

## ANNEX 7

TENDER SRB/OP/2/2016

# Roadmaps to Order

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### 1. INTRODUCTION

The present document details the processes for:

- Time & Means orders;
- Fixed Price orders;
- Quoted Time & Means orders.

#### **Actors:**

- The involved actors are the **Contractor** and the **SRB Unit** performing the ordering.
- “**SRB Unit**” refers to a principal division of the procuring organisation.

#### **Email:**

- **Email** shall be the regular way for exchanging all documents between the SRB Unit initiating a request and the contractor.
- Emails from the SRB Unit shall be sent **with reading and delivery receipt**.

#### **Formats:**

- All documents transmitted by the Contractor must clearly specify the subject, as well as the SRB Unit’s references and the Contractor’s own references.
- In the absence of any specification to the contrary, when a signed document is required from the Contractor, a copy of such document shall be forwarded

by email as an Adobe® PDF documents. The original shall be provided by the Contractor to the Contracting Authority's SRB Unit on request.

### **Required office automation level:**

No specific infrastructure is required from the contractor within the context of the ordering process, other than:

- an Internet connection
- an e-mail address
- a browser with SSL support (to enable secure network transmissions).

### **Terminology:**

**“Letter of Intent”:** Within the context of the ordering process, proposed freelancers may be requested by the SRB Unit to submit a *Letter of Intent* as per Annex 7 of the Tender Specifications.

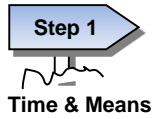
**“Fault”:** The term “fault” refers hereafter to a Contractor’s *procedural error* and not to the quality of the content of the documents.

**“Proposal” vs. “Offer”:** For the Time & Means order procedure, the “offer stage” follows a “proposal stage”. The “proposal stage” refers to the presentation of the candidates list by the Contractor following a request by the SRB Unit, and subsequent assessment of the candidates by the SRB Unit. Only when the SRB Unit has identified a suitable candidate can the Contractor submit its “Offer”.

### **Computerization**

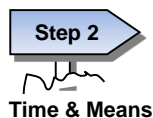
The Contracting Authority reserves the right to computerize the present roadmap procedures, by directing all exchanges via a secure web-accessible computer platform provided by the Contracting Authority, at any time during the execution of the Framework Contract, subject to a 2-month advance notice.

### Step 1: Need arises



What	<p><b><u>Establishment of the specifications on the “SRB Unit” side:</u></b> (skip this step for an extension)</p> <p>The need for a Time &amp; Means service arises.</p> <p>The “SRB Unit” prepares the requirements/specifications, by means of a <i>Request Form</i> and a <i>Technical Annex</i> (as per Annex I of the Specific Contract for Time &amp; Means services).</p> <p>In particular, such request specifies:</p> <ol style="list-style-type: none"> <li>1. The <i>Profile</i> within the meaning of the Tender Specifications, point 4.2.4.B;</li> <li>2. The required <i>Specific Knowledge and Skills</i> within the meaning of the Tender Specifications, point 4.2.4.B.</li> <li>3. The “N° of days”</li> <li>4. The “Y/N Date”.</li> <li>5. The “List Presentation Date”</li> </ol> <p><b>“N° of days”:</b> Estimated global need for the profile in days (this figure cannot exceed the remaining days of the FWC). The exact ordered number of days shall be subsequently specified either in the <i>Proposal Acceptance/Refusal Form</i> (attachment 5) or, when applicable, in the <i>Extension Form</i> (attachment 6).</p> <p><b>“Y/N Date”:</b> This date refers to the deadline by which the Contractor must make known his willingness to make a proposal. The time given for that end to the Contractor must be at least 3 working days, from the date the request is sent to the contractor (request date).</p> <p><b>“List Presentation Date”:</b> This date refers to the deadline by which the Contractor must present his list of proposed qualified service providers. The time given for that end to the Contractor must be at least 3 working days from the “Y/N date”.</p>
Parties involved	<ul style="list-style-type: none"> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Requirements.</li> <li>• “Y/N date” deadline is fixed.</li> <li>• “List presentation date” deadline is fixed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• n/a.</li> </ul>

