



# How to apply for TAIEX assistance?

## Guidelines

Version 10.0.4

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You are a public official from one of the TAIEX beneficiaries and you are about to prepare a TAIEX assistance request. These guidelines are meant to assist you during the online filling of your TAIEX application form.

## 1. How to access the application form or to get a list of my drafted and submitted application forms?

This online form gathers information related to your TAIEX assistance request. Your application will be carefully examined and if approved, TAIEX will provide technical assistance on the basis of the provided information.

### Functionality

#### 1. Visit the **home page**

<https://webgate.ec.europa.eu/TMSWebRestrict/applicationForm>

The screenshot shows the TAIEX application form home page. At the top, there is a header with a logo on the left and a 'Professional email' field on the right containing 'email@xx.eu'. Below the email field are two buttons: 'Create new' and 'My list'. The main content area contains a message: 'You are a public official and you are about to prepare an application form for TAIEX assistance which you will be able to select by following the below guidance.' Below this message is a section titled 'Please note that:' followed by a list of bullet points. To the right of the list are two buttons: 'Cancel' and 'Create'. Below the buttons is a section titled 'Select the instrument for which you want to create an new application form:' followed by a list of radio buttons and their corresponding instrument names. The list includes 'IPA, ENI', 'EIR PEER 2 PEER', 'INTPA PEER 2 PEER', 'PI', 'REGIO PEER 2 PEER', and 'TAIEX Strategic'. The 'TAIEX Strategic' option is selected. Below the list is a section titled 'The below application forms are for EU Internal applicants only' followed by a list of radio buttons and their corresponding application form names. The list includes 'PI', 'REGIO PEER 2 PEER', and 'TAIEX Strategic'. The 'TAIEX Strategic' option is selected. Annotations with orange boxes and arrows point to various elements: '2' points to the email field, '2b' points to the 'Create new' button, '2a' points to the 'My list' button, '2b2' points to the 'Cancel' button, '2b1' points to the 'Create' button, and '2b1' points to the 'TAIEX Strategic' option in the second list.

Professional email: email@xx.eu

Create new My list

You are a public official and you are about to prepare an application form for TAIEX assistance which you will be able to select by following the below guidance.

Please note that:

- If you are a public official from an enlargement or neighbourhood country please use the IPA/ENI application form.
- If you are a public official from a Member State please use the EIR/PI application form.
- The PI, TAIEX Strategic and Twinning
- The INTPA PEER TO PEER application form is for EU Internal applicants only.

If you want to prepare a new application: €

Select the instrument for which you want to create an new application form:

- ☐ IPA, ENI  
Instrument for Pre-Accession Assistance, European Neighbourhood Instrument
- ☐ EIR PEER 2 PEER  
Environmental Implementation Review
- ☐ INTPA PEER 2 PEER

The below application forms are for EU Internal applicants only

- ☐ PI  
Partnership Instrument
- ☐ REGIO PEER 2 PEER  
Regional policy
- ☒ TAIEX Strategic  
EU Internal Application

#### 2. Encodes your

**professional email address and:**

a. Press **“My list”** to retrieve the list of application forms

b. Press **“Create new”** to create a blank application form:

1. Select the **Instrument** and press **“Create”**

2. You can always **cancel** the operation by **pressing** the “**Cancel**” **button**. You are **redirected** to or the **Home page** or the **new application form in case you are already authenticated** (see [UC 3](#))
3. A **popup message** (“An email has been send to your professional mailbox. Please continue from there. In case of any issues, please check the help guide”) appears and asks you to **check** the **mailbox** to precede the process. The system will send an email, which contains a **secured link** to continue the application form process. The process will check two points:
- Verify the "Application email" address
  - Provide the application form with already predefined field filled out in the application form about the applicant
- Checks the mailbox and opens the email with the request for a new application form (3.I) or the application form list (3.II). **Clicks** on the **link** to **open** the **application form** (see [How to submit an application form?](#)) or your list of application forms (see [How to manage your list of application forms?](#))

Dear Applicant,

Thanks for your interest in the IPA, ENI instrument.  
You can now fill and submit online your IPA, ENI assistance request by clicking this link:

[New Application Form](#)

Kind regards,

Unit C.3 - Institution-Building, TAIEX, Twinning  
Directorate C - Neighbourhood East  
Directorate-General Neighbourhood and Enlargement Negotiations  
European Commission  
<http://ec.europa.eu/taieux>

3.I

Dear Applicant,

Please find below the link to your list of application forms.

