

# User's guide for the contractualisation process

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## A. INTRODUCTION

The Monitoring Committee of the Atlantic Area Transnational Cooperation Programme 2007 - 2013 selected your project. Once received the notification of this decision, it is necessary to start immediately to the contracting phase to conclude it as soon as possible and, if possible, respecting the deadline specified in the notification letter.

This manual gives you several instructions, information and document templates that will allow you to manage this phase in the best conditions.

### **WARNING:**

After the submission of your application some information might have been modified and those changes can have impact in the context of your project implementation.

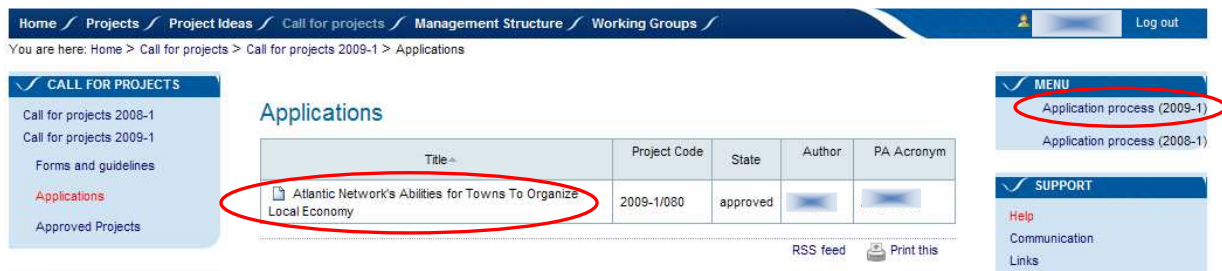
**Whatever the nature of these changes, please contact **FIRST** the Joint Technical Secretariat (JTS).**

Before the signature of the contract you must provide some documentation.

## B. DOCUMENTS AT YOUR DISPOSAL ON THE PROGRAM COMMUNICATION PLATFORM


On the website [www.coop-atlantico.com](http://www.coop-atlantico.com), please click on "Call for Projects"/ "Application Process (2009-1)" then you have access to your application (Acronym / Title / Number / Status<sup>1</sup>).

Click on the project's title to access it.



<sup>1</sup> The status is "Approved" or "Approved under conditions"

Click on “Contents”



The screenshot shows a web portal with a navigation menu at the top: Home / Projects / Project Ideas / Call for projects / Management Structure / Working Groups. Below the menu, the breadcrumb trail reads: You are here: Home > Call for projects > Call for projects 2008-1 > Applications > Platform of Knowledge Intensive Services for Innovation and Technology and Knowledge Transfer.

The main content area is titled "Platform of Knowledge Intensive Services for Innovation and Technology and Knowledge Transfer". It contains a list of documents:

- [Project identification] **[Contents]** [lead partner] [Results of the JTS assessment]
- [Approved Application Form](#) — by [Carla Guimarães](#) — last modified Apr 08, 2009 02:56 PM
- [Contractualisation \(JTS DOCS\)](#) — by [Carla Guimarães](#) — last modified Jan 05, 2009 06:43 PM
- [Contractualisation \(PA DOCS\)](#) — by [\[User\]](#) — last modified Apr 30, 2009 01:48 PM
- [Final Admissibility Report](#)  
Final Admissibility Report project nr. 2008-1/033
- [Platform of Knowledge Intensive Services for Innovation and Technology and Knowledge Transfer](#) — by [\[User\]](#)
- [Selection Decision](#) — by [Carla Guimarães](#) — last modified Dec 26, 2008 05:47 PM

On the right side, there are several utility boxes: MENU (Application process (2009-1), Application process (2008-1)), SUPPORT (Help, Communication, Links, FAQ, Contacts), NEWSLETTER (Your mail address, Subscribe, Visit our archives), and NEWS (Oct 18, 2008, Eurostat Regional Yearbook 2009).

You now have access to all documents made available by the Joint Technical Secretariat for you, since the application date.

**For this phase of contractualisation the major documents are the following:**

**i) Contractualisation: Approved application form**

You access the last version on which the selection decision has been taken. As a consequence, PRIOR to any changes on this file, you must contact the JTS.

**ii) Contractualisation (JTS DOCS)**

Clicking on this link, you access the following files:

- Subsidy contract proposal
- Partnership agreement model
- The bank identification model
- Contractualisation instructions (this manual).

## **C. COMPULSORY DOCUMENTS THAT YOU MUST PROVIDE PRIOR TO THE SIGNATURE OF THE CONTRACT**

Among the documents you must provide:

- Some of them are integral part of the contract,
- Others are evidences that will be checked, but without making integral part of the contract.

