ProcurComp^{EU}

European Competency Framework
for Public Procurement Professionals

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European Competency Framework for Public Procurement Professionals

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TABLE OF CONTENTS

GLOSSARY OF TERMS

Term	Definition[1]
Competency framework	A model that acts as a frame of reference for individuals and organisations and provides them with tools to define, assess, and enhance their competences.
Competency Matrix	A structure that outlines and describes a set of competences that can be applied to several job profiles.
Competency/Competence	The knowledge, skills and attitudes that enable individuals and organisations to act effectively in a job or situation.
Knowledge	Factual, theoretical or practical information about a subject that an individual can acquire through education or training.
Skills	The ability to carry out a specific activity or task acquired through professional experience or practical training.
Proficiency levels	Different levels of knowledge, skills and responsibilities procurement professionals are expected to demonstrate at a specific level. Each competence is described along four proficiency levels: 1. Basic, 2. Intermediate, 3. Advanced, 4. Expert.
Target proficiency levels	Desired level of knowledge and skills expected from public procurement professionals for a specific competence.
Job profiles	A set of competences that reflect the tasks and responsibilities of an actual public procurement practitioner and corresponding target proficiency levels.
Self-assessment tool	A questionnaire which helps assess individuals' and organisations' knowledge and skills against target levels to identify competence strengths and gaps.
Generic training curriculum	A structured document that describes the standard training content and learning outcomes expected for a set of competences.
Learning outcomes	Descriptions of what individuals should know and be able to do after they complete a training.
Procurement specific competences	A category of competences specific to the management of the public procurement procedures.
Soft competences	A category of competences related to behavioural skills that are by nature transversal.
Horizontal procurement competences	A cluster of procurement competences applicable to all stages of the public procurement lifecycle.
Pre-award competences	A cluster of procurement competences related to the tasks and activities taking place before the award of a public contract.
Post-award competences	A cluster of procurement competences necessary after the award of a public contract, including contract management.
Personal competences	A cluster of soft competences related to the behaviour and attributes public procurement professionals should possess, as well as the mind-set they should demonstrate.
People competences	A cluster of soft competences enabling public procurement professionals to interact and cooperate with other practitioners.
Performance competences	A cluster of soft competences related to increasing value for money in public procurement procedures.

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[1] Cf also https://europass.cedefop.europa.eu/education-and-training-glossary/

Term	Definition[1]
Procurement	A structured procedure designed to find and agree to terms, and acquire for the purchase of works, goods and services on the market, often via a tendering or competitive bidding process.
Public Procurement	Acquisition by means of a public contract of works, supplies or services by one or more contracting authorities from economic operators.
European Public Procurement Directives	Directives establishing the rules on the procedures for procurement by contracting authorities with respect to public contracts as well as design contests within the European Union.
Strategic approach to public procurement	Use of sustainable and innovation public procurement as a powerful tool for a more responsible and strategic way of spending public money to respond to societal, environmental, and economic challenges and to support genuine competition, SMEs participation, and innovation.
Contracting Authority	State, regional or local authorities, bodies governed by public law or associations formed by one or more such authorities or one or more such bodies governed by public law.
Public procurement professionals	Any individual working in a contracting authority and is responsible for and/ or is taking part in one or several procurement stages.
Economic operator	Any natural or legal person or public entity which offers the execution of works, the supply of products or the provision of services on the market.
Procurement document	Any document produced or referred to by the contracting authority to describe or determine elements of the procurement or the procedure.
Central purchasing body	A central purchasing body is a contracting authority that acquires goods or services, awards public contracts and concludes framework agreements for works, goods or services intended for one or more contracting authorities.
Aggregation	The process of combining several procurement procedures together in order to achieve greater value and savings.
e-procurement	The process of carrying out a public procurement procedure by electronic means.
Value for money	The most advantageous combination of cost, quality and sustainability to meet a contracting authority's procurement requirements.
Life-cycle costing	All costs over the life cycle of works, supplies or services.

EXECUTIVE SUMMARY

Professionalisation of the public procurement workforce is essential to ensure that public buyers have the skills, knowledge and integrity needed to perform their jobs and tasks in compliance with the law, and in an efficient, effective and strategic manner to deliver best value for money for the citizens.

In 2017, the European Commission (EC) issued a 'Recommendation on the professionalisation of public procurement'[2] to encourage EU Member States to develop professionalisation policies and initiatives at national level aimed at increasing the professionalisation of public procurement. This Recommendation is part of the Public Procurement Strategy[3], which outlines the priorities for EU procurement policy. The European Commission supports the Member States in their efforts by providing guidance to practitioners, training, technical assistance and facilitating the exchange of good practices and innovative approaches.[4]

As part of this support, the European Competency Framework for public procurement professionals (ProcurComp[EU]) aims to valorise the procurement profession as a strategic function and to make it fit for future challenges. It is a voluntary tool developed and provided by the European Commission (DG Internal Market, Industry, Entrepreneurship and SMEs) to help contracting authorities, public procurement authorities and training organisations to identify and address competences that require strengthening.

Professionalisation and human resource management in public procurement face a number of challenges. For instance, procurement is often not a clearly defined organisational function with a corresponding training, recruitment and career path. It is frequently conducted as an additional task by civil servants that may lack specific procurement-related skills. Furthermore, business-related skills are often underrated in the public administration resulting in an overly legalistic, compliance-focused approach.

Competency frameworks are a human resource tool that define the set of knowledge and skills individuals need to possess in order to perform their job and tasks effectively and efficiently. Applied to public procurement, a competency framework can support multiple objectives. For individuals, it can help self-assess individuals' skills and strengths, identify gaps and training needs, design and plan a personal development and career path, and improve performance. At the organisational level, a competency framework can be used to assess and enhance organisational and personnel performance and to ensure a highly capable procurement function able to respond to the organisation's policy priorities.

ProcurComp[EU] is not intended to impose any particular solution on the Member States or on the organisations. It does not intend to create any restrictions or minimum requirements for the access to the procurement functions. On the contrary, it should be perceived as a voluntary and fully customizable tool aiming to:

- facilitate the recruitment, training and career development of all the professionals concerned,

- allow the organisations to steer their human resource management to fit their goals,

- improve the level of competence of the public procurement workforce as a whole, and

- make the procurement function more valued for its multidisciplinary and strategic dimension and therefore more attractive.

The process for developing ProcurComp[EU] for public procurement professionals involved both reviewing existing procurement competency frameworks and an extensive consultation process with stakeholders from international and professional organisations, central purchasing bodies, EU-level public procurement experts, and EU Member States representatives. We are very grateful to the more than 300 professionals and stakeholders who took the time to share their views with us through the Advisory Committee, interviews, workshops, focus groups and expert group meetings, and who participated in the pilot exercise which covered 30 organisations in 15 countries.

The complete ProcurComp[EU] package for Public Procurement Professionals consists of a number of elements, including:

- A **Competency Matrix**, which outlines the competences and skills public procurement professionals should have depending on the role they perform.

- A **Self-Assessment Tool**, which public procurement professionals and organisations can use to assess their levels of proficiency and organisational maturity in the different competences identified in the Competency Matrix; and

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[2] Commission Recommendation (EU) 2017/1805 of 3 October 2017 on the professionalisation of public procurement – Building an architecture for the professionalisation of public procurement: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32017H1805
[3] https://ec.europa.eu/growth/content/increasing-impact-public-investment-through-efficient-and-professional-procurement-0_en
[4] https://ec.europa.eu/info/policies/public-procurement/support-tools-public-buyers_en

- A **Generic Training Curriculum** that shows how public administrations can upskill their procurement professionals;

- A **Study on professionalisation of public procurement in the EU and beyond** providing an overview of professionalisation policies in public procurement related to competency-based human resource management in the Member States and selected third countries.

10

ProcurComp^{EU}

European Competency Framework for Public Procurement Professionals

OVERVIEW

OVERVIEW. PROCURCOMP^{EU} – A EUROPEAN COMPETENCY FRAMEWORK FOR PUBLIC PROCUREMENT PROFESSIONALS

1. WHY A EUROPEAN PROFESSIONALISATION TOOL FOR PUBLIC PROCUREMENT?

1.1. Why ProcurComp^{EU}?

Professionalisation of the public procurement workforce is essential to ensure that public buyers have the skills, knowledge and integrity needed to perform their jobs and tasks in compliance with the law, and in an efficient, effective and strategic manner to deliver best value for money for the citizens.

In 2017, the European Commission (EC) issued a 'Recommendation on the professionalisation of public procurement'[5] to encourage EU Member States to develop professionalisation policies and initiatives at national level aimed at increasing the professionalisation of public procurement. This Recommendation is part of the Public Procurement Strategy [6], which recognised the importance of a strategic approach to public procurement as a powerful tool for spending public money to respond to societal, environmental and economic challenges and to support genuine competition and innovation. The European Commission supports the Member States in their efforts by providing guidance to practitioners, training, technical assistance and facilitating the exchange of good practices and innovative approaches.[7]

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Professionalisation and human resource management in public procurement face a number of challenges. For instance, procurement is often not a clearly defined organisational function with a corresponding training, recruitment and career path. It is frequently conducted as an additional task by civil servants that may lack specific procurement-related skills. Furthermore, business-related skills are often underrated in the public administration resulting in an overly legalistic, compliance-focused approach.

A competency based approach to human resources management allows organisations to manage performance, training and career development in line with the overall strategic plan of the organisation. Competency frameworks are a human resource tool that define the set of knowledge and skills individuals need to possess in order to perform their job and tasks effectively and efficiently. Applied to public procurement, a competency framework can support multiple objectives. For individuals, it can help self-assess individuals' skills and strengths, identify gaps and training needs, design and plan a personal development and career path, and improve performance. At the organisational level, a competency framework can be used to assess and enhance organisational and personnel performance and to ensure a highly capable procurement function able to respond to the organisation's policy priorities.

The 2016 New Skills Agenda for Europe[8] highlighted the strategic importance of skills for sustaining jobs, growth and competitiveness. Furthermore, the 2018 Council Recommendation on key competences for lifelong learning[9] sets out a core set of skills necessary to work and live in the 21st century and identifies the use of the European reference

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[5] Commission Recommendation (EU) 2017/1805 of 3 October 2017 on the professionalisation of public procurement – Building an architecture for the professionalisation of public procurement: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32017H1805

[6] https://ec.europa.eu/growth/content/increasing-impact-public-investment-through-efficient-and-professional-procurement-0_en

[7] https://ec.europa.eu/info/policies/public-procurement/support-tools-public-buyers_en

[8] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52016DC0381

[9] https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018H0604%2801%29

frameworks, including competence frameworks, as a means of facilitating the development and assessment of competences and supporting learning goals.

ProcurComp^{EU} should be considered as a tool and enabler for making procurement professionals' skills and qualifications easier to understand and compare, rather than being constraining and restrictive. It is intended to act as central reference framework which national procurement professionalisation frameworks can link into, whether they are newly developed based on ProcurComp^{EU}, or existing frameworks embedded in their specific environment. By using a common language for competences, skills and capabilities that can be understood across Europe, ProcurComp^{EU} can provide a reference that can be directly adopted or adaptable to meet specific contexts and needs. The European dimension will improve transparency, comparability and has the potential to facilitate European training initiatives.

Sound administrative capacity of public administrations and more professional and strategic public procurement professionals are key determinants for making procurement organisations, functions and departments more strategic. Hence, ProcurComp^{EU} exists to help shape sound administrative capacities and help individuals and organisations think and act beyond the baseline of legal compliance and procedural approach to procurement. It also seeks to help individuals and organisations achieve better implementation of their procurement activities for higher value for money and better functioning of the single market. If public procurement professionals have better business skills and a strategic approach to procurement, they can enhance their market knowledge, improve the design of overall procurement documents and include aspects like green, social and innovation procurement.

ProcurComp^{EU} is not intended to impose any particular solution on the Member States or on the organisations. It does not intend to create any restrictions or minimum requirements for the access to the procurement functions. On the contrary, it should be perceived as a voluntary and fully customizable tool aiming to:

- facilitate the recruitment, training and career development of all the professionals concerned,

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The complete ProcurComp^{EU} package for Public Procurement Professionals consists of a number of elements, including:

- A **Competency Matrix**, which outlines the competences and skills public procurement professionals should have depending on the role they perform.

- A **Self-Assessment Tool**, which public procurement professionals and organisations can use to assess their levels of proficiency and organisational maturity in the different competences identified in the Competency Matrix [10]; and

- A **Generic Training Curriculum** that shows how public administrations can upskill their procurement professionals.

- A **Study on professionalisation of public procurement in the EU and beyond** providing an overview of professionalisation policies in public procurement related to competency-based human resource management in the Member States and selected third countries.

1.2. Who is ProcurComp^{EU} for?

ProcurComp^{EU} is a reference framework of procurement competences that a variety of procurement stakeholders can use.

ProcurComp^{EU} is primarily targeted at public procurement practitioners and managers, and all types of contracting authorities and organisations that vary in terms of their size, capacity, practices and cultures. Therefore, ProcurComp^{EU} can be used according to the goal sought by the organisation, region or government. It does not aim to provide a one-size-fit all approach. Rather, it can be adapted to the various contexts, environments and organisational structures in which procurement practitioners operate.

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[10] A Self-Assessment user guide, explaining the technical steps to perform a self-assessment at individual or organisation level using the Self-Assessment Tool, is available as a separate document.

In addition, ProcurCompEU can also benefit other type of stakeholders that play a key role in the professionalisation of public procurement, namely: national governments and policy makers, education and training institutes, certification bodies.

Individuals and professional bodies

Individuals refer to any public procurement professionals taking part in any phase or process of public procurement procedures. This include practitioners with many different job profiles ranging from clerks, procurement lawyers, procurement specialists, junior and senior buyers, category specialists, strategic procurement officers, procurement managers and heads of procurement functions or departments in contracting authorities.

Procurement-oriented professional bodies are sectoral, regional, national or international associations operating as networks sharing expertise, tips and good practices among their members. Such networks of organisations support their private and public members in becoming more strategic and professional. They promote the development of the profession by defining standards and common understanding of new practices in the field, creating environmental and societal values, and fostering digitalisation and innovation. Often they run their own assessment, training and certification programmes.

Organisations and Contracting Authorities

Small organisations refer to contracting authorities where only a small set of individuals perform procurement procedures from A to Z. These organisations may not have a dedicated human resources practice responsible for the recruitment and management of their procurement workforce. In many cases, those responsible for public procurement in small organisations do so only on a part-time basis, in addition to other responsibilities. They work in municipalities, small cities and small public bodies. Small organisations tend to contract consultants to perform specific tasks and activities deemed technical and for which the desired level of expertise is not present.

Large organisations are contracting authorities that have a dedicated public procurement function and well-defined HR management practices. They can be ministries, regions or cities, central purchasing bodies, or large institutions like hospitals or universities. Tasks and responsibilities are split among different job profiles, meaning that there is a greater degree of specialisation in roles, for example in the different steps and phases of a procurement procedure in which different profiles intervene. There is also a greater hierarchy among the procurement workforce, with the presence of line managers, team leaders and category managers in charge of specific work streams related to public procurement. Larger organisations may also include a dedicated legal expert or department.

Authorities and policy makers

Member States public procurement authorities and policy makers define the rules and policies regarding public procurement supporting an effective public spending by contracting authorities and entities to the benefit of the society. They have development, coordinating and supervisory roles as they ensure that rules and procedures are correctly interpreted and understood and that public procurement is performed in compliance with the law, while ensuring the greatest possible value for money. Such authorities may be dedicated public procurement offices or agencies, or a specific directorate or department within a Ministry. They are also responsible for the professionalisation of public procurement by providing analysis and legal and technical advice through telephone hotlines, guidance and template documents, as well as practical capacity-building tools including training and seminars.

Training organisations and certifying bodies

Training organisations (public or private training providers, institutes, associations, public administration schools and universities) refer to public and private training organisations at national, European and international level delivering procurement-oriented courses. They contribute to the professionalisation of public procurement professionals by providing training courses on the legal, procedural, technical and commercial aspects of public procurement.

In some Member States, **certifying bodies** also offer mandatory or voluntary certification and accreditation schemes in public procurement. Certification schemes can be mandatory (sometimes regulated by law) and non-mandatory and define a specific set of skills and knowledge for individuals in order to be able to perform a specific role in public procurement procedures. They can be primarily focused on the knowledge/skills necessary for the tendering phase or target a wider skillset, including commercial and professional skills necessary to carry out the pre-award and post-award phases of the procurement cycle.

1.3. How was ProcurComp^{EU} developed?

The process for developing ProcurComp^{EU} for public procurement professionals involved both reviewing existing procurement competency frameworks and an extensive consultation process with stakeholders from international and professional organisations, central purchasing bodies, EU-level public procurement experts, and EU Member States representatives.

Benchmarking of existing policies and tools

In the process of developing ProcurComp^{EU}, we have reviewed a number of other competency frameworks from the public procurement field and beyond. Many of these were used as inspiration in developing the structure and content of ProcurComp^{EU}. In addition to available public sector materials, competency frameworks developed and implemented for the private sector were also used as inspiration.

A stock-taking study in the EU Member States and beyond was carried out with the objective to investigate the state of play of public procurement professionalisation in the EU Member States and third countries and identify professionalisation good practices. It includes country fact sheets for each EU Member State, and case studies of good practice initiatives. The findings from the study were a key input to the design of ProcurComp^{EU} and helped to ensure all its elements are tailored to the current practices, challenges and priorities in public procurement in specific national contexts.

Input form stakeholder consultations

The content of ProcurComp^{EU} reflects input from a broad range of consultations and interactions carried out with public procurement stakeholders, which have been in contact with ProcurComp^{EU} or other competency frameworks and can therefore provide advice and tips on what works and what does not in specific procurement professional contexts. More than 100 qualitative interviews were conducted with public procurement stakeholders including public procurement authorities, supervisory bodies, large and small contracting authorities, central purchasing bodies, professional procurement associations and training and certifications bodies, based within and outside the EU.

The inputs gathered during these interviews contributed to the development of a balanced and comprehensive understanding of the key issues around the professionalisation of public procurement within the EU Member States. Practitioners' feedback on recent initiatives and priorities in the professionalisation of public procurement at national and international level helped ensure that ProcurComp^{EU} takes account of the latest developments and provides relevant solutions.

Interactions with public procurement stakeholders of many kinds and from many backgrounds were also carried out via several roundtable discussions and participatory workshops. Comments, ideas and suggestions raised during these interactions were incorporated to ensure that ProcurComp^{EU} speaks to the concerns of the target audience: public procurement practitioners.

User feedback from a pilot exercise

ProcurComp^{EU} intends to be practical and, as much as possible, based on real-life situations. Some of the most important input comes from those who have first-hand experience using ProcurComp^{EU}, through their participation in the pilot exercise. Special thanks should be made to the 151 practitioners from a total of 33 organisations including municipalities, regional authorities, executive agencies, government ministries, central purchasing bodies across 14 countries including Austria, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Malta, the Netherlands, Norway, Slovakia, Slovenia and Spain and the European Investment Bank.

Coordination of the project

ProcurComp^{EU} has been developed through a collaborative process involving a broad range of international stakeholders.