<https://webgate.acceptance.ec.europa.eu/TMSWebRestrict/resources/js/>

**In case the link does not work, copy and paste the entire URL into your browser's address bar and press Enter.**

Thanks for your collaboration.  
Kind regards,

Unit C.3 - Institution-Building, TAIEX, Twinning  
Directorate C - Neighbourhood East  
Directorate-General Neighbourhood and Enlargement Negotiations  
European Commission  
<http://ec.europa.eu/taieux>

3.II

## 2. How to submit an application form?

Below the **main steps** to **complete** and **submit** an **application form**:

- a. **Complete** the application form. Check if all required fields marked by an asterisk (\*) are properly filled in
- b. **Save** regularly the form: you are not obliged to fill in the form in one go. If you do not have all the necessary information, you can easily save your form as a draft and work on it later. You have also the possibility to share it with your colleagues by copying the URL address and paste it in the correspondence with your counterparts
- c. Once the application is ready, don't forget to **submit** the application form

### Functionality

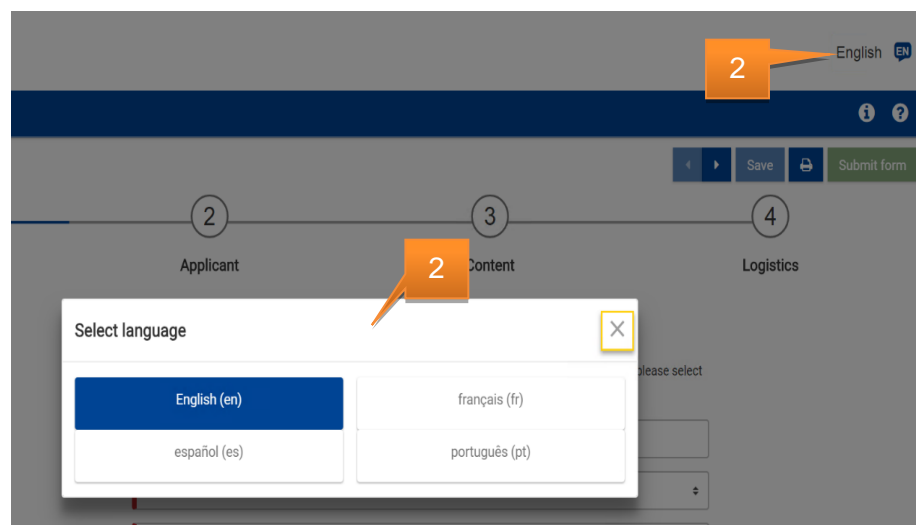
1. **Complete** the **application form**. Check if all required fields marked by an asterisk (\*) are properly filled in
2. **Navigation** through the form can be done in two ways:
  - a. Or use the **navigation button** to move through the form
  - b. Or **select the tab** by **clicking on the bullet point**



- c. **Select the language** in which the **application form** will be submitted. **Press** on the **language label** and **select the language** or **press the close button** to **cancel** the operation.

Note: By **default** the **application form** is only **available** in **EN – English**. Option is only available if **multiple languages** exist


3. You can **save** the form at **any moment**

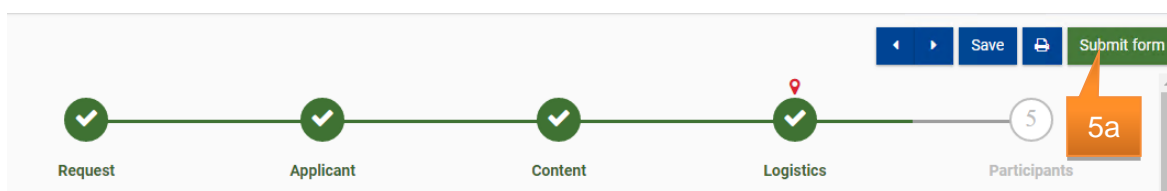
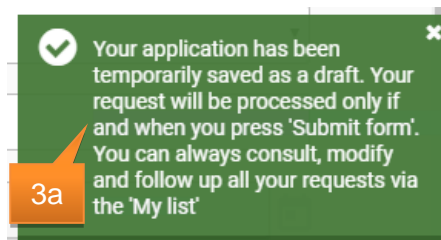


as a **draft version**:

- a. **Save** with **success**, the **green popup message** is displayed
- b. **With failure**, the **popup message** "Saving failed, ..." is displayed

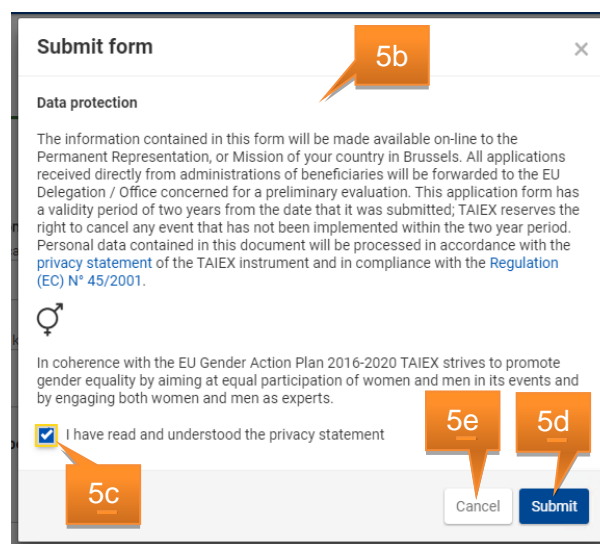
**Reopening** of draft happens from the '**My list**' or via a **link** which is **send** to your **mailbox**

4. If needed (before or after submitting), you can  **print** the encoded **application form**. As long as the form is not submitted, a **Draft watermark** is **available on the form**. Once submitted, the application form becomes read-only.



5. **Once the form is valid** (all enabled tabs need to be marked in green), the **submit button** will be **enabled**. To **submit the form**:

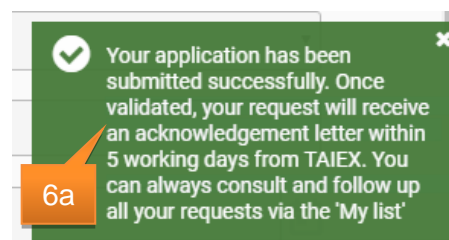
- a. **Press** the "**Submit form**" button
- b. A popup message is displayed
- c. **Accept** the "**I have read and understood the privacy statement**" message by **clicking** on the **checkbox**
- d. Finally, **Press** the "**Submit**" to complete the request

A screenshot of a "Submit form" dialog box. At the top, it says "Data protection". Below that, there is a paragraph of text: "The information contained in this form will be made available on-line to the Permanent Representation, or Mission of your country in Brussels. All applications received directly from administrations of beneficiaries will be forwarded to the EU Delegation / Office concerned for a preliminary evaluation. This application form has a validity period of two years from the date that it was submitted; TAIEX reserves the right to cancel any event that has not been implemented within the two year period. Personal data contained in this document will be processed in accordance with the [privacy statement](#) of the TAIEX instrument and in compliance with the [Regulation \(EC\) N° 45/2001](#)." Below this text is a checkbox with a male symbol icon and the text "I have read and understood the privacy statement". An orange callout bubble labeled "5c" points to this checkbox. To the right of the checkbox, there are two orange callout bubbles labeled "5e" and "5d" pointing to the "Cancel" and "Submit" buttons respectively. The "Submit" button is highlighted in blue.

- e. At any moment before pressing the "Submit" button, you can **cancel** the **operation** by **pressing** the "**Cancel**" button

6. When submitting:

- a. **With success**, the popup message informing you that the submitting process was completed successfully and the form becomes read-only
- b. **With failure**, the popup message "Submit failed, ..." is displayed



Note: Once submitted, application forms can no longer be modified. Via the "Get my list"

button you can follow the status of the submitted application forms. Once submitted and validated, the applicant will receive an acknowledgement within 5 working days from TAIEX






