Culture & Creativity

Co-funded by the European Union

EIT CULTURE & CREATIVITY PROCUREMENT PROCEDURE

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Contents

1. INTRODUCTION 4
2. BASIC RULES 6
2.1. General principles to be applied 6
2.2. Essential rules for award procedures 7
No conflict-of-interest 7
Awarding principles 8
Non-retroactivity 9
Use of standard documents 9
Communication 10
Record keeping 10
Segregation of duties 10
Approval Process 10
PURCHASE ORDERS ELABORATION (PO) 11
3. SUPPLIER SELECTION PROCEDURES – GENERAL STEPS 11
3.1. Step 1: Estimating the contract value 12
3.2. Step 2: Choosing the appropriate procedure 14
3.3. Step 3: Market research stage 14
3.4. Step 4: Request for Proposals stage 15
What to consider when drawing up the RFP? 16
3.5. Step 5: Proposal submission and evaluation 17
Creating an Evaluation committee 17
Submission of tenders 18
Detailed evaluation of proposals 19
3.6. Step 6: Notification of award 20
3.7. Step 7: Appeals procedure 21
3.8. Step 8: Signature of the contract 22
Contract modification 23
4. DIRECT AWARD 24
5. FRAMEWORK AGREEMENTS 25

6. PROCUREMENT TEMPLATES 26

Competitive tendering 26

Direct Award 26

Additional Templates 26

Agreement Templates 27

7. STEP-BY-STEP PROCESS FLOWS 28

7.1. Purchases below €1,000 28

7.2. Purchases between €1,001 and €15,000 29

7.3. Purchases between € 15,001 and €60,000 30

7.4. Purchases between € 60,001 below €221,000 32

7.5. Purchases from or above €221,000 34

7.6. Direct Award 37

INTRODUCTION

EIT Culture & Creativity is a Knowledge and Innovation Community (KIC) established by the European Institute of Innovation and Technology (EIT). Its mission is to strengthen and transform Europe's cultural and creative sectors and industries by fostering innovation, entrepreneurship, education, and cross-sector collaboration.

EIT Culture & Creativity brings together a wide network of partners from business, higher education, research, and the cultural and creative fields across Europe. By supporting innovative solutions, start-ups, and skills development, it aims to enhance the global competitiveness, resilience, and societal impact of the cultural and creative sectors while contributing to sustainable economic growth and European values.

A. Procurement Manual

This Procurement Manual describes the tendering and contracting procedures and processes applying to all purchases made by EIT Culture and Creativity and its CLCs (hereafter cumulatively referred to as "EIT CC").

The Manual sets out the basic procurement principles and rules, as well as explains the practical step-by-step implementation of the procurement process. The Manual is accompanied by a set of templates to be used at the different stages of the supplier selection and contracting (refer to paragraph 6 for the list of templates).

This Procurement Manual is part of the EIT CC policy framework, and we therefore encourage that it be read and understood by all EIT CC employees. Knowledge of the EIT CC supplier selection rules and procedures described in this manual is mandatory for all staff with a purchasing role.

B. Scope of Application

EIT CC carries out its activities according to the Business Plan for each current annual which is amended during the relevant year. The BP is approved by the European Institute of Innovation and Technology (EIT). Its assignment is to complete the activities.

B.1 Legal Framework

Given that a significant proportion of EIT Culture & Creativity's funding is provided by the European Institute of Innovation and Technology (EIT), this Procurement Manual shall be interpreted and applied in accordance with the Framework Partnership Agreement (FPA) and the Horizon Europe Grant Agreement (HE GA).

In line with Article 6.1 of the Framework Partnership Agreement, EIT Culture & Creativity ensures that its procurement activities comply with the substantive requirements of EU public procurement law, including the principles of transparency, equal treatment, non-discrimination, competition, proportionality, best value for money and avoidance of conflict of interest.

EIT Culture & Creativity carries out its activities in accordance with its Statutes, Bylaws and internal agreements with partners. These internal governance documents are aligned with, and shall not derogate from, the provisions of the FPA and the HE GA concluded with the EIT.

B.2 Scope of Application

The Specific Grant Agreement signed between EIT CC and the EIT sets the scope of application to EIT CC's activities under the abovementioned legal framework.

Article 8 of the SGA (Purchase of goods, works and services) and the article 11 (implementation of the Action tasks made by Subcontractors) define the scope and extent of the purchases for which will be applicable to this procurement policy and the procedures described herein.

EIT CC, also in addition takes responsibility as an organization linked to the EIT, a European Community body acting in the internal European Market while being partially funded by EU money.

C. Policy

The legal qualification of KIC Legal Entities and their Co-Location Centers (CLCs) under the EU public procurement directives requires a case-by-case assessment in light of Directive 2014/24/EU on public procurement and the applicable national procurement legislation.

In accordance with Article 6.1 of the Framework Partnership Agreement, Article 6.2 of the Horizon Europe Grant Agreement, and the EIT Guidelines for KIC Procurement Policies (January 2024), EIT Culture & Creativity has adopted this Procurement Policy to ensure compliance with the substantive requirements of EU public procurement law and to guarantee sound financial management.

Irrespective of its formal qualification as a contracting authority, EIT Culture & Creativity applies procurement rules aligned with the principles of transparency, equal treatment, non-discrimination, competition, proportionality, best value for money and avoidance of conflict of interest, as required under the EIT contractual framework.

Considering that EIT Culture & Creativity operates across several EU Member States through its CLCs, this Procurement Policy establishes a common system-wide framework. CLCs and affiliated entities shall implement procurement practices consistent with the principles and rules set out in this Manual and with the applicable national legislation.

This Procurement Policy has been developed in line with Regulation (EU, Euratom) 2018/1046 (EU Financial Regulation), Directive 2014/24/EU on public procurement, the Remedies Directive 2007/66/EC, and the EIT Procurement Guidelines. The Procurement Manual aims to ensure compliance with the substantive requirements of EU public procurement law as interpreted by EU legislation and case law.

This procurement policy explains the procedures to be followed for procurements of different contract values.

*EIT CC's Partners, Linked third parties, affiliated entities and are encouraged to have their own procurement policy and comply with the applicable procurement legislation (in case these entities) to mitigate the potential financial interests and credibility of EIT CC, however the current manual is been implemented for its use by EIT

CC and its CLCs and the tendering will remain under the responsibility of each EIT CC Partner or Linked Third Party.

2. BASIC RULES

2.1. General principles to be applied

The goal of procurement is to award timely and cost-effective contracts to qualified contractors, in accordance with principles and certain procedures. The following principles should be adhered to:

Principle	Definition
Best value for money (BVFM)	In brief, ensuring value for money in procurement means: • choosing the right thing, • with the proper quality (not only with the minimum acceptable quality), • at the proper price, and • following sound financial and legal procedures.
Transparency	The main objective is to introduce a system of openness, which is essential to ensure non-discrimination, equal treatment and competition. To ensure transparency means to allow the verification of whether the principle of equal treatment has been adhered to. Transparency can be achieved through: • Adequate publicity and advertisement of procurement opportunities • Procurement rules being defined in advance in a transparent manner • Communication to both successful and unsuccessful parties about the outcome of the procedure, for example summarizing the pros and cons as compared to the winning offer
Non-discrimination	• This principle prohibits any discrimination on grounds of nationality, meaning that all participants should be treated in the same manner, unless the difference is objectively justified. • Both direct and indirect discrimination is prohibited. • Contracting entities must remain non-biased and impartial toward all participants.
Equal Treatment	• Equal treatment requires that comparable situations are not treated differently and that different situations are not treated similarly unless such a difference or similarity in treatment can be justified objectively. • All competitors must have equal opportunity to compete for the contract.
Competition	• Competition is a key requirement for ensuring compliance with the best value for money principle. The greater the competition, the better the chances to have lower price and higher value. • Competition can be ensured by advertising the requirements of the procedure and by ensuring that an adequate number of bidders can participate in procurement procedures. • Exceptions from the requirements for the minimum number of operators shall be limited to strictly justified cases, such as those provided for in the EU public procurement (e.g. for contracts which may, for technical or artistic reasons or for reasons connected with the protection of exclusive rights be executed only by one operator).
Proportionality	• To ensure proportionality in procurement means to guarantee that the procurement measure at issue is appropriate for attaining the objective pursued and does not go beyond what is necessary to achieve the objective. • Procurement procedures should be of a complexity which is proportional to the contract value, prequalification criteria should be proportional to the contract value and minor irregularities should be settled with proportional measures.

2.2. Essential rules for award procedures

No conflict of interest

EIT CC must take all measures to prevent any situation where the impartial and objective implementation of the specific actions is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ("conflict of interests").

EIT CC Co-Location Centers (CLCs) and affiliated entities shall not participate as suppliers or service providers in any procurement process organized by EIT CC, unless it is demonstrated that their participation does not compromise impartiality, transparency, and fair competition. Any involvement of CLCs or affiliated entities in procurement processes must be clearly disclosed and approved in advance by the LM and the CFO to avoid any undue advantage or privileged access to information.

To ensure fair competition, CLCs and affiliated entities shall be subject to the same procurement procedures, eligibility requirements, and evaluation criteria as any other external bidder. Any failure to disclose such relationships shall be considered a breach of procurement integrity and may result in the disqualification of the entity from the procurement process and further disciplinary or contractual actions

Having as reference the best practices in EU procurement, the concept of "conflicts of interest" covers any situation where persons of the contracting entity (i.e. EIT CC) who are involved in the implementation of the procurement procedure or may influence the outcome of that procedure have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

A "conflict of interest" could exist if shared interests:

- influenced the contract award procedure.
- influenced the contract price as a result of which this does not correspond to the market price, or
- affected the contracting entity's performance, as measured by the appropriate quality standards.