A dedicated Advisory Committee was set up to provide technical input and expert review for each of the ProcurComp^{EU} components through regular meetings, as well as valuable indication of relevant stakeholders to consult with at national or regional level. Members of the Advisory Committee included representatives of the following organisations: the OECD, Organisation for Economic Co-operation and Development; CIPS, Chartered Institute of Procurement and Supply; IFPSM, International Federation of Purchasing and Supply Management; LOGY, Finnish Association of Purchasing and Logistics; BBG, Austrian Federal Procurement Agency; Ministry of Economy, Entrepreneurship and Crafts, Croatia; Competition and

Consumer Authority, Denmark; HSPPA, Hellenic Single Public Procurement Authority, Greece; Ministry of Finance, Finland; Ministry of Economy Finance, Action and Public Accounts, France; Prime Minister's Office, Hungary; Office of Government Procurement, Ireland; Consip, Italian Central Purchasing Body; Ministry for Finance and Financial Services, Malta; eSPap, Government Shared Services Entity, Portugal; Difi, Norwegian Agency for Public Management and e-Government; ANAP, National Agency for Public Procurement Romania; Ministry of Finance, Spain; and private experts.

The project was also presented and discussed in several European Commission expert groups and events and to various stakeholder audiences, including the Expert Group on Public Procurement (EXPP), the Stakeholder Expert Group on Public Procurement (SEGPP), the European Network of Central Purchasing Bodies, as well as numerous conferences and events such as, in 2019, the meeting of the public procurement experts in the health sector and a workshop dedicated to the project during the European Week of Regions and Cities (EWRC).

The work on ProcurCompEU was coordinated by the Professionalisation of Public Procurement Team of the European Commission's Directorate General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW-G1). The project was overseen by a Commission internal Steering Group composed of DG GROW, DG REGIO, DG TAXUD and DG EMPL. Technical assistance to produce the Competency Framework was provided by PwC.

We are very grateful to the more than 300 professionals and stakeholders who took the time to share their views with us through the Advisory Committee, interviews, workshops, round-table discussion and expert group meetings, and who participated in the pilot exercise.

2. WHAT IS PROCURCOMP^{EU}?

2.1. The main components of ProcurComp^{EU}

The ProcurComp^{EU} Package is a set of three tools that can be used all together or independently. The ProcurComp^{EU} components have been developed to complement and build on each other, as well as to be standalone tools that can be used independently.

PART I.   The ProcurComp^{EU} Competency Matrix

The ProcurComp^{EU} Competency Matrix outlines the core competences (knowledge, skills and attitudes) public procurement professionals should demonstrate in order to perform their job effectively and efficiently and carry out public procurement procedures that bring value for money.

The core activities, tasks and responsibilities public procurement professionals usually perform are described and structure around 30 competences.

The competences are grouped in **two main categories**: procurement specific competences, and soft competences. The categories are then divided into **six clusters**, three per category:

- **Procurement-specific competences**:
    - Horizontal
    - Pre-award
    - Post-award

- **Soft competences**:
    - Personal
    - People
    - Performance

Each competence is described along **four proficiency levels**: 1. Basic, 2. Intermediate, 3. Advanced, 4. Expert.

The Competency matrix can be used primarily to assess individuals' and organisations' competences against pre-defined targets. Based on that, it can be used to support the professional development of the staff or the achievement of the organisation's procurement objectives.

In conjunction with the rest of the ProcurComp^{EU} tools, the matrix can help to:

- **Identify and structure the various procurement roles** that are needed in a procurement team and in an organisation, together with the tasks that need to be performed within a specific role;

- **Perform individual gap analysis**, to assess an individual's actual proficiency level in relevant competences against the pre-defined target levels; and

- **Perform organisational gap analysis**, to identify strengths and weaknesses in terms of available competences within an organisation.

- **Define measures** to align competences with the required targets for the job profiles, for example via training or recruitment, and support the policy orientations of the organisation as a whole.

PART II.   The ProcurComp^{EU} Self-Assessment Tool

The ProcurComp^{EU} Self-Assessment Tool is composed of several key elements:

- A self-assessment questionnaire

- Templates for job profiles

- A calculation tool for computing individual and organisational assessment results.

The matrix supports individuals taking the Self-Assessment Tool to correctly assess their knowledge and skills in each of the competences tested in the tool. The competence descriptions in the Competency matrix refer to the knowledge that individuals should have and are thus the basis for responding to knowledge questions. The proficiency levels defined for each competence are the basis for responding to the skills questions. Individuals can use the Self-Assessment Tool to test their current proficiency level against the corresponding job profile.

The organisation should define the desired level of knowledge and skills expected from public procurement professionals, by setting target proficiency levels for all the job profiles existing within the organisation. Examples of job profiles are: public buyer, procurement clerk, procurement specialist, legal advisor, category specialist, purchasing agent, procurement technician, etc. They are always specific to each organisation and can change over time. To do this, organisations can use or adapt the common job profiles proposed in the ProcurComp^{EU} Self-Assessment tool or create new ones, referring to the descriptions of competences and proficiency levels in the Competency matrix.

Based on the individual assessment results, individuals are able to quickly identify areas where their current proficiency level meets the target, exceeds the target, or falls short of the target level for their job profile.

Organisations can compile and aggregate individual results and obtain an organisational level assessment indicating competency gaps at job profile and organisational level.

PART III.   The ProcurComp^{EU} Reference Training Curriculum

The ProcurComp^{EU} Reference Training Curriculum lists all learning outcomes public procurement professionals should know and be able to demonstrate after having attended a training for a certain proficiency level.

Based on the competency gaps identified at individual, profile and organisation level, the organisation can use the Competency matrix and specifically the Generic Training Curriculum to decide how to address them best, including via: learning and development (training, eLearning, capacity building measures, etc.), recruitment hiring external expertise, or changes to organisation policy or strategy such as cooperating with other contracting authorities through exchange of good practice, joint procurement or delegating to central purchasing bodies.

The organisation can also, based on the overview of existing competences, plan the strategic development of the organisation as a whole, according to its future policy priorities. For example, if the organisation wants to develop sustainable or innovation procurement or if it wants to put in place state-of-the-art eProcurement processes, it may orient its training and recruitment strategy in a way to obtain the right competency mix.

2.2. The ProcurComp^{EU} mission statement

To support the users of ProcurComp^{EU} and guide developers in charge of implementing the ProcurComp^{EU} tools at national, regional and organisational levels, the following mission statement provides an overview of the underlying philosophy and principles adopted during their elaboration and subsequent revisions of the ProcurComp^{EU} tools.

ProcurComp^{EU} is a voluntary and free to use tool

ProcurComp^{EU} is a key component of the European Commission's professionalisation policy. It provides a structure and content for application by many types of users from national governments, public procurement authorities, educational and training institutions including higher education and certification providers, and practitioners. In this broad application context, ProcurComp^{EU} is designed to support initiatives and policies for public procurement professionalisation. Any individual and organisation engaged in procurement professionalisation efforts, procurement human resource planning and competency-based management is invited to use it in the way that can most conducive to achieving their own professionalisation goals.

ProcurComp^EU is an enabler

ProcurComp^EU is designed to be a framework to empower and valorise users, not to restrict them. Applying ProcurComp^EU should not lead to any restriction in the hiring process based on nationality or residence. It should also not create any disproportionate requirements.[11] The competences are understood as the "desired" or "optimal" competences, but in no case do they mean "minimal requirements" in a sense that would restrict the access to the procurement functions. Similarly, the self-assessment tool is not only intended to provide a view of its users' current capacity and skills level and organisational maturity, but also to trigger interest from them to acquire new knowledge and skills and to consciously build the progress in their role and to steer the organisation's capacity as a whole towards achieving its strategic goals.

ProcurComp^EU is customisable

ProcurComp^EU provides a common set of competences, knowledge, and skills public procurement individuals and organisations need to do their jobs well. However, because every procurement professional and organisation is different, ProcurComp^EU can be tailored to a wide variety of organisational contexts and needs. Getting value from ProcurComp^EU does not require using each and every component of the framework, nor does it require the use of each and every competence defined in the ProcurComp^EU Competency Matrix. As such, the way of implementing ProcurComp^EU in a given context should be clearly defined to ensure the tools correspond to the needs and objectives of the organisation.

ProcurComp^EU is a common reference for the EU – and beyond

ProcurComp^EU was established as a framework to support mutual understanding and harmonisation of procurement knowledge and skills through the articulation of competences required and demonstrated by public procurement professionals. It intends to provide a common reference for competency-based human resource management allowing organisations to manage performance, training and career development in line with the overall strategic plan of an organisation. By using a common language for competences, skills and capabilities that can be understood across Europe and beyond, ProcurComp^EU can be directly adopted or adapted to meet specific contexts and needs. The European dimension will improve transparency, comparability and has the potential to facilitate European-level training initiatives as well as exchange of good practices with other regions beyond the European Union.

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[11] Directive (EU) 2018/958 of the European Parliament and of the Council of 28 June 2018 on a proportionality test before adoption of new regulation of professions, OJ L 173, 9.7.2018; https://eur-lex.europa.eu/eli/dir/2018/958/oj

3. WHAT CAN PROCURCOMP^{EU} BE USED FOR?

3.1. Individual competency analysis and development

While ProcurComp[EU] is designed to operate also at the organisational level, it is first implemented at the individual level. This means that any individual can make use of the ProcurComp[EU] tools for their professional development, whether as a member of a large team of specialised practitioners, or as a staff member of a small contracting authority for whom public procurement is not a primary responsibility, or external experts and consultants. Indeed, it could even be used by individuals who are not currently working in public procurement, such as students or other officials envisaging to work in public procurement.

Individuals can use the Competency Matrix and the Self-Assessment Tool to explore their current public procurement capacity, knowledge and skills, their future professional goals and the priority gaps between them. This can be facilitated by using one of the pre-defined ProcurComp[EU] job profiles, a profile adapted by a manager or HR professional in their organisation, or a profile they have tailored to their personal goals.

Individuals can use the results of their competency analysis to identify areas in which they can upskill themselves to reach their desired level of proficiency, or to identify the competences they would need to develop in order to specialise within a certain job profile (e.g. category manager). The Generic Training Curriculum can support such individuals in identifying training activities that are relevant for supporting their professionalisation goals.

As an example, the Chartered Institute of Procurement and Supply (CIPS) established the Global Standard for Procurement and Supply[12] which is a comprehensive procurement competency framework used by public and private practitioners and organisations. It is structured around four pillars (infrastructure, process, performance and people development) and 11 themes such as spend management, metrics and measurements, ethics, and technology, further divided into individual segments such as logistics control, contract administration, delivering value for money, team in procurement. Each segment is described in terms of knowledge and capability required at five proficiency levels namely: tactical, operational, managerial, professional, and advanced professional. At the individual level, the Global Standard can help to identify current competency levels and the knowledge and capabilities needed to move onto the next career stage. It can also help individuals to develop a personal development plan to address the knowledge and skills gaps identified though training courses developed by CIPS for each of the segments covered in the Global Standard and monitor their progress by referring to other proficiency levels.

Inspired by the CIPS standard, the Scottish Government established a national procurement development framework[13] composed of a competency matrix that sets out the skills and competency levels required by public sector staff involved in the procurement process, and a self-assessment tool to self-assess their skills, identify training and development needs and help with career planning and personal development.

3.2. Organisational competency gap analysis

Procurement organisations, functions and teams can use the ProcurComp[EU] tools to assess whether their staff members possess the right level of knowledge and skills to achieve their current policy, business and organisational goals. In other words, the ProcurComp[EU] tools can be used to conduct an organisational competency gap analysis comparing staff members' current competency levels with pre-defined targets.

Similar to the first use case, the Competency Matrix can be used to determine the set of competences that are relevant to each of the job profiles present within the organisation, function or team, and to set the appropriate target proficiency level for those competences.

The Self-Assessment Tool can be used to identify gaps between the target level and the actual level of knowledge and skills of individuals that belong to the targeted job profile. All staff members' assessment results can further be aggregated to get a helicopter view of the competency strengths and competency gaps.

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[12] CIPS Global Standard for Procurement and Supply: https://www.cips.org/en/knowledge/global-standard-for-procurement-and-supply/
[13] Scottish Government's national procurement development framework: https://www.gov.scot/publications/scottish-procurement-competency-framework/

Procurement organisations, functions or teams that identify competency gaps can further decide the best way to go about addressing those gaps. This may involve attending training, recruiting new profiles with the missing knowledge and skills, or by collaborating with other individual experts in some respects and help others enhance their knowledge and skills.

The Scottish national procurement development framework is also used by organisations of different types and in sizes including ministries, municipalities, schools, universities, or the police force. Such organisations use it to carry out regular organisational competency gap analysis exercises which allow them to ensure that they have the right people with the right skills and experience in the right place at the right time to deliver to the best procurement outcome.

Another example is the Best in Class Procurement tool [14] developed by the Finnish Association of Purchasing and Logistics (LOGY) launched in 2015 with the goal to support member organisations from the private and public sector in developing their procurement function. The tool works as an organisational self-assessment tool that provides organisations with a description of their procurement function, allows them to benchmark themselves against other member organisations, and points out areas where the organisation could improve the performance of its procurement activities. The tool requires the organisation to provide background information on its activities (e.g. branch of business, procurement spending, etc.) and answer a set of 14 questions related to its procurement performance and use of good practices in different categories (e.g. about whether the procurement function has and uses a documented model to evaluate its competences). The assessment results indicate the organisation's average score (on a scale of 1-5) in the different categories assessed, the average score of other organisations of similar size and sector, the gap (if any) between these two scores, and an indication of the top quarter average scores.

When competency gaps are identified and needs for development or recruitments are targeted, organisations can use the framework to ensure that they attract, develop and retain talent, and enable a learning culture and environment where staff members are offered the opportunity to develop and improve in line with their own professional goals.

3.3. Performing a maturity assessment for future goals

Whereas a competency gap analysis can be used to assess an individual or organisation's capacity to meet current needs, a maturity assessment is used to assess suitability for future growth or specialisation. In this context, the approach that the organisation should take to define job profiles for its staff members should shift from an "as is" situation to reflect a desired "to be" situation, in order to support the development of an action plan to achieve growth, improvement or specialisation objectives.

The Competency Matrix and the Self-Assessment Tool can help define the new competences necessary for an organisation to achieve new procurement policy objectives, and the ways to achieve them. By mapping existing competences, procurement organisations, functions or teams can realistically set future goals, and identify the relevant knowledge and skills that will serve to achieve them. In particular, it can help identify new procurement job profiles that can be filled through recruitment or identify which of its staff members have skills and expertise they can leverage to help others grow and develop new skills.

For example, the administration of the Dutch city of Haarlem was looking to expand their use of environmentally sustainable public procurement and innovation procurement and shift to circular procurement. As part of this process, they mapped out the relevant competences and the target levels for each of their key procurement job profiles, and then used these targets to define the organisation's learning and development strategy.

Similarly, the Norwegian Agency for Public Management and eGovernment (Difi) developed a procurement strategy tool [15] which provides support to contracting authorities looking to define and adjust their procurement strategy in the long term. The strategy tool is complementary to the organisational self-assessment tool provided by Difi and helps the contracting authorities to analyse the current state of their procurement strategy, plan activities for the upcoming year and measure developments by comparing to earlier results. In addition, Difi regularly conducts a maturity survey of contracting authorities. The results provide a knowledge base on the state of maturity of procurement functions in the public sector and are used to develop and improve work in the field.

ProcurComp^{EU} can be used for this purpose, providing a framework for assessing needs and priorities and tools for addressing identified maturity gaps via training or recruitment.

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[14] Finnish Association of Purchasing and Logistics' Best in Class Procurement tool: https://www.logy.fi/tietoa/best-in-class-tyokalut.html
[15] Norwegian Agency for Public Management and eGovernment's procurement strategy tool:
https://www.anskaffelser.no/verktoy/analyseverktoy/selvevalueringsverktoy&usg=ALkJrhiA628FDoDAnxnjBiJXndX-ydwSXA

3.4. Joint competency assessment by multiple procurement organisations

Multiple procurement organisations, functions or teams from a same geographical region, or organisations with a similar function (central purchasing bodies, professional associations) or scope (working in the same sector of activity like health or innovation) may want to coordinate their efforts in carrying out organisational gap analyses and use the results as a basis for achieving common benefits. The results of a joint competency assessment, for example of municipalities in the same region, could be used to support requests for policy response or investment in procurement professionalisation by the regional authorities.

Some procurement organisations may want to identify areas for cooperation in order to complement each other's skills and/or support each other in addressing competency gaps. This is particularly relevant for small contracting authorities that may not have the capacity and resources to employ full-time procurement specialists. Conducting a joint competency assessment using the Competency Matrix and Self-Assessment Tool in comparable ways (e.g. using the same job profiles), may inform such organisations about their respective strengths and weaknesses and better support the implementation of joint actions to achieve synergies.

Procurement organisations may also be interested in benchmarking their performance against each other and identifying areas for improvement, which could be addressed, for example, by exchanging experiences and cooperating in the development of a joint training offering in response to identified common competency gaps based on the Generic Training Curriculum.

Such cooperation can be illustrated by the Global Standard in Purchasing and Supply Management[16] developed by the International Federation of Purchasing and Supply Management (IFPSM) for its 48 members across the world. With a view to serve purchasing and supply management professionals and the organisations for which they work worldwide, IFPSM created the Global Standard that reflects a mix of knowledge, learning and skills appropriate to the profession and against which education programmes (typically with a duration of three to four years such as Bachelor's degree programmes) can be assessed or accredited. The Global Standard provides generic statements/ descriptors of attributes that a professional in the field should demonstrate, such as having comprehensive knowledge, understanding and acumen across the fields of strategic supply chain management or knowledge and understanding of the different tools, techniques, models and methodologies of purchasing and supply management. The Global Standard aims to assure employers that prospective employees who have graduated from an accredited programme have the required minimum level of knowledge and skills in the field. At the same time, it assures students that the educational programme they are enrolling in will provide them with knowledge relevant to employers' needs and with a qualification recognised around the world.

3.5. Designing official job profiles

As part of the overall human resources management of the public administration, some Member States maintain a database or register of civil service job profiles, including public procurement job profiles. Individual entries include job descriptions of the kinds of competences public procurement professionals should have and the kinds of tasks they should be able to perform. The Competency Matrix can be a valuable support tool in this regard, as it ensures harmonisation of job profiles titles, and supports the content definition of job profiles based on the same reference point.

Job profiles are also used to prepare job descriptions for recruitment (see use case 6). When organisations, regions, and governments use ProcurComp[EU] as a reference for defining their job profiles, they will also contribute to the recognition of the public procurement function as a profession.

Procurement organisations and teams willing to use the ProcurComp[EU] tools should invest some time upfront to carefully map and develop their job profiles, as it makes it easier for staff members to use them later. All staff members (full-time and part-time) involved in at least one procurement activity should have a job profile tailored to their role and

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[16] International Federation of Procurement and Supply Management's Global Standard: https://www.ifpsm.org/global-standard

reflecting their tasks and responsibilities. Such job profiles allow staff members to do their specific job in their specific organisation and assess only those competences that are required to do their job.

An example of the use of job profiles can be found in the official registry of State civil service job profiles (RIME[17]) established by the French State Procurement Directorate. The registry defines a purchasing job family which contains five job profiles that the French State administration uses for recruitment and performance assessment purposes. Each job profile includes a specific 'know-what' and 'know-how' elements similar in content to the proficiency levels in the Competency Matrix.