### 3. How to manage your list of application forms?

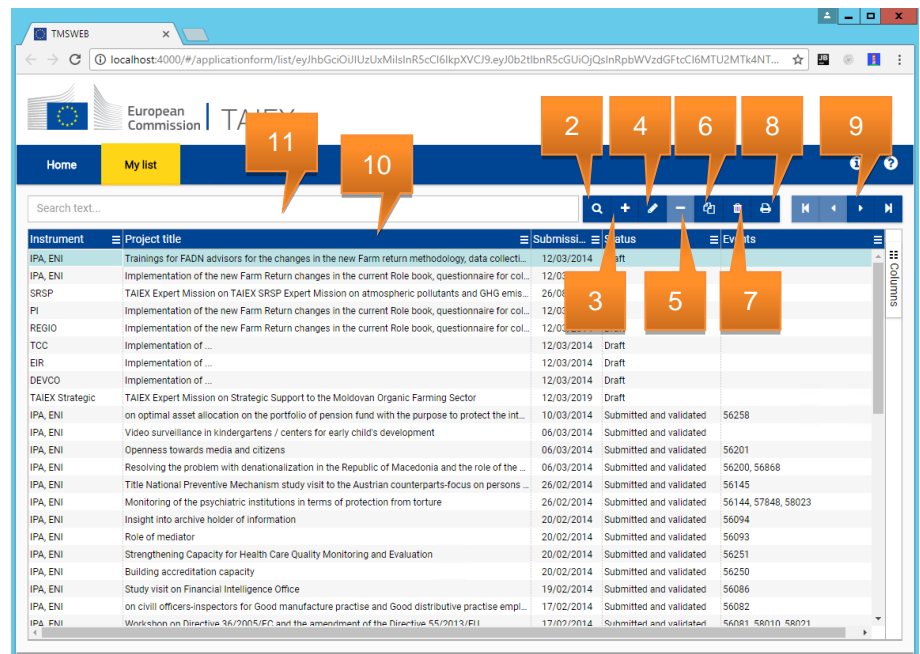
#### Functionality

1. Use the **link** open the application form list. Two possible results:




- a. **Valid token:** The application form list for the specified actor is opened
- b. **Expired token:** The warning message "The token is expired. Please

create a new token via the "My list" button" is displayed. You are redirected to the **home page** (see [How to access the application form or to get a list of my drafted and submitted application forms?](#))

2. Press the  button to **reload the list**
3. Press the  button to **create a new application form**. See [How to access the application form or to get a list of my drafted and submitted application forms?](#) – point 2.b
4. To modify an application form, **select** an application form from the **list** and press the  button. If **no row** is **selected** the **button** is **disabled**. It will open the application form detail page. See [How to submit an application form?](#)
5. The  button allows you to **delete** or **hiding** a **request** from the **list**:
  - a. **Delete** is only possible for requests with a status **Draft** and will remove the data
  - b. **Hiding** is only possible for requests with a status **Refused by CP** or **Refused**  
A confirmation message is displayed: "Are you sure you want to delete this Application Form?". If **yes**, the application form is **removed** from the list. If **no** the action is **cancelled**. The **button** is **only enabled** for application forms in the **status: Draft, Refused by CP, Refused**.
6. The  button allows to **duplicate** the **selected item** in the list. For the reuse an existing application form only some predefined parts of the form are reused, **except** when a **refused** or **refused by CP** form is selected. In this case, you could reintroduce a modified request.



Duplicate option is only enabled if the selected application form is from the last existing version

7. To **reset** the **default filters**, **press** on the  button. All filters are cleared and the result set is refreshed
8. **Press** the  button to **export** the (filtered, without pagination) list to excel. **Maximum allowed number of records** to download is limited to **50000**
9. The  **navigation button** allow you to **navigate** through the different pages of the **result**
10. The grid layout can be extended with the following fields below. Filters and sort order will be remembered during the session.

| Caption  | Default columns Order* | Sort/Filter | Filters options** |
|--|------------------------|-------------|-------------------|
| ID   | <u>1</u>               | Y/Y         | Contains          |
| Create date  | <u>2</u>               | Y/Y         | Contains          |
| Instrument   | 3                      | Y/Y         | Contains          |
| Type   | <u>4</u>               | Y/Y         | Contains          |
| Project title  | 5                      | Y/Y         | Contains          |
| Submission date  | 6                      | Y/Y         | Contains          |
| Status<br>Draft<br>Submitted<br>Translating<br>Translated<br>Submitted and validated<br>Refused by CP<br>Accepted<br>Refused<br>Done | 7                      | Y/Y         | Contains          |
| Events   | 8                      | Y/Y         | Contains          |
| Removable  | <u>9</u>               | Y/Y         | Contains (Y/N)    |
| Can duplicate  | <u>10</u>              | Y/Y         | Contains (Y/N)    |