## Step 2: Send request form



What	<p>1. The SRB Unit determines to which <i>company</i> (or group of companies if applicable) the <i>Request</i> should be sent to:</p> <ul style="list-style-type: none"> <li>In case of an <b>initial request</b>, the <i>Request Form</i> is forwarded to the first company in the cascade of companies that have been awarded a contract. However, if the first company in the cascade is unable to favourably answer the request, the same request is sent to the next company in the cascade, with the same conditions. If the second company fails to fulfil the request, the same process is repeated for the third company in the cascade. If the third company of the cascade also fails to fulfil the request, the SRB Unit can then decide to redefine the project or else start the procedure again on the same project at a later time.</li> <li>In case of an <b>extension</b>, the request (<i>Extension Form</i>) is to be sent to the company to which the relevant specific contract was awarded. In case the contractor is unable to favourably answer the extension request, a new initial request must be launched.</li> </ul> <p>2. The SRB Unit sends the request (the <i>Request Form</i> with its <i>Technical Annex</i> or else the <i>Extension Form</i> as appropriate) by email (with reading and delivery receipt) to the Contractor. The day on which the SRB Unit sends the Request Form is referred to below as the “request date”.</p>
Parties involved	<ul style="list-style-type: none"> <li>SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>The “Request Form” is emailed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>n/a.</li> </ul>

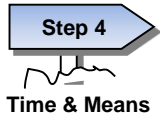


## Step 3: Willingness to make a proposal

What	<p>If the Contractor does not state by the “Y/N date”, to the requesting SRB Unit, whether it will be making a proposal, the SRB Unit goes back to Step 2 (cascade).</p> <p>If the Contractor has stated NO (i.e. it declines to submit a proposal) the SRB Unit goes back to Step 2 (cascade).</p>
Parties involved	<ul style="list-style-type: none"> <li>Contractor.</li> <li>SRB Unit.</li> </ul>

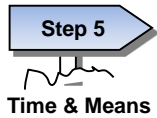
Result	<ul style="list-style-type: none"> <li>Willingness to make a proposal is expressed, or cascade mechanism activated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>Not respecting the “Y/N date”.</li> </ul>

#### Step 4: Presentation of candidate list (proposal)



What	<p>The Contractor sends a proposal containing a list of candidates (at least 4 CVs) having the required profile by the “list presentation date” to the requesting SRB Unit. The candidate list will include for each candidate the name of the candidate, the date when the candidate is available, the candidate’s profile and the requested specific knowledge and skills - whether the candidate is offered via subcontracting and whether the candidate is permanent or non-permanently employed - as well as any other relevant information. The CVs (with signed front-page) of all candidates must be attached to the list sent to the requesting SRB Unit. All candidates on the list must be available for interviews in the 2 weeks following the sending of the candidate list.</p> <p>If the Contractor does not send the candidate list to the requesting SRB Unit by the “list presentation date”, the SRB Unit may consider that the requirements are not fulfilled, and, if so, it goes back to step 2.</p>
Parties involved	<ul style="list-style-type: none"> <li>Contractor.</li> <li>SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>List with proposed qualified candidates or cascade mechanism activated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>Not respecting the “list presentation date” (even if the SRB Unit accepts the proposed list).</li> </ul>

