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Expert of Interest Procedure

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1. INTRODUCTION

This procedure applies to the Expression of Interest (EoI) pool of experts, who may be engaged on a temporary, task-based basis by the EIT CC. The expression of interest will open on a regular basis, and the expert pool will be updated as well, the same procedure will apply.

This procedure details the evaluation under the four-eyes principle, three core criteria—professional experience, relevant background & requirements, required expertise—and checks for consistency and thematic fit. It also covers financial terms, engagement rules, conflict of interest declarations, and post-intervention review, in compliance with EU grant requirements.

This procedure ensures transparent, fair, and compliant expert selection from the EoI pools, aligned with KIC programme needs, the EIT CC Code of Conduct and EU funding rules.

Admission to the Expert Pool is not automatic and is not limited to an administrative eligibility check.

All applicants are assessed against defined competence-based evaluation criteria. Only experts who meet or exceed a minimum quality threshold are admitted to the pool. Applicants who do not meet this threshold are excluded from the pool and informed accordingly.

Admission to the pool grants eligibility to be considered for future assignments but does not guarantee engagement.

The Expression of Interest (EoI) Expert Pool constitutes a mechanism for the identification and engagement of individual experts based on competence, experience and programme needs. Admission to the Expert Pool does not constitute a procurement procedure nor does it create any entitlement to assignment.

Experts are engaged in their personal capacity as independent specialists and not as economic operators competing to provide commercial services. Engagements under this procedure are based on expertise and suitability for specific tasks rather than price competition.

Individual assignments awarded under this procedure are expected to remain below EUR 15,000 (net of VAT) per expert and per assignment, in accordance with EIT CC procurement rules.

Assignments shall not be artificially split in order to remain below procurement thresholds. Where needs are recurrent, continuous, or exceed applicable procurement thresholds, EIT CC shall apply the procurement procedures defined in the EIT CC Procurement Manual.

This Expert Pool mechanism shall not be used where the nature of the need constitutes the procurement of services rather than the engagement of an individual expert.

In particular, the EoI mechanism shall not be used where:

- The assignment concerns the provision of services by a company or team rather than an individual expert acting in personal capacity;
- The need is recurrent, continuous or operational in nature and comparable to outsourced services;
- The expected total value of similar services exceeds applicable procurement thresholds;
- The engagement would result in artificial splitting of services to remain below procurement thresholds.

In such cases, EIT CC shall apply the procurement procedures defined in the EIT CC Procurement Manual.

2. Context and Scope

Every expert in the EoI pool is available to deliver specific results at defined moments, based on programme needs. **Experts are contacted when they are shortlisted (ranked as priority 1 and 2), it aims to inform them about a potential future selection, the experts ranked in priority 1 are contacted for specific tasks**, they are not informed about their ranking in the pool.

Upon acceptance of the assignment every expert will sign a consultancy agreement with the expected workload and tasks to be carried on. The work is based on a temporary task allocation, as per the agreement signed.

Financial compensation is pre-defined in the respective Expression of Interest and shall not be negotiated. Any exception requires written justification and prior approval by the Legal Manager.

Regular expression of interest will be launched to update the pool

Experts must not receive more than €15,000 per calendar year across all EIT CC areas. Multiple contracts in different areas are allowed provided the annual cap is respected.

The workflow is broken down in 5 steps:

1. Eligibility of the pool
2. Evaluation (four-eyes principle)
3. Alignment meeting and shortlist finalization chaired by the Director of Transformation
4. Final approval, consultancy agreement, and conflict of interest declarations
5. Post-intervention review and pool ranking update by the Transformation team

Expressions of Interest are launched on a regular basis, according to a defined rhythm, to:

- Update and renew the Expert Pool
- Include new profiles
- Reassess existing experts where relevant

3. The Workflow

3.1. Eligibility of the pool

- All applications are received and stored in the project management tool Monday in the workspace “Transformation - EoI & Calls”.
- The Transformation team verifies the administrative completeness: CV, alignment to the EoI topic (no mistake in submitting for another EoI).
- Exclude candidates lacking mandatory information or outside scope, if any.
- Create a separate board for evaluation of the Experts and grant access to the relevant people.