\* Italic underlined = Default hidden

\*\* Text filter definition

\*\*\* Status

- a. **Draft**: a temporary version of the form is saved but not submitted
- b. **Submitted**: application form has been submitted and waits for validation by the contact point (CP).
- c. **Translating**: Translation of the application form is in progress
- d. **Translated**: Translation of the application form has been submitted and waiting for approval
- e. **Submitted and validated**: application form has been submitted and validated. The applicant will receive an acknowledgement of receipt by email within 5 working days
- f. **Refused by CP**: the request has been refused by the CP. The applicant is informed by email. In case of rejection because of an incomplete application form, you can use the duplicate button to complement and resubmit a refused application form.
- g. **Accepted**: the request has been accepted by TAIEX. The applicant is also informed by email
- h. **Refused**: the request has been refused. The applicant is informed by email. In case of rejection because of an incomplete



application form, you can use the duplicate button to complement and resubmit a refused application form

- i. **Done:** an event has been planned/held to execute the requests as described in the application form

11. You can **filter** the list based on a **global search**.

a. **Typing the word searching**

b. Followed by **pressing** the  **button** which will **extract** an updated **list**

#### 4. How to validate an application form?

Application form validation is performed by the contact point.

##### Functionality

1. **Opens** the received **email** which contains the link to for the application form that need to be validated
2. By **clicking** on the "**Application form to validate**" in the email, the application form which needs to be validated is opened in read-only mode.
3. In case the validation was already done, a popup message is displayed and the application form is opened in read-only mode
4. **Verify the request.** Once done, there are two options:
  - a. In case the application form is **submitted** in a

**language different** than **English**, you have the **possibility to request a translation.**

**Reply** to the **message** "Application form in .... Should the form be translated in EN?".

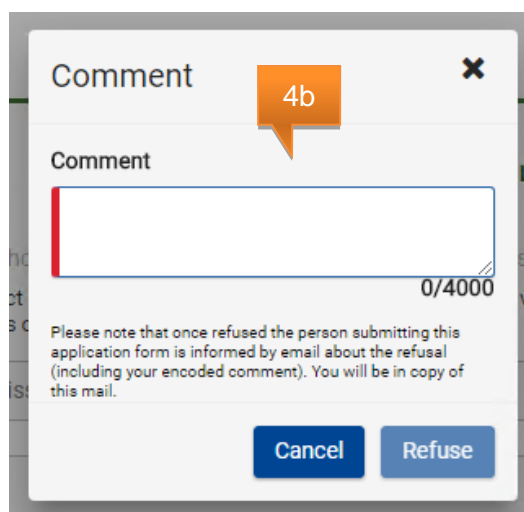
**Press Yes** to **request a translation** or **No** for **no translation**. The action can be **cancelled** by **pressing** the **close button**. In case of Yes or No, **clicks** on the "**Validate**" button to validate the request or the "**Cancel**" button to cancel the validation. A popup message is displayed which allows you to **encode** an **optional comment**. If you **press** "**Validate**" the data is saved and an alert is displayed (success: "Successfully approved" , failure: "Application form validation failed - ...").

Finally, if the request is validated and a translation was requested, automatically a draft translation request email is downloaded. Please don't forget to send this email to the translator

- b. Or **clicks** on the "**Refuse**" button to refuse the request. A popup message is displayed. You needs to encode a comment. If you **press** "**Refuse**" the data is saved and an alert is displayed (success: "Successfully




The screenshot shows a 'Comment' dialog box with a title bar containing a close button (X). An orange callout bubble labeled '4a' points to the dialog. Inside, there is a text input field with a placeholder line and a character count '0/4000'. Below the input field is a note: 'Please note that once validated the person submitting this application form is informed by email about the validation (including your encoded comment). You will be in copy of this mail.' At the bottom are two blue buttons: 'Cancel' and 'Validate'.