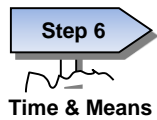
## Step 5: The offer



What	<p>The period after the “list presentation date” can be used by the Contractor and the requesting SRB Unit to organise meetings to present and interview the service providers proposed.</p> <p>If the SRB Unit accepts a candidate from the list, the SRB Unit replies to the Contractor using the <i>Proposal Acceptance/Refusal Form</i>, indicating that the proposal is accepted, specifying:</p> <ul style="list-style-type: none"> <li>• The candidate name</li> <li>• The profile</li> <li>• The number of days for the supply of which the contractor is solicited to submit an offer.</li> </ul> <p>The Contractor then checks that the selected candidate is still available. If yes, the Contractor sends (within 10 working days from the date the proposal acceptance is sent) a formal offer to the SRB Unit indicating:</p> <ul style="list-style-type: none"> <li>• The earliest date on which the candidate can start;</li> <li>• His/her profile;</li> <li>• His/her specific knowledge and skills;</li> <li>• The period of validity of this offer.</li> </ul> <p>Further, the following documents must be attached to the offer:</p> <ul style="list-style-type: none"> <li>• Letter of Intent (for freelancers only);</li> <li>• Declaration of Confidentiality;</li> <li>• A valid copy of an identity document in pdf format.</li> </ul> <p>The SRB Unit sends the <i>Offer Acceptance/Refusal Form</i> so as to accept, or else to refuse, the offer.</p> <p>If the selected candidate is no longer available, the Contractor informs officially the SRB Unit. In this case the SRB Unit can either go back to step 2 and initiate the cascade or select another candidate from the initial list of candidates (the Contractor cannot propose new candidates).</p> <p>If the Contractor doesn't send the formal offer on time the SRB Unit can either extend the delay or else decide to activate the cascade, going back to step 2.</p> <p>If the candidates on the list do not correspond to the requirements, the SRB Unit informs the Contractor using the <i>Offer Acceptance/Refusal Form</i> explaining the reasons why the candidates do not fulfil the requirements, and goes back to Step 2.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Candidate(s) accepted or cascade mechanism activated.</li> </ul>

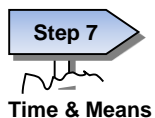
Fault	<ul style="list-style-type: none"> <li>• None.</li> </ul>
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#### Step 6: Establishment of the Specific Contract



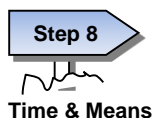
What	The Specific Contract is established based on the formal offer. The Specific Contract will include details of the work to be carried out, the start date, the duration in days and any other relevant information.
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Specific Contract signed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Not signing the specific contract</li> </ul>

#### Step 7: Execution of the Specific Contract



What	The task(s) as requested in the order is/are carried out by the Contractor under the technical supervision of the SRB Unit.
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Successful completion of the task(s).</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• The tasks are not successfully completed.</li> </ul>

#### Step 8: Acceptance



What	The acceptance is based on the number of days or half-days performed by the Contractor's staff in accordance with the T&M conditions
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• The Contractor's invoice(s) are paid by the Contracting Authority</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• None</li> </ul>

### 3. ROADMAP FOR FIXED PRICE PROJECTS

#### Step 1: Need arises



What	<p><b><u>Establishment of the specifications on the “SRB Unit” side:</u></b> (skip this step for an extension)</p> <p>The need for a Fixed Price service arises.</p> <p>The <i>SRB Unit</i> establishes the requirements, by drafting the <i>request form</i> and the <i>Technical annex</i> (as per Annex I of the Specific Contract for Fixed Price services). During that process, in particular:</p> <ul style="list-style-type: none"> <li>• The SRB Unit decides how much time it wants to allow the Contractor to decide if he can make an offer. The time allowed to the Contractor must be at least 5 working days from the date the request is sent to the Contractor (request date). This date, by which the Contractor must make known his willingness to make an offer, is referred to as the “Y/N date”.</li> <li>• The SRB Unit decides how much time it wants to allow the Contractor to make an offer by stipulating an “<i>Expected Offer Date</i>”. The time allowed to the Contractor to present an offer must be at least 5 working days counting from the “Y/N Date”.</li> </ul>
Parties involved	<ul style="list-style-type: none"> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Requirements (including the “Y/N date” and the “Expected Offer Date”).</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• n/a.</li> </ul>