Another example is the database of procurement job roles developed by the Scottish contracting authorities using the national procurement competency development framework.[18] The roles included range from buyer, contract manager, team leader, administrator, category manager, corporate procurement officer, head of procurement, lead procurement officer, assistant procurement officer, to eProcurement manager, senior procurement specialist, procurement co-ordinator, and procurement business partner.

3.6. Recruitment of procurement staff

Recruitment may be the preferred approach when competency gaps identified in the organisational competency gap assessment (see use case 2) are more substantial and cannot be met by upskilling profiles already present in the organisation.

Using the Competency Matrix and job profiles in the recruitment process can lead to a faster, targeted, and more efficient hiring process. Defining job profiles on the basis of the Competency Matrix will bring consistency and comprehensiveness across the job descriptions. It will also ensure that the individuals recruited using the same reference have the right competency and the right level of knowledge and skills, thereby ensuring a better fit with the job position filled. It can also help to better align recruitment with organisational goals.

The content of the Competency Matrix and Self-Assessment Tool can also be used to conduct competency-based interviews that evaluate the needed knowledge and skills.

For example, the Federal Procurement Agency (BBG), which is the main central purchasing body in Austria, developed an internal procurement competency framework and a comprehensive training curriculum for the professionalisation of its staff and for the recruitment and onboarding of new employees. First, the job description is elaborated using the competences listed in their framework. During the recruitment process, the competency framework is used to assess whether the applicant actually possess the knowledge and skills in the competences BBG needs to obtain or reinforce. Once the position is filled, the new employee takes part in the BBG onboarding programme and follows a series of training courses that BBG considers to provide the minimum knowledge and skills a new joiner should have to be able to start working.

3.7. Outsourcing of procurement activities

Many contracting authorities address short-term needs for support in their procurement activities by outsourcing certain roles or tasks to staff from other departments in their organisation or external experts. This process can be facilitated through the use of the ProcurComp[EU] tools.

The results of the organisational competency gap analysis can be used to identify the areas where additional expertise is needed based on the procurement plan of the organisation while the ProcurComp[EU] job profiles and the Competency Matrix can be used to define the levels of knowledge and skills that are sought by the organisation and to assess the suitability of candidates (similar to use case 6).

Concretely, procurement organisations may, for instance, want to involve external experts in the tender evaluation committee in order to benefit from their business or sectoral expertise and knowledge when analysing the bids received. The Competency Matrix can be used to define the skills and knowledge needed from such individuals in order to perform this task.

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[17] https://www.fonction-publique.gouv.fr/biep/repertoire-interministeriel-des-metiers-de-letat
[18] https://www.gov.scot/publications/scottish-procurement-competency-framework/

3.8. Developing procurement training curriculum and content

When the competency gaps identified based on the use of the Self-Assessment Tool for an organisational competency gap analysis are limited, training may be the preferred approach for upskilling the procurement team members to their targeted level of proficiency.

Governments and procurement organisations can use the Generic Training Curriculum as the basis for establishing a comprehensive education curriculum for the development of procurement, for targeted training courses or for the development of a Procurement Academy.

Similarly, large procurement organisations can use the Curriculum to make a structured evaluation of how their existing training offer can address the competency gaps identified. Based on this review, they may want to update the content of existing courses to ensure their comprehensiveness and alignment with the Generic Training Curriculum or to create new training modules.

Small organisations which do not have the capacity and resources to build their own training courses may want to use the Generic Training Curriculum to identify available training courses on the market that would be relevant for addressing the competency gaps identified. Existing training providers (e.g. universities and private sector providers) can use the Curriculum to ensure that their training offer is comprehensive and includes the content relevant for procurement organisations' training needs.

An example of the development of a procurement training curriculum can be found in Norway, where in 2017 the Norwegian Agency for Public Management and eGovernment (Difi) founded the Public Procurement Academy[19]. The Academy was set up with the goal to increase the overall professionalisation of procurement staff in Norway and strengthen the recruitment of procurement professionals to meet the future needs of contracting authorities. The Academy offers Research and Education programmes. The education curriculum covers various domains related to procurement, including economy and law, project management, market dialogue, market analysis, negotiation skills, organisational psychology, innovation and corporate social responsibility.

The Federal Procurement Agency of Austria (BBG) has also recently developed a comprehensive training curriculum for its staff. The curriculum is also offered to other central purchasing bodies (CPBs). The design of the curriculum started by identifying the key competences and learning outcomes needed by the organisation's procurement professionals. On this basis, BBG developed coursework that would get staff with different levels of knowledge and skills to their target proficiency level.

3.9. Developing certification schemes

A growing trend in procurement professionalisation is the introduction of official certifications for procurement experts. The certification scheme delineates a list of subjects that a candidate has to master in order to obtain the certificate. In order to ensure that they do, the certification scheme can be accompanied by a recommended training curriculum and requires passing a written exam.

Certifications schemes promote professionalisation by valorising the broader set of skills a procurement practitioner needs to have to do the job well, and by requiring that qualified professionals are involved in procurement procedures, especially those above a given minimum value.

Such a certification scheme was established in Croatia as part of their accession to the EU. It requires candidates to attend 50 hours of training and to pass a written examination in order to become certified public procurement experts. The certification is valid for 3 years and can be renewed after completing a 32-hour refresher course. The certification curriculum covers a number of topics, including legislation, implementation strategies, evaluation, and prevention of fraud and corruption. The scheme does not, however, impose the certification on all public buyers to ensure that their staff is certified. Rather, it requires that each procurement procedure is verified by a certified buyer, whereby the certified buyer can be staff of the organisation, staff of another organisation, or a private service provider such as a consultant or a lawyer.

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[19] Norway's Public Procurement Academy: https://anskaffelsesakademiet.no/om-anskaffelsesakademiet/

The ProcurComp[EU] tools could be used to support the development of a certification scheme, in particular to ensure the comprehensiveness of the curriculum and to target the right proficiency levels for different competences. The Competency Matrix can be used to support the definition of the competences, knowledge and skills required by the certification scheme, while the Generic Training Curriculum can help create the content of the training modules that will be required to attend as part of the certification scheme. It should be made clear however that any certification scheme should not lead to any restriction in the hiring process based on nationality or residence. It should also not create any disproportionate requirements.[20]

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[20] See Directive (EU) 2018/958 of the European Parliament and of the Council of 28 June 2018 on a proportionality test before adoption of new regulation of professions, OJ L 173, 9.7.2018. Available on: https://eur-lex.europa.eu/eli/dir/2018/958/oj

26

ProcurComp^{EU}

European Competency Framework for Public Procurement Professionals

PART I. THE COMPETENCY MATRIX

PART I. THE PROCURCOMP^{EU} COMPETENCY MATRIX

1. HOW TO READ THE PROCURCOMP^{EU} COMPETENCY MATRIX?

1.1. Structure of the Competency Matrix

The Competency Matrix outlines the core competences public procurement professionals should demonstrate in order to perform their job effectively and efficiently and carry out public procurement procedures that bring value for money.

There are **30 competences** in the Competency Matrix grouped in **two categories**:

- **Procurement-specific competences**, which encompass the competences necessary at each stage of the public procurement lifecycle. They are derived from the knowledge and skills required to perform the main tasks and activities of a procurement stage.

- **Soft competences**, which represent the soft skills public procurement professionals should have in order to master procurement specific competences. Hence soft competences complement procurement specific competences. By nature, soft competences are transversal competences.

Within each category, competences are further grouped into **competence clusters**, as described in the Figure below.

Figure 1: Clusters of competences
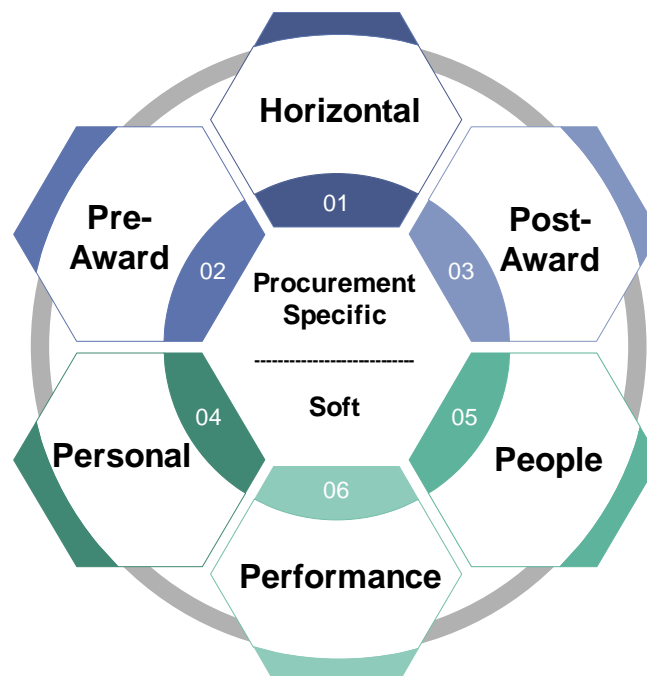
Procurement specific competences:

- **The "horizontal" cluster** encompasses competences applicable to all stages of the public procurement lifecycle;

- **The "pre-award" cluster** includes all competences required to perform all the tasks and activities taking place before the award of a public contract;

- **The "post-award" cluster** contains competences necessary for the contract management after the award of a public contract.

Soft competences:

- **The "personal" cluster** captures the behaviours, skills and attributes, public procurement professionals should possess, as well as the mind-set they should display according to their job profile;

- **The "people" cluster** comprises those competences enabling public procurement professionals to interact and cooperate with other professionals, and to do so in the most professional manner;

- **The "performance" cluster** includes all competences public procurement professionals need to have in order to increase value for money in public procurement procedures.

1.2. Overview of the 30 ProcurComp^{EU} competences

An overview of the **30 competences** contained in the Competency Matrix is available in the table below.

Table 1: Overview of competences

Category of competence	Cluster of competences	Competence
Procurement specific	**Horizontal**	1. Planning
		2. Lifecycle
		3. Legislation
		4. e-Procurement and other IT tools
		5. Sustainable procurement
		6. Innovation procurement
		7. Category specific
		8. Supplier management
		9. Negotiations
	Pre-award	10. Needs assessment
		11. Market analysis and engagement
		12. Procurement strategy
		13. Technical specifications
		14. Tender documentation
		15. Tender evaluation
	Post-award	16. Contract management
		17. Certification and payment
		18. Reporting and evaluation
		19. Conflict resolution and mediation
Soft	**Personal**	20. Adaptability and modernisation
		21. Analytical and critical thinking
		22. Communication
		23. Ethics and compliance
	People	24. Collaboration
		25. Stakeholder relationship management
		26. Team management and Leadership
	Performance	27. Organisational awareness
		28. Project management
		29. Business and performance orientation
		30. Risk management and internal control

1.3. Structure of the proficiency levels

The Competency Matrix is structured around **competence descriptions** and **proficiency level descriptions**. [21]

Competence descriptions provide a detailed explanation of each competence, its underlying concepts and policies. Where relevant, competence descriptions also indicate the **knowledge** required to master this competence, namely the factual information about each competence that procurement professionals can acquire through education or training.

While the type of knowledge for a given competence remains the same, the breadth of knowledge and skills increases across **four proficiency levels**: 1. Basic, 2. Intermediate, 3. Advanced, 4. Expert.

Proficiency level descriptions define the **skills and responsibilities** procurement professionals should be able to demonstrate at a specific level. As a general rule, the mastery of the skills required at a specific level implies the mastery of the skills required at all preceding proficiency levels.

The four proficiency levels are explained in the table below.

Table 2: Proficiency level descriptions

ProcurComp^{EU} proficiency levels	Description of the proficiency levels
1. Basic	- You demonstrate **basic factual knowledge/ awareness** of the procurement field; - You have **basic practical skills**, required to use relevant information in order to carry out simple tasks and activities of public procurement processes; - You perform quality work and acquire new skills **under direct supervision** and within a structured context.
2. Intermediate	- You demonstrate **factual and theoretical knowledge** of public procurement and related fields; - You have **a range of cognitive and practical skills** required to use relevant information in order to carry out recurring procurement tasks and solve simple problems; - You are able to carry out **public procurement processes** and tasks with little supervision.
3. Advanced	- You demonstrate **advanced practical and theoretical knowledge** of the public procurement field; - You display a range of **advanced practical skills** required to tackle **complex and less frequent tasks** and problems using innovative methods and approaches; - You take **responsibility and ownership** for completion of public procurement tasks, **manage inputs by other procurement specialists** and **take key decision** at different stages of public procurement procures. You know to quickly adapt your behaviour to others' and specific circumstances.
4. Expert	- You demonstrate **comprehensive, specialised, practical and theoretical knowledge** of the public procurement field at expert level; - You possess an **extensive range of techniques, methods and skills** required to address complex issues, develop innovative solutions, and contribute to expand the public procurement knowledge of your organisation; - You exercise **leadership** and **keep abreast of latest developments** in the field of public procurement by attending and participating in key procurement related events with both expert and non-expert audiences, based on which you **shape your organisation's policy and vision**.

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[21] See also https://europa.eu/europass/en/european-qualifications-framework-eqf

2. THE PROCURCOMP^EU COMPETENCY MATRIX

2.1. Procurement specific competences

Cluster of horizontal competences

COMPETENCE 1: PLANNING

Description

The formulation, development and implementation of **procurement planning** translate the policy choices of the organisation into where and how public procurement should be used to cost-effectively purchase the required supplies, services or works in line with the desired policy impact. The planning should take into account:

- The political and policy priorities of the organisation;
- The relevant policies at national level;
- The adopted budget plans and available resources;
- Whether procurement is the right option to meet the identified need;
- The need to prioritise and manage timelines;
- Potential opportunities and risks in the implementation process.

KNOWLEDGE OF: the procurement planning and policy priorities of the organisation, including budget plans and options for implementation, as well as relevant policies at national level.

Basic

Is able to:
- Perform basic procurement planning tasks, such as collecting and consolidating contributions from various departments;
- Implement the procurement planning in their daily work.

Intermediate

Is able to:
- Provide research and gather input for the procurement planning in line with the policy and political goals of the organisation;
- Help implement the organisation's procurement planning in line with the budget and timeline;
- Ensure their daily work aligns with and contributes to the procurement planning in line with political and policy priorities.

Advanced

Is able to:
- Coordinate the preparation of the organisation's procurement plan, and make recommendations for the final planning and timeline;
- Anticipate potential opportunities and challenges and mitigate risks in the implementation process;
- Monitor implementation of the plan to ensure the success of the policy;
- Provide feedback to policymakers on the implementation of the plan

Expert

Is able to:

- Set the vision for the organisation's procurement and adjacent policies;
- Establish the procurement plan and budget focusing on policy outcomes and benefits;
- Act as a reference point for high level policymakers on procurement issues, including giving feedback to the political level;
- Promote the procurement function in the overall strategy of the organisation.

COMPETENCE 2: LIFECYCLE

Description

The **procurement lifecycle** includes the various phases from planning and pre-publication to post-award and contract management. Each step affects the nature of subsequent steps. Understanding the overall lifecycle and the interactions between the steps, over a number of procedures, is necessary for the design and implementation of robust procurement procedures. It allows to anticipate risks and opportunities, thus improving efficiency and value for money.

KNOWLEDGE OF: the procurement lifecycle from pre-publication to post-award, and how the different phases interact with each other.

Basic

Is able to:

- Help monitor the implementation of the different steps of the procurement lifecycle, with an understanding of the interactions between the phases, and the risks.

Intermediate

Is able to:

- Implement the different phases of the procurement lifecycle, with an understanding of the interactions between the phases, the risks and opportunities they present.

Advanced

Is able to:

- Manage the implementation of all phases of the procurement lifecycle, understanding how each interacts with the others;
- Consistently apply their procurement lifecycle knowledge to maximise efficiency and value for money;
- Anticipate potential challenges, risks and impacts of the various phases of the procurement lifecycle;
- Guide others in implementing procedures to capitalise on links between phases.

Expert

Is able to:

- Oversee all phases of the procurement lifecycle across multiple contract types;
- Shape internal policies and tools to exploit links between procurement phases to maximise efficiency and value for money;
- Act as a reference point on procurement lifecycle management for those within and outside the organisation.

COMPETENCE 3: LEGISLATION

Description

Public procurement professionals need to understand and be able to apply the relevant **national and EU level legal frameworks** and the principles of non-discrimination, equal treatment, transparency, proportionality and sound financial management. This includes adjacent areas of law and policy, e.g.:

- Competition, administrative, contract, environmental, social and labour laws, accessibility obligations and Intellectual Property Rights;
- EU funding, budgetary and accounting rules;
- Remedies;
- Anti-corruption and anti-fraud measures;
- Any relevant international obligations.

Knowledge of the legislation is also essential to understand and ensure the desired impact on the procurement system and on the supply chains.

KNOWLEDGE OF: The procurement legislation at national and EU level, as well as adjacent areas of law and their implications for public procurement.

Basic

Is able to:

- Monitor developments in national legislation to support the organisation's procurement decisions;
- Apply procurement procedures in line with the legal framework and best practices.

Intermediate

Is able to:

- Understand the implications and impacts of procurement law on the procurement system and the supply chain;
- Make procurement decisions in line with policy requirements and provide clear advice and solutions;
- Perform research and analysis of the impact of EU or national regulation on procurement.

Advanced

Is able to:

- Apply diverse aspects of the procurement legislation, as well as other legal frameworks impacting procurement;
- Take deliberate steps to ensure specific impact of procurement law on supply chains;
- Help develop the organisation's procurement practices in line with key issues and the broader procurement policy context.

Expert

Is able to:

- Contribute to the creation of public procurement policy of the organisation;
- Act as a knowledge sharing agent on EU and national procurement law;
- Promote the adoption of non-binding and innovative legal provisions that represent new opportunities;
- Take part in expert working groups on procurement law.

COMPETENCE 4: E-PROCUREMENT & OTHER IT TOOLS

Description

e-Procurement and other IT systems and tools support the procurement lifecycle, from the publication of tender opportunities to the final payment. They reduce administrative burden, improve efficiency, and strengthen transparency and accountability of procurement procedures. Key tools include:

- Preparatory phase tools, e.g. TED and national procurement platforms, e-notification, standardised tender documents and templates;
- Submission phase tools, e.g. e-submission, the European Single Procurement Document, e-Certis;
- Tendering phase tools, e.g. e-catalogues, electronic procurement platforms, dynamic purchasing systems, auction systems, and e-invoicing;
- Other IT tools for data transparency, anti-fraud and anti-corruption, such as business and public contract registers.

The digital transformation of public procurement requires a continuous proactive approach to take advantage of the best available tools. It also requires continuous training.

KNOWLEDGE OF: eProcurement platforms and functionalities used within the organisation, including national and EU procurement systems, as well as other relevant IT systems and tools.

Basic

Is able to:

- Perform basic operations using the available procurement systems and tools, such as uploading data;
- Collect and centralise required template documents to prepare tender documentation.

Intermediate

Is able to:

- Use the systems and tools available for supporting procurement procedures and perform the main e-procurement procedures;
- Use template documents, the national e-procurement platform and public contract registers;
- Use relevant procurement systems and tools in order to ensure the transparency of the procurement process;
- Use available data from the systems in order to assess the risk of anti-competitive practices by suppliers (such as collusion).