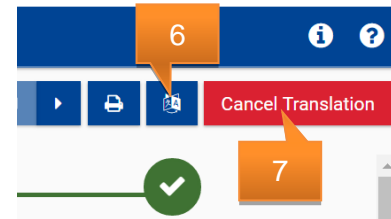
The screenshot shows a 'Comment' dialog box with a title bar containing a close button (X). An orange callout bubble labeled '4b' points to the dialog. Inside, there is a text input field with a placeholder line and a character count '0/4000'. Below the input field is a note: 'Please note that once refused the person submitting this application form is informed by email about the refusal (including your encoded comment). You will be in copy of this mail.' At the bottom are two blue buttons: 'Cancel' and 'Refuse'.

refused” , failure: “Application form refusal failed - ...”)

5. In both situations, the person submitting the application form is informed about the decision including the encoded comment. You are in CC of that email.

6. Press the  button to extract the translation request email

7. For **application forms** which are validate and in the **process of translating**, you have the possibility to **cancel** the **translation process** at any moment by **pressing** the “**Cancel Translating**” button. Since the form was validated, the **status will be updated** to **Submitted and validated**



## 5. How to translate an application form?

You as translator received an email from the validator containing a link to the application form.

### Functionality

1. Opens the received email which contains the link to the application form that need to be translated

2. By clicking on the "Application form to translate" in the email, the application form which needs to be validated is opened. The form is opened with the labels in English. You can change the language by pressing the language button (top right) and selection the language.

<https://webgate.acceptance.ec.europa.eu/Twinning/getAppFormDocumAuthorization=eyJhbGciOiJIUzI1NiJ9.eyJyZXZlZXN0SWQjOjczMjY>

In case the link does not work, copy and paste the entire URL into your browser's address bar and press Enter.  
Kind regards,


Unit C.3 - Institution-Building, TAIEX, Twinning  
Directorate C - Neighbourhood East  
Directorate-General Neighbourhood and Enlargement Negotiations  
European Commission  
<http://ec.europa.eu/taix>

3. In the upper right corner you find the status of the process. Translating is only possible if the status = Translation in progress
4. Translate all the fields which needs to be translated in the different tabs of the application form
5. Save the form at any time:
  - a. Save with success, the green popup message "The application form including translations has been temporarily saved. To finalise the process you need to 'Submit form' the form"
  - b. With failure, the popup message "Saving failed, ..." is displayed
6. Finally, submit the application form.
  - a. Submit with success, the green popup message "The application form including translations have been submitted successful"

Note: The validator is automatically informed by email about the submitted translation

b. With **failure**, the **popup message** “Saving failed - ...” is displayed

Note: The submit button is only enable if all the fields that require translations have been completed

7. You can  print the encoded application form

## **6. Further details**

### **a. Description of the state of play**

TAIEX takes the decision on the introduced requests based on the relevance and the appropriateness of the assistance. It is therefore very important to properly fill in the description fields.

### **b. Objective of the request**

Here it is expected to have a short and clear description of the objectives that your administration aims to reach thanks to TAIEX assistance.

### **c. EU legislation concerned**

TAIEX mandate covers all EU legislation. All requests of assistance have to be based on EU legislation. It will also provide TAIEX with a more focused field of expertise when looking for the experts in the Member States.

### **d. Main topics/content**

It is needed to mention the activities which you expect TAIEX to organise in collaboration with the experts and ideally to provide details on a provisional agenda.

### **e. Current situation/justification**

The situation in the country or this specific sector has to be described. This information is key for TAIEX to understand the state of play and the needs.

### **f. Planned or currently running project**

All projects planned or running in the sector of the requested assistance should be listed. In case consultations show that the request is a duplication of existing projects, it will be rejected; on the other hand, if it is complementary and has a significant added value, TAIEX support will be provided.

## g. Contact persons

**Person submitting** is the public official who physically encodes the assistance request.

**Authorisation from your Administration** is the official authorising the request for assistance. In case the "Person submitting" is also authorising the request, you can press "Copy data" and information will be duplicated.

**Contact person for administrative questions and practical matters related to this event** is the official in charge of all administrative and practical matters related to the organisation of the technical assistance. TAIEX will be in contact with this person along the preparation and implementation of the assistance. It is necessary to designate a person who has allocated time and who speaks one of the working languages of the Commission.

**Contact person for evaluation** is involved in the assistance process and well aware of the effects of the support provided. Six months after its implementation an automated email will be sent to the contact person for evaluation asking to provide an overall assessment of the impact (approximation, implementation of EU legislation, institutional development) of previous TAIEX assistance.