#### Step 2: Send Request



What	<p>The SRB Unit determines to which <i>company</i> (or group of companies if applicable) the Request should be sent to:</p> <ul style="list-style-type: none"> <li>• In case of an <b>initial request</b>, the <i>Request Form for FP</i> and its <i>Technical Annex</i> is to be sent to the first company in the cascade of companies that have been awarded a contract. However, if the first company in the cascade is unable to favourably answer the request, the same request is sent to the next company in the cascade, with the same conditions. If the second company fails to fulfil the request, the same process is repeated for the third company in the cascade. If the third company of the cascade also fails to fulfil the request, the SRB Unit can then decide to redefine the project or else start the procedure again on the same project at a later time.</li> </ul>
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	<ul style="list-style-type: none"> <li>In case of an <b>extension</b>, the <i>Extension Form for FP</i> is to be sent to the company to which the relevant specific contract was awarded. In case the company is unable to favourably answer the extension request, a new initial request must be launched.</li> </ul> <p>The SRB Unit sends the request (the <i>FP Request Form</i> with its <i>Technical Annex</i> or else the <i>FP Extension Form</i> as appropriate) to the Contractor. The day on which the SRB Unit sends the Request Form is referred to below as the “request date”.</p>
Parties involved	<ul style="list-style-type: none"> <li>SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>“Request date” is fixed.</li> <li>The Request Form and Technical Annex (requirements) are dispatched to the contractor. The fixed “Y/N date” and the fixed “Expected Offer Date” are therein communicated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>n/a.</li> </ul>

### Step 3: Willingness to make an offer



What	<p>The period between the “request date” and the “Y/N date” may be used to clarify the requirements, so as to allow the Contractor to decide whether he will be able to make an offer.</p> <p>If the Contractor does not state by the “Y/N date”, to the requesting SRB Unit, whether it will or will not be making an offer, the SRB Unit goes back to Step 2 (cascade).</p> <p>If the Contractor has stated NO (i.e. it declines to submit an offer) the SRB Unit goes back to Step 2 (cascade).</p> <p>At this stage, exceptionally, and with due justification, the “Expected Offer Date” may be extended, by discretionary decision of the SRB Unit.</p>
Parties involved	<ul style="list-style-type: none"> <li>Contractor.</li> <li>SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>Willingness to make an offer is expressed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>Not respecting the “Y/N date”.</li> </ul>

#### Step 4: The offer



What	<p>The period between the “Y/N date” and the “Expected Offer Date” can be used to prepare and finalise the offer.</p> <p>The Contractor delivers a formal offer (which should include a project plan, the team structure and the workload) by the “Expected Offer Date”.</p> <p>If the Contractor does not provide an offer by the “<i>Expected Offer Date</i>”, the SRB Unit is entitled to conclude that the requirements were not fulfilled. If the SRB Unit so decides, it replies to the Contractor stating therein that the offer cannot be accepted, as well as the reason, and goes back to Step 2.</p> <p>If the SRB Unit accepts the offer, the SRB Unit replies to the Contractor stating that the offer is accepted and is to be regarded as the basis for Specific Contract, using for that purpose the <i>Offer Acceptance/Refusal Form</i>.</p> <p>If the SRB Unit does not accept the offer, the SRB Unit will prepare documentation indicating why acceptance was not possible. The SRB Unit informs the Contractor with an explanation as to why that the offer cannot be accepted (using for that purpose the <i>Offer Acceptance/Refusal Form</i>) and goes back to Step 2.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Offer accepted or cascade mechanism is activated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Not respecting the “Offer date”</li> </ul>

#### Step 5: Establishment of the Specific Contract



What	<p>The Specific Contract is established based on the formal offer. The Specific Contract will include details of the work to be carried out with the requested deliverables, the start date, the duration and any other relevant information.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Specific Contract signed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Specific contract not signed</li> </ul>