Advanced

Is able to:

- Implement the use of a wide range of procurement systems and tools;
- Analyse procurement data for budget monitoring and forecasting upcoming procurements;
- Identify inefficiencies in the organisation's use of systems and tools and make suggestions for improvements;
- Ensure that all users have the appropriate access and training and act as a change management agent during implementation of a newly adopted system or tool.

Expert

Is able to:

- Promote procurement systems and tools and encourage a professionalisation culture within the organisation;
- Use procurement data to identify procurement trends and to improve the organisation's procurement procedures;
- Contribute to the introduction and/or development of new procurement systems and tools, or to the improvement of existing ones, as well as advocate at the political level for the uptake of the latest systems and tools available;
- Take part in expert working groups aimed at developing and fostering the uptake of the procurement systems and tools nationally and internationally.

COMPETENCE 5: SUSTAINABLE PROCUREMENT

Description

Sustainable public procurement incorporates strategic public policy goals into procurement procedures, such as green public procurement (GPP), socially responsible public procurement (SRPP), and ensuring genuine competition and SME participation. It contributes to reducing the environmental impact of procurement, to achieving social goals, and to improving value for money for the organisation and for society at large.

Sustainable objectives can be implemented in many ways:

- Exclusion criteria that require a minimum level of compliance with environmental and social law by contractors and sub-contractors;
- Selection criteria that verify the bidder's qualifications to achieve environmental and social goals; Technical specifications that include social and environmental considerations such as label requirements or sustainable production processes;
- Evaluation techniques such as life-cycle costing and use of environmental or social award criteria;
- Contract performance clauses in order to monitor and enforce high sustainability standards;
- Sector specific legislation requiring, for example, minimum energy-efficiency standards, as well as horizontal rules such as accessibility obligations;
- Member State level green or social action plans outlining support measures or setting targets.

KNOWLEDGE OF: The sustainability objectives of the organisation (environmental and social) and related national policies, as well as of the available tools, standards and techniques for incorporating these into the procurement process.

Basic

Is able to:

- Understand the scope and benefits of sustainable procurement for achieving the organisation's sustainability objectives;
- Understand how sustainable procurement aspects are implemented and the resources available to implement them; Support the implementation of sustainable procurement approaches within the organisation;
- Gather data to monitor the performance of sustainable procurement projects.

Intermediate

Is able to:

- Implement sustainable procurement aspects in technical specifications, selection and award criteria, contract clauses and key performance indicators;
- Use sustainable procurement tools and methods, such us standards, life-cycle costing and labels;
- Carry out research, analysis and networking activities that support sustainable procurement decisions;
- Monitor the sustainability impact and performance of the project, including commitments made by contractors and subcontractors.

Advanced

Is able to:

- Implement the organisation's sustainable procurement strategy in terms of the targets, priorities and timeframes to achieve the organisation's sustainability objectives;
- Make decisions about integrating sustainable procurement aspects into e.g. technical specifications, selection and award criteria, contract clauses and key performance indicators;
- Promote and encourage the use of sustainable procurement tools and techniques, such as standards, life-cycle costing techniques and labels;
- Get an overview of the products and services available on the market by engaging suppliers and make a business case for sustainable procurement based on life-cycle costing and social impact;
- Reach out to stakeholders who are conducive to developing sustainable procurement markets and opportunities;
- Ensure there is a system for monitoring the sustainability impact of contracts, including commitments made by contractors and subcontractors.

Expert

Is able to:

- Master the concepts and application of sustainable procurement aspects and prioritise based on impact, budgetary importance and influence on the market;
- Secure political support and promote the organisation's sustainable procurement strategy and priorities;
- Design the organisation's sustainable procurement strategy, setting clear scope, targets, priorities and timeframes, and ensure it is implemented effectively;
- Define priority sectors with high-impact and identify approaches to tendering in the selected sectors such as construction, food and catering, vehicles, and ICT;
- Integrate sustainable procurement good practices to the organisation and among peer organisations;
- Advocate for the development and widespread use of sustainable procurement within and beyond the organisation, take part in expert groups and networks and create partnerships with other public authorities and stakeholders (e.g. civil society and NGOs) to promote and improve implementation of sustainable public procurement.

COMPETENCE 6: INNOVATION PROCUREMENT

Description

Innovation procurement refers to a public procurement that involves either:

- Buying the process of innovation (e.g. buying research and development services), or
- Buying the outcomes of innovation created by others (i.e. buying innovative solutions).

Innovation procurement helps modernise public services while creating opportunities for companies to develop new markets. By developing a forward-looking innovation procurement strategy and considering alternative competing solutions, contracting authorities can drive innovation from the demand side to meet short term as well as medium to long term needs. A well-designed innovation procurement strategy will reduce the risk of low- or non-performance of the purchased innovations by providing a step-by-step approach from solution design, prototyping, and development to development and product testing.

KNOWLEDGE OF: The innovation objectives of the organisation and related national policies, as well as the available tools and techniques for incorporating these into the procurement process.

Basic

Is able to:

- Understand why and how innovation procurement aspects are implemented and how they can add value to the procurement process for the organisation.
- Support the implementation process of innovation procurement within an organisation;
- Perform basic tasks for conducting innovation procurements using available tools (e.g. template documents);
- Gather data for monitoring the expenditure level and the impact of innovation procurement.

Intermediate

Is able to:

- Prepare a business case for starting an innovation procurement (incl. cost/benefit analysis);
- Understand how innovation procurement aspects, including key emerging technologies, are implemented and how they can add value to the objectives of the organisation;
- Carry out preliminary market consultations in order to assess the gap between the procurement need and ongoing market developments and networking activities that support innovation procurement solutions;
- Set the public procurement procedure parameters (e.g. by using functional or performance based requirements instead of prescriptive requirements, examining the use of variants, innovation-friendly selection and award criteria, standards, certifications, quality labels, key performance indicators and innovation-friendly IPR conditions) to enable innovative solutions to compete with established ones;
- Monitor the innovation impact and the performance of the project.

Advanced

Is able to:

- Implement the organisation's innovation procurement strategy in line with the organisation's objectives;
- Make decisions about key performance indicators to integrate within tender specifications and contracts;
- Ensure there is a system for monitoring the expenditure on innovation procurements and the impacts achieved;
- Maintain a good overview of the products and services available on the market by engaging with suppliers and stakeholder groups involved in innovation;
- Incentivise the industry to invest in research and development and expand commercialisation to bring innovative solutions, including key emerging technologies, to the market with the quality and price needed for mass-market deployment;
- Promote and encourage the use of innovation procurement tools and techniques.

Expert

Is able to:

- Master the concepts and application of innovation procurement and prioritise based on innovation impact, budgetary importance and potential influence on the market;
- Design and implement a forward-looking strategy for innovation procurement for the organisation based on high-impact opportunities (e.g. ICTs and key enabling technologies) and on the impacts achieved by completed innovation procurements;
- Drive the organisation and others to adopt good practices in line with national and EU public sector modernisation and sectorial emerging technology action plans;
- Advocate for the development and widespread use of innovation procurement within and beyond the organisation, take part in key innovation procurement related events, expert groups and networks to promote and improve the implementation of innovation procurement;
- Establish strategic agreements and cooperation structures with other buyers that enable regular coordinated or joint procurements.

COMPETENCE 7: CATEGORY SPECIFIC

Description

Category specific expertise is at the core of the procurement procedure. The characteristics of the category of supplies, services or works to be acquired need to be well understood, including by involving experts and stakeholders (professionals and end-users). The procurement strategy and documents have to be tailored to fulfil the identified need and maximise value for money.

KNOWLEDGE OF: The features and specificities relevant to one or more categories of supplies, services or works, including suppliers, technical parameters and market conditions.

Basic

Is able to:

- Perform research and provide relevant information on a category of supplies, services or works to make informed purchasing decisions.

Intermediate

Is able to:

- Check if any legal and regulatory requirements apply to their category of supplies, services or works (e.g. ensuring a minimum stock level for healthcare supplies, transport and storage requirements for hazardous materials);
- Contribute to the definition of product technical requirements in preparing technical specifications.

Advanced

Is able to:

- Arrange or categorise planned spending according to markets trends, keeping in mind quality, service, risk and cost.

Expert

Is able to:

- Act as a reference point for procurement professionals and users at organisational and even national level;
- Shape organisational or national policy for procurement or use of the supplies, services or works in their category;
- Prepare targeted thematic guidance and disseminate best practices developed by similar organisations.

COMPETENCE 8: SUPPLIER MANAGEMENT

Description

Supplier management involves building and maintaining effective relationships with current and potential future suppliers. It is essential to ensuring the successful delivery of current contracts and of future calls for tender. In addition, increased understanding of suppliers can help procurement professionals drive more robust, ethical, responsible and economically advantageous supply chains through open channels of communication with suppliers, especially SMEs. Providing information, guidance and potentially support and training to suppliers (e.g. on the use of e-procurement) are efficient ways to achieve these objectives, while ensuring that communication with economic operators during the tendering phase is in accordance with public procurement principles (i.e. non-discrimination, transparency, and equal treatment) and ethical standards.

KNOWLEDGE OF: strategies and processes to develop and manage relationships with suppliers in accordance with public procurement principles.

Basic

Is able to:

- Reply to simple queries from suppliers;
- Support the work of other procurement professionals in meetings and other communication with suppliers.

Intermediate

Is able to:

- Interact directly with suppliers on low-complexity contracts;
- Advise economic operators and suppliers on the conduct of e-procurement procedures;
- Monitor supplier performance, identify trends and take necessary actions;
- Develop sound working relationships with suppliers based on trust, commitment, integrity and an awareness of mutual obligations.

Advanced

Is able to:

- Maintain structured and strategic relationships with suppliers and potential suppliers based on trust, commitment, integrity and an awareness of mutual obligations;
- Provide support to suppliers in particular on the use of the e-procurement system;
- Analyse supplier trends and draw conclusions in terms of opportunities for improvement;
- Handle cases of disputes with suppliers;
- Identify and foster ethical and economically advantageous supply chains.

Expert

Is able to:

- Maintain high level relationships with strategic suppliers;
- Explore opportunities for increased value added in complex projects with political implications;
- Define topics and design the content of support to suppliers;
- Shape and exploit ethical and economically advantageous supply chains.

COMPETENCE 9: NEGOTIATIONS

Description

Negotiations can be used to secure and advance the interests of the organisation, and ultimately of the final beneficiary, in achieving best value for money. They aim at reaching a mutual agreement between the contracting authority and the supplier, despite potentially opposing interests, on how to improve the submitted tenders to better satisfy the terms and conditions stated in the procurement documents. Negotiations must respect the general procurement principles (i.e. non-discrimination, transparency and equal treatment), as well as ethical and integrity standards.

KNOWLEDGE OF: negotiation strategies during the procurement phases and contract management, in accordance with public procurement principles.

Basic

Is able to:

- Perform basic tasks related to the negotiation process;
- Support the negotiation process with data and input gathering, and data analysis.

Intermediate

Is able to:

- Collect input, data and information, including from internal experts, to help prepare negotiation strategies;
- Attend and actively participate in negotiation meetings;
- Run negotiations and solve straightforward issues for routine, low-complexity projects;
- Provide support in negotiations for higher complexity projects.

Advanced

Is able to:

- Prepare negotiation strategies and elaborate negotiation positions based on research and analysis, and input from internal stakeholders;
- Attend negotiations and solve complex issues that arise for different types of procurements and contracts;
- Run the majority of negotiations of high complexity projects (in terms of risk, technicality, and/or procedural aspects).

Expert

Is able to:

- Lead complex operational and strategic negotiations across a wide range of contract types, issues and stakeholders;
- Lead complex negotiations for high-complexity and high-risk, politically-sensitive procurements;
- Obtain the best value for money and best solution in terms of contributing to the achievement of the policy objectives.

> ## *Cluster of Pre-award competences*

COMPETENCE 10: NEEDS ASSESSMENT

Description

The **needs assessment** is the process of determining the needs, including possible impacts in terms of value for money or environmental impacts, regarding the subject matter of the procurement by various means, including:

- Liaising with internal and external stakeholders, within the organisation itself or third parties to identify their needs;
- Translating identified needs into procurement planning of supplies, services, or in line with the organisation's budget plan;
- Considering aggregation of needs related to the same subject matter.

KNOWLEDGE OF: Needs assessment techniques and tools for determining the underlying needs of the organisation and of the end-users regarding the subject matter of the procurement.

Basic

Is able to:

- Gather relevant information from multiple sources in a structured manner (e.g. using templates);
- Interact with internal and external stakeholders to understand organisational needs;
- Draft the first needs assessment.

Intermediate

Is able to:

- Interact with internal and external stakeholders to understand the range of current and foreseeable needs;
- Analyse and interpret collected data, and draw conclusions in the identification of potential needs;
- Identify similar cases and make suggestions for needs aggregation to generate savings;
- Act autonomously in identifying the need for and running standard procurement procedures.

Advanced

Is able to:

- Manage the full process of needs analysis and data interpretation;
- Bring in technical expertise as required for complex procurement procedures;
- Liaise with colleagues to gather advanced technological knowledge for drafting technical specifications;
- Propose alternative options and solutions to better address the underlying needs and priorities and makes recommendations;
- Put in place solutions and strategies that help anticipate and create innovative ways to meet internal and externals needs (e.g. needs aggregation);
- Communicate convincingly to internal and external stakeholders on the recommended approach.

Expert

Is able to:

- Oversee the full process of needs assessment with an eye for opportunities to increase value for money and impact on policy objectives across the organisation;
- Advise on possible distinctions between investment costs and current expenditure for a specific budget;
- Influence key stakeholders to implement the broader procurement strategy of the organisation including the identification of synergies across organisations;
- Drive and challenge the organisation's needs identification strategy and creates a culture of performance and innovation.

COMPETENCE 11: MARKET ANALYSIS & MARKET ENGAGEMENT

Description

Market analysis provides an in-depth view of which supplies and services can or cannot be provided by the market, and under what conditions. It involves collecting information on key market drivers (e.g. political, environmental, technological, and social) and on the potential bidders. This information can be used to define the procurement strategy (e.g. division into lots), the reference price, and selection and award criteria to better advance the organisation's objectives.

Market engagement is a consultation process that helps identify potential bidders and solutions, identify the gap between the procurement need and what the market is able to offer or inform the market about an upcoming procurement. Different market engagement techniques, such as questionnaires, technical dialogue, open days, and direct emails to suppliers, can be used as long as they are conducted in accordance with the public procurement principles (i.e. non-discrimination, transparency and equal treatment,), and ethical, privacy, confidentiality and integrity standards, in order to ensure genuine and fair competition.

KNOWLEDGE OF: Market analysis and market engagement techniques and tools that can be used to understand the characteristics of the supplier market as well as the market conditions and trends, in order to define the procurement strategy.

Basic

Is able to:

- Apply the principles of transparency, non-discrimination and equal treatment, as well as ethical, privacy, confidentiality and integrity standards to market consultations;
- Collect information from available sources without engaging suppliers, to support market assessment on straightforward requirements;
- Prepare supporting documentation.

Intermediate

Is able to:

- Apply the principles of non-discrimination, transparency and equal treatment as well as ethical and integrity standards to market consultations;
- Analyse and interpret market research to estimate cost and forecast budgets;
- Evaluate the potential impact of market factors using relevant tools.

Advanced

Is able to:

- Review market analysis and ensure completeness; undertake market research on complex organisational needs in line with principles;
- Identify market opportunities and propose mitigation measures to any risk identified;
- Set up processes for enabling a relevant number of suppliers to take part in market consultations and competitive dialogue procedures;
- Ensure that procurement strategies are designed to reflect market conditions, policy goals, and opportunities identified;
- Identify risks to genuine competition in the case of limited market offer, either due to the number of active suppliers or the nature of the service or supply.

Expert

Is able to:

- Take advantage of the market conditions and opportunities to align the procurement strategy to emerging market trends and shape it to best meet the policy goals of the organisation;

- Advise on best market engagement techniques and propose ways to mitigate risks associated to them;

- Supervise the market analysis process and take relevant decisions based on the assessment;

- Anticipate future developments and potential risks in the supply chain;

- Promote a culture of meeting and exceeding internal needs and maximising value for money at the organisational level;

- Understand and open up markets by influencing supply chains (e.g. consulting with SMEs) through market engagement.

COMPETENCE 12: PROCUREMENT STRATEGY

Description

The design of the **procurement strategy** is the deliberate use of different elements in the procurement lifecycle to reflect and exploit the conditions of the subject matter of the procurement and define the most appropriate and impactful process in order to reach the organisation's objectives and ensure genuine competition. It includes the identification of the most appropriate option between:

- Types of procurement procedures;
- Standalone or joint procurement;
- Features of the procedure, such as scope, duration, and division into lots;
- Techniques and instruments for electronic submission (electronic auctions and catalogues, and dynamic purchasing systems);
- Types of contract (e.g. direct or framework agreement) and contract performance clauses.

KNOWLEDGE OF: The range of available procurement strategies and their components (e.g. in terms of choice and features of the procedures, instruments for submission, types of contracts) in order to reach the organisation's objectives.

Basic

Is able to:

- Understand commonly used procurement procedures, techniques for electronic submission and contract types;
- Support research on the procurement procedures, techniques and instruments for the procurement strategy;
- Provide input to support the procurement strategy decision-making process; e.g. summarise and report information gathered on procurement options.

Intermediate

Is able to:

- Understand the different steps of the procurement strategy;
- Gather the information necessary to make data driven procurement strategy decisions and recommendations;
- Make effective use of the whole range of procurement procedures, techniques for electronic submission, contract types and contract performance clauses where appropriate.

Advanced

Is able to:

- Make suggestions for the use of various procurement procedures and techniques in order to design the procurement strategy;
- Oversee the research and analysis process and make the final decision on the most appropriate procurement process;
- Ensure that the right resources are available for the research and analysis process;
- Using the results of the market analysis, assess and take action to mitigate any risk of anti-competitive behaviours by suppliers linked to various options;
- Decide on the design of the procurement strategy using the full range of procurement procedures and techniques.

Expert

Is able to:

- Provide expert advice to practitioners on the procurement design process and support the use of alternative procurement procedures;
- Help shape organisational and national policy to support good procurement strategy;
  Analyse and implement the findings of market analysis and market engagement to shape the procurement strategy.

COMPETENCE 13: TECHNICAL SPECIFICATIONS

Description

Drafting technical specifications involves transforming the findings of the needs assessment and market analysis into concrete specifications and evaluation criteria that can be used in assessing bids and awarding the contract. This includes setting objective and not over-prescriptive minimum requirements for the subject matter to avoid unnecessarily limiting competition Ensuring that technical specifications are outcome-focused and future-proofed is key to enable innovation and continuous improvement. When drafting the technical specifications, public buyers should already define the exclusion, selection and award criteria which will be used to evaluate the offers in order to identify the Most Economically Advantageous Tender (MEAT). Technical specifications can also contain references to standards in order to ensure common understanding, transparency and equal treatment.

KNOWLEDGE OF: Drafting technical specifications that enable potential bidders to submit realistic offers that directly address the underlying need of the organisation.