These interests may be:

- *economic interests* (e.g. unjustified and preferential contracts or subcontracts with connected companies (not based on best value for money, technical merit, etc.)
- *political or national affinity* (e.g. beneficiaries or third parties are chosen, or research-related decisions are adopted, based on political considerations, connections or national affinity)
- *family or emotional ties* (e.g. contracts made with family members or other persons in close personal relationship with the EIT CC staff member)

A conflict of interest occurs when the impartial and objective exercise of the functions of the contracting entity, or observance of the principles of competition, non-discrimination against or equality of treatment of candidates, tenderers, contractors is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other shared interest with a beneficiary.

A conflict of interest may arise where, for instance, a member of the evaluation committee or someone in the contracting entity or others involved in the procedure themselves, or others, unjustified direct or indirect advantages by influencing the outcome. If this situation happens or if there is a risk that this situation may happen, the person has the obligation to inform its hierarchy in writing, and the hierarchy will decide the appropriate action.

Cases where an expert or company attempts to obtain information leading to an unfair advantage in subsequent or related procedures or attempts to influence the decision-making process of the contracting entity or enters into agreement with other economic operators with the aim of distorting competition are rather to be treated as grave professional misconduct and are a basis to reject/exclude the economic operator concerned.

Should any of the persons involved in the procurement procedure become aware of their potential conflict of interest regarding the procurement procedure they are implementing, they shall inform the Legal Manager (hereinafter also referred to as "the LM") or the COO. In the case of a potential conflict of interest, the concerned EIT CC staff member shall either withdraw from the procedure or alternatively, depending on the stage of the procurement procedure, the supplier in question might be replaced with a different company (if this is in the best interests of EIT CC).

Compliance with the requirement of absence of conflict of interest will be attested upon signature of the Tender Evaluation Report and of the Declaration of honor for the members of the Evaluation Committee by all members of the Evaluation Committee.

Awarding principles

All contract awards financed by EIT CC must obey the principles of best value for money; absence of conflict of interest; transparency; proportionality; equal treatment; and non-discrimination and need to follow the procedures set out in this Procurement Manual. Deviation from this Procurement Manual is only possible with the written approval of the COO (email accepted).

To ensure objectivity in bid evaluation, all tenders above EUR 15,000 must be assessed using a formal scoring system based on the Most Economically Advantageous Tender (MEAT) principle.

1. Award Criteria: The MEAT Principle

EIT CC shall award contracts based on the MEAT (Most Economically Advantageous Tender) principle, which means contracts are not awarded solely based on price, but on a combination of price, quality, and other value-for-money factors.

The main award criteria shall include:

1. Price-Quality Ratio (weighting price vs. technical merit)
2. Technical & Methodological Approach (how well the bidder meets the requirements)
3. Experience & Expertise (relevant experience and skills of the bidder)
4. Delivery & Project Management (timelines, after-sales service, customer support)

For high-value procurements (above EUR 143,000), the use of MEAT-based scoring is mandatory, ensuring the best quality-price ratio.

Weighting and Scoring System

The evaluation criteria must be weighted according to their importance. The total weighting shall always sum up to 100%, and the recommended distribution is as follows:

Award Criteria	Recommended Weight (%)
Price	30-50%
Technical & Methodological Approach	30-40%
Experience & Expertise	10-20%
Delivery & Service Conditions	5-10%

Price-Only Evaluations

For simple purchases (e.g., standard goods with clear specifications), a 100% price- based evaluation can be used, if competition exists.

Quality-Weighted Evaluations

For complex services, consultancy, or innovation projects, the price should be weighted at 30-40%, and technical aspects should be weighted higher.

Scoring Methodology

Each bid shall be scored on a 100-point scale according to the following standard scoring methodology:

Score	Description
0	Unacceptable – Does not meet the requirement at all
1-3	Poor – Meets the requirement only in a very limited manner
4-6	Acceptable – Meets the minimum requirement, but not exceptional
7-9	Good – Exceeds the requirement and provides added value
10	Excellent – Fully meets or exceeds all expectations

After scoring, weighted averages shall be applied based on the weighting matrix to determine the final ranking of bidders.

Evaluation Process and Decision-Making

1. Bid Evaluation Panel

   An Evaluation Committee (EC) is recommended for procurements above EUR 15,000. The EC must include at least 3 members (Business Requestor, Budget Owner, plus third member) which has power to take decision about the awarding after going through all the steps listed in this section and according to the evaluation rules explained in the present manual (decision taking committee).

2. Application of the Weighted Scoring System

   Each committee member independently scores the bids.
   The final score is calculated by applying the weighting system.

3. Bidder Selection & Justification

   The winning bidder is the one with the highest weighted score.
   A Tender Evaluation Report must be completed, including justifications

Non-retroactivity

Contracts take effect from the date of signature of the last signatory. In case the start date differs from the contract signature date, it should be explicitly mentioned in the contract.

Use of standard documents

Standard contracts and document templates must be used, please refer to Section 6 for an overview of

procurement templates to be used.

Please note that all templates included in the Manual are there to assist you to apply the rules in a compliant way. In case they are not fully assisting you during the procurement process, please consult with the Legal Manager (or in their absence – the COO).

Communication

Generally, all communications relating to the procurement procedure shall be made in writing between the contracting entity (Business Requestor) and the economic operators (preferably by email). Oral communication may only be used for non-essential elements of the procedure, and providing substantial information via phone should be avoided.

Record keeping

Written records of the entire procurement procedure shall be stored for five years following the calendar year in which the contract has been completed. EIT CC retains ownership of all proposals received under any tendering procedure. Proprietary information identified as such, which is submitted by tenderer in connections with all procurements, shall be kept confidential.

All potential or actual suppliers should accept that during the implementation of the contract and for five years following the year in which the contract has been completed, for the purposes of safeguarding the EU's financial interests, EIT CC has the right to provide the internal audit services, the European Court of Auditors, the Financial Irregularities Panel or the European Anti-Fraud Office with all documentation pertaining to any procurement procedure (the proposal and all its annexes, all communication with the supplier, the contract, and any relevant documentation – for more information refer to the list in Table 1 of documentation to be kept at each threshold).

Segregation of duties

To organize a procurement, the following roles are identified:

1. Legal Manager, responsible for ensuring the proper implementation of the Procurement Policy and respect of procedures. In the absence of the Legal Manager this function will be implemented by the COO.
2. Business Requestor, i.e. the person initiating the procurement process – role may be fulfilled by all members of the Management Board of EIT CC, who may also delegate this role to their direct reports in EIT CC and the CLCs in these situations the Business requestor should ensure that their directs follows the procurement rules from this manual);
3. Budget Owner – role may be fulfilled by all members of the Management Board having budget authority for the concerned spending, who may also delegate this role to their direct reports in EIT CC and the CLC (in this case the Budget Owner shall ensure that the staff involved in the Procurement procedure at the CLCs follow the rules include in this manual);
4. Members of an Evaluation Committee (if required, depending on the applicable procurement procedure)

Approval Process

Contract Value (EUR excl. VAT)	Internal Authorization (PO / Pivot)	Authorized Signatory
Up to €15,000	Budget Owner + Finance	Director
€15,001 – €60,000	Budget Owner + Finance + Legal	Director and Chief Operating Officer
€60,001 – €143,000	Budget Owner + Finance + Legal	Chief Operating Officer
€143,001 – €221,000	Budget Owner + Finance + Legal	Chief Executive Officer

Above €221,000	Budget Owner + Finance + Legal	Chief Executive Officer and Chief Operating Officer

In practice the approvals procedure is implemented through the Purchasing Order system used at EIT CC, and through the signature of the agreements.

*For questions regarding the approval process and the signature of contracts above 221.000.-€ please contact the COO and/or the Legal Manager.

PURCHASE ELABORATION RULE

The purchase elaboration process starts with a purchase request, where an internal requester formally identifies the need for goods or services and provides the business justification and estimated cost. The request then undergoes purchase validation, during which budget availability, managerial authorization, and compliance with procurement rules are verified; once approved, a Purchase Order (PO) is created as an official and binding commitment, and—when required—a contract is signed and stored in the contract repository to ensure legal traceability and compliance. After delivery of the goods or services, the supplier submits an invoice, which is subject to invoice approval through verification against the approved PO and the signed contract (when applicable), ensuring accuracy and authorization before payment is released

3. SUPPLIER SELECTION PROCEDURES – GENERAL STEPS

The basic mean of awarding contracts by EIT CC is competitive tendering. The purpose is two-folded:

- to ensure that operations comply with the awarding principles of the donors; and
- to obtain the quality of services, supplies or works wanted, at the best possible price.

There are several different procurement procedures, each requiring a different degree of competition. This section of the Procurement Manual describes the main steps to be and the sequence in which they shall be

carried out. Section 7 provides a step-by-step description of the procedure in each threshold, mentioning the key aspects to be considered for that procedure.

Procedures in the Manual are one-stage procedures. This means that all procurement steps are carried out in one flow.

You are obliged to carry out the steps according to the information below. Spontaneous deviation from the procedures described in this Procurement Manual might lead to non-eligibility of the procedure and, therefore, rejection of the related costs by donors. Any deviation is only possible in exceptional cases with the written approval of the COO (email accepted).

Important Note:

It is considered a default pre-condition for the start of any procurement procedure that the Business Requestor has clearly defined the need, identified the Budget Owner, verified the availability of budget for the procurement activity and obtained a "green light" from the Budget Owner to proceed with the procurement.

Internal Preliminary Supplier's Check and verification:

Furthermore, as a rule and regardless of the amount of the procurement the Business requestor before initiating any procurement procedure shall make preliminary Supplier's check and verification to identify whether the selected supplier (or the potential suppliers) is already an existing supplier of EIT CC and whether or not this supplier has an active contract or not. For this the Business requestor shall consult Finance if the Supplier already exists in the database and later will also check in the Contract Repository if the supplier has an active contract with EIT CC (or alternatively consult with the LM).