The eligibility check is strictly administrative. Passing the eligibility check does not imply admission to the Expert Pool. Only eligible applications proceed to the competence-based evaluation and ranking stage.

3.2. Evaluation

The expert selection process follows a two-step approach. First, an eligibility check is carried out to verify administrative completeness and alignment with the scope of the Expression of Interest. Second, eligible applications undergo a competence-based evaluation and ranking, which determines admission to or exclusion from the Expert Pool. A minimum quality threshold is defined for each Expression of Interest: experts scoring at or above this threshold are admitted to the Expert Pool, while experts scoring below the threshold are not admitted and are informed accordingly. Admission to the pool confirms that the expert meets the required level of competence, experience, and expertise and grants eligibility to be considered for future assignments, without guaranteeing engagement. Among applicants meeting the minimum quality threshold, a priority ranking (Priority 1 or Priority 2) is assigned to establish the order of priority for future assignments. Applicants not meeting the threshold are assigned Priority 3 and are not admitted to the Expert Pool.”Only experts admitted to the Expert Pool

are eligible to be contacted for assignments under EIT CC programmes. This process is repeated regularly through recurring Expressions of Interest to ensure a high-quality and up-to-date pool of experts.

- For each type of expert (teacher, facilitator, coach, creatives), two evaluators are appointed with no overlapping professional ties to candidates.
- The evaluators are appointed by the Director of Transformation & RIS, they can either be full time employees or contractors for the Transformation team.
- In the event of conflict of interest, the evaluator will inform the Director of Transformation via email and will not evaluate the applicant(s). The Director of Transformation will appoint another evaluator for this(ese) applicant(s).
- Each evaluator will receive an access to the evaluation file / platform and the content information needed: requirements from the EoI document.
- Core evaluation criteria (no weighting):
    - Professional experience
    - Relevant background & requirements
    - Expertise (for instance systemic transformation or Fashion & Circularity, other, depending on the EoI)
- Each evaluator scores independently and add comments when and if appropriate.

3.3. Alignment Meeting and Ranking

- Evaluators are invited into a meeting to compare scores, discuss discrepancies, and agree on a ranking (priority list).
- The meeting is chaired by the Director of Transformation & RIS
- Final selection of expert should respect minimum diversity requirements:
    - Minimum 50 % women
    - Minimum 30 % experts from RIS regions
- If the programme does not require more than one expert then the minimum diversity requirement does not apply.
- The minimum diversity requirements might not be reached in case of exceptional cases that must be documented.

- The programme in which every admitted expert is engaged is tracked through the EoI application page, as well as the respective final average score.
- The final score is the average of the 2 scores from the evaluators after the alignment meeting.
- The Alignment meeting is useful to rank experts by priority of choice ensuring the best fit for the specific tasks to be conducted.
- The Alignment meeting is also used to ensure consistency and highest quality of scoring between the two evaluators.
- All evaluated applicants are assigned an evaluation outcome and, where applicable, a priority ranking as complementary information to the average score, defined as follows:
    - **Priority 1 (admitted)**: The applicant meets or exceeds the minimum quality threshold and is the preferred profile for the next programme; an assignment may be offered.
    - **Priority 2 (admitted)**: The applicant meets or exceeds the minimum quality threshold and is admitted to the Expert Pool; the expert may be contacted for future assignments.
    - **Priority 3 (not admitted):** The applicant does not meet the minimum quality threshold and is not admitted to the Expert Pool; the applicant will not be contacted.

3.4. Consistency and Fit Verification

- The Director of Transformation can review the priority ranking for:
    - Alignment with the task the experts are invited to contribute to
    - Complementarity and balanced skill coverage with the other experts involved (when applicable)
- Adjust the priority ranking to fill thematic gaps or reduce overlap.