In order to clarify the nature and the content of each of the requested document an explanation and a description are below provided.

### **C.1 Documents that are integral part of the contract**

#### **C.1.1 Application form approved**

Until the 05 of June 2009, you presented your application form; during the admissibility process some adjustments could have been requested.

The decision of the Monitoring Committee **is based on the version at your disposal on the website Platform of the programme.**

- If your project has been selected under prior conditions, the eventual modifications must be done within this version of the application.
- If, during the period between the application and selection, some modifications occurred on formal elements (address, contact persons,...) the eventual changes must be done within this version of the application.

**IN BOTH CASES or in all OTHERS CASES OF MODIFICATIONS of the application form approved, you must PRIOR contact the JTS.**

#### **C.1.2 Notification letter of the selection decision signed by the representative of the Managing Authority.**

This is the notification letter sent by the Managing Authority presenting the characteristics of the decision on your project.

This document is already in our possession, you do not have to worry about it.

### C.1.3 Transnational Partnership Agreement

This is the document that defines the obligations among the Lead beneficiary and the partners. It defines the rules of the internal operation among the partners. The Partnership Agreement model is very similar to the contract.

**Article 5**, "Activities of the partners, project financing and distribution within the partnership" and **Article 6** "Management structure and organization of transnational partnership" refer to the annexes which will define the internal rules of operation or any other rules already not defined in the articles of the model.

These two articles and annexes must be consistent and not contradict what has been incorporated into the approved application form, including Section 10 "Description of the Partnership." If in doubt, please contact the JTS.

### C.1.4 Supporting documents for the effective availability of national funds.

The national matching funding can be built up through the self-financing of the partner, through public financing of the local authorities who have agreed to support the partners in the project selected.

The Lead Partner **MUST** first sort out which partners or external financiers provide a firm commitment and the one which provide only an intention to commit at the moment of the application.

**At the moment of the application**, within the electronic form you already provide documents regarding national matching. The templates of those participation letters gave the signatory **two options**:

- 1) a **FIRM** commitment to provide match funding in case of approval of the project, or
- 2) a **declaration of INTENTION** to commit providing match funding in case of approval of the project

In the **case 1)** you do not have to provide any other declaration and the document already signed attached to the application is valid.

In the **case 2)** you **MUST** provide a new declaration making the matching funds for the organisation is **EFFECTIVE**. Or provide all other type of document that proofs the availability of the national matching funding in the case of external financier (deliberation for example).

You **MUST** use the model provided in Appendix 1 and attached all those documents evidencing the matching funding in the section 15 “Annexes” all the of the electronic form.

The annexed declaration also includes commitments relating to compliance with environmental regulations on non-discrimination and state aid.

#### **C.1.5 Supporting documents for the solvency of the Lead beneficiary (Lead partner) of the project.**

When the Lead beneficiary (Lead partner) is a public body, its solvency is assumed. It is not necessary to provide specific documents on this point.

However, it will be necessary to place on the platform of communication a statement confirming the public nature of the Lead beneficiary (Lead partner) and the exemption from the provision of this document.

#### **C.1.6 Financial identification**

The financial identification indicates the bank account details of the Lead beneficiary's account on which all payments by the Certification Authority will be made.

#### **C.2 Other information to provide**

In cases where the project could benefit from assistance from the European Investment Bank (EIB) or whether it includes revenues generated under the activities implemented, we ask you to let us know about them by e-mail as soon as possible.

### **D. INPUT OF THE DOCUMENTS ON THE COMMUNICATION PLATFORM**

Once you have gathered all the necessary documents for the contract signature, you can place them on the platform.

After accessing your project you must click on "Contractualisation (PA Docs)"

The screenshot shows a web application interface with a blue header and navigation menu. The main content area displays project details for "Atlantic Network's Abilities for Towns To Organize Local Economy". On the right side, there is a "MENU" section with several items. The item "Contractualisation (PA Docs)" is circled in red, indicating the next step in the process. Other menu items include "Application process (2009-1)", "Application process (2008-1)", and "Agreement on Contrat?". Below the menu is a "SUPPORT" section with links for "Help", "Communication", "Links", "FAQ", and "Contacts".

The next screen appears, you can submit files corresponding to different types of documents requested. Use zipped files to limit the weight of the different pieces.

The screenshot shows the "Add Contractualisation PA" form. The form has a title "Add Contractualisation PA" and two tabs: "Default" (selected) and "Metadata". The form contains several sections, each with a text input field and a "Procurar..." button:
 

- Project Website Reponsible:** A dropdown menu.
- Partnership Agreements:** A text input field.
- National Financing Documents:** A text input field.
- LP Solvency Documents:** A text input field.
- LP Bank Identification:** A text input field.