If the selected supplier (whether under the single supplier procedure for amounts inferior to 15k or under the competitive procedure for amounts higher than 15k) is not a current supplier and neither has a contract, the Business requestor has green light to initiate the corresponding procurement procedure. In case that the selected supplier is identified as an existing supplier, the Business Requestor and previously to initiating any contact with the selected/ potential supplier the Business requestor will look into the Contract Repository to verify the existence of a contract and if found will inform of this circumstance to the LM, who will make a verification of the current contracts with the suppliers, initially to avoid the existence of different contracts signed by different functional units with the same supplier, the LM also will contact the responsible of the functional area that subscribed the agreement with the supplier in order to assess the possibility of negotiating and concluding a common Framework Agreement.

All EIT CC functional areas and staff are encouraged to plan its contracting needs in anticipation for the relevant year. With this purpose we recommend that the Internal Preliminary Supplier's Check and verification is performed in prevision of the contracting needs for the relevant year; this preliminary verification will be extremely useful to assess the possibility of negotiating and concluding jointly agreement valid for the organization, that will benefit us by reducing costs and mitigating risks. When the functional area has identified in advance a contracting need with an specific supplier, the Business requestor will inform of said circumstance to the LM, who will coordinate with the other functional areas.

3.1. Step 1: Estimating the contract value

The estimated contract value is a key determinant for selecting the appropriate procurement procedure. It must be calculated net of VAT and include all foreseeable costs associated with the procurement, ensuring compliance with the principles of transparency, proportionality, and non-discrimination.

To ensure consistency with the EIT Procurement Guidelines, the following rules shall be applied when estimating contract value:

1. Aggregation Rule

When estimating the contract value, all purchases that are similar in nature, function, or subject matter must be aggregated.

Splitting contracts artificially to circumvent higher procurement thresholds is strictly prohibited.

The aggregation must consider all foreseeable procurements of the same type over a 12-month period or the full duration of the contract, including any anticipated renewals.

2. Optional Elements

If a contract includes optional extensions or renewal clauses, the estimated value must include the full potential cost (i.e., base contract period + any possible extensions).

If options are included, they must be clearly defined in the procurement documents.

3. Dividing Contracts into Lots

Contracts may be divided into lots only if:

It enhances competition and market accessibility.

It does not artificially lower the procurement threshold to use a less restrictive process.

If a contract is divided into multiple lots, the total value of all lots combined determines the applicable procurement procedure.

A tenderer may be allowed to bid for one, multiple, or all lots, as specified in the procurement notice.

4. Recurring Contracts and Framework Agreements

If a procurement involves recurring purchases, the estimated value must be based on:

The total anticipated expenditure over 3 years for recurring contracts.

The total contract value over the entire duration for framework agreements.

If the estimated value is uncertain, the highest historical contract value over the past 12 months should be used as a reference.

5. Ensuring Compliance with EU Thresholds

For contracts that approach the EU public procurement threshold, the procurement team must conduct an internal review to assess if a higher procedure should be applied.

Any deviation from the standard valuation approach must be documented and justified.

6. Responsibility for Contract Value Estimation

The Business Requestor is responsible for correctly estimating the contract value before initiating procurement.

The Legal Manager shall review the estimated contract value to ensure compliance with EIT Procurement Guidelines and EU public procurement regulation.

Since numerous services and/or deliveries are required for a longer duration or are recurring, from a procurement point of view it is not acceptable to deliberately avoid a heavier procurement procedure by tendering every year for the same purchase. For this type of deliveries or services, EIT CC should seek to conclude framework agreements – for more information refer to Section 5, special conditions apply.

3.2. Step 2: Choosing the appropriate procedure

The estimated contract value will fall into one of the pre-defined procurement thresholds outlined in Table 1 and will determine the procedure to be followed to select a provider. The Business Requestor should then select the most appropriate type of procedure, with the support of the Procurement Officer if necessary. Procuring without call for competition is only allowed in certain specific, exceptional and well-defined cases (please refer to Section 4 on Direct Award).

Please keep in mind the following considerations:

- Using a procedure for a higher threshold is in general never a problem, unless a structural miscalculation of the estimated contract value which could mean violation of the basis procurement element: "proportionality";
- Please be aware that if you are constantly using one and the same supplier within the < € 15 000 threshold (without the obligation of a competitive supplier selection), the total cost within one reporting year for amendment purchase of goods or services could add up to more than € 15 000, automatically requiring the compliance with procedures pertaining to the € 15 000 to € 60 000 threshold or even higher. You may need to return to Step 2 and revise the estimated contract value; consider concluding a framework agreement for these services; In this regard is essential to understand that the estimated value of a Framework Agreement must be calculated taking in consideration the total estimated value of the contract during the whole term of the Framework Agreement, typically 3 years (1 initial year + 2 yearly written extensions.
- All basic principles (including the eligibility, exclusion and selection criteria) must be complied with regardless of which procedure is used.

3.3. Step 3: Market research stage

Depending on the chosen procedure, the Business Requestor may have to contact typically between 3 and 5 potential suppliers (only for procurements above 15k) and depending on the value (i.e. above EUR 15,000 and up to EUR 60,000 3 suppliers, above EUR 60,000 and up to EUR 143,000 5 suppliers).

During the selection, the Business Requestor can rely on their previous contractors, information from colleagues, recommendations and potential suppliers identified through desktop research. All information received regarding potential suppliers to be included on the list shall be screened in relation to the project size and complexity. The Business Requestor should be able to provide a justification why they think that the selected suppliers are able to provide the requested service. In some instances, this information should be included in the supplier selection Tender Evaluation Report (i.e. above € 15 000).

During the market research the Business Requestor should consider:

- suitability of the tenderer to carry out the activity.
- technical and professional ability (e.g. what type of staff they have available);
- economic and financial standing (this would mainly be relevant for larger procurements).

During this market research phase, the Business Requestor can carry out phone calls with the potential suppliers to ensure that they are able and willing to participate in the tender procedure. However, it is important to note the below rules:

During this call the Business Requestor *can disclose* information regarding:

- the timing of the procedure.
- basic information about the task.
- planned duration of the contract.

However, the Business Requestor *cannot disclose* information regarding:

- the detailed project description.
- award criteria.
- detailed organization of work.
- budget.
- evaluation of proposals.
- and any other information that might affect the principles of equal treatment and fair competition.

Once the selection of the potential suppliers is completed, the Business Requestor should make sure that there is no actual or potential conflict of interest with any potential supplier. In case of any actual or potential conflict of interest, the Business Requestor must declare it and immediately withdraw from the procedure or select different supplier(s) to avoid the conflict of interest.

Please note that for those procurements above 15k, in case the Business Requestor is unable to identify the required number of potential suppliers, the procurement should be advertised in the relevant fora or as widely as possible according to the specifics of Table 1.

Expression of Interest (EOI)

As part of the market research phase, EIT CC may make use of an Expression of Interest (EOI) to support market understanding or to identify and pre-screen potential experts or economic operators in view of possible future needs.

In accordance with Directive 2014/24/EU on public procurement, procurement procedures are processes that may lead to the award of a contract and are therefore subject to specific procedural requirements. Directive 2014/24/EU distinguishes between preparatory market consultations and procurement procedures leading to contract award, and only the latter are subject to the full set of EU public procurement rules.

An EOI constitutes a preparatory market consultation and does not constitute a procurement procedure. Consequently, an EOI cannot result in the direct award of a contract and cannot replace the application of the procurement procedures and thresholds set out in this Procurement Manual.

Where an EOI is used, the applicable EOI workflow and evaluation rules are defined in separate EOI process documents, and any subsequent engagement or contracting shall be carried out in accordance with this Procurement Manual.

EOI for Experts – Applicable procedure

Where an Expression of Interest is used for the identification, selection, and engagement of individual experts (including trainers, coaches, facilitators, or similar profiles), EIT CC shall apply the dedicated Expert EOI procedure approved by EIT CC management. This procedure governs, *inter alia*, the publication of the EOI, eligibility checks, evaluation under the four-eyes principle, ranking and shortlisting, conflict-of-interest management, remuneration rules, and post-engagement review.

The Expert EOI procedure constitutes a selection mechanism for expert pools and does not constitute a

procurement procedure within the meaning of Directive 2014/24/EU on public procurement. Experts included in an EOI pool are not guaranteed any assignment, and any engagement shall be formalized through a consultancy agreement in accordance with the applicable internal rules and budgetary limits. For all matters relating to expert EOIs, staff shall refer exclusively to the applicable Expert EOI procedure.

3.4. Step 4: Request for Proposals stage

After selecting the required number of potential suppliers to be approached for bidding, the next step is to compile a simple supplier selection document that will include the following:

- a request for proposal (RFP) document;
- a draft service agreement form of EIT CC (simplified service agreement – service agreement or framework version) exclusively for information and guidance purposes;
- tenderers declaration form.

As a basic rule, the language of the procedure should be English, however, exception from this rule is possible for procurement procedures below €60,000, if approved by the designated Budget Owner (below €1,000 no approval necessary).

The RFP is to be drawn up by the Business Requestor using the designated template, if necessary, in consultation with other colleagues/partners involved in the activity.

- For the threshold between €14,999 and €60.000 when deviating from the RFP template document will be reviewed and approved by the Legal Manager.
- For all procurements above €60,000 the RFP document will be reviewed by the Legal Manager and approved by the Budget Owner (via e-mail).

To launch the procedure, the Business Requestor sends out an e-mail notification (unless the cases of mandatory publication on the website and / or TED) to the shortlisted tenderers, attaching the approved RFP together with the recommended annexes. The e-mail text should indicate key information about the RFP (tendered services/goods, submission deadline and contact information of the Business Requestor.

What to consider when drawing up the RFP?

