

Technical instructions for managing changes to the composition of Strategic Partnerships in EPlusLink

Disclaimer: As a follow-up to numerous requests for guidance on the steps to be taken in case of withdrawal/change/adding of partners in KA2 projects, the present instructions have been prepared for the NAs to facilitate the implementation of changes in EPlusLink.

I. STRATEGIC PARTNERSHIPS (MULTI-BENEFICIARY AGREEMENT)

According to the multi-beneficiary agreement (article II.15.2), in duly justified cases, following the termination of one or more beneficiaries, the coordinator together with the remaining beneficiaries can make a proposal (amendment request) to the NA to replace the withdrawing partner/s, and/or redistribute their activities among the remaining partners. This proposal should also provide indications on how the budget of the Strategic Partnership should be revised. An amendment has to be made to introduce the necessary modifications.

Before authorising a change in any of the cases described in this Annex, the National Agency shall conduct a viability assessment to determine that the proposed change:

- Does not impact the eligibility of the project as a whole: the minimum number and type of participating organisations is preserved
- Does not hinder the ability of the Strategic Partnership to carry out the planned core-activities and reach the intended objectives (i.e. if the role of the withdrawing partner is fundamental for the implementation of the project and/or it is not being replaced by a partner with equivalent profile and expertise).

1. REPLACEMENT OF PARTNERS – the following procedures should be followed by the NA:

- a) If the withdrawing partner has been contributing to the activities of the partnership for a certain period of time and therefore is entitled to receive a part of the grant in relation to the activities undertaken, the NA **must not delete the replaced partner in EPlusLink**. Instead, the NA should reduce the withdrawing partner's budget to the amount that it is entitled to receive for the performed activities, including the appropriate amount of PMI funds.

If the partner has not contributed to the activities of the partnership and therefore is not entitled to receive a part of the grant, the NA **must delete the replaced partner in EPlusLink**.

- b) Add a new partner with the corresponding budget. If the new partner has not registered in URF in the past and does not have a PIC, the organisation has to first register in URF. The new partner has to be validated by their respective NA.
- c) Add a note or attach a file in EPlusLink documenting the replacement of the partner.

2. **WITHDRAWAL OF PARTNERS** – if the NA has conducted the viability assessment and concluded that the partnership may continue without the withdrawing partner, it shall approve the withdrawal and implement it by following the same procedure as in case of partner replacement.

Additionally, if requested by the project coordinator and deemed appropriate by the NA, the unused part of the withdrawing partner's budget may be re-allocated to the remaining partners according to the re-allocation of the withdrawing partner's tasks to other partners in the project.

Finally, the withdrawal should be documented in EPlusLink with an appropriate note or attachment.

3. **CHANGE OF COORDINATOR** – is not possible as it would inevitably constitute a substantial change of the nature of the partnership due to the unique role and necessary financial and operational capacity of the coordinator organisation.

A technical change of the coordinator is allowed only in the case of a merge or split of the coordinating organisation which determines a change in its legal status (while the organisation substantially remains the same as the one that has applied for funds on behalf of the partnership). To address such a case, the coordinating NA should manually modify the details of the coordinator in EPlusLink and document this change with an appropriate note or a file attachment showing the change in the legal status of the coordinator.

4. **ADDING A PARTNER** – it is possible on the condition that it can be soundly proven to increase the quality of the partnership. Taking over by a new partner of responsibilities in the implementation of tasks originally foreseen for partners specified in the application form should only be allowed under duly justified circumstances and proving that at least the same level of project quality is ensured.

The new partner has to have a PIC, be validated by their respective NA and must sign a mandate that should be submitted by the applicant together with the request to add the new partner to the partnership.

In EPlusLink, the NA should: add the new partner with the corresponding budget, modify the budget of the other partners (if requested by the applicant and approved by the NA), add a note or attach a file documenting the addition of the new partner.

II. STRATEGIC PARTNERSHIPS FOR SCHOOLS ONLY (MONO-BENEFICIARY GRANT AGREEMENTS)

1. **REPLACEMENT OF PARTNERS, ADDING OF PARTNERS OR CHANGE OF COORDINATOR** – there is no possibility to implement any of these changes with the mono-beneficiary Grant Agreements.
2. **WITHDRAWAL OF PARTNERS** – both the Partner NA and the Coordinator NA must receive a written request from the withdrawing school that they wish to withdraw from the project. The Coordinator NA shall then verify if the project can continue without the partner by assessing the essential conditions defined in the opening part of this Annex.

Following the decision by the Coordinator NA, the Partner NA terminates their agreement with the withdrawing school.

3. **REDISTRIBUTION OF ACTIVITIES FOLLOWING A WITHDRAWAL OF A PARTNER** – no transfer of funds can take place between the withdrawing partner and the remaining ones due to the partnership being contracted with mono-beneficiary grant agreements.

However, some or all of the activities that would have been organised by the withdrawing partner can be re-allocated to remaining partners. The funds for the re-allocated activities may be obtained either by transfers between budget headings without Grant Agreement amendment or via Grant Agreement amendment, if necessary.

The reallocation of activities may occur only if it does not cause undue constraint on the budgets of the remaining partners. The National Agencies who are in a contractual relationship with the remaining organisations in the partnership should coordinate to decide jointly which overall re-allocation of activities is viable, taking into account that the quality of project implementation and expected impact must not be adversely affected. Whenever possible, this step should therefore be a part of the viability assessment conducted by the Coordinator NA upon receiving the request for withdrawal.

To ensure continued viability of the partnerships, an appropriate reduction of the scope of re-allocated activities can be made insofar as it does not affect the core-activities planned by the partnership and does not prevent the remaining partners from reaching the project's overall objectives. The re-allocated activities should be reported in the final report by the project and will be taken into account at the final assessment stage.