#### Step 6: Execution of the Specific Contract

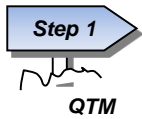
What	<p>The project is worked on by the Contractor, in contact as required with the concerned SRB Unit.</p> <p>The Contractor provides the requested deliverables to the SRB Unit as specified in the Specific Contract.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Successful completion of the project.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• The deliverables are not provided on time</li> </ul>

#### Step 7: Acceptance

What	<p>The acceptance is based on the conformance of the deliverables with the specifications described in the specific contract. A formal acceptance note must be issued by the SRB Unit in the form of a <i>Receipt Advice Slip for "Deliverables"</i> as per Annex II of the relevant Specific Contract, and is to be signed by both parties in order to allow the invoicing.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Accepted deliverables are paid by the Contracting Authority after reception of Contractor's invoices.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• The deliverable(s) do not conform to the specifications</li> </ul>

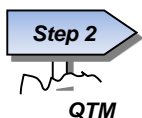
#### 4. ROADMAP FOR QUOTED TIME & MEANS PROJECTS

##### Step 1: Need arises



What	<p><b><u>Establishment of the specifications on the “SRB Unit” side:</u></b> (skip this step for an extension)</p> <p>The need for a Quoted Time &amp; Means service arises.</p> <p>The SRB Unit specifies how much time it wants to allow the Contractor to decide if he can make an offer. The time allowed to the Contractor must be at least 3 working days from the date the request is sent to the contractor (request date). This date, by which the Contractor must make known his willingness to make an offer, is referred to as the “<b>Y/N date</b>”.</p> <p>The SRB Unit specifies a date for receiving an offer from the Contractor. This date is referred to as the “<b>Offer date</b>”. (The time allowed to the Contractor should normally be of at least 10 working days from the date on which the SRB Unit emails the Request Form).</p>
Parties involved	<ul style="list-style-type: none"> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Requirements.</li> <li>• “Y/N date” deadline is fixed.</li> <li>• “Offer date” is fixed.</li> </ul>

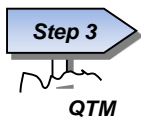
##### Step 2: Send request form



What	<p>The SRB Unit determines to which <i>company</i> (or group of companies if applicable) the <i>Request</i> should be sent to:</p> <ul style="list-style-type: none"> <li>• In case of an <b>initial request</b>, the <i>Request Form</i> is to be forwarded to the first company in the cascade of companies that have been awarded a contract. However, if the first company in the cascade is unable to favourably answer the request, the same request is sent to the next company in the cascade, with the same conditions. If the second company fails to fulfil the request, the same process is repeated for the third company in the cascade. If the third company of the cascade also fails to fulfil the request, the SRB Unit can then decide to redefine the project or else start the procedure again on the same project at a later time.</li> <li>• In case of an <b>extension</b>, the request (<i>Extension Form</i>) is to be sent to the company to which the relevant specific contract was awarded. In case the company is unable to</li> </ul>
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	<p>favourably answer the extension request, a new initial request must be launched.</p> <p>The SRB Unit sends the request (the <i>QTM Request Form</i> with its <i>Technical Annex</i> or else the <i>QTM Extension Form</i> as appropriate) to the Contractor. The day on which the SRB Unit sends the Request Form is referred to below as the “request date”.</p>
Parties involved	<ul style="list-style-type: none"> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• “Request date” is fixed.</li> <li>• “Y/N date” is fixed.</li> <li>• Request Form is emailed.</li> </ul>

### Step 3: Willingness to make an offer



What	<p>The period between the “request date” and the “Y/N date” may be used to clarify the requirements, so as to allow the Contractor to decide whether he will be able to make an offer.</p> <p>If the Contractor does not reply within the “Y/N date”, to the requesting SRB Unit, stating whether he will or will not be making an offer, the SRB Unit goes back to Step 2.</p> <p>If the Contractor has stated NO - i.e. he declines to make an offer - the SRB Unit goes back to Step 2.</p> <p>At this stage, exceptionally, and with due justification, the “Offer Date” may be extended, by discretionary decision of the SRB Unit.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Willingness to make an offer is expressed, or cascade mechanism activated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Not respecting the “Y/N date”.</li> </ul>