Scope of work

Include a detailed description of the goods or services required that will enable the tenderers to assess the required resources and prepare their proposal. You may consider breaking the assignment up into several work packages / lots if this seems appropriate for your procurement procedure. If possible, pre-assess the number of hours that a service provider would be expected to invest in the implementation of the assignment, giving the tenderer a better understanding of the scope of the assignment and making it easier for the Business Requestor to compare financial offers of the different tenderers.

Criteria

Contracts shall always be awarded based on objective award criteria, published in the Request for Proposals, that ensure compliance with the principles of transparency, non-discrimination and equal treatment, thereby ensuring an objective comparison of the relative merits of the tenders. The criteria must be outlined in the RFP document and shall be related and proportionate to the subject matter of the contract.

Award criteria shall be linked to the subject-matter of the contract and may relate to:

- quality of the proposed approach;
- qualification and experience of staff assigned to performing the contract;
- delivery conditions, after-sales service and technical assistance proposed by the tenderer;
- proposed price.

Price only can be considered suitable for certain specific cases, such as for the purchase of standardized goods or commodities where the specification can be clearly defined by reference to well-defined standards, and if the number of suppliers in the market can generate reasonable competition. In such cases, the Business Requestor should be particularly careful to tenders where the price or costs proposed appear to be abnormally low in relation to the works, supplies or services tendered. Should there be a suspicion that the provider will not be able to perform according to the price offered, EIT CC has the right to ask for explanations and may reject the tender where the evidence supplied does not satisfactorily account for the low level of price or cost proposed.

Deadline

The deadline for the submission of proposals should comply with the minimum requirements set out in Table *1 (7 calendar days for purchases between above €15,000 and up to €60,000: 10 calendar days for purchases between above €60,000 and up to €143,000 and 15 calendar days for purchases above between above €143,000 and below 221,000), at least 30 days, with possible reduction to 15 days in case of a prior information notice or duly substantiated state of urgency for contracts having a value equal or above EUR 221,000* and should be noted in the RFP document. In case the requested services/supplies are simple, or in the case of urgent extenuating circumstances, the Business Requestor may set a shorter deadline with a prior approval by the Legal Manager or COO.

3.5. Step 5: Proposal submission and evaluation

Exclusion, Eligibility and Selection Criteria

To ensure fair competition and compliance with EU procurement principles, EIT CC applies the following exclusion, eligibility, and selection criteria to all procurement procedures

1. Exclusion Grounds

A bidder shall be excluded from participating in an EIT CC procurement process if they:

- Have been convicted of fraud, corruption, money laundering, or any other criminal offense affecting the financial interests of the EU.
- Are subject to bankruptcy, insolvency, or liquidation proceedings.
- Have violated tax or social security obligations in their country of registration.
- Have engaged in anti-competitive agreements or serious misconduct in prior contracts.
- Have provided false information in a procurement process.

For all procurements above €60,000, the procurement procedure must explicitly include exclusion grounds (such as bankruptcy, criminal offences, or serious professional misconduct), eligibility criteria (including legal status and capacity), and selection criteria (including technical, professional, and financial capacity). These criteria must be published in the Request for Proposals (RFP) and applied transparently during the evaluation process. Bidders must submit a signed Tenderer's Declaration confirming compliance. Only bids meeting these minimum criteria shall proceed to technical and financial evaluation.

Verification Method:

- All bidders above EUR 60,000 must submit a Tenderer's Declaration Form certifying that they are not subject to any of the above exclusion grounds.
- EIT CC reserves the right to request official certificates (e.g., tax clearance, bankruptcy status) where applicable.

2. Eligibility Criteria (Who Can Participate?)

To be eligible to participate, bidders must meet the following minimum requirements:

- Legal and Financial Standing: The tenderer must be a legally registered company or entity with financial capacity to complete the contract.
- Independence from EIT CC: CLCs and affiliated entities must comply with conflict-of-interest rules and cannot receive preferential treatment.
- Compliance with EU & National Laws: The bidder must comply with all applicable laws, including labor laws and GDPR regulations.

3. Selection Criteria (How the Best Bidder is Chosen?)

Selection criteria shall be applied in all procedures above EUR 60,000 to assess the technical and professional capacity of bidders.

Mandatory Selection Criteria (Above EUR 60,000):

1. Technical Capacity:
    - The bidder must have experience in similar projects within the last [.] years.

- The bidder must provide references or case studies demonstrating previous work.

2. Professional Qualifications:
   - Key personnel must have relevant professional qualifications for the required service.
   - CVs and certifications should be submitted for evaluation.
3. Economic & Financial Capacity: The bidder must demonstrate sufficient financial and economic capacity to perform the contract. This is covered by the signature of the Declaration of Honour.

4. Open Procedure (Above EUR 143,000) – Mandatory Selection Process

For open procedures above EUR 143,000, the Procurement Manual is updated as follows:

- All bidders must pass eligibility, and exclusion checks before their proposals are evaluated.
- Professional quality must be assessed based on experience, personnel qualifications, and financial stability.
- A scoring matrix shall be used to evaluate the selection criteria transparently.

How to submit a proposal?

The proposals shall be submitted by email. The proposals shall be opened by the Business Requestor at the expiration of the term for submitting proposals while keeping them in a specific named folder.

Creating an Evaluation committee

For all procurements with the estimated contract value exceeding €15,000 it is recommended to establish an evaluation committee (EC). The EC shall consist of at least three members – (1) the Business Requestor, (2) Budget Owner and (3) third member (when absent, to be replaced by the COO). The members of the EC should jointly have the professional competence for the evaluation and assessment of the proposals therefore it is possible to include other person(s) with knowledge relevant to the subject-matter of the procurement procedure or with appropriate decision-making power (for example, if two or more of these functions are held by the same person(s)). Please keep in mind that an EC should always have an odd number of members.

Anybody participating in the evaluation who has or might have any actual or potential conflict of interest with any potential supplier must declare it and immediately withdraw from the evaluation committee. In case of withdrawal, suitable replacements shall be identified and approved by the Budget Owner. Keep in mind that all EC members should sign the annual COI absence declaration.

Submission of tenders

Proposals must be submitted by e-mail within the deadline indicated in the RFP document. All proposals received after the deadline should be rejected.

In duly justified cases, however, no later than 1 calendar day before the original deadline, the submission deadline can be extended.

Detailed evaluation of proposals

Timely received proposals submitted by the tenderers shall be examined, evaluated, and compared in accordance with the exclusion, eligibility, and selection criteria outlined in Section 3.2.1.

Bidders who fail to meet the exclusion grounds or eligibility criteria shall be disqualified. The selection process shall evaluate technical and financial capacity, ensuring that only qualified and experienced tenderers are awarded contracts.

For open procedures above EUR 143,000, eligibility and selection criteria shall be mandatory, and bidders will be assessed on their professional competence, financial standing, and technical experience, in line with EU public procurement principles

Stage 1 – Administrative assessment

Proposals received after the time limit set for the submission of tenders shall be deemed invalid.

A proposal is considered to be conforming in administrative terms if it satisfies all the formal requirements set out in the request for proposals (submission deadline, submission of the required documentation such as the proposal, methodology, financial offer, declaration by the tenderer (if applicable), additional documentation (e.g. CVs, etc.)). The formal requirements for tenderers are described in the request for proposals document. The conformity of the submitted proposals shall be checked as the 1st step of evaluation and should be recorded in the Tender Evaluation Report.

Where information or documentation to be submitted by tenderers is incomplete or erroneous or where specific documents are missing, EIT CC staff may request the party concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit (this should be proportionate to the complexity of the missing documentation/information, a minimum of 1 day), provided that such requests are made in full compliance with the principles of equal treatment and transparency. No other documentation or information in addition to the requested documentation can be supplied by the tenderer(s) at this stage. If the missing information relates only to one or several specific tenderers, you should only contact the tenderer(s) concerned. However, if the issue relates to something in the RFP that could have been wrong or misleading, then you should send the additional information request to all bidders simultaneously.

Stage 2 – Negotiation regarding the technical and financial solutions/proposals (this stage is optional)

All proposals that are fully compliant with the formal requirements (Stage 1, above, completed) would move on to Stage 2. In this stage, the evaluators must review the detailed proposals of the tenderers assessing the technical content and can call the tenderers for negotiations. Negotiation(s) can only be held with the tenderers whose proposals are fully compliant; however, all fully compliant tenderers have to be called to participate, equal treatment needs to be secured throughout the entire procedure.

Negotiations can be held in the following cases:

- if it is identified that the scope of services or technical specification issued by EIT CC is not detailed enough, complete or some areas are lacking crucial information to complete the procedure;
- if the contracting entity has the intention to reduce the offered prices to find the best value for money;
- if all submitted prices are above the planned budget and it is everyone's interest to finish the procedure with success – in that case, price negotiation can take place. During a price negotiation, all tenderers are called to lower their prices by the same deadline in a written form;

EIT CC can organize as many rounds of negotiation as it is needed during the procedure in order to reach the highest quality of proposals and the best price.

Whenever possible, the negotiations should be carried out in writing, however, in special cases, video conference or even live negotiation can be organized. All compliant bidders should have access to the same information and conclusions of each negotiation should be shared equally with all bidders.

The recommended sequence of negotiations:

- If the negotiations are carried out via videoconferencing or face-to-face, each tenderer can have a separate session, however, to save time a joint session can also be organised;
- The Evaluation Committee shall indicate which areas of the proposals need to be adjusted (technical offer, personnel, financial offer, etc.);
- Tenderers must be given a reasonable deadline to comply with the Evaluation Committee request (or alternatively must be given an opportunity to address the issue during the live negotiations meeting);
- Following the deadline, the Evaluation Committee shall assess the submitted content and perform a final technical evaluation of the proposals;
- If any tenderer does not provide a revised variant offer conforming to the Evaluation Committee's request, their original submitted tender shall remain valid and will continue to be considered in the evaluation process
- Exclusion shall only apply if the originally submitted proposal is non-compliant with the mandatory requirements outlined in the RFP. The Evaluation Committee shall fairly assess all compliant offers, including the initial submission of bidders who choose not to revise their offer during negotiations
- If any tenderer does not provide a variant offer conforming to the Evaluation Committee's request, they will be excluded from any further assessment;
- After each stage of negotiation, EIT CC must prepare minutes of the negotiations to be signed by the members of the Evaluation Committee. These minutes shall be annexed to the Tender Evaluation Report.

