

Procurement Threshold Process – ESIF funded expenditure

Spend threshold (excl. VAT) ⁽¹⁾	Procedure	Indicative Timescale ⁽²⁾	Advertisement Requirements
Up to £2,499	Direct award	Less than 1 week	None
£2,500 - £24,999	3 written quotes or prices sought from relevant suppliers of goods, works or services. Keep the quotations/prices and brief evaluation report/choice of supplier justification report for audit	Less than 1 week	None
£25,000 – £181,302	Invitation to Tender: Invite tenders from interested suppliers. Advertise nationally (but consider advertising in the EU if for an EU-funded project). Aim for at least 3 competitive tenders. Keep the tenders and evaluation report/contract award justification report for audit.	2 months	1) Advertised on Contract Finder And 2) The opportunity is advertised on the ESIF grant recipient's website for a reasonable time period.
Equal to, or above £181,302	EU Invitation to Tender: Sufficient number of invitations to tender must be issued to ensure a minimum of 3 written competitive bids are received. Keep the tenders and evaluation report/contract award justification report for audit. It is important that the guidance stated above is complied with. Contact Procurement Services for advice & support.	4 months	1) Advertised on Online Journal of the European Union (OJEU) And 2) The opportunity is advertised on the ESIF grant recipient's website for a reasonable time period.

EU Grant holders should note that all EU grant funded travel should now be booked

through Key Travel. Staff who book their own travel ['self-booker'], or who book their own travel & travel for colleagues ['booker'] &, or have travel arrangements booked for them by others ['traveller'] should complete the attached travel profile template & send it to procurement@exeter.ac.uk for profiles to be set up with Key Travel. You will receive a 'welcome' email from Key Travel with your unique login once your profile has been created. Please note: your profile must be completed with your full name & title [e.g. Dr., Prof., Mr/Mrs/Ms/Miss etc.] as it appears on your passport as this is the information that will appear on all flight tickets. Any discrepancy between this information as held on the Key Travel online booking software & your passport may lead to you being refused permission to board flights by airlines.

Once your profile is set up, you are recommended to access your profile & complete all information regarding contact telephone numbers [to allow you to receive alerts re train/flight cancellations/delays etc. & assistance from Key Travel staff to rebook travel arrangements if necessary] & your advanced passenger information [data issued automatically by Key Travel to airlines for all booked flights – saves you having to input for every booked flight]. If you wish to receive automated alerts about passports & visas that need renewing, you may input this information into your profile too.

Purchase of IT Devices

Due to changes in the contract with HP for the provision of desktops and notebooks a procurement guidance note has been prepared: [PURCHASE OF IT DEVICES](#)

This process has been designed for **ALL purchases of IT devices against EU funded research grants**, including desktops, notebooks, tablets, workstations, thin clients and associated accessories (e.g. monitors, keyboards, mice etc.).

The guidance outlines a temporary procurement process whilst a new tender process for the supply of IT Devices is run. The guidance states that purchases will continue to be made through the National Desktop and Notebook Agreement (NDNA); however quotations from HP direct as well as their three nominated resellers, Academia, DTP and XMA should be sought before purchase orders are placed to ensure best terms are achieved. [A sample quotation document is included within the guidance document.](#)

Notes:

(1) The “spend threshold” is the maximum estimated (or known) cost of the goods or service to be bought, or leased etc. Calculate this cost as either a one-off transaction, or the total value of all transactions you expect during the period of the contract (up to a 4 year period).

(2) The indicative timetable is minimum period that should be allowed for the procurement process from start to finish i.e. from identifying need for goods/services/works to settlement of supplier's final invoice [unless a payment retention is included within the UoE's contract with the supplier].

(3) At audit, projects will have to demonstrate that they have met EU and national law. This guidance sets out some national rules (in particular at Chapter 6 – Procurement Law ESIF Guidance Note – V3) which shall apply to procurement processes commenced on or after the date of publication as contractual requirements, unless otherwise stated. Procurement Law ESIF Guidance Note – V3:



ESIF Guidance
notes.pdf