contact details (address, email, telephone) of new contact person Name and contact details (address, email, telephone) of legal rep of new coordinating institution
9	Eligibility period	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> Amendment request by email (to the Functional Mailbox cc. PO) sent by the legal rep or contact person of the coordinating institution or at least with the legal rep in copy (Cc) Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> Justification for the extension Updated work programme with an explanation Revised budget allocation (if applicable): detailed excel table or budget per beneficiary and per budget heading Revised distribution of tasks (if applicable) New proposed project end date Length of extension
10	Budget breakdown	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> Amendment request by email (to the Functional Mailbox cc. PO) sent by the legal rep or contact person of the coordinating institution or at least with the legal rep in copy (Cc) Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> Justification and explanation Revised budget allocation per beneficiary (detailed excel table or budget per beneficiary and per budget heading) Revised budget breakdown table (Annex III)

Change Nb	Change of/in	Amendment Request via	Required Supporting Documents & Information
11	Partnership composition	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> ▪ Amendment request by email to the Functional Mailbox cc. PO sent by the legal rep or contact person of the coordinating institution or at least with the legal rep in copy (Cc) ▪ Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<p>a) Addition of new beneficiary:</p> <ul style="list-style-type: none"> ▪ Explanatory letter from the legal rep of the coordinating institution ▪ Explanatory and acceptance letter from the new beneficiary's legal rep ▪ A signed mandate by the legal rep of the new beneficiary ▪ Acceptance letters from all beneficiaries signed by the legal reps ▪ Date at which the partner addition takes effect ▪ Revised budget allocation per beneficiary (detailed excel table or budget per beneficiary and per budget heading) ▪ Revised distribution of tasks. ▪ A validated PIC number ▪ Name of contact person of new beneficiary ▪ Contact details <p>b) Withdrawal of a beneficiary:</p> <ul style="list-style-type: none"> ▪ Explanatory letter from the legal rep of the coordinating institution ▪ Explanatory letter from the legal rep of the withdrawing beneficiary ▪ Date at which the withdrawal takes effect ▪ Revised budget allocation per beneficiary (detailed excel table or budget per beneficiary and per budget heading) ▪ Revised distribution of tasks ▪ E-mail/letter showing that the partnership has been informed
12	Legal representative of the coordinating institution	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> ▪ Amendment request by email to the Functional Mailbox cc. PO sent by the legal rep or contact person of the coordinating institution ▪ Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> ▪ Name of legal rep ▪ Official document (official journal, decree, election results) proving the status of legal rep ▪ Contact details
13	Bank account of the coordinating institution	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> ▪ Amendment request by email to the Functional Mailbox cc. PO sent by the legal rep or contact person of the coordinating institution ▪ Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> ▪ New financial identification form
14	Major changes to the work programme	<p>Email with signed letter attached:</p> <ul style="list-style-type: none"> ▪ Amendment request by email to the Functional Mailbox cc. PO sent by the legal rep or contact person of the coordinating institution ▪ Attachment: scanned letter dated and signed by the <u>legal rep</u> of the coordinating institution 	<ul style="list-style-type: none"> ▪ New work programme in track changes ▪ Justification of the changes ▪ Revised budget allocation per beneficiary (if applicable): detailed excel table or budget per beneficiary and per budget heading ▪ Revised distribution of tasks (if applicable)

3. Authorisations

Certain activities and/or expenses do not require a formal change of the contract (amendment) but are subject to a written authorisation of the Agency to consider them eligible and/or reimbursable.

3.1. How to proceed?

As soon as activities and/or expenses outlined below are envisaged by the Partnership (to the project and/or the partnership composition), the coordinator should contact the Project Officer in charge and ask for his/her authorisation in writing. Please note that the below list is not exclusive and in case of doubt it is advisable to verify with the project officer in charge. In general, they concern exceptions to the general rules and require duly justified circumstances.

3.2 Non-exclusive list of case where an authorisation is required

- expenses for activities that are not carried out in the project beneficiaries';
- expenses for activities not foreseen in the application;
- hiring of equipment;
- changes in equipment in comparison to the specification in the original application;
- sub-contracting initially not foreseen in the budget;
- dissemination activities in the Programme Countries;
- Student activities that do not concern the following activities:
 - Study Period/intensive courses/practical placements (min 2. Weeks and max. 3 Months);
 - Participation in short term activities linked to the management of the project (steering committees, coordination meetings, quality control activities, etc. (max. 1 Week);
- Place of departure is different from the place of the home institution