Negotiations are not required if all compliant proposals are clear and there is no further need to clarify the proposed technical proposal or price or to have a price reduction.

Stage 3 – Evaluation of proposals (scoring, defining strengths and weaknesses, determining the winner)

The Evaluation Committee shall complete the final scoring of the proposals. All tenderers deemed compliant shall be evaluated and compared against the contract award criteria specified in the RFP.

All scores are recorded in the Tender Evaluation Report. In this table the Business Requestor is required to include detailed justification for the scores given to each award criteria for each tenderer and record it under the column (Rationale for scores). The scores shall be agreed by all Evaluation Committee members.

The contract shall be awarded to the tenderer having submitted the most economically advantageous tender, as identified by the aggregate score following the assessment of the technical and financial offer.

The Business Requestor is responsible for completing the Tender Evaluation Report. All sections of the report should be completed, including the information regarding the selection of potential suppliers during the market research phase. The Tender Evaluation Report should be signed by all Evaluation Committee members.

3.6. Step 6: Notification of award

The Business Requestor shall inform each candidate and tenderer of decisions reached concerning the award of a contract, including the grounds for any decision not to award a contract for which there has been a call for competition, or to recommence the procedure.

Additionally, following the award of a contract, a Contract Award Notice shall be published to ensure transparency and compliance with EU procurement regulations. The Contract Award Notice shall include details on the awarded contractor, contract value, justification for the decision, and other relevant information. For procurements above the EU threshold, the notice shall be published on the TED eNotices

platform, while for lower-value procurements, it shall be made available on the EIT CC website to inform economic operators of the final decision

The winning supplier will be sent the notification along with the contract to be signed (indicating the deadline by which the signed contract should be returned to EIT CC).

EIT CC shall observe a mandatory standstill period before signing the contract with the winning bidder. The standstill period shall be: **3 calendar days for tenders between €15,000 and €60,000. 3 calendar days for tenders between €60,001 and €143,000; 5 calendar days for tenders between €143,001 and €221,000; 10 calendar days for tenders equal to or above €221,000, in line with Directive 2014/24/EU.**

The standstill period begins on the day after the Notification of Award is sent to all bidders. During this period, unsuccessful bidders may submit a formal appeal

Prior to the notification, ensure that the budgetary commitments are approved in line with the Approvals Matrix noted in Section 2.2.

Upon request from the candidate or tenderer concerned, EIT CC shall as quickly as possible, and in any event within 15 calendar days from receipt of a written request, inform:

- any unsuccessful candidate of the reasons for the rejection of its request to participate,
- any unsuccessful tenderer of the reasons for the rejection of its tender, including, if this is the case, its decision that the works, supplies or services do not meet the performance or functional requirements,
- any tenderer that has made an admissible tender of the characteristics and relative advantages of the tender selected as well as the name of the successful tenderer or the parties to the framework agreement,
- any tenderer that has made an admissible tender of the conduct and progress of negotiations and dialogue with tenderers.

Information referred to above may be withheld where the release of such information would be contrary to the public interest, would prejudice the legitimate commercial interests of a particular economic operator, or might prejudice fair competition between economic operators.

3.7. Step 7: Appeals procedure

After notifying bidders of the contract award decision, EIT CC shall implement a mandatory standstill period before the contract is signed (see below), allowing unsuccessful bidders the opportunity to raise any justified complaints or request clarifications. All bidders must be informed in writing of the award decision, including the name of the selected contractor and the main reasons for the selection. Any complaints or grievances must be submitted in writing within the standstill period to the designated Procurement Contact Point, who will acknowledge receipt and ensure an impartial review. EIT CC shall provide a written response to the complainant within a reasonable timeframe and, if necessary, take corrective measures before the contract is signed. All complaints, responses, and resolutions shall be properly documented and archived as part of the procurement file to ensure transparency and compliance with EIT and EU procurement rules.

Waiting Period

To allow for any such potential complaints, EIT CC shall observe a mandatory waiting period prior to the signing of the contract with the winning tenderer:

3 calendar days for tenders between €15,000 and €60,000. 3 calendar days for tenders between €60,001 and €143,000; 5 calendar days for tenders between €143,001 and €221,000; 10 calendar days for tenders equal to or above €221,000, in line with Directive 2014/24/EU.

Filing an Appeal

The complainant must submit a formal application to EIT CC, detailing the procedural aspects they believe were violated, along with supporting data, facts, and documentation if available. Appeals that solely seek a second evaluation without any substantiated claim of procedural irregularity will be rejected.

Suspension of Contract Signature

In cases where an appeal is deemed compliant and valid, the contract signature shall be suspended until the appeal procedure is concluded. This ensures that corrective measures, if necessary, can be implemented before finalizing the contract.

Review and Resolution

All complaints related to EIT CC's procurement procedures shall be reviewed and processed by the Legal Manager in cooperation with the COO, who will determine the appropriate course of action.

All communication regarding the appeal process shall be conducted via email, and EIT CC shall respond to appeals without undue delay but no later than seven (7) calendar days from the receipt of the complaint.

Possible Outcomes of the Appeal Process

- Rejection of the complaint due to lack of merit.
- Acceptance of the complaint, resulting in the re-evaluation of the proposal(s) and the formation of a new decision.

3.8. Step 8: Signature of the contract

Firstly, contracts shall not be signed before the mandatory standstill period has expired. If an appeal is lodged, contract signing is suspended until the issue is resolved. If no appeal is received, the contract may be signed immediately after the standstill period ends.

Contracts should be signed using the EIT CC contract templates. Any deviation from these templates, including the use of the supplier's contract template, should be agreed with the Legal Manager. For specific situations the supplier's own contract can be accepted if previously have been reviewed and approved by the LM. For questions regarding this process always contact the LM.

The selected tenderer shall sign and date the contract first within the deadline set in the notification of award e-mail and return it to EIT CC. Failure of the winner to sign the contract within a given timeline may constitute grounds for annulling the decision to award the contract. In this event, EIT CC may award the tender to the second best or cancel the tender procedure.

Prior to signing the contract, ensure that a PO has been raised and approved in line with the Approvals Matrix explained in Section 2.2.

A sample of an extra-budgeted contract/commitment is a contract (other than a Framework Agreement) specifying a fixed term of. 3 years

When signing multi-annual contracts (framework agreements), it's always mandatory to foresee an initial duration of one year with a possibility to extend the contract by one year up to three times.

Contract modification

As a general rule, in case of a substantial change to the initial contract that renders the amended contract materially different in character from the one initially concluded, a new procurement procedure is required.

Contracts may be modified without a new procurement procedure in any of the following cases:

- where such modifications, irrespective of their monetary value, have been provided for in the initial procurement documents in clear, precise and unequivocal review clauses, which may include price revision clauses, or options;
- for additional works, services or supplies by the original contractor that were not included in the initial procurement but that have become necessary and where a change of contractor cannot be made or would cause significant inconvenience, provided that the increase in price does not exceed 50 % of the value of the original contract;
- where all of the following conditions are fulfilled: the need for modification has been brought about by circumstances which a diligent contracting authority could not foresee; the modification does not alter the overall nature of the contract; any increase in price is not higher than 50 % of the value of the original contract;
- where a new contractor replaces the one to which the contracting authority had initially awarded the contract as a consequence of a clause initially provided for in the contract, due to succession or if the contracting authority itself assumes the main contractors' obligations towards subcontractors where this is provided for in national law;
- where the value of the modification is not substantial, i.e. it is below 10 % of the initial contract value for service and supply contracts (the modification may not alter the overall nature of the contract).

Where several successive modifications are made, the value shall be assessed on the basis of the net cumulative value of the successive modifications.

Any modification above 10% should be documented as a contract amendment and should be signed by all parties in accordance with the original contract. The template should follow the original contract template and should refer to the amended articles only. Successive modifications should be numbered as "contract amendment No. 1", etc. Justification for the modification should be documented by the Business Requestor and must be added to the procurement documentation/purchase order.

Contract modifications and extensions are only allowed within the limits set by the original contract and must comply with EU procurement principles. Any substantial modification — such as increasing scope or value — requires a formal justification, approval by the Budget Owner and the Legal & Procurement Officer, and, if necessary, initiation of a new procurement procedure. Indefinite or automatic extensions are not permitted. All modifications must be recorded in writing, signed by both parties, and annexed to the original contract documentation.