Basic

Is able to:

- Contribute to the preparation of clear technical specifications;
- Adapt standardised or previously used tender specifications to current needs.

Intermediate

Is able to:

- Collect information and analysis on technical content to support the specification development;
- Apply the selection and award criteria and understand their influence on the market;
- Ensure that the technical specifications are compliant with the principles of public procurement, horizontal obligations such as accessibility as well as relevant sector specific legal requirements.
- Make use of non-price criteria for routine procurement procedures, including appropriate weighting to ensure best price-quality balance;
- Make references to standards to increase common understanding of procurement documents between buyers and suppliers;
- Engage with experts to understand technology roadmaps that will support the drafting of technical specifications for innovation procurements.

Advanced

Is able to:

- Draft specifications that take advantage of evolving markets and keep pace with changing needs;
- Liaise with relevant colleagues and services to gather advanced technological knowledge for drafting technical specifications;
- Define the selection and award criteria to deliver value for money with an understanding of the market implications and legal requirements as well as for the potential use of standards;
- Provide guidance on drafting technical specifications to team members;
- Understand and incorporate technology roadmaps when drafting technical specifications.

Expert

Is able to:

- Provide advice or lead development of very complex specifications;
- Drive the development of innovative and forward-looking specifications with the relevant specialists and experts, including the use of functional requirements;
- Review technical specifications for complex and high-profile procurements.

COMPETENCE 14: TENDER DOCUMENTATION

Description

To launch a procurement procedure, **tender documentation** has to be prepared and the exclusion, selection and award criteria that are the basis for the contract award decision must be defined. The tender documentation (in addition to the technical specifications) explains the administrative requirements of the procedure, justifies the estimated value of the contract, and specifies the terms and conditions under which tenders are to be submitted, evaluated and awarded. They may include other elements such as draft contract provisions, cancellation conditions for the tender, as well as modifications, performance and termination provisions, etc.

KNOWLEDGE OF: The content of the tender documentation, including the exclusion, selection and award criteria that are the basis for the contract award decision, in order to run a successful procurement procedure.

Basic

Is able to:

- Support the preparation of procurement documents such as instructions to tenderers, annexes to be completed, and draft contracts, based on guidelines and templates;
- Ensure the quality of the tender documentation process by applying the right methodology and standards.

Intermediate

Is able to:

- Draft procurement documentation in line with the organisation policy and EU and national regulations;
- Publish tender announcements and respond to economic operators questions about tender documentation requirements;
- Design both standard and non-standard contract terms in collaboration with legal advisors;
- Verify the compliance and completeness of procurement documentation prepared.

Advanced

Is able to:

- Design and complete tender documentation that reflects policy goals and helps maximise value for money;
- Make sure the correct methodology is applied to the issued public procurement tenders;
- Foresee and tackle risks linked to financial and legal aspects of concerned documents;
- Endorse final documentation and other management decisions related to process.

Expert

Is able to:

- Contribute to the policy of the organisation as regards tender documentation, and act as a reference point for compliance review and verification for others;
- Design and implement transparent and appropriate tender documentation strategy for the organisation in full compliance with the legal limitations and possibilities.

COMPETENCE 15: TENDER EVALUATION

Description

The **tender evaluation** process must ensure that tenders are assessed in an objective and legally compliant way and against exclusion, selection and award criteria defined in the call for tender, in order to identify the Most Economically Advantageous Tender (MEAT). The evaluation committee should be led by experienced administrators who are well-versed in their roles, responsibilities and procedural obligations, supported by relevant technical experts in the field of the subject matter, including assessing standards and labels. The process should be documented to provide the evidence and the rationale for the award.

KNOWLEDGE OF: The appropriate evaluation process depending on the type of procurement procedures, including the role and responsibilities of the evaluation committee, in order to ensure that all tenders are assessed in an objective and transparent way against pre-defined criteria.

Basic

Is able to:

- Support the evaluation process, including the preparation of documentation for the evaluation committee;
- Manage tender documentation, including receipt of offers and archiving;
- Participate in the assessment of tenders and ensure the process is documented.

Intermediate

Is able to:

- Perform evaluation against the defined criteria and make recommendations to support the award decision making;
- Participate as a voting member in evaluation committees for routine contracts;
- Detect possible cases of anti-competitive and corrupt behaviours, such as collusion among suppliers, based on the tender;
- Prepare and provide feedback to tenderers;
- Document the evaluation process used to rank the offers in order to ensure proper reporting and audit trail.

Advanced

Is able to:

- Chair evaluation committees for most types of procedures;
- Ensure that the evaluation process is conducted in way that is consistent, transparent and fair;
- Ensure that the number, skills and knowledge of the evaluation panel members is appropriate, and that they are free of conflict of interest;
- Communicate the outcomes of the evaluation panel to stakeholders.

Expert

Is able to:

- Facilitate the resolution of complex cases where the tenders are difficult to evaluate or where conflict of interest arises;
- Provide suggestions for mobilising relevant experts to take part in the evaluation committees.

Cluster of post-award competences

COMPETENCE 16: CONTRACT MANAGEMENT

Description

Contract management involves ensuring that the subject of the procurement is delivered according to the terms, conditions in the technical specifications and the contract, and in compliance with all legal requirements and technical specifications. This includes aspects related to governance, risk, performance (and Key Performance Indicators (KPIs)), rules on modifications of contracts and financial management of contracts.

In the case of supply contracts, contract management also covers logistics and inventory management. This means ensuring that goods are delivered on time and meet quality standards, and that the availability of stocks is consistently and cost-effectively maintained.

KNOWLEDGE OF: Contract management principles to ensure proper delivery, in compliance with all legal requirements and technical specifications, as well as logistics and inventory management considerations.

Basic

Is able to:

- Gather data for contract implementation monitoring;
- Update and maintain contract databases and registers;
- Support contract delivery functions in line with scope, quality, time and budget;
- Report on contractual milestones and outcomes;
- Support inventory management and inform when issues with the logistics or with the inventory arise.

Intermediate

Is able to:

- Define and implement the contract management plan;
- Monitor the performance of contracts against pre-defined KPIs;
- Perform regular risk assessments on procurement contracts;
- Apply the terms and conditions of contracts in varied circumstances;
- Advise on contract modifications;
- Prepare the ground for contract termination;
- Apply corrective measures in case of deviations from the contract terms;
- Apply first-hand experience with logistics and perform inventory management.

Advanced

Is able to:

- Manage a portfolio of contracts for the procurement of supplies, works and services;
- Anticipate the implementation of the contract already during the pre-award phase to minimise contract modifications later;
- Adapt management practices in difficult situations;
- Make a decision on contract termination;
- Understand and provide advice on all aspects related to contract law and contract management strategies;
- Tailor the logistics and inventory management for the delivery of complex goods.

Expert

Is able to:

- Supervise the management of complex contracts and provide advice on resolving contracts with challenging issues;
- Shape the contract management policy at organisational or national level;
- Ensure overall alignment with national policy or legal requirements in terms of logistics and inventory management;
- Steer the logistics and inventory policy across the organisation with efficiency and effectiveness.

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COMPETENCE 17: CERTIFICATION & PAYMENT

Description

Before proceeding with a payment to a contractor for the provision of supplies, works or services, the procuring organisation needs to **perform a verification check** to ensure alignment with the specifications of the terms and conditions of the contract and all applicable financial and accounting rules.

KNOWLEDGE OF: The verification principles and the financial control framework which ensure that the relevant supplies, services or works are delivered in compliance with the terms and conditions of the contract and all applicable financial and accounting rules in order to proceed to the payment.

Basic

Is able to:

- Collect invoices and other documents which support the procurement verification process;
- Help to ensure a clear audit trail for all payments made.

Intermediate

Is able to:

- Review the documentation required for the payment certification process;
- Use relevant techniques and tools to check for double payments;
- Assess the conformity of supplies, works or services with the terms and conditions of routine contracts;
- Prepare recommendations for approval or rejection of payment.

Advanced

Is able to:

- Assess the conformity of supplies, works or services with the terms and conditions of complex contracts;
- Develop mitigation measures to prevent and detect payment fraud, such as double payments;
- Sign off or reject payment requests.

Expert

Is able to:

- Create a culture of performing verification checks across the organisation;
- Solve payment issues related to the non-conformity of supplies, works or services of high-value contracts with the terms and conditions of the contract.

COMPETENCE 18: REPORTING & EVALUATION

Description

Reporting and evaluation is the ex-post assessment of the deliverables and outcomes of a procurement process to assess the strengths and weaknesses and draw lessons for future calls for tender. It is done by collecting relevant data in line with organisational and national reporting obligations.

KNOWLEDGE OF: Monitoring tools and techniques for the implementation and performance of the contracts

Basic

Is able to:

- Support the analysis of contract performance, including by collecting data from the procurement management process;
- Ensure record keeping of all transactions and make sure an audit trail is kept;
- Collect relevant data that helps address national and organisational reporting obligations.

Intermediate

Is able to:

- Perform the contract reporting and evaluation process to ensure that the organisation is extracting lessons learnt from their experience;
- Analyse performance data and formulate clear findings and recommendations;
- Conduct ex post verification and draft reports on standard cases of underperformance.

Advanced

Is able to:

- Analyse complex cases of underperformance to identify underlying causes and recommend mitigating measures;
- Ensure transparency of data and findings in line with organisational and national policies and standards;
- Implement the recommendations of audit and ex-post verification reports;
- Engage suppliers in performance improvement discussions.

Expert

Is able to:

- Analyse contract performance reporting to assess the contribution to organisation's objectives;
- Review reports on complex cases of underperformance;
- Supervise the implementation of audit recommendations and ex-post verification reports;
- Develop a culture of supplier engagement within the organisation to create clear communication channels for feedback and improvement.

COMPETENCE 19: CONFLICT RESOLUTION & MEDIATION

Description

Conflict resolution or mediation refers to the process of:

- Preventing and solving points of difference, disagreements and conflicts between parties, during all phases of the procurement process and contract management, in order to reach an agreement for the common interest of both parties;
- Managing complaints filed against the organisation according to the national review system;
- Understanding of the national review system and remedies system, and conflict solving mechanisms at different levels.

KNOWLEDGE OF: Conflict resolution and mediation processes, including managing complaints and procedures in the context of the national review system.

Basic

Is able to:

- Identify potential conflicts and refer them to the hierarchy according to organisational policy;
- Gather information to support the management of the complaints.

Intermediate

Is able to:

- Anticipate and take steps to prevent potential conflicts;
- Objectively analyse the facts of a situation and present clear findings and recommendations for potential solutions;
- Participate in the conflict resolution process;
- Help address complaints, e.g. by drafting the appropriate response.

Advanced

Is able to:

- Manage procedural and contractual issues such as claims and disputes, etc.;
- Manage the conflict resolution process using different conflict resolution, arbitration and mediation techniques;
- Provide recommendations to improve organisational procedures for avoiding and resolving conflicts and complaints.

Expert

Is able to:

- Lead activities in case of conflict escalation;
- Provide final approval of the response to complaints;
- Implement lessons learnt from review cases at national and European level as well as from good practices and cases that were solved without reaching the level of an official complaint;
- Create a culture of conflict resolution and mediation with the tenderers and suppliers.

2.2. Soft competences

Cluster of personal competences

COMPETENCE 20: ADAPTABILITY & MODERNISATION

Description

Public procurement professionals need to **respond and adapt** to changing tasks and circumstances. Such changes can occur in terms of working methods (e.g. digitalisation), citizens' expectations (e.g. food safety), technological solutions and challenges (e.g. big data and cybersecurity), emergency scenarios (e.g. pandemics, natural disasters) and policy challenges (e.g. climate change).

Public procurement professionals must keep abreast of relevant changes in the regulatory, political, and technological environment of public procurement. They must keep an open mind to changing conditions, new ideas and viewpoints and working methods. They must adapt, be resilient to change, and even embrace change by looking for modern and innovative solutions to overcome new procurement challenges. They should be capable of reassessing their approach in emergency situations to ensure compliance while making full use of available flexibilities. They should identify learning and development opportunities that support agile adaptation to change and new tools.

KNOWLEDGE OF: Change management techniques and tools.

Basic

Is able to:

- Accept new priorities positively and apply new tools and processes;
- Suggest ways to make a change work effectively and demonstrate a positive mind-set.

Intermediate

Is able to:

- Implement new procurement techniques and approaches in line with procurement modernisation strategies;
- Contribute to an environment that facilitates team and individual change and learning processes.

Advanced

Is able to:

- Manage innovation and change efforts to maximise effectiveness, speed of response and adaption;
- Adjust internal procedures and workflows according to implemented change initiatives;
- Prepare the procurement team and organisation for dealing with, responding and adapting to change;
- Foster an environment conducive to innovation, learning and development and ensure that learning and development needs are addressed.

Expert

Is able to:

- Seek out innovative and effective ways to improve the organisation's procurement processes, in line with innovation trends in the public service;
- Identify future competences and expertise required by the organisation to quickly respond and adapt;
- Set up the organisational context for learning and development and professionalisation through upskilling of the procurement staff;
- Encourage a culture of change and innovation in order to deliver better outcomes for citizens.

COMPETENCE 21: ANALYTICAL & CRITICAL THINKING

Description

Procurement professionals need **analytical and critical thinking** to evaluate information with accuracy and objectivity. In doing so, they use good judgment, anticipate opportunities and threats and solve problems in an efficient and creative way.

KNOWLEDGE OF: Analytical and critical thinking approaches and tools.

Basic

Is able to:

- Gather and analyse relevant data while applying existing qualitative and quantitative approaches in a consistent way;
- Identify and suggest alternative solutions when solving problems;
- Show awareness of opportunities and risks throughout the procurement cycle.

Intermediate

Is able to:

- Interpret trends and patterns when processing data;
- Review documents with a critical eye, ensuring that implications and risks are considered;
- Analyse and raise awareness among colleagues and stakeholders on potential risks and suggest adequate approaches for mitigating risks.

Advanced

Is able to:

- Develop analytical processes to ensure all relevant factors are considered;
- Establish criteria to evaluate data, while taking into account both current and future needs;
- Adapt the procurement approach based on the situation and requirements.

Expert

Is able to:

- Determine the nature and scope of analysis;
- Interpret analysis outputs to support and motivate strategic decisions;
- Lead monitoring of emerging threats.

COMPETENCE 22: COMMUNICATION

Description

Communication aims to ensure that the goals and processes of procurement policy in general, and individual procurement procedures, are well understood by stakeholders. It relies on the use of appropriate communication channels (oral, written, electronic) in order to deliver relevant and accurate information in line with the public procurement principles of non-discrimination, transparency and equal treatment. In doing so, public procurement professionals need to adapt the communication medium and message to the target audience.

KNOWLEDGE OF: Communication tools and techniques and how the public procurement principles apply to various communication situations.

Basic

Is able to:

- Listen actively, speak and write clearly, logically and concisely;
- Ensure efficient release of information through various communication channels;
- Support the team in designing clear and sound communication deliverables.

Intermediate

Is able to:

- Use active listening and communication skills in conversations and meetings;
- Prepare detailed and accurate communication deliverables, to present procurement priorities through the organisation communication strategy.

Advanced

Is able to:

- Deliver strategic, engaging and persuasive communication with a consistent message around values and objectives;
- Implement the communication strategy of the organisation in relation to specific procurement projects by defining the relevant deliverables, overseeing their design and delivery, and creating a structure that ensures a good flow of communication.

Expert

Is able to:

- Create and champion an open and transparent environment for communication within the organisation;
- Define a public procurement communication strategy for the organisation that promotes the organisation's procurement priorities;
- Promote creative, innovative and impactful communication methods;
- Deal with complex information requests and controversial communication issues both inside and outside of the organisation.

COMPETENCE 23: ETHICS & COMPLIANCE

Description

Public procurement stakeholders must ensure **compliance** with all applicable rules, codes of conducts and guidelines and adherence to the principles of public procurement: equal treatment, non-discrimination, transparency and proportionality.

All stakeholders involved in public procurement must ensure verification throughout the full range of concrete tasks, making use of available tools to assess the risks of conflict of interest, corruption on the one hand, and anti-competitive practices by suppliers such as collusion and bid-rigging, or potential problems with compliance in their work on the other hand.

KNOWLEDGE OF: The applicable procedural rules and principles as well as tools, codes and guidance documents which help ensure adherence thereto.

Basic

Is able to:

- Adopt ethical and professional behaviour in line with the organisation's code of conduct and ethical standards;
- Demonstrate a compliance mind-set when preparing procurement deliverables.

Intermediate

Is able to:

- Understand and respect the organisation's compliance policies, their scope and the requirements and risks related to them;
- Understand and assess the impact and consequences of a violation of ethical standards and compliance policies;
- Consult with legal and relevant subject-matter experts when in doubt about compliance related practices.

Advanced

Is able to:

- Promote the organisation's code of conduct and ethical standards among staff;
- Review and monitor procurement projects and ensure supply chain processes are compliant with national ethical policies;
- Provides practical recommendations for improving adherence with the organisation's compliance and regulatory policies.

Expert

Is able to:

- Design the organisation's code of conduct and ethics and create the conditions for its observance by the staff, through guidance and training and leadership;
- Create the compliance culture of the organisation and align it with government regulations and policies;
- Monitor actions and plans that drive effective compliance and constant improvements;
- Analyse and identify compliance issues that may threaten the quality of work and organisational development.

Cluster of people competences

COMPETENCE 24: COLLABORATION

Description

No public procurement professional works in isolation. To be successful, procurement professionals need to **collaborate** with each other and their environment. This means working in teams and encouraging the sharing of ideas and strategies and the gathering input and expertise. This is equally applicable for a small organisation where the public buyer will have to rely on both internal and external stakeholders, as well as for larger organisations and central purchasing bodies, where there is a conscious strategy for building multidisciplinary procurement teams for specific procurement procedures (e.g. lawyer, economist, specialist or subject-matter expert).

KNOWLEDGE OF: Collaborative tools and techniques.

Basic

Is able to:

- Take accountability for their role and actively contribute to reach the objectives of the procurement team;
- Understand the importance of building relationships based on trust and reliability;
- Apply interpersonal skills when working with team members;
- Act honestly and fairly with others, showing consideration and respect.

Intermediate

Is able to:

- Contribute to the team dynamics to ensure cooperative and positive working relationships for the team's success;
- Develop and enhance relationships within different departments, and with stakeholders, citizens, suppliers, etc.

Advanced

Is able to:

- Promote the importance and benefits of diversity and inclusion within procurement teams;
- Share your knowledge with others while acknowledging others' experience and skills;
- Facilitate the sharing of expertise and resources with and between teams taking into consideration their structural, functional and cultural dimensions;
- Build strong teams that capitalise on differences in expertise, competences and background.

Expert

Is able to:

- Develop team spirit and culture for effective team work and collaboration;
- Promote a conducive environment for team work to achieve results;
- Leverage the benefits of diverse teams and stakeholder collaboration to achieve organisational results;
- Act as a role model and show strong examples of cooperation in the organisation.

COMPETENCE 25: STAKEHOLDER RELATIONSHIP MANAGEMENT

Description

Stakeholder relationship management means creating and maintaining solid internal and external relations based on mutual trust and credibility. Public procurement professionals often need to engage with stakeholders to achieve organisational goals and contribute to the sustainable development of stakeholder relationships.