 At the bottom of the form are "Save" and "Cancel" buttons. On the right side, there is a "MENU" section with "Application process (2009-1)" and "Application process (2008-1)". Below that is a "SUPPORT" section with "Help", "Communication", "Links", "FAQ", and "Contacts". Further down is a "NEWSLETTER" section with a "Your mail address" input field and a "Subscribe" button. At the bottom is a "NEWS" section with a date "Oct 16, 2009" and the text "Eurostat Regional Yearbook 2009".

Once loaded the documents on this screen click on "Save". The initial screen reappears. You have then the option to report by clicking on "Agree" or "Rejected" if you accept the contract or not.

**NOTE:** After this operation you cannot return on the documents that you have loaded on the platform.



Home / Projects / Project Ideas / Call for projects / Management Structure / Working Groups / Log out

You are here: Home > Call for projects > Call for projects 2009-1 > Applications > Atlantic Network's Abilities for Towns To Organize Local Economy

**NAVIGATION**

- Call for projects 2008-1
- Call for projects 2009-1
- Forms and guidelines
- Applications**
- Approved Projects

[\[Project identification\]](#) [\[Contents\]](#) [\[Lead partner\]](#) [\[Results of the JTS assessment\]](#)

### Atlantic Network's Abilities for Towns To Organize Local Economy

**Project title:**  
Atlantic Network's Abilities for Towns To Organize Local Economy

**Project code:**  
2009-1/080

**Acronym:**

**MENU**

- Application process (2009-1)
- Application process (2008-1)
- Agreement on Contract?
  - Agreed
  - Not Agreed

**SUPPORT**

If you accepted the contract you must forward in parallel and by post the three copies of the Subsidy Contract signed by you.

The Joint Technical Secretariat will then review all the documents you have submitted. If it is not satisfactory, the JTS will ask for changes.

If it is satisfactory, the JTS will present the contract for signature by the Managing Authority, will resend a copy to you and activate on the communication platform the area dedicated to your project.

In the field **Project Website Responsible** of this screen you must define who will be the responsible for the management of the project website of the programme. As information some details on the tasks to be achieved and its profile are provided below.

This person must be registered in the system by choosing a username and login. This can be done on the homepage, by clicking on "Register".

Home / Projects / Project Ideas / Call for projects / Management Structure / Working Groups / Log in **Register**

You are here: Home > Call for projects > Call for projects 2009-1

**CALL FOR PROJECTS**

- Call for projects 2008-1
- Call for projects 2009-1
- Forms and guidelines
- Approved Projects

**LINKS**

- FAQs for Applications

**DOCUMENTS**

**EVENTS**

### Call for projects 2009-1

The Atlantic Area 2007-2013, European Trans-national Cooperation Programme launches the **Call for projects 2009-1**:

To find more details, please download the [Call for Proposals Announcement](#).

**Priorities and objectives**

Project proposals shall cover one of the following Programme priorities and objectives:

- 1.1 - Develop knowledge transfers between companies and research centres
- 1.2 - Enhance competitiveness and innovation capacities in maritime economy niches of excellence
- 1.3 - Stimulate economic conversion and diversification by promoting the regional endogenous potential
- 2.1 - Reinforce maritime security
- 2.2 - Sustainable management and protection of the resources of marine spaces
- 2.3 - Exploit the renewable energy potential of the marine and coastal environment
- 2.4 - Protect and promote natural spaces, water resources and coastal zones

**SUPPORT**

- Communication
- Links
- FAQ
- Contacts

**NEWSLETTER**

Your mail address

Subscribe

Visit our archives

**NEWS**

### **Project website manager:**

The project website manager is the technical responsible for the administration of the Programme website domain allocated for the collaborative communicative within the partnership, with the Programme structures and with the Public.

Three kinds of users are established:

- Project\_Admin: the website manager;
- Project\_member: The members of the partnership;
- Project\_nonmember: Other stakeholders with restricted access to the website project domain.

The website manager is the person in charge with the general administration of the project website domain, having full capacity:

- To create new project website items;
- To read, edit and remove existent project website items;
- To create and remove project website users, as well as to manage access permissions;
- To act as project contact point concerning the project website domain.

As an indicative profile, the person indicated to perform the duties of project website domain manager shall:

- Have experience as user of information systems and of internet;
- Good knowledge of the Atlantic Area Communication Plan;
- Good knowledge of the project specifications;
- Regularly follow the project implementation.