4. DIRECT AWARD

In duly justified and exceptional cases and for very low value (below 15,000) EIT CC can using this simplified one-stage negotiated procedure with one single supplier. This type of procedure can only be selected if one of the below services or supplies are listed or can interpreted as part of them:

a) Where the supplies or services can be only supplied by a particular economic operator for any of the following reasons:
   - the aim of the procurement is the creation or acquisition of a unique work of art or artistic performance
   - competition is absent for technical reasons
   - the protection of exclusive rights, including intellectual property rights

b) Arbitration and mediation services;

c) One of the following legal services:
   - Representation of EIT CC by a lawyer in a procedure for a judicial or public authority of a European State;
   - Legal advice given in preparation for a procedure for a judicial or public authority of a European State;
   - Authentication and authentication of documents by a notary
   - Legal services provided by administrators or designated persons, non-legal services of the providers by a court of a European State concerned or, by law, designated to carry out specific tasks under the supervision of those courts;

d) Insofar as is strictly necessary where, for reasons of extreme urgency brought about by events unforeseeable by EIT CC, the time limits for the open procedure cannot be complied with;

e) Where the open procedure was unsuccessful meaning that no tenderers or no suitable tenderers have submitted a response in response to an open procedure.

f) Participation in specific conferences or events where no reasonable alternative exists and where competition cannot be ensured, subject to written justification. (thematic field, participating prospects etc.).
   In this case the Legal &Procurement Officer may ask for filling in the tender evaluation form for Direct Award to ensure a compliant justification for the Direct Award.

g) In The acquisition or rental regardless of its financial conditions, of land, existing buildings or other immovable property or in respect of rights to this;
   In this case the Business requestor is required in the justification document to provide information on corresponding market prices supporting the selection in line with the best value for money principle.

h) In case there is the need for extending/continuing services/supply contracts with the existing suppliers but the contract amount would exceed 50% of the original contract value you may initiate a direct award procedure but proper justification is required in order to prove the legal basis for it;
   For additional deliveries by the original supplier or service provider, which are intended either as a partial replacement of supplies or services or as the extension of existing supplies or services where a change of provider would oblige the contracting entity to acquire supplies or services having different technical characteristics which would result in incompatibility or disproportionate technical difficulties in operation and maintenance. To extend these contracts original request for proposal (RFP) should contain a reference that EIT CC plans to extend the contract by means of the Direct Award once the original contract is concluded and additional services are needed. The RFP will also clearly state that and major elements of the original contract cannot be changed.

Prior to the launch of this procedure, the Legal& Procurement Officer needs to be consulted and should agree on the choice of the procedure.

Once agreed with the Legal & Procurement Officer the procedure, the Business requestor shall collect and document detailed justification regarding the choice of the procedure in a Direct Award Approval Form. The Direct Award Approval Form shall be prepared by the Business Requestor and submitted to the Legal &

Procurement Officer for its review. Finally the Direct Award Approval Form requires the written approval of the COO (email accepted)

When the Direct Award falls under the categories a, b, c, d and e) the Business Requestor shall identify follow the same steps as outlined in Section 3, and preparation of an RFP, receipt and evaluation of tender proposal and conclusion of a contract, as indicated in Section 7.6).

When the Direct Award falls under the categories f, g, and h) no procedure shall be carried out. The contract shall be tailor made by the Legal Manager using the existing templates and in case of extensions the original contract shall be amended.

Furthermore, these conditions must be fulfilled in case of modifications:

- the modification does not alter the overall nature of the contract – should not alter the original competition in case of option i).
- Any modification resulting in an increase in the contract price shall comply with the conditions set out in Directive 2014/24/EU on public procurement. Additional works, services or supplies may be ordered from the original contractor without launching a new procurement procedure only where this possibility is justified and does not exceed 50% of the value of the initial contract. Successive contract modifications shall not be used to circumvent procurement rules. The cumulative value of modifications shall remain within the limits allowed under EU public procurement law and shall not alter the overall nature of the contract. Any contract modification must be duly justified in writing, approved in accordance with EIT CC internal governance rules, and verified for compliance by the Legal & Procurement function prior to signature.

5. FRAMEWORK AGREEMENTS

Framework agreements are arrangements whereby EIT CC and the supplier establish the terms upon which purchases may be made over a period of time. Such contracts are used in cases when there are recurring or continuing needs to purchase certain products or services (e.g. stationary, computers, maintenance services, etc.) and where the exact timing or quantity of the services is not known at the time of the execution of the procurement procedure. This should allow EIT CC to establish the terms of (future) transactions in advance of specific orders, leading to more rapid procedures and reduced costs when it comes to actually placing an order. The term of a framework agreement may not exceed 4 (four) years.

Considering the financial set-up of EIT CC, in the case of concluding a framework agreement, the RFP and model contract should foresee an initial duration of one year with a possibility to extend the contract by one year up to three times. When the estimated contract value spans also future years, a termination clause is required in case EIT decides not to sign an SGA for one or more years during this contract span with EIT CC.

The full estimated value of a framework agreement must be considered in Step 2 therefore using a procedure for a higher contract value might need to be considered. Also, contracts based on a framework agreement may not entail substantial modifications to the terms laid down in that framework agreement.

Please note that prior to signature, any multi-year contracts that are not part of the Business Plan of EIT CC must be approved by the CEO. Please notify the COO of any such cases and the COO will seek said approval. The Business requestor must take this into account when drafting the RFP. A clear sample of a multiyear not part of the Business Plan is a fixed term 3 years contract without clarifying in the RFP that the contract will foresee an initial duration of one year with a possibility to extend the contract by one year up to 2 times.

*It is important to clarify that it's possible to conclude a Framework Agreement which is not expected to exceed a period of time superior to 1 year, however the structure shall not be the same as the Framework Agreement but an extended regular agreement with multiple call-offs that will allow the Business requestor to place several purchase of orders (Statement of works) .

Notwithstanding the abovementioned the Business Requestors are encouraged to make a solid analysis at the beginning of the current year and plan beforehand it's contracting needs; when the need of recurring or

continuing need to purchase certain products or services from a supplier has been identified , it's advisable to conclude the Framework Agreement with a maximum of 3 years as explained previously.

For the analysis at the beginning of the current year and plan beforehand it's contracting needs we suggest to follow the procedure stated in Section 3: Internal Preliminary Supplier's Check and verification

When using framework agreements, the total estimated value of the entire contract duration (including all extensions) must be considered to determine the procurement threshold and applicable procedure. Framework agreements must be designed to allow fair competition and should not be used to circumvent open procedures or aggregate unrelated services. All framework agreements must include clear terms on duration, maximum value, scope, and conditions for call-offs or mini-competitions.

6. PROCUREMENT TEMPLATES

Below is a list of templates that should be used at the different stages of the procurement procedure. Should any of the templates not fit with the specifics of the services or goods you are purchasing, please consult the Legal & Procurement Officer to discuss and agree any potential modifications. **The following standard procurement templates are available and shall be used as applicable, depending on the value and type of procurement:**

Conflict of Interest

- Declaration of Honour (Bidder)
- Declaration of Honour for members of the Evaluation Committee

Procurement documents

- Request for Proposals (RFP) – standard procedure
- Request for Proposals (RFP) – direct award procedure
- Prior Information Notice (PIN)
- Justification for very low value procurement
- Request for good and services for very low value procurement

Evaluation

- Evaluation Template (Tender Evaluation Report)

Award and notifications

- Notification of Award
- Notification of non-award

Contractual templates

- Simplified Services Agreement
- Service Agreement
- Framework Agreement (for multiple deliveries over time)
- Consultant Agreement

Additional Templates

Additional templates can be developed in the future and will be available in EIT CC SharePoint.

The agreement templates are intended to be attached as an Annex to the RFP together with the Declaration of honor attesting the eligibility criteria of the bidder. To select the corresponding agreement template that will be attached to the RFP, the Business Requestor shall look into Table 1 and the corresponding flow as detailed in Section 7 for guidance. The templates are provided for information purposes only and might be subject to changes upon finalization and completion by the Legal Manager. The templates shall not be sent outside the organization except for its inclusion as an annex to a RFP and shall not be completed and/ or signed by the Business requestor without the supervision of the Legal Manager.

Exception: The simplified agreement shall only be used for the procurements below 5.000 euros and can be directly populated and used by the Business requestor without the involvement of the LM.

*Special mention to the Consultancy Agreements. These templates have been implemented, but regardless of the amount the Business requestor shall always contact the LM.

Table 1: Overview of key procedural steps for the different thresholds

Thresholds (EUR)	€0-€1000	€1,001 - €15,000	€15,001- €60,000	€60,001 -€143,000	143,001 to 221,000	Above 221,000	Direct Award
Min. potential suppliers to be invited	1	1	3	5	Open procedure	Open procedure	1
Language	Preferable English (local language acceptable)	English (local language acceptable after approval of LM)	English (no exceptions)				English (local language acceptable after approval of LM)
Evaluation committee members	n/a	n/a			BR + BO + third member (		
Waiting period (min. days)	n/a	n/a	3 days	3 days	5 days	10 days	n/a
Min. days for proposal submission	n/a	n/a	7 days	10 days	15 days	at least 30 days, with possible reduction to 15 days in case of a prior information notice or duly substantiated state of urgency	3 days
Advertising (publication of notice) and competition	n/a	n/a	Request for proposal sent to at least 3 bidders	Request for proposal sent to at least 5 bidders	Publication on KIC website, open procedure	Publication on TED and KIC website to ensure widest possible reach at EU level. Open procedure	n/a
Contract modification	n/a	n/a	Possible but cases to be clearly defined in the KIC's Procurement policy	possible but cases to be clearly defined in the KIC's Procurement policy, no substantial changes without new procurement	possible but cases to be clearly defined in the KIC's Procurement policy, no substantial changes without new procurement	possible only under the conditions provided in the EU public procurement directive	
Contract form or terms of contract	n/a	<€5,000 - EIT CC's simplified template €5.000- €1 Supplier's template after approval by LM OR Supplier's template	EIT CC's contract template OR Suppliers template after approval by LM				
Minimum docs. to be provided	• Invoice	• Quote • E-mail exchanges with potential supplier(s) (if applicable) • Contract (signed) • Evidence of delivery of goods/services • Invoice	• RFP/ e-mail or document • Submitted Offer(s) • All e-mail exchange with potential suppliers • Tender Evaluation Report • Contract (signed) • Evidence of delivery of goods/services • Invoice(s)	• RFP • Submitted Offer(s) • All e-mail exchange with potential suppliers • Tender Evaluation Report • Contract (signed) • Evidence of delivery of goods/services • Invoice(s)	• RFP + printout of publication on EIT CC website and other fora • Submitted Offer(s) • All e-mail exchange with potential suppliers Tender Evaluation Report • Contract (signed) • Evidence of delivery of goods/services • Invoice(s)		• Direct Award Approval • RFP • Submitted Offer • E-mail exchange with potential suppliers • Tender Evaluation Report • Contract (signed) • Evidence of delivery of goods/services • Invoice

BR = Business Requestor
BO = Budget Owner
LM=Legal Manager

7. STEP-BY-STEP PROCESS FLOWS

This section outlines the main steps to be followed, as well as which templates should be used and what documentation needs to be kept at each procurement threshold.