KNOWLEDGE OF: Key concepts and methods of stakeholder relationship management.

Basic

Is able to:

- Identify internal and external stakeholders and understand their needs;
- Maintain good working relationships with internal and external stakeholders at an operational level;
- Consider all stakeholder points of view when analysing problems and opportunities;
- Seek solutions that balance the needs of various stakeholders and look for win-win solutions.

Intermediate

Is able to:

- Ensure stakeholders' needs are heard and effectively addressed;
- Develop good working relationships and communication with internal and external stakeholders based on mutual trust;
- Analyse potential positive and negatives consequences to select the most appropriate stakeholder management methods;
- Build and manage relationships with subject matter stakeholders to ensure sustainability of stakeholder strategies.

Advanced

Is able to:

- Leverage sound working relationships based on trust, commitment and integrity;
- Motivate internal and external stakeholders in order to achieve the desired outcomes;
- Facilitate an environment where win-win solutions can be achieved;
- Work proactively to anticipate and mitigate potential stakeholder communication challenges;
- Develop and leverage strategic stakeholder relationships.

Expert

Is able to:

- Champion sound and effective working relationships at senior level;
- Create a culture of outstanding stakeholder relationship management within the organisation;
- Ensure organisational strategies incorporate strong stakeholder relationship management;
- Identify and prioritise strategic stakeholder relationships;
- Take responsibility for improving stakeholder orientation and engagement at organisational level.

COMPETENCE 26: TEAM MANAGEMENT & LEADERSHIP

Description

Team management and leadership are key to setting a clear direction and achievable objectives for procurement teams and functions. They should be used to promote a collaborative environment and work towards common goals. This implies using methods and techniques that are tailored to the team to support its members, clearly defining roles and responsibilities; setting individual and group performance expectations; and encouraging the team to work together to achieve the set goals.

KNOWLEDGE OF: Key concepts and methods of team management.

Basic

Is able to:

- Understand and adapt to various leadership styles;
- Encourage open communication within the team;
- Give constructive feedback to ensure continuous improvement within team, organisation and service;
- Make constructive suggestions for improvement.

Intermediate

Is able to:

- Understand the necessity to align team work with the delivery of the organisation's goals and act accordingly;
- Give team members regular feedback on their strengths and weaknesses;
- Listen and value input from other team members.

Advanced

Is able to:

- Demonstrate assertiveness, confidence and emotional intelligence when managing a team;
- Plan, manage, prioritise and delegate responsibilities, in accordance with the team's capabilities;
- Encourage and support change initiatives and involve team members.

Expert

Is able to:

- Develop a culture of best practices and innovation within the procurement team and the organisation;
- Promote and support positive team management and leadership practices;
- Lead change initiatives to meet policy requirements.

Cluster of performance competences

COMPETENCE 27: ORGANISATIONAL AWARENESS

Description

Organisational awareness is the understanding of the administrative structure, organisational culture, as well as the legal and policy framework, that impacts the organisation. It allows one to understand the drivers and motivations of different stakeholders, and to take appropriate actions leading to securing value for money and the best outcome for the organisation.

KNOWLEDGE OF: The organisation's administrative structure, procedures and processes, internal culture and legal and policy framework.

Basic

Is able to:

- Operate according to the organisation's vision, mission and values;
- Identify relevant training opportunities to support own professional development;
- Understand the organisation structure and processes, and how different departments influence procurement decisions.

Intermediate

Is able to:

- Identify the interests and motivations of internal stakeholders and point out associated risks;
- Understand and respect the organisation's legal environment;
- Seek guidance and advice from experts in the organisation to solve problems.

Advanced

Is able to:

- Design and deliver relevant trainings to convey the organisation's values and working methods;
- Promote values and social aspects of the organisation to support successful team work;
- Provide the deepest level of knowledge of the organisation internal processes and procedures, and system and tools.

Expert

Is able to:

- Lead and shape high level internal policy discussions;
- Define clear career prospects and staff learning and development opportunities;
- Steer the organisation's strategy towards the achievement of value for money.

COMPETENCE 28: PROJECT MANAGEMENT

Description

The effective delivery of a procurement project requires the understanding and application of key concepts, practices and tools to manage procurement procedures. These **project management** concepts can be used to ensure that procurement projects are delivered in line with the expected timeline, budget, quality, stakeholder involvement and risk mitigation.

KNOWLEDGE OF: The key concepts and tools of project management relevant for the public administration.

Basic

Is able to:

- Undertake simple tasks and support the preparation of deliverables;
- Respect the guidelines and timeline for deliverables and project activities.

Intermediate

Is able to:

- Make informed and appropriate decisions that support the advancement of the project;
- Organise and coordinate activities in line with project objectives and strategy;
- Report on project progress and results, including quality assessment;
- Successfully manage an individual project from the scoping phase to project closure;
- Identify tasks and delegate them using the right resources.

Advanced

Is able to:

- Ensure key project milestones and deliverables are met to deliver project's objectives;
- Monitor and deliver multiple complex projects in an uncertain environment;
- Handle complex budget issues and stakeholder communication;
- Establish a framework and approach for the project, ensuring the right alignment of project objectives with the overall strategy.

Expert

Is able to:

- Promote relevant project management system and tools for the organisation;
- Take accountability for project effectiveness and deployment of the selected approach;
- Govern the organisation's project management strategy and anticipate high risks and unexpected situations and mitigate them.

COMPETENCE 29: PERFORMANCE ORIENTATION

Description

Public procurement professionals need to focus efforts and prioritise work to **deliver value for money**, in line with public service guidelines and policies. Their role is to achieve cost savings and strategic and sustainable goals, proactively identify inefficiencies, overcome obstacles and adapt their approach to consistently deliver sustainable and high-performance procurement outcomes.

KNOWLEDGE OF: Performance management strategies and methods that help identify inefficiencies and monitor the performance of procurement and the way it delivers value for money.

Basic

Is able to:

- Manage time effectively and prioritise work to meet deadlines;
- Review and improve own performance;
- Pursue individual goals with energy and persistence, setting high standards of performance;
- Develop a basic factual understanding of organisational drivers.

Intermediate

Is able to:

- Demonstrate perseverance and commitment to achieve team and organisational goals;
- Set team goals that support organisational goals and KPIs;
- Keep the team focused by setting short and long-term action plans;
- Effectively manage team performance to achieve value for money results;
- Measure the extent to which targets have been achieved.

Advanced

Is able to:

- Set goals that support performance and value for money targets;
- Drive the procurement team to achieve standards and results in line with the values and mission of the organisation;
- Monitor and analyse performance, including using statistical analysis techniques, for setting new goals.

Expert

Is able to:

- Show strategic awareness of the role of internal teams and external stakeholders in delivering successful procurements;
- Drive motivation and shape stakeholders' behaviours to achieve organisational objectives;
- Create a performance culture and shape an organisational structure that supports goals achievement;
- Sets high value for money and procurement performance goals.

COMPETENCE 30: RISK MANAGEMENT & INTERNAL CONTROL

Description

Public procurement takes place at an intersection of public and private interests. It is subject to several layers of **internal and external oversight**, even including media attention, and is widely identified as a key risk area for fraud and corruption. As such, a big part of a procurement professional's job is managing a number of overlapping risks. This requires rigorous and thoughtful application of mitigation measures and controls, as well as a proactive approach to protecting the interests of the organisation and the public good.

KNOWLEDGE OF: The different types of risk in public procurement processes and mitigation measures, functions of internal control and audit from the procurement point of view.

Basic

Is able to:

- Understand that procurement is open to risks, such as fraud and corruption, and contribute to their identification;
- Implement risk management processes such as change management and version control.

Intermediate

Is able to:

- Effectively implement the different functions of internal control and audit;
- Apply and tailor internal control processes to procurement.

Advanced

Is able to:

- Proactively manage risks to add value to the procurement activities;
- Implement advanced risk management and control processes and tools, including IT-based ones;
- Integrate the inputs from risk assessment exercises as input for designing procurement strategies and policies;
- Suggest improvements to the internal control system of the procurement activity.

Expert

Is able to:

- Use advanced risk management and control activities both at operational and strategical level;
- Master all internal and external assurance functions and use them to add value to the procurement activity;
- Fully integrate control and risk management processes into governance and operational procurement systems, using established channels of communication with competition and anti-corruption authorities;
- Use the benefits of procurement system and tools to enhance the design and the implementation of controls.

ProcurComp^EU

European Competency Framework for Public Procurement Professionals

PART II. THE SELF-ASSESSMENT TOOL

PART II. THE PROCURCOMP^EU SELF-ASSESSMENT TOOL

The Self-Assessment part of ProcurComp^EU is divided into **four sections,** each corresponding to a step of the ProcurComp^EU Self-Assessment Tool process.

The **first section** outlines the entire sequence of steps to complete the ProcurComp^EU Self-Assessment Tool, and how at each step, the elements of the ProcurComp^EU package come into play.

The **second section** explains the concept job profiles in the context of ProcurComp^EU, the various options to define job profiles, and their role in the self-assessment process.

The **third section** provides an overview of the ProcurComp^EU Self-Assessment Questionnaire, explains the type of questions included and the approach to answering the questionnaire.

The **fourth section** explains the output of the ProcurComp^EU Self-Assessment Tool process, i.e. the type of assessment results that can be obtained and how to understand and interpret them from an individual and organisational perspective.
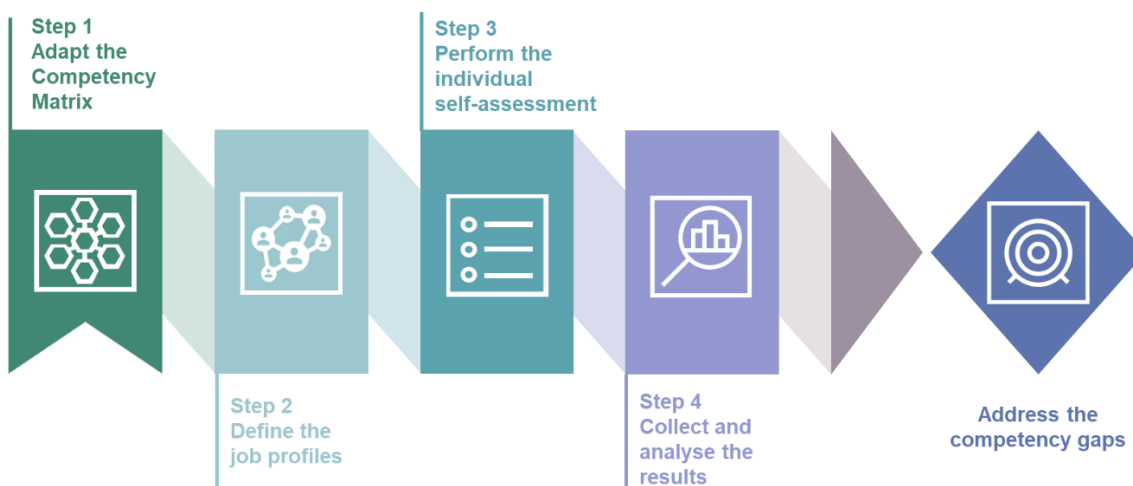
1. THE SELF-ASSESSMENT PROCESS

The ProcurComp^EU **Self-Assessment Tool** is a professional organisational development tool that provides an opportunity to public procurement professionals to assess their mastery of activities core to their role and job profile in the organisation and to reflect on their future professional development. The SAT can be used both by organisations and individuals, as many times as needed.

The ProcurComp^EU **Self-Assessment User Guide** provides detailed step by step guidance on how to carry out the Self-Assessment Tool process.

An indicative sequence of the steps to complete the self-assessment process is outlined below, although the sequence can be adapted to the specific needs of each organisation or individual.

Figure 2: the self-assessment process

Step 1
Adapt the
Competency
Matrix

Step 3
Perform the
individual
self-assessment

Step 2
Define the
job profiles

Step 4
Collect and
analyse the
results

Address the
competency gaps

1.1. Step 1 – Adapt the Competency Matrix

The first step in performing the self-assessment process is to get familiar with the ProcurComp^EU Competency Matrix and assess how closely it fits the situation of the organisation. The ProcurComp^EU Competency Matrix aims to provide a European reference point for all public procurement professionals and organisations. However, organisations vary in size, sectoral focus, and may function differently. Organisations should therefore be able to adapt the matrix to their local context and needs.

The following changes to the Competency Matrix can be made:

- **Adapting the content of the existing competences** – Changes to the content of the existing competences can be made by, for example, adapting the list of tasks in the different proficiency levels.

- **Excluding some of the existing competences** – Some competences can be excluded if they are not considered relevant for organisation or if they are already covered by an existing competency framework, for example for transversal or specialised skills.

- **Adding new competences to the existing list** – Organisations may wish to define competences additional to those listed already.

The technical steps for adapting the Competency Matrix are described in the ProcurComp^{EU} Self-Assessment User Guide.

1.2. Step 2 - Define the job profiles

The organisation (or the individual) can define, using the Competency Matrix, the desired level of knowledge and skills expected from public procurement professionals, by **setting target proficiency levels** for all the job profiles existing within the organisation. This is done by determining the proficiency level (1. Basic – 2. Intermediate – 3. Advanced – 4. Expert) that an individual or all individuals in a given role or job profile should have. To do this, organisations can use or adapt the template job profiles proposed in the tool or create new ones.

Job profiles are always specific to each organisation and can change over time with the evolution of procurement tasks and the individuals available to perform those tasks. Therefore, the examples presented in Section 2 below are only an illustration of common profiles for demonstration purposes. It is up to each organisation to define its own set of job profiles, with corresponding competences and target proficiency levels.

If the organisation wants to simply take a snapshot of its current resources, it can also start the assessment from a neutral profile, i.e. showing all the competences and without assigning them target proficiency levels.

See Section 2 below for the descriptions of the six ProcurComp^{EU} example job profiles. The technical steps for defining job profiles are described in the ProcurComp^{EU} Self-Assessment User Guide.

1.3. Step 3 – Perform individual self-assessment

Next, procurement professionals should individually **complete the ProcurComp^{EU} Self-Assessment Questionnaire**, which starts with background information such as years of professional experience, training experience, etc., and further invites individuals to answer a set of questions aimed at assessing their existing knowledge and skills in public procurement.

See Section 3 below for the full Self-Assessment Questionnaire. The technical steps to answer the questionnaire are described in the ProcurComp^{EU} Self-Assessment User Guide.

1.4. Step 4 – Collect and analyse the results

Once all the individuals have completed their ProcurComp^{EU} Self-Assessment Questionnaire, individual results should be analysed using the appropriate calculation tools as described in the ProcurComp^{EU} User Guide. This will provide results at individual level, and at organisational level.

Individual results: Based on the individual answers to the ProcurComp^{EU} Self-Assessment Questionnaire and on the target proficiency levels corresponding to the job profiles, individual scores for all competences can be obtained. Using these scores, individuals can identify their competency gaps, i.e. their strengths and weaknesses in some competences.

See Section 4 below for more information on the individual assessment results. The technical steps to collect and analyse results are described in the ProcurComp^{EU} Self-Assessment User Guide.

Organisational results: Organisations can compile and aggregate individual results and obtain an organisational level assessment indicating competency gaps at job profile and organisational level.

The aggregation of the results for all the individuals who occupy the same job profile, within a department or a team, or for the organisation as a whole, may lead to:

- Calculating the average performance for each competence which allows to identify the maturity and competence of the organisation as a whole;

- Spotting the highest or lowest scores of individuals which allows to identify individual talent or weaknesses.

See Section 4 below for more information on organisational assessment results. The technical steps to collect and analyse results are described in the ProcurComp^{EU} Self-Assessment User Guide.

1.5. Step 5 – Address the gaps

Based on the competency gaps identified at individual, profile and organisation level, organisations can define targeted actions to fill these gaps.

At individual level, individuals can receive a report on their assessment, and this can be further discussed with the organisation in order to **determine individual steps to take**, such as training needs to fill gaps related to a present post, or potential for career progression.

At organisational level, **gaps can be addressed in several ways**, such as:

- Providing training to procurement staff through internal or external training,

- Recruiting new procurement staff,

- Hiring external expertise,

- Cooperating with other contracting authorities through exchange of good practice or joint procurement,

- Delegating to central purchasing bodies.

The organisation can also, based on the overview of existing competences, **plan the strategic development of the organisation** as a whole, according to its future policy priorities. For example, if the organisation wants to develop sustainable or innovation procurement or if it wants to put in place state-of-the-art eProcurement processes, it may orient its training and recruitment strategy in a way to obtain the right competency mix.

The ProcurComp^{EU} **Generic Training Curriculum** can help organisations identify the right training programmes, or design targeted training modules or training programmes.

The various uses of ProcurComp^{EU} are described in the ProcurComp^{EU} **Overview**.

2. THE PROCURCOMP^{EU} JOB PROFILES

2.1. Defining job profiles

In the context of ProcurComp^{EU}, the job profiles represent the **desired levels of knowledge and skills** sought by an individual and expected by an organisation for a specific position.

Job profiles are always **specific to each organisation** and can change over time with the evolutions of procurement tasks and available individuals performing those tasks. A variety of procurement job profiles exists across procurement organisations, departments and teams across the EU Member States. Such job profiles include but are not limited to public procurement expert, public procurer, procurement practitioner, junior buyer, senior buyer, category manager, performance manager, procurement officer, procurement assistant, procurement officer, commercial specialist, and head of procurement department. In addition, other organisational support functions such as legal and IT functions are also often involved in public procurement processes.

Therefore, the ProcurComp^{EU} job profiles presented below are only an illustration of common profiles for demonstration purposes. It is **up to each organisation to define its own set of job profiles** with corresponding competences and target proficiency levels.

The objectives of defining job profiles is to help public procurement professionals and organisations to:

- Access the self-assessment tool;
- Focus on the required competences for the relevant job profile;
- Target a level of proficiency to support career progression; and
- Identify training and hiring needs.

The aim of this section is to outline **examples of six broadly used procurement job profiles** based on the most common profiles observed in the public procurement area.

It should be clear that these six common job profiles are presented **only with the goal to provide an illustration** and an example, which every organisation can **adapt** to its context or **use as a starting point** and inspiration to define its own set of job profiles and target proficiency levels.

It is also possible to **create a new job profile**: start from the full list of competences and decide, for each profile or individual, which are the relevant competences, and what proficiency levels to set as a target.

Finally, it is also possible to conduct the self-assessment **without defining any profile** or target level, for example if the organisation wants to start from an overview of existing resources, assets and talent. Therefore, any organisation may:

- Use the six examples of common job profiles presented here, as long as they fit the organisation;
- Adapt these profiles to the specific profiles of the organisation;
- Define its own set of job profiles based only on its own analysis; and
- Start from a neutral list of competences and observe the results without a point of comparison.

In the following paragraphs you will find:

- The description of the six example of common job profiles; and
- An indicative list of the competences and corresponding target proficiency levels for each job profile.

2.2. Examples of most common job profiles

Procurement support officer

"You support your team of procurement staff throughout the procurement processes and tasks the team is in charge of."

As a procurement support officer, your job is to assist staff members throughout the entire public procurement cycle, making sure all procurement documents are compliant with procedural, technical and legal requirements, and that meetings and other contacts are well organised.