3.5. Consultancy Agreement and Conflict of Interest

1. Consultancy Agreements
    - Once the experts are selected they receive an email to inform them about the tasks, financial compensation and timeline.
    - Upon written acceptance via email they will receive a consultancy agreement for signature.
    - The consultancy agreement will specify: role, scope of work, deliverables (if applicable), timelines, compensation (fixed per EoI), and no-AI clause (the possible use of generative AI systems requires an assessment done in conversation with EIT CC).
2. Conflict of Interest (CoI) Declarations
    - Requires every expert to sign a CoI declaration for each consultancy agreement.
    - Evaluators must recuse themselves from assessing any candidate where a conflict exists.
    - All communication regarding CoI should be stored and kept for audit purposes.
3. Engagement Rules
    - Experts are engaged in their personal capacity as independent specialists and not as economic operators providing commercial services. Engagement under this procedure does not create an employment relationship.
    - Expert delivers results per consultancy agreement.

- Compensation cannot exceed € 15,000 per expert per year across all KIC areas.

Before contacting an expert for a specific assignment, the responsible programme manager shall document:

- The description and scope of the task;
- The justification for engaging an expert under this procedure;
- Confirmation that the estimated value of the assignment does not exceed EUR 15,000 (net of VAT);
- Confirmation that the assignment does not constitute artificial splitting of services;
- Budget availability.

This documentation shall be retained for audit purposes.

Financial compensation is pre-defined in the respective Expression of Interest and shall not be negotiated. Any exception requires written justification and prior approval by Legal Manager.

3.6. Post-Intervention Review and Pool Ranking Update

Upon completion of each assignment, the Transformation team evaluates the effectiveness of the collaboration based on predefined qualitative criteria, such as delivery quality, adherence to agreed timelines, collaboration with programme teams, and alignment with EIT CC values and Code of Conduct.

Feedback is recorded in the project management tool and used to adjust each expert's priority ranking within the Expert Pool, ensuring that high-performing experts remain prioritised for future opportunities.

Where post-intervention feedback identifies significant or recurring performance issues, the Transformation team may decide to downgrade the expert's priority ranking or exclude the expert from the Expert Pool. Any decision to exclude an expert must be:

- Based on documented evidence from one or more assignments
- Proportionate to the severity and recurrence of the identified issues
- Recorded in the project management tool for audit purposes

Experts excluded from the pool are informed accordingly. Exclusion from the pool does not prevent the expert from reapplying through a future Expression of Interest.

To ensure traceability, a dedicated column ("priority for future opportunities") and a comments field are maintained in the project management tool to document ranking changes, feedback, and exclusion decisions.

4. Evaluation Criteria

Criterion	Description (detailed information are part of the EoI document)
Professional experience	Aligned with the requirements
Relevant background & requirements	Relevant experience in the selected roles.
Expertise	Proven documented experience (education background, research work, professional background) in required expertise (as per the related EoI guidelines)

5. Conflict of Interest Rules

All evaluators and experts must complete a CoI declaration for every scope of work. A conflict exists if an individual:

- Has personal or financial ties with a candidate/supported company.
- Collaborated professionally with a candidate/supported company in the past three years.
- Stands to gain from the candidate's/supported company appointment (financially or non financially).

All records of recusals and CoI declarations are stored at least 5 years for audit purposes.

6. Duration and Data Protection

All applicants will remain in the pool for a duration of 36 months, unless they inform the EIT CC of their willingness to withdraw.

In the event of an applicant willing to withdraw from the pool, they can inform the EIT CC as per the privacy policy available on the website and they will be excluded from the related pool.

In the event the Transformation Team require the need of updating the pool of Experts, it can be done through:

- reopening the EoI for receiving new applicants
- sending communication to the existing pool to request the update of their CV or ask complementary information

Admission to the pool is valid for a maximum of 36 months, subject to periodic updates of the pool through new or renewed Expressions of Interest.

All documentation related to expert selection, assignment justification, consultancy agreements and conflict of interest declarations shall be retained in accordance with the retention obligations under the Horizon Europe Grant Agreement and applicable EIT rules.