7.1. Purchases up to €1,000

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	€0 - €999 Procedure: single payment against invoice	
Step 3: Market research	Based on knowledge of the market, desk research and/or consultations, Business Requestor identifies at least one potential supplier. Depending on the type of purchase, Business Requestor can decide to contact several suppliers, in particular, this might be relevant for purchase of standardized goods/services.	
Step 4: RFP	Business Requestor can either contact a potential supplier directly (communication by e-mail is preferable) to request a quote or use website or any other means to identify the price and technical specification of the item or service to be purchased. The quotes can be provided either in the local language or English. Approval of the purchase will be done through the Purchasing Order system.	
Step 5: Proposal submission and evaluation		VIF (Vendor Information Form)
Step 6: Notification of award	No formal acceptance of the offer is required at this threshold.	
Step 7: Appeals procedure	No waiting time prior to contracting is required at this threshold.	
Step 8: Signature of the contract	No contract is required at this threshold.	Invoice

7.2. Purchases between €1,001 and €15,000

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	€1,001 - €15,000 Procedure: negotiated procedure with single tender (direct award) or tenderers	
Step 3: Market research	Based on knowledge of the market, desk research and/or consultations, Business Requestor identifies at least one potential supplier. Depending on the type of purchase, Business Requestor can decide to contact several suppliers, in particular, this might be relevant for purchase of standardised goods/services.	
Step 4: RFP	If the goods or services to be purchased are not standardised and their price and technical specification is not readily available online or otherwise (e.g. at the shop), Business Requestor shall contact the potential supplier(s) directly (communication must be done by e-mail) briefly describing main requirements for the goods/services to be purchased (general specifications, volume, period of delivery, etc.) and the main components of the offer to be submitted by the potential supplier(s) (e.g. financial offer, methodology of service delivery, technical specification, etc.). The customized quotes must be provided in English. Standardized offers (e.g. those that are downloaded from the website) can also be in the local language.	E-mail exchange with the potential supplier(s)
Step 5: Proposal submission and evaluation	The decision to proceed with a purchase is to be based on the obtained quote(s). Where the Business Requestor has obtained quotes from several potential suppliers, a brief evaluation note should be drawn up (no template provided). Should this be necessary, the Business Requestor can enter into a negotiation regarding the financial or technical aspects of the submitted quotes. Approval of the purchase will be done through the Purchasing Order system.	Readily available specification and price and/or quote sent by the potential supplier(s) E-mail exchange with the potential supplier(s)
Step 6: Notification of award	If a customized quote has been requested from the potential supplier by e-mail, please inform the chosen supplier of the final quote accepted. If you requested quotes from several suppliers, please also inform the suppliers who were not chosen for the contract.	E-mail exchange with the potential provider(s)
Step 7: Appeals procedure	No waiting time prior to contracting is required at this threshold.	
Step 8: Signature of the contract	Contract is mandatory for purchases above €5,000 (net of VAT) For amount above 5k the supplier's own contract can be accepted provided that EIT CC's General Purchase are applicable and attached to said contract. For purchases up to €5,000 invoice(s) is sufficient together with the simplified agreement.	Contract template (simplified or extended), invoice(s)

7.3. Purchases between € 15,001 and €60,000

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	€15,001 - €60,000 Procedure: Request for proposals (at least 3 suppliers)	
Step 3: Market research	Based on knowledge of the market, desk research and/or consultations, Business Requestor identifies at least three potential suppliers. Should the Business Requestor not be able to identify at least three eligible suppliers that could provide the required goods/services, all effort should made to publicize the RFP in the relevant fora Should the Business Requestor only be able to identify one supplier that is able to provide the required goods/services, the procedure should either be conducted as a Direct Award (see Section 7.6).	
Step 4: RFP	Business Requestor should draw up an RFP. For this threshold the use of the RFP template is considered best practice however, for lower amounts deviations from the template are acceptable (the template can be simplified, or the request be sent in e-mail). Deviation from the RFP template should be agreed with the Legal & Procurement Officer. Please keep in mind: • The language of the procedure should be English. • The deadline for submission of proposals should be at least 7 calendar days. Before publication, the RFP should be reviewed by the Legal Manager. The notice of the procurement procedure should be sent to the identified potential suppliers. Should the Business Requestor not have managed to identify three potential suppliers, it is advisable to publish the RFP notice on EIT CC website and publicize the contract in the relevant fora complying with the principle of proportionality.	Request for Proposals (if used) Contract (one call off/ multiple call-off/framework) RFP Publication (only use if applicable) Emails to potential suppliers Proof of publication of the RFP on EIT CC website + promotion in other fora (only use if applicable)
Step 5: Proposal submission and evaluation	Only proposals submitted within the defined deadline can be accepted and evaluated. The evaluation should be done against the pre-defined criteria described in the RFP. It is also possible to conduct negotiations regarding the financial and/or technical solutions proposed by the bidders following the procedure described in Section 3.5. To assess the submitted proposals, an Evaluation Committee with at least three members needs to be created, consisting of the Business Requestor, Budget Owner and a third member (or the COO in their absence). If you	E-mail exchange with the bidders Submitted offers (complete documentation pack)

	decide to include additional members, please make sure that the Evaluation Committee always has an off number of participants. Evaluation of the offers shall be documented in the Tender Evaluation Report Simple, to be dated and signed by all Evaluation Committee members.	Tender Evaluation Report
Step 6: Notification of award	Business Requestor shall inform all bidders of the result of the procurement procedure. The winning supplier will be sent by the Legal Manager (via the Business requestor) a populated contract to be signed within the indicated deadline. The contract to be signed can be either the EIT CC's own contract (completed in collaboration between the Business Requestor, the LM – and if necessary the Budget Owner) OR Supplier's template that has been reviewed and approved by the LM or includes a mention that EIT CC's General Purchase T&C shall apply (in this case the T&C shall be attached to the contract. Approval of the purchase will be done through the Purchasing Order system following the Approvals Matrix indicated in Section 2.2 (PO should be generated prior to the signature of the contract).	E-mail exchange with the bidders Contract (one call-off/ multiple call-off/) framework) Request completion of contract to the LM
Step 7: Appeals procedure	Prior to the conclusion of the contract with the successful bidder, the Business Requestor should allow at least 3 days for the possibility of complaints. If any complaints are received, these should be treated in line with the procedure outlined in Section 3.7.	Received complaints and following e-mail exchange (if applicable)
Step 8: Signature of the contract	The signed contract should be obtained from the supplier within the deadline set in the notification of the award. Modification of the contract during its implementation is only possible in cases and in accordance with the principles described in Section 3.8.	Contract signed by both parties

7.4. Purchases between € 60,001 and €143,000

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	€60,000 - €142,999 Procedure: Request for proposals (at least 5 suppliers)	
Step 3: Market research	Based on knowledge of the market, desk research and/or consultations, Business Requestor identifies at least five potential suppliers. Should the Business Requestor not be able to identify at least five eligible suppliers that can provide the required goods/services, the RFP should be publicised on EIT CC website and in the relevant fora. Should the Business Requestor only be able to identify one supplier that is able to provide the required goods/services, the procedure should either be conducted as a Direct Award (see Section 7.6).	
Step 4: RFP	Business Requestor should draw up an RFP; use of the RFP template is mandatory. Please remember: • The language of the procedure must be English. • The deadline for submission of proposals should be at least 10 calendar days. • The RFP document package should include the RFP document, contract template. Before publication, the RFP should be reviewed by the Legal Manager and by the Budget Owner. The notice of the procurement procedure should be sent to the identified potential suppliers, as well as published on EIT CC website; please use the RFP Publication template. To strengthen the competition and when it is not possible to identify five eligible suppliers that can provide the required goods/services, all effort should made to publicize the RFP notice in the relevant fora. Any questions submitted by the interested tenderers as well as the answers shall be published on the EIT CC website thus ensuring that all potential bidders are aware of the information.	Request for Proposals Agreement (one call off/ multiple call off/framework) RFP Publication (only if applicable) Proof of publication of the RFP on EIT CC website + promotion in other fora (only if applicable)
Step 5: Proposal submission and evaluation	Only proposals submitted within the defined deadline can be accepted and evaluated. The evaluation should be done against the pre-defined criteria described in the RFP. It is also possible to conduct negotiations regarding the financial and/or technical solutions proposed by the bidders following the procedure described in Section 3.5. To assess the submitted proposals, an Evaluation Committee with at least three members needs to be created, consisting of the Business Requestor,	E-mail exchange with the bidders Submitted offers (complete documentation pack)

	Budget Owner and the Legal & Procurement Officer (or the COO in their absence). If you decide to include additional members, please make sure that the Evaluation Committee always has an off number of participants. Evaluation of the offers shall be documented in the Tender Evaluation Report, to be dated and signed by all Evaluation Committee members.	Tender Evaluation Report
Step 6: Notification of award	Business Requestor shall inform all bidders of the result of the procurement procedure. The winning supplier will be sent by the LM (via the Business requestor) a populated contract to be signed within the indicated deadline. The contract to be signed can be either the EIT CC's own contract (completed in collaboration between the Business Requestor, the Legal & Procurement Officer – and if necessary the Budget Owner) OR Supplier's template that has been reviewed and approved by the Legal & Procurement Officer. Approval of the purchase will be done through the Purchasing Order system following the Approvals Matrix indicated in Section 2.2 (PO must be generated prior to the signature of the contract).	E-mail exchange with the bidders Contract (one call off/ multiple call off/ framework Request completion of Contract to the LM
Step 7: Appeals procedure	Prior to the conclusion of the contract with the successful bidder, the Business Requestor should allow at least 3 days for the possibility of complaints. If any complaints are received, these should be treated in line with the procedure outlined in Section 3.7.	Received complaints and following e-mail exchange (if applicable)
Step 8: Signature of the contract	The signed contract should be obtained from the supplier within the deadline set in the notification of the award. Modification of the contract during its implementation is only possible in cases and in accordance with the principles described in Section 3.8.	Contract signed by both parties