### Step 4: The offer



What	<p>The Contractor sends a formal offer to the SRB Unit, respecting the “<b>Offer date</b>”, including workload, team structure (CVs, Declarations of Confidentiality and Letters of Intent if needed) and time schedule</p> <p>If the contractor does not send the offer to the requesting SRB Unit by the “<b>Offer date</b>”, the SRB Unit may consider this as a breach of the requirements, and, if so, goes back to Step 1.</p>
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	<p>If the SRB Unit accepts the offer of the contractor, the SRB Unit replies to the Contractor using the <i>Offer Acceptance/ Refusal Form</i>, indicating that the offer is accepted.</p> <p>If the offer does not correspond to the requirements, the SRB Unit informs the Contractor using the <i>Offer Acceptance/Refusal Form</i>, explaining the reason why the candidates do not fulfil the requirements, and goes back to Step 2.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Offer accepted or cascade mechanism activated.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Not respecting the “<b>Offer date</b>”.</li> </ul>

#### Step 5: Establishment of the Specific Contract



What	The Specific Contract is established based on the formal offer. The Specific Contract will include details of the work to be carried out, the start date, the duration in days and any other relevant information.
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Specific Contract signed.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• Specific Contract not signed on time.</li> </ul>

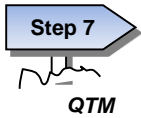
#### Step 6: Execution of the Specific Contract



What	<p>The tasks are carried out as defined in the <i>QTM Request Form</i> and its <i>Technical Annex</i>:</p> <ul style="list-style-type: none"> <li>(a) For each requested task, the SRB Unit fills in a <i>Quotation Form</i> (as per Annex II to the Specific Contract for QTM).</li> <li>(b) For each quotation form, the Contractor sends a signed offer (using the quotation form to that effect) for executing such a task.</li> <li>(c) The SRB Unit countersigns each quotation form, provided it agrees with it. Countersigned quotation forms become then binding.</li> <li>(d) The Contractor executes those tasks that are backed by a countersigned order.</li> </ul>
------	--

Parties involved	<ul style="list-style-type: none"> <li>• Contractor</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Successful completion of the task(s).</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• The tasks are not successfully completed</li> </ul>

#### Step 7: Acceptance



What	<p>The acceptance derives from the conformity of each task delivered with the specifications.</p> <p>For each task, a <i>Certificate of Conformity</i> (as per Annex III to the Specific Contract for QTM) must be issued and signed by both parties before invoicing.</p>
Parties involved	<ul style="list-style-type: none"> <li>• Contractor.</li> <li>• SRB Unit.</li> </ul>
Result	<ul style="list-style-type: none"> <li>• Accepted tasks are paid by the Contracting Authority after receipt of the Contractor's invoices.</li> </ul>
Fault	<ul style="list-style-type: none"> <li>• The task(s) delivered do not conform to the specifications</li> </ul>

#### Appendix to the “Roadmap to Order”

01. Request Form ‘Time & Means’ (TM)
02. Request Form ‘Quoted Time & Means’ (QTM)
03. Request Form ‘Fixed Price’ (FP)
04. Proposal Acceptance / Refusal
05. Offer Acceptance / Refusal
06. Extension Form ‘Time & Means’ (TM)
07. Extension Form ‘Quoted Time & Means’ (QTM)
08. Extension Form ‘Fixed Price’ (FP)

Appendix 5.01 – Request Form TM

## **REQUEST FORM**

### **Time & Means (TM)**

<b>Request Form reference</b>	SRB/UNITxx/201x/SRB.ref.nr.
<b>Framework Contract N°</b>	SRB/OP/2/2016

<b>To:</b> Contractor: ..... Contact person: .....	Phone n°: ..... Email: .....
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<i>Description of required service</i> <b>Tasks</b> (reference to attached Technical Annex): ..... .....	
<b>Profile:</b> ..... with specific knowledge and skills: ..... .....	<b>N° of days:</b> .....
<b>Profile:</b> ..... with specific knowledge and skills: ..... .....	<b>N° of days:</b> .....
<b>Required start date:</b> .....	
<b>Place of delivery:</b> .....	
<b>Y/N Date :</b> ..... (dd/mm/yy)	
<b>List Presentation Date :</b> ..... (dd/mm/yy)	

<b>From:</b> SRB Unit: ..... ..... Contact person: ..... ..... Signature: ..... .....	Phone n°: ..... Email: ..... Date: ..... (dd/mm/yy)
---	---

This Request Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.



## REQUEST FORM Quoted Time & Means (QTM)

<b>Request Form reference</b>	SRB/UNITxx/201x/SRB ref. nr.....
<b>Framework Contract N°</b>	SRB/OP/2/2016.....

<b>To:</b> Contractor: ..... Contact person: .....	Phone n°: ..... Email: .....
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<i>Description of required service</i> <b>Services</b> (reference to attached Technical Annex): ..... .....	
<b>Profile (by deliverable/task);</b> ..... ..... with specific knowledge and skills: ..... .....	<b>N° of days:</b> .....
<b>Profile (*by deliverable/task):</b> ..... ..... with specific knowledge and skills: ..... .....	<b>N° of days:</b> .....
<b>Required start date:</b> .....	
<b>Place of delivery :</b> .....	
<b>Y/N Date :</b> ..... (dd/mm/yy)	
<b>Offer Date :</b> ..... (dd/mm/yy)	

<b>From:</b> SRB Unit: ..... ..... Contact person: ..... ..... Signature: ..... .....	Phone n°: ..... Email: ..... Date: ..... (dd/mm/yy)
---	---

This Request Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

## REQUEST FORM Fixed Price (FP)

<b>Request Form reference</b>	SRB/UNITxx/201x/SRB ref. nr .....
<b>Framework Contract N°</b>	...SRB/OP/2/2016.....

<b>To:</b> Contractor: ..... Contact person: .....	Phone n°: ..... Email: .....
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<i>Description of required service</i> <b>Specifications – Service Description</b> (reference to attached Technical Annex, details of deliverables must be provided therein): .....	
<b>Expected start date</b> .....	
<b>Delay for delivery</b> (e.g. in months): .....	
<b>Place of delivery :</b> .....	
<b>Y/N Date :</b> .....	(dd/mm/yy)
<b>Offer Date :</b> .....	(dd/mm/yy)

<b>From:</b> SRB Unit: .....  Contact person: .....  Signature: .....	Phone n°: .....  Email: .....  Date: ..... (dd/mm/yy)
--	---

This Request Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

## PROPOSAL ACCEPTANCE /REFUSAL

<b>Request Form ID</b>	.....
<b>Framework Contract N°</b>	...SRB/OP/2/2016.....
<b>Your proposal reference</b>	.....

<b>To:</b>	Contractor: .....	Phone n°: .....
	Contact person: .....	Email: .....

<b>Your proposal is:</b>	
<input type="checkbox"/> <b>Accepted</b> and will be used for the establishment of a Specific Contract <i>(for a T&amp;M: mention the profile, the name and the number of days)</i>  ..... .....	
<hr/> <input type="checkbox"/> <b>Refused</b> , for following reasons ..... (dd/mm/yy) (reference to document attached):  ..... .....	
<b>Offer Date :</b>	..... (dd/mm/yy)

<b>From:</b>	SRB Unit: .....	Phone n°: .....
	Contact person: .....	Email: .....
	Signature: .....	Date: ..... (dd/mm/yy)

This Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

## OFFER ACCEPTANCE /REFUSAL

<b>Request Form ID</b>	.....
<b>Framework Contract N°</b>	...SRB/OP/2/2016.....
<b>Your offer reference</b>	.....