- You need to have a solid overview of the different steps in the procurement **lifecycle**, and proficiency with the relevant **Procurement and other IT tools** needed.
- You also need to rely on good **communication** and **collaboration**, as well as strong organisational awareness to move the process along efficiently.
- Your major added value is in helping the procurement team to ensure **compliance**, particularly in the preparation of **tender documentation**.

Standalone public buyer

"You are the go-to procurement person for your (small) organisation, which means you have to be able to do a bit of everything."

The **standalone public buyer**'s job is the most common. You are the person who has to manage all of the procurement needs for a small contracting authority. As such, your job is to be a generalist who knows what needs to be done at each stage of the process, and where to find the kinds of specialised knowledge you may not have.

- You need to have solid understanding of relevant EU and national **legislation** and be proficient with the relevant **IT systems and tools**.
- You also need to be able to handle **compliance** and **risk management** responsibilities.
- As a public buyer, your internal clients and end users rely on you to bring strong **business and performance orientation**, and to take care of outward-facing aspects such as **supplier management**.
- Your major added value is to be a generalist who has at least an intermediate understanding of all the steps in the procurement **lifecycle**, from **needs assessment** and **market consultation** to drafting **technical specifications** and leading the **evaluation.**
- You may also need to cover the post-award phase of the procurement process, including **contract management** and **certification and payment**.
- Being able to incorporate **sustainability and innovation** objectives into the procurement process is an asset.
- Your role requires **analytical and critical thinking** to address problems independently, and **organisational awareness** to get support when you need it.

Public procurement specialist

"You are a full-time public procurement practitioner, working as part of a team in a large organisation to translate needs into contracts and deliver value for money for your organisation and the public."

The **public buyer**'s job is to be a specialist in the public procurement for a larger contracting authority or central purchasing body, as part of a larger team.

- You need to have solid understanding of relevant EU and national **legislation**, apply a consistent **compliance** mindset, and be proficient with the relevant **IT systems and tools**.
- As a public procurement specialist, your internal clients and end users rely on you to bring strong **business and performance orientation**, and to take care of outward-facing aspects such as **supplier management**.
- Your major added value is in the pre-award phase, translating the results of the **needs assessment** of internal clients into clear and objective **technical specifications**, and taking an active role in the **tender evaluation** committee.
- As a specialist, you need to bring strong understanding of how the work in your remit fits into the broader procurement **lifecycle**, and to craft tailored **procurement strategies**.
- You are able to incorporate **sustainability and innovation** objectives into the procurement process.
- As a member of a larger team, **collaboration** and **organisational awareness** are essential to your success.

Category specialist

"Your role is to provide advanced knowledge of a particular category of supplies, services or works that can only come from specialisation and experience."

- Your job as the **category specialist** is to become an expert in a specific kind of market and contract. You help the internal or external clients to increase their value for money and the satisfaction of end users through your advanced knowledge of the suppliers and their offering.
- Your major added value is in your **category specific** knowledge. Within this category, you are particularly adept at conducting **market analysis and engagement**, and **in drafting technical specifications**.
- This knowledge also makes you uniquely effective at the **needs assessment** process, as well as on how the specificities of your field interact with the steps of the procurement **lifecycle**.

- You rely on your **business and performance orientation** to transform your knowledge into better results for end users and the public.
- You are able to leverage your insights to achieve more **sustainable and innovation procurement**.

Contract manager

"You are the one who steps in after the contract has been signed to ensure that it is delivered as foreseen, and to ensure that each step of the delivery is properly documented."

As a **contract manager**, your job is to oversee the operation and performance of the contracts. You act as the main point of contact for suppliers on contractual matters, and you report back to your leadership. This includes implementing financial and operational controls, and compliance with all reporting requirements.

- You need to have a strong understanding of relevant EU and national **legislation**, particularly contract law.
- You also need to represent the organisation in terms of **supplier management**, as well as any **negotiations** or **conflict resolution** that may be necessary.
- Your major added value is in the post-ward phase, taking the lead on **contract management**, **certification and payment**, and **reporting and evaluation** responsibilities.

Department manager

"You ensure that the organisation's policies goals are transformed into concrete action, and you support your teams to achieve the best results for your clients and the public."

- Your job as the **department manager**'s job is to oversee the public procurement professionals in the organisation to deliver on their objectives. As a management position, this role requires less specialisation in procurement and more professional competences.
- You need to have a solid grasp of relevant EU and national **legislation**, and to be able to translate that into tailored **procurement strategy**.
- You are ultimately responsible for **compliance**, as well as **internal control and risk management**.
- You are responsible for the **planning**, making sure organisational and national policies are being implement day-to-day. This includes incorporating **sustainable and innovation** policy goals into the procurement process, where relevant.
- You are often called on to represent your organisation, so you will need excellent **communication** and **negotiation** skills.
- As a manager, you are accountable for the department budget, thus you need to bring a strong **performance orientation** and **project management** to the job to drive value for money.
- Your major added value is as a leader. This requires exceptional **team management and leadership** and **stakeholder relationship management** skills, as well as very strong **organisational awareness**.
- You will need to rely on your **analytical and critical thinking**, and to drive change through **adaptability**.
- You are accountable to the organisation for all **reporting and evaluation**, and authorising **certification and payment**.

2.3. Examples of competences and target levels for common job profiles

The table below provides an overview of the target proficiency levels corresponding to the competences required by the six examples of common job profiles. Where there is no number, it means that the competence is deemed not relevant to the job profile i.e. does not correspond to the activities carried out by individuals that belong to this job profile.

Table 3: Examples of competences and target levels for common job profiles

Cluster	Competence	Procurement job profiles					
		Procurement support officer	Standalone public buyer	Public procurement specialist	Category specialist	Contract manager	Department manager
Horizontal	1. Planning	-	1	1	2	2	3
Horizontal	2. Lifecycle	1	2	3	3	2	3
Horizontal	3. Legislation	-	2	1	1	2	4
Horizontal	4. e-Procurement & other IT tools	1	2	2	1	1	2
Horizontal	5. Sustainable procurement	-	1	2	3	2	3
Horizontal	6. Innovation Procurement	-	1	2	3	2	3
Horizontal	7. Category specific	-	1	1	3	-	-
Horizontal	8. Supplier management	1	1	1	2	2	2
Horizontal	9. Negotiations	-	2	2	-	2	3
Pre-award	10. Needs assessment	1	1	2	2	-	3
Pre-award	11. Market analysis and market engagement	1	2	2	2	-	-
Pre-award	12. Procurement strategy	-	2	2	1	-	3
Pre-award	13. Technical specifications	1	2	2	3	-	-
Pre-award	14. Tender documentation	1	2	2	1	-	-
Pre-award	15. Tender evaluation	-	2	2	1	-	2
Post-award	16. Contract management	1	2	1	2	3	2
Post-award	17. Certification and payment	1	2	1	-	3	2
Post-award	18. Reporting and evaluation	1	2	2	-	2	3
Post-award	19. Conflict resolution/ mediation	-	1	1	-	2	2
Personal	20. Adaptability and modernisation	-	2	1	2	2	3
Personal	21. Analytical and critical thinking	1	2	2	2	3	4
Personal	22. Communication	1	2	2	1	3	3
Personal	23. Ethics and compliance	2	3	2	1	3	4
People	24. Collaboration	2	1	2	1	2	3
People	25. Stakeholder relationship management	1	1	2	1	3	4
People	26. Team management and Leadership	-	1	1	-	-	3
Performance	27. Organisational awareness	2	2	2	1	2	4
Performance	28. Project management	1	2	2	-	2	3
Performance	29. Performance orientation	1	2	2	2	3	3
Performance	30. Risk management and internal control	1	2	2	1	3	4

3. THE SELF-ASSESSMENT QUESTIONNAIRE

The individual ProcurComp^{EU} Self-Assessment Questionnaire is divided into three main sections:

- **General questions** give an overview of the individual's background in public procurement. These questions do not have a score and therefore do not count for the individual self-assessment results. Rather, these questions are contextual information complementary to the individual self-assessment.
  -
- **Knowledge questions** capture the knowledge the individual has in public procurement against the expected knowledge (target proficiency level) set for the individual's job profile.
  -
- **Skills questions** capture the range of skills the individual has against the expected skills (target proficiency levels) set by the individual's job profile.

For each competence there is at least one knowledge and one skills questions. The questions can be presented in an order that follows the Competency Framework or separate the knowledge questions from the skills questions.

The ProcurComp^{EU} Self-Assessment Tool is not intended to serve a performance review tool, but as a professional organisation development tool. Therefore, questions have been designed in the form of self-declaration questions and not test questions.

Except from the general questions, answers to the knowledge and skills questions are scored from 0 to 4:

- **0**: I have no knowledge/ I have no skills
- **1**: I have basic knowledge/ I have basic skills
- **2**: I have intermediate knowledge/ I have intermediate skills
- **3**: I have advanced knowledge/ I have advanced skills
- **4**: I have expert knowledge/ I have expert skills

The list presented hereafter outlines the questions corresponding to each competence.

3.1. General questions

- **General question 1:** What is your position within your organisation?
- **General question 2:** What are your current tasks and responsibilities related to public procurement?
- **General question 3:** Are you working full-time or part-time on these tasks and responsibilities?
- **General question 4:** How many years have you been occupying this position?
- **General question 5:** How many years of experience do you have working in public procurement in total?
- **General question 6:** What type and level of training related to public procurement have you received?

3.2. Knowledge and skills questions corresponding to ProcurComp^EU competences

Competence 1: Planning

- **Knowledge question 1:** How well do you know your organisation's procurement planning, policy priorities and budget?

- **Skill question 1:** To what extent are you able to develop a procurement plan according to available budget resources?

Competence 2: Lifecycle

- **Knowledge question 2:** How well do you know the different phases of the procurement lifecycle, from pre-publication to post-award?

- **Skill question 2**: To what extent are you able to follow the various phases of the procurement lifecycle?

Competence 3: Legislation

- **Knowledge question 3:** How well do you know the legislation on public procurement and other relevant areas of law?

- **Skill question 3:** To what extent are you able to apply specific aspects of the procurement legislation, as well as other legal frameworks impacting procurement?

Competence 4: e-Procurement and other IT tools

- **Knowledge question 4:** How well do you know e-Procurement and other IT systems and tools?

- **Skill question 4:** To what extent are you able use e-procurement and other IT systems and tools?

Competence 5: Sustainable procurement

- **Knowledge question 5**: How well do you know the relevant sustainability policies and how to promote them?

- **Skill question 5**: How well do you know how to incorporate sustainable objectives set by the organisation and national policies into the procurement process?

Competence 6: Innovation procurement

- **Knowledge question 6:** How well do you know the relevant innovation policies and how to promote them?

- **Skill question 6:** To what extent are you able to incorporate innovation objectives set by the organisation and national policies into the procurement process?

Competence 7: Category specific

- **Knowledge question 7:** How well do you know the features and specificities of one or more specific category of supplies, services or works?

- **Skill question 7:** To what extent are you able to get the most out of one or more category of supplies, services or works?

Competence 8: Supplier management

- **Knowledge question 8:** How well do you know supplier management strategies and processes?

- **Skill question 8:** To what extent are you able to develop, manage and maintain relationship with suppliers while respecting public procurement principles?

Competence 9: Negotiations

- **Knowledge question 9:** How well do you know negotiation processes relevant in public procurement?

- **Skill question 9:** To what extent are we able to apply negotiation processes strategies during the procurement phases and contract management in accordance with public procurement principles and ethical standards?

Competence 10: Needs assessment

- **Knowledge question 10:** How well do you know needs identification tools and techniques?

- **Skill question 10:** To what extent are you able to apply needs assessment techniques and tools for determining needs of the organisation and end-users regarding the subject-matter of the procurement?

Competence 11: Market analysis and market engagement

- **Knowledge question 11**: How well do you know market analysis tools and appropriate market engagement techniques?

- **Skill question 11**: To what extent are you able to use market analysis and market engagement techniques to understand the characteristics and trends of the supplier market?

Competence 12: Procurement strategy

- **Knowledge question 12:** How well do you know the different procurement strategies, such as procedure types, use of lots, and kinds of contracts?

- **Skill question 12:** To what extent are you able to determine among the range of available procurement strategies the one that fits best to the procurement at stake while reaching the organisation's objectives?

Competence 13: Technical specifications

- **Knowledge question 13:** How well do you know the requirements of drafting technical specifications?

- **Skill question 13**: To what extent are you able to draft technical specifications that enable potential bidders to submit realistic offers that address the needs of the organisation?

Competence 14: Tender documentation

- **Knowledge question 14:** How well do you know the requirements of preparing tender documentation?

- **Skill question 14:** To what extent are you able to prepare procurement documentation including appropriate exclusion, selection and award criteria?

Competence 15: Tender evaluation

- **Knowledge question 15:** How well do you know the evaluation process?

- **Skill question 15**: To what extent are you able to evaluate offers against pre-defined criteria in an objective and transparent way?

Competence 16: Contract management

- **Knowledge question 16:** How well do you know the principles of contract management?

- **Skill question 16:** To what extent are you able to oversee contract implementation while ensuring technical compliance of the good, work or service delivered?

Competence 17: Certification and payment

- **Knowledge question 17:** How well do you know the process for certification and payment?

- **Skill question 17:** To what extent are you able to apply verification principles and the financial control framework to verify the legal compliance of the procurement contract before proceeding to payment?

Competence 18: Reporting and evaluation

- **Knowledge question 18:** How well do you know contract monitoring tools and techniques?

- **Skill question 18:** To what extent are you able to evaluate the process, deliverables and outcomes of a procurement to draw lessons on how to improve the performance of future procurements?

Competence 19: Conflict resolution/mediation

- **Knowledge question 19:** How well do you know conflict resolution and mediation processes and the functioning of the review system?

- **Skill question 19:** To what extent are you able to prevent and resolve conflicts and manage complaints in the framework of the national review system?

Competence 20: Adaptability and modernisation

- **Knowledge question 20**: How well do you know change management techniques and tools?

- **Skill question 20:** To what extent are you able to anticipate and accommodate to changing tasks and circumstances and aim to continuously learn and grow?

Competence 21: Analytical and critical thinking

- **Knowledge question 21:** How well do you know analytical and critical thinking approaches and tools?

- **Skill question 21**: To what extent are you able to use analytical and critical thinking in evaluating an information and/or a situation and solving problems?

Competence 22: Communication

- **Knowledge question 22:** How well do you know communication tools and techniques and how to apply the public procurement principles in various communication situations?

- **Skill question 22:** To what extent are you able to communicate effectively by adapting the communication medium and message to the target audience while ensuring public procurement principles are respected?

Competence 23: Ethics and compliance

- **Knowledge question 23:** How well do you know the procedural rules and principles as well as tools, codes and guidance document that help ensure adherence thereto?

- **Skill question 23:** To what extent are you able to ensure compliance with applicable public procurement rules, principles, and ethical standards?

Competence 24: Collaboration

- **Knowledge question 24:** How well do you know collaboration tools and techniques?

- **Skill question 24:** To what extent are you able to promote inclusive and collaborative thinking and processes?

Competence 25: Stakeholder relationship management

- **Knowledge question 25:** How well do you know the key concepts and methods of stakeholder management?

- **Skill question 25:** To what extent are you able to create mutual trust that contribute to solid internal and external stakeholder relationships?

Competence 26: Team management and leadership

- **Knowledge question 26**: How well do you know the key concepts and methods of team management?

- **Skill question 26:** To what extent are you able to tailor management and leadership methods and techniques to the team and circumstances thereby creating a conducive environment for achieving common goals?

Competence 27: Organisational awareness

- **Knowledge question 27**: How well do you know your organisation's administrative structure, procedures and processes, internal culture and legal and policy framework?

- **Skill question 27:** To what extent are you able to understand both the procurement function and the organisation's structure and culture?

Competence 28: Project management

- **Knowledge question 28:** How well do you know project management tools and techniques relevant for the public administration?

- **Skill question 28:** To what extent are you able to apply project management tools and techniques to effectively carry out a procurement procedure and contract?

Competence 29: Performance orientation

- **Knowledge question 29:** How well do you know cost and performance management strategies and methods as well as Key Performance Indicators (KPIs) that help identify inefficiencies and monitor the financial performance of the procurement and the way it delivers value for money?

- **Skill question 29:** To what extent are you able to apply commercial and performance management strategies and methods to maximise value for money of procurement contracts?

Competence 30: Risk management and internal control

- **Knowledge question 30a:** How well do you know audit and control functions?

- **Skill question 30a:** To what extent are you able to carry out the different functions of inspection, control, audit, and evaluation applicable to public procurement?

- **Knowledge question 30b:** How well do you know audit risk management tools and techniques?

- **Skill question 30b:** To what extent are you able to monitor risks closely and apply mitigating measures and proactive approaches to protect the interest of the organisation?
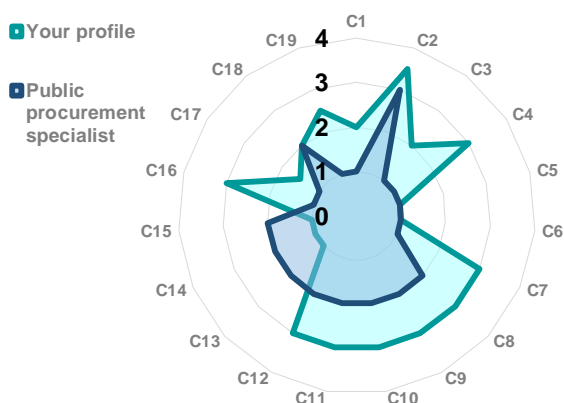
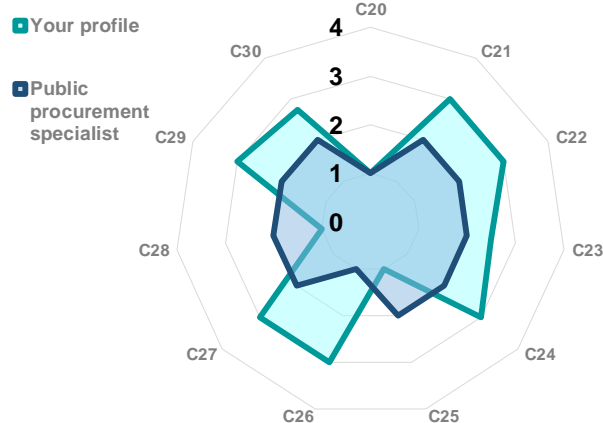# 4. THE ASSESSMENT RESULTS

4.1. Individual assessment results

Individual assessments' results can be visualised in the form of radar charts indicating the scores for the procurement specific competences and the soft competences. For each competence, the chart indicates the **target proficiency level** set for the individual job profile, and the **actual score** reached by the individual in that competence.

Individuals are therefore able to quickly identify areas where their current proficiency level meets the target, exceeds the target, or falls short of the target level for their job profile. Individuals can use any gaps identified to support their own career and professional development, e.g. by seeking out targeted learning and development activities. Within the organisation, individuals can use their results to build a case to their management for attending certain trainings in order to enhance their competences and develop new skills that will also benefit the organisation.

4.2. Profile assessment results

Profile assessment results can be obtained by aggregating assessment results from all individuals that belong to the same job profile.

For each job profile, the following results can be calculated:

- **Target Score:** The target level set for the competence for a specific job profile;
- **Average Score:** The average of all individual assessment results for the same profile;
- **Maximum Score:** The maximum score obtained by an individual from the same profile.

The **average score** helps to identify patterns of strengths and weaknesses across all team members of a given profile in the organisation. That is, it allows the organisation to see if there are competences in which the professionals within a specific role generally exceed or fall short of the target proficiency level. This information is particularly valuable at a strategic level, telling the leadership where the organisation is particularly strong, or where they need to invest in longer-term capacity building.

The **maximum score** allows organisations to answer a very different question: does any of the team members of a given profile have the maximum proficiency level that the organisation determined it needs in each of the competences. In contrast to a gap in the average score, a finding that no one in that role in the organisation has the maximum target

proficiency level may call for more immediate action to address the gap. This is particularly salient for specialised job profiles, such as a legal expert or contract manager, that are expected to bring particular knowledge or skills not present elsewhere in the organisation.

Procurement Specific Competencies Maximum Scores
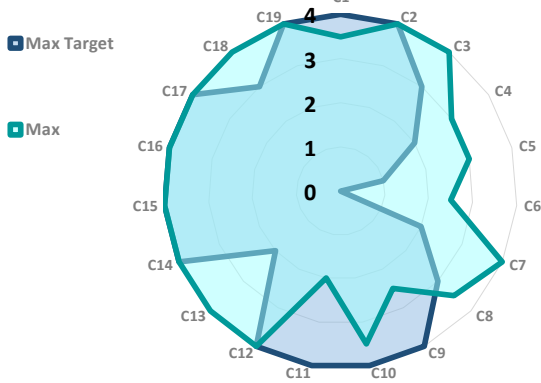
Procurement Specific Competencies Average Scores
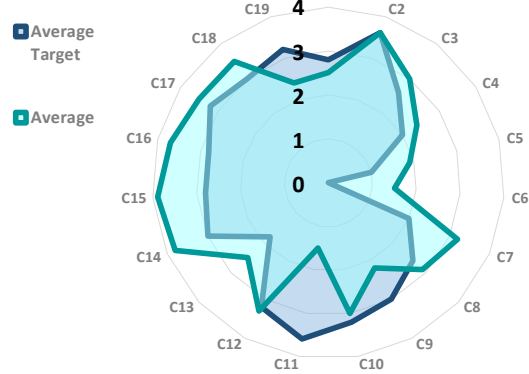
4.3. Organisational assessment results

Organisational assessment results can be computed by aggregating all individual assessment results. Results can be visualised, for example, in four radar charts: two for the procurement specific competences and two for the soft ones.

For each competence, the charts indicate:

- **Target Maximum:** The maximum target level for all the job profiles taken together
- **Maximum Score**: The maximum score reached
- **Average Target:** The average of all target proficiency levels
- **Average Score:** The average of all profiles results

The two sets of scores help address different kinds of organisational questions.

The **maximum score** allows organisations to answer a very different question: does anyone in the organisation have the maximum proficiency level that the organisation determined it needs in each of the competences. In contrast to a gap in the average score, a finding that no one in the organisation has the maximum target proficiency level may call for more immediate action to address the gap.

The **average score** helps to identify patterns of strengths and weaknesses in the organisation. That is, it allows the organisation to see if there are competences in which multiple individuals exceed or fall short of the target proficiency level. This information is particularly valuable at a strategic level, telling the leadership where the organisation is particularly strong, or where they need to invest in longer-term capacity building.

Soft competencies Maximum Scores
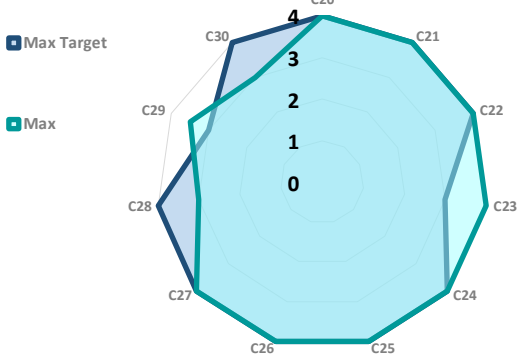
Soft competencies Average Scores
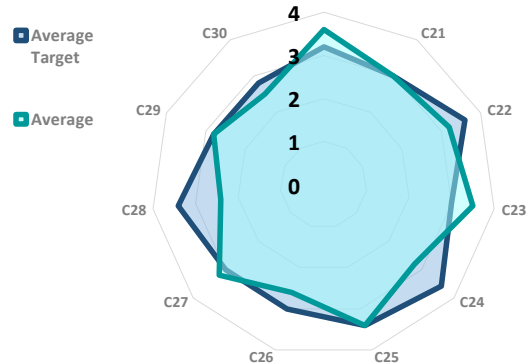
ProcurComp^EU

European Competency Framework for Public Procurement Professionals

PART III.THE GENERIC TRAINING CURRICULUM

PART III. THE PROCURCOMP^{EU} GENERIC TRAINING CURRICULUM

1. WHAT IS THE GENERIC TRAINING CURRICULUM?

The ProcurComp^{EU} Generic Training Curriculum is one of the tools that comprise the ProcurComp^{EU} package. It was developed based on the ProcurComp^{EU} Competency Matrix and builds on the 30 competences described in it.

While the Competency Matrix outlines the different levels of relevant knowledge and skills public procurement professionals should possess to do their job well, the Training Curriculum provides an outline of the content of trainings through which the procurement-specific and soft competences contained in the Competency Matrix can be developed. More specifically, it describes the standard training content and learning outcomes for 30 training modules based on the competences listed in the Competency Matrix (see Table 1).

1.1. Goal of the ProcurComp^{EU} Generic Training Curriculum

From an organisational or institutional perspective, the Training Curriculum is **an outline of standard training content** that public procurement organisations, governments, universities, training institutions, and certifying institutions can use as a basis for developing procurement training programmes targeted at professionals.

1.2. Structure of the ProcurComp^{EU} Generic Training Curriculum

The **training modules** provide descriptions of the competences at stake, the list of training topics that should be addressed in a training course, and the expected learning outcomes.

Each training module is structured as follows:

Competence description: a short explanation of the competence covered by the training module and the type of knowledge required to master the competence.

Training topics: the subject areas and topics that should be covered in the training module.

Learning outcomes: the expected knowledge and skills that learners should be able to understand and apply at appropriate level at the end of the training.

1.3. Training and learning methods targeted to the proficiency level

The Training Curriculum provides a basis for preparing the content to be covered in training modules for the four distinct proficiency levels set out in the ProcurComp^{EU} Competency Matrix. Although the training topics will be the same across the four levels, **different learning methods** will need to be used to effectively deliver a training that supports the development of competences from basic to expert level.

The range of training and learning methods that can be employed for the delivery of trainings based on the Training Curriculum includes:

- Introductory seminars and workshops;

- Conferences and high-level expert groups;

- Classroom training;

- Web-based learning;

- Structured e-learning modules;

- On-the-job learning; and

- Coaching.

The Training Curriculum is intended to be a **flexible tool** and does not mandate the use of any particular learning method for addressing a training level. Although some training methods are more suitable for certain training levels (e.g. introductory seminars and workshops are typical ways of acquiring a basic awareness level, while for a higher proficiency level the learning method will rather be peer learning, exchange of good practices, specialised seminars, etc.), it is up to the users of the ProcurComp^{EU} Generic Training Curriculum to define and decide which training and learning methods are best fitted to the training programme they are developing.

The learning outcomes presented here are indicative and should be seen as a starting point for developing and adapting the training content to the specific national or organisational context as well as in terms of specific training objectives, target audiences, proficiency levels and teaching methods. As there are different ways to approach learning outcomes, guidance can be found in the Handbook on defining, writing and applying learning outcomes.[22] Furthermore, the European Qualifications Framework is a tool to ensure consistency between types and levels of qualifications in the Union.[23]

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[22] Cedefop (2017). Defining, writing and applying learning outcomes: a European handbook; https://www.cedefop.europa.eu/files/4156_en.pdf
[23] https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52016DC0383&from=EN

2. THE PROCURCOMP^{EU} GENERIC TRAINING MODULES

TRAINING MODULE 1. PROCUREMENT PLANNING

COMPETENCE DESCRIPTION

The formulation, development and implementation of **procurement planning** that says where and how public procurement should be used to cost-effectively purchase the required supplies, services or works in line with the desired policy impact. This should take into account:

- The political and policy priorities of the organisation;
- The relevant policies at national level;
- The adopted budget plans and available resources;
- Whether procurement is the right option to meet the identified need;
- The need to prioritise and manage timelines; and
- Potential opportunities and risks in the implementation process.

This competence requires knowledge of the procurement planning and policy priorities of the organisation, including budget plans and options for implementation, as well as relevant policies at national level.

TRAINING TOPICS

This training module should cover:

- The political and policy priorities of the organisation and the link to relevant policies at national level
- The procurement processes and timelines for accurate planning
- The adopted budget plans, the budgetary cycle of the organisation and available resources
- The need to prioritise and manage timelines
- Potential opportunities and risks in the implementation process

L**EARNING OUTCOMES**

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- The process of gathering and consolidating input and contributions from various departments depending on their functions in the organisation with a view to identify the needs and resources
- Setting priorities to match the available resources, identifying options for combining needs and achieving economies of scale
- Performing a Strengths–Weaknesses–Opportunities–Threats (SWOT) analysis from the point of view of the organisation and of the economic operators
- Assessing whether procurement is the right option to meet the identified need, and aligning the procurement projects to the organisation's budget
- Identifying potential implementation risks and preparation of a risk mitigation plan (cf. specialised module)
- Developing and drafting the procurement planning of the organisation focusing on the policy outcomes and operational deliverables
- Assessing and reporting on the implementation of previous procurement plans
- Assessing the maturity of the organisation procurement function/department and proposing a vision for the future and the corresponding development strategy

TRAINING MODULE 2. PROCUREMENT LIFECYCLE

COMPETENCE DESCRIPTION

The procurement lifecycle includes the various phases, from planning and pre-publication to post-award and contract management. Each step affects the nature of subsequent steps. Understanding the overall lifecycle and the interactions between the steps, over a number of procedures, is necessary for the design and implementation of robust procurement procedures. It allows to anticipate risks and opportunities, thus improving efficiency and value for money.

This competence requires knowledge of the procurement lifecycle from pre-publication to post-award, and how the different phases interact with each other.

TRAINING TOPICS

This training module should cover:

- Steps, tasks and processes in the public procurement lifecycle and how they interact with each other
- Common challenges related to the links between different phases in the procurement lifecycle
- Good practices in public procurement lifecycle management, such as tracking tools, communication, and continuous improvement
- Organisations' internal frameworks for procurement processes

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand steps, tasks and processes in the public procurement lifecycle and how they interact with each other
- Implement the different phases of the procurement lifecycle, understanding how each interacts with the others
- Exploit opportunities and anticipates risks in other steps
- Anticipate risks and challenges between steps
- Monitor and reporting on the implementation of the various steps
- Incorporate lessons learned from past procedures
- Ensure knowledge transfer between various phases
- Identify operational inefficiencies from previous procurements
- Shape organisational policies and internal tools to exploit the links between the procurement phases to maximise the efficiency
- Set organisational goals and strategies for improving the overall approach to public procurement within the organisation

TRAINING MODULE 3. PROCUREMENT LEGISLATION

COMPETENCE DESCRIPTION

Public procurement professionals need to understand and be able to apply the relevant **national and EU level legal frameworks** and the principles of non-discrimination, equal treatment, transparency, proportionality and sound financial management. This includes adjacent areas of law and policy, e.g.:

- Competition, administrative, contract, environmental, social and labour laws, accessibility obligations and Intellectual Property Rights;
- EU funding, budgetary and accounting rules;
- Remedies;
- Anti-corruption and anti-fraud measures;
- Any relevant international obligations.

Knowledge of the legislation is also essential to understand and ensure the desired impact on the procurement system and on the supply chains.

This competence requires knowledge of the procurement legislation at national and EU level, as well as adjacent areas of law and their implications for public procurement.

TRAINING TOPICS

This training module should cover:

- The core principles of public procurement
- EU, national, and sub-national level procurement regulation
- Adjacent areas of law, including competition, administrative, contract, environmental, social and labour laws, accessibility obligations and Intellectual Property Rights
- EU funding, budgetary and accounting rules
- Remedies
- Regulations and requirements related to anti-corruption and anti-fraud
- Any relevant international obligations

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand how public procurement is regulated at EU, national, and sub-national level, where relevant, and how to monitor legislative developments
- Understand the implications and impact of procurement law on the procurement system and the supply chain
- Understand and navigate adjacent legislation to public procurement (including competition, administrative, contract, criminal, environmental, social, labour and budget law, accessibility obligations as well as Intellectual Property Rights)
- Identify and rely on relevant case laws from the ECJ to make decision during the procurement process
- Design systems, tools and procedures that promote compliance with rules and procedures

TRAINING MODULE 4. E-PROCUREMENT AND OTHER IT TOOLS

COMPETENCE DESCRIPTION

e-Procurement and other IT systems and tools support the procurement lifecycle, from the publication of tender opportunities to the final payment. They reduce administrative burden, improve efficiency, and strengthen transparency and accountability of procurement procedures. Key tools include:

- Preparatory phase tools, e.g. TED and national procurement platforms, e-notification, standardised tender documents and templates
- Submission phase tools, e.g. e-submission, the European Single Procurement Document, e-Certis
- Tendering phase tools, e.g. e-catalogues, electronic procurement platforms, dynamic purchasing systems, auction systems, and e-invoicing
- Other IT tools for data transparency, anti-fraud and anti-corruption, such as business and public contract registers

The digital transformation of public procurement requires a continuous proactive approach to take advantage of the best available tools. It also requires continuous training.

This competence requires knowledge of eProcurement platforms and functionalities used within the organisation, including national and EU procurement systems, as well as other relevant IT systems and tools.

TRAINING TOPICS

This training module should cover:

- National and EU-level e-procurement systems
- Key e-procurement tools, including e.g. e-notification, e-submission, e-tendering, and e-invoicing
- e-procurement indicators that can be used to produce statistical analysis for organisations
- Transparency rules in public procurement and ICT accessibility

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Use available e-procurement systems and tools to implement public procurement procedures
- Make use of other IT tools (e.g. contract registers, Arachne tool) that can help ensure greater transparency and prevent and/or detect corruption in public procurement
- Use more advanced e-procurement capabilities, such as vendor management systems, e-auctions and e-catalogues, where relevant
- Analyse and make use of data collected via e-procurement systems to improve the organisation's procedures and processes
- Shape e-procurement indicators for the organisation
- Identify new IT tools that could increase organisation's procurement efficiency, including ICT accessibility
- Set the organisation strategy and procedures for using e-procurement and other IT tools

TRAINING MODULE 5. SUSTAINABLE PROCUREMENT

COMPETENCE DESCRIPTION

Sustainable public procurement incorporates strategic public policy goals into procurement procedures, such as green public procurement (GPP), socially responsible public procurement (SRPP), and ensuring genuine competition and SME participation. It contributes to reducing the environmental impact of procurement, to achieving social goals, and to improving value for money for the organisation and for society at large. Sustainable objectives can be implemented in many ways:

- Exclusion criteria that require a minimum level of compliance with environmental and social law by contractors and sub-contractors;
- Selection criteria that verify the bidder's qualifications to achieve environmental and social goals; Technical specifications that include social and environmental considerations such as label requirements or sustainable production processes;
- Evaluation techniques such as life-cycle costing and use of environmental or social award criteria;
- Contract performance clauses in order to monitor and enforce high sustainability standards;
- Sector specific legislation requiring, for example, minimum energy-efficiency standards, as well as horizontal rules such as accessibility obligations;
- Member State level green or social action plans outlining support measures or setting targets.

This competence requires knowledge of the sustainability objectives of the organisation (environmental and social) and related national policies, as well as of the available tools, standards and techniques for incorporating these into the procurement process.

TRAINING TOPICS

This training module should cover:

- Principles and standards of GPP and SRPP, including those facilitating the participation of SMEs and social enterprises
- Green and social action plan and targets at national level
- Sustainable considerations, selection and award criteria and accessibility obligations
- Tools, methods and solutions supporting sustainable procurement, such as life-cycle costing techniques and labels
- Examples of sector specific legislation

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand and anticipate potential challenges to and expected benefits of sustainable procurement
- Identify opportunities where sustainability goals can be reflected in procurement procedures
- Use the tools, methods and solutions supporting sustainable procurement, such as standards, life-cycle costing techniques and labels
- Define GPP, SRPP and SME friendly selection and award criteria
- Incorporate GPP, SRPP and SME friendly contract performance clauses and award criteria in the procurement documents
- Ensure compliance with accessibility obligations
- Maintain market access for suppliers, despite the use of environmental-friendly criteria
- Use of reserved contracts to facilitate access to procurement opportunities to operators having a positive social impact
- Communicate GPP and SRPP requirements to the market and make sustainable procurement work visible
- Design and tailor realistic sustainable procurement policies and targets for the organisation
- Allocate GPP and SRPP resources and budget

TRAINING MODULE 6. INNOVATION PROCUREMENT

COMPETENCE DESCRIPTION

Innovation procurement refers to a public procurement that involves either:

- Buying the process of innovation (e.g. buying research and development services), or
- Buying the outcomes of innovation created by others (i.e. buying innovative solutions).

Innovation procurement helps modernise public services while creating opportunities for companies to develop new markets. By developing a forward-looking innovation procurement strategy and considering alternative competing solutions, contracting authorities can drive innovation from the demand side to meet short term as well as medium to long-term needs. A well-designed innovation procurement strategy will reduce the risk of low- or non-performance of the purchased innovations by providing a step-by-step approach from solution design, prototyping, and development to development and product testing.

This competence requires knowledge of the innovation objectives of the organisation and related national policies, as well as of the available tools and techniques for incorporating these into the procurement process.

TRAINING TOPICS

This training module should cover:

- Principles of Innovation procurement
- National innovation objectives, targets, strategies and action plans
- Available tools and techniques for incorporating innovation objectives into the procurement processes
- Procedures involving procurement of R&D: Pre-Commercial Procurement (PCP) and Innovation Partnership procedures
- Competitive dialogue
- Early market engagement strategies, in particular preliminary market consultations

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Support the implementation of innovation procurement
- Understand how innovation procurement aspects are implemented and what their benefits are
- Identify and exploit opportunities to open planned procurement procedures to more innovative suppliers
- Apply the various techniques to open any type of procurement procedure and contract to innovative tenders (e.g. functional specifications, variants, innovation-friendly selection and award criteria, standards, quality labels, key performance indicators and innovation-friendly IPR conditions)
- Build a business case for Pre-commercial Procurement (PCP) and Public Procurement of Innovative solutions (PPI)
- Conduct Pre-Commercial Procurement and Innovation partnership procedures
- Identify and exploit opportunities to leverage the organisation's procurement plan to incentivise innovation in the market
- Implement advanced Innovation procurement procedures, such as competitive dialogue
- Incorporate innovation procurement objectives and policies into the organisation vision and strategy
- Communicate medium to long-term plan and objectives to the market and collect market feedback on procurement objectives

TRAINING MODULE 7. CATEGORY SPECIFIC

COMPETENCE DESCRIPTION