7.5. Purchases above €143,001 and below 221,000

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	Procedure: Public tender	
Step 3: Market research	There is no market research for this threshold. This is a public tender with no minimum number of bidders – even one compliant bid is enough for the successful completion of the procedure.	
Step 4: RFP	Business Requestor should draw up an RFP; use of the RFP template is mandatory. Please remember: • The language of the procedure must be English. • The deadline for submission of proposals should be at least 15 calendar days. • The RFP document package should include the RFP document, contract template. Before publication, the RFP should be reviewed by the Legal & Procurement Officer and by the Budget Owner. The RFP shall be published on the EIT CC website; use of the RFP Publication procedure via EIT CC Website is mandatory. To strengthen the competition, all effort should made to publicise the RFP notice in the relevant fora. Any questions submitted by the interested tenderers as well as the answers shall be published on the EIT CC website thus ensuring that all potential bidders are aware of the information. No submission of the template along with the RFP. Upon request of any of the tenderers the Business Requestor shall ask the LM to send him/her the appropriate template for submission to said tenderer.	Request for Proposals Proof of publication of the RFP on EIT CC website + promotion in other fora (mandatory)
Step 5: Proposal submission and evaluation	Only proposals submitted within the defined deadline can be accepted and evaluated. The evaluation should be done against the pre-defined criteria described in the RFP. It is also possible to conduct negotiations regarding the financial and/or technical solutions proposed by the bidders following the procedure described in Section 3.5. To assess the submitted proposals, an Evaluation Committee with at least three members needs to be created, consisting of the Business Requestor, Budget Owner and the Legal & Procurement Officer (or the COO in their absence). If you decide to include additional members, please make sure that the Evaluation Committee always has an off number of participants. Evaluation of the offers shall be documented in the Tender Evaluation Report, to be dated and signed by all Evaluation Committee members.	E-mail exchange with the bidders Submitted offers (complete documentation pack) Tender Evaluation Report.

Step 6: Notification of award	Business Requestor shall inform all bidders of the result of the procurement procedure. The winning supplier will be sent by the LM (via the Business requestor) a populated contract to be signed within the indicated deadline. The contract to be signed can be either the EIT CC's own contract (completed in collaboration between the Business Requestor, the LM – and if necessary, the Budget Owner) OR Supplier's template that has been reviewed and approved by the Legal & Procurement Officer. Approval of the purchase will be done through the Purchasing Order system following the Approvals Matrix indicated in Section 2.2 (PO must be generated prior to the signature of the contract).	E-mail exchange with the bidders Contract (one call-off/ multiple call-off/ Framework) Request completion of contract from the LM
Step 7: Appeals procedure	Prior to the conclusion of the contract with the successful bidder, the Business Requestor should allow at least 5 days for the possibility of complaints. If any complaints are received, these should be treated in line with the procedure outlined in Section 3.7.	Received complaints and following e-mail exchange (if applicable)
Step 8: Signature of the contract	The signed contract should be obtained from the supplier within the deadline set in the notification of the award. Modification of the contract during its implementation is only possible in cases and in accordance with the principles described in Section 3.8.	Contract signed by both parties

7.6. Purchases equal or above EUR 221,000 (EU Procurement value)

Procedural step	Action	Documentation/ Templates
Step 1: Estimate contract value	Estimate the value of goods/services to be purchased net of VAT (this may require some prior market research).	
Step 2: Choose the procurement procedure	Procedure: Open procedure	
Step 3: Market research	There is no market research for this threshold. This is a public tender with no minimum number of bidders – even one compliant bid is enough for the successful completion of the procedure.	
Step 4: RFP	Business Requestor should draw up an RFP; use of the RFP template is mandatory. Please remember: • The language of the procedure must be English. • The deadline for submission of proposals should be at least 30 calendar days. • The RFP document package should include the RFP document, contract template. Before publication, the RFP should be reviewed by the Legal & Procurement Officer and by the Budget Owner. The RFP shall be published on the EIT CC website and on TED; use of the RFP Publication procedure via EIT CC Website and TED is mandatory. To strengthen the competition, all effort should made to publicise the RFP notice in the relevant fora. Any questions submitted by the interested tenderers as well as the answers shall be published on the EIT CC website thus ensuring that all potential bidders are aware of the information. No submission of the template along with the RFP. Upon request of any of the tenderers the Business Requestor shall ask the LM to send him/her the appropriate template for submission to said tenderer.	T_0_1 Request for Proposals Proof of Publication on TED and KIC website Prior Information Notice (not mandatory under Directive 2014/24/EU on public procurement, can be used to reduce the terms and to advertise an upcoming procurement to the market)
Step 5: Proposal submission and evaluation	Only proposals submitted within the defined deadline can be accepted and evaluated. The evaluation should be done against the pre-defined criteria described in the RFP. It is also possible to conduct negotiations regarding the financial and/or technical solutions proposed by the bidders following the procedure described in Section 3.5. To assess the submitted proposals, an Evaluation Committee with at least three members needs to be created, consisting of the Business Requestor, Budget Owner and a third member (or the COO in their absence). If you decide to include additional members, please make sure that the Evaluation Committee always has an off number of participants.	E-mail exchange with the bidders Submitted offers (complete documentation pack) Tender Evaluation Report

	Evaluation of the offers shall be documented in the Tender Evaluation Report, to be dated and signed by all Evaluation Committee members.	
Step 6: Notification of award	Business Requestor shall inform all bidders of the result of the procurement procedure. The winning supplier will be sent by the LM (via the Business requestor) a populated contract to be signed within the indicated deadline. The contract to be signed can be either the EIT CC's own contract(completed in collaboration between the Business Requestor, the LM – and if necessary the Budget Owner) OR Supplier's template that has been reviewed and approved by the Legal & Procurement Officer. Approval of the purchase will be done through the Purchasing Order system following the Approvals Matrix indicated in Section 2.2 (PO must be generated prior to the signature of the contract).	E-mail exchange with the bidders Contract (one call-off/ multiple call-off/ Framework) Request completion of contract from the LM
Step 7: Appeals procedure	Prior to the conclusion of the contract with the successful bidder, the Business Requestor should allow at least 10 days for the possibility of complaints. If any complaints are received, these should be treated in line with the procedure outlined in Section 3.7.	Received complaints and following e-mail exchange (if applicable)
Step 8: Signature of the contract	The signed contract should be obtained from the supplier within the deadline set in the notification of the award. Modification of the contract during its implementation is only possible in cases and in accordance with the principles described in Section 3.8.	Contract signed by both parties

7.7. Direct Award

These steps shall be followed when the Direct Award falls under one of the following categories a, b, c, d, e, f, detailed Section 4.

Where in compliance with the conditions described in Section 4, the decision is taken to opt for Direct Award, this shall be attested by the Direct Award Approval laying out the justification for Direct Award and written approval by the COO (email accepted). The Direct Award Approval form (no template applicable nor available) shall be prepared by the Business Requestor and reviewed and pre-approved by the Legal & Procurement Officer as well as the Budget Owner.

Procedural step	Action	Documentation/ Templates
Step 4: RFP	Business Requestor should draw up an RFP; use of the RFP template is mandatory. Please remember: • The language of the procedure must be English. • The deadline for submission of proposals should be at least 3 calendar days. • The RFP document package should include the RFP document, contract template.	Request for Proposals - Direct Award Contract (one call-off/ multiple call- off/ framework)

	Direct award is it admissible just for purchases below EUR 15,000, T=the RFP should be reviewed by the Legal & Procurement Office.	E-mail exchange with the potential supplier
Step 5: Proposal submission and evaluation	The proposal shall only be evaluated if it has been submitted within the defined deadline. The evaluation should be done against the pre-defined criteria described in the RFP. It is also possible to conduct negotiations regarding the financial and/or technical solutions proposed by the bidder following the procedure described in Section 3.5. To assess the submitted proposal, an Evaluation Committee with at least three members needs to be created, consisting of the Business Requestor, Budget Owner and the Legal & Procurement Officer (or the COO in their absence). If you decide to include additional members, please make sure that the Evaluation Committee always has an off number of participants. Evaluation of the offer shall be documented in the Tender Evaluation Report, to be dated and signed by all Evaluation Committee members.	Submitted offer (complete documentation pack) E-mail exchange with the potential supplier Tender Evaluation Report - Direct Award
Step 6: Notification of award	Business Requestor shall inform the bidder of the result of the procurement procedure. If the offer is accepted, the supplier will be sent by the Legal & Procurement Officer (via the Business requestor) a populated contract to be signed within the indicated deadline. The contract to be signed can be either the EIT CC's own contract (completed in collaboration between the Business Requestor, the LM – and if necessary the Budget Owner) OR Supplier's template that has been reviewed and approved by the Legal & Procurement Officer. Approval of the purchase will be done through the Purchasing Order system following the Approvals Matrix indicated in Section 2.2 (PO should be generated prior to the signature of the contract).	E-mail exchange with the supplier Contract (extended/framework) Same contract as provided along with the RFP, completed by the LM.
Step 7: Appeals procedure	No waiting period or appeals procedure applicable for Direct Award.	
Step 8: Signature of the contract	The signed contract should be obtained from the supplier within the deadline set in the notification of the award. Modification of the contract during its implementation is only possible in cases and in accordance with the principles described in Section 3.8.	Contract signed by both parties