<b>To:</b>	Contractor: .....	Phone n°: .....
	Contact person: .....	Email: .....

**Your offer is:**

☐ **Accepted** and will be used for the establishment of a Specific Contract

*(for a T&M: mention the profile, the name and the number of days)*

.....  
.....

☐ **Refused**, for following reasons (reference to document attached):

.....  
.....

..... (dd/mm/yy)

<b>From:</b>	SRB Unit: .....	Phone n°: .....
	Contact person: .....	Email: .....
	Signature: .....	Date: ..... (dd/mm/yy)

This Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

Appendix 5.06– Extension Form TM

## EXTENSION FORM Time & Means (TM)

<b>Extension of Specific Contract Nr:</b> ..... <b>Extension Nr (1, 2, 3 etc.):</b> ..... <b>SRB Unit's Initial Request Form ID:</b> ..... <b>Contractor's initial reference ID:</b> ..... <b>Name of the person:</b> .....
---

<b>To:</b> Contractor: ..... Contact person: .....	Phone n°: ..... Email: .....
---	---------------------------------

<p><b><u>Description of the extension</u></b></p> <p>Number of days on the new Specific Contract : .. ..... <b>days</b>      <b>Level:</b> .....</p> <p><b>To specify :</b></p> <p>- <i>New technical annex (in line with the initial request) <u>or</u></i></p> <p>- <i>The terms are those specified in the initial request form and are therefore not subject to modification.</i></p> <p><b>Remaining days before the current extension:</b> .....</p>
--

<p><b>Send your offer by email before:</b></p> <p>..... (dd/mm/yy)</p>
--

<b>From:</b> SRB Unit: ..... Contact person: ..... Signature: .....	Phone n°: ..... Email: ..... Date: ..... (dd/mm/yy)
---	---

This Extension Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

## EXTENSION FORM

### Quoted Time & Means (QTM)

**Extension of Specific Contract Nr:**.....

**Extension Nr (1, 2, 3 etc.):** .....

**SRB Unit's Initial Request Form ID:** .....

**Contractor's initial reference ID:** .....

**Name of the person:** .....

**To:** Contractor: ..... Phone n°: .....  
 Contact person: ..... Email: .....

### *Description of the extension*

Number of days on the new Specific Contract:

<b>Profile:</b>	.....	<b>Days:</b>	.....
<b>Profile:</b>	.....	<b>Days:</b>	.....
<b>Profile:</b>	.....	<b>Days:</b>	.....

*To specify :*

- New technical annex (in line with the initial request) or*  
*- The terms are those specified in the initial request form and are therefore not subject to modification.*

Remaining days before the current extension:

Profile: ..... Days: .....

Profile: ..... Days: .....

**Send your offer by email before:**

\_\_\_\_ (dd/mm/yy)

**From:** SRB Unit: ..... Phone n°: .....  
 Contact person: ..... Email: .....  
 Signature: ..... Date: ..... (dd/mm/yy)

This Extension Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.

## EXTENSION FORM Fixed Price (FP)

Extension of Specific Contract Nr:.....  
 Extension Nr (1, 2, 3 etc.): .....  
 Framework Contract Nr.: .....  
 SRB Unit's Initial Request Form ID: .....  
 Contractor's initial reference ID: .....  
 Name of the person: .....

To: Contractor: ..... Phone n°: .....  
 Contact person: ..... Email: .....

### Description of the extension

Services/Deliverable(s) : .....  
 .....

*To specify :*

- *Updated technical annex (in line with the initial request) or*
- *The terms are those specified in the initial request form and are therefore not subject to modification.*

**The proposal included in the initial referenced offer remains valid**

**Send your offer by email before:** (dd/mm/yy)

From: SRB Unit: ..... Phone n°: .....  
 Contact person: ..... Email: .....  
 Signature: ..... Date: ..... (dd/mm/yy)

This Extension Form does not constitute any firm order until such time as a contractual document, signed by the Contracting Authority, has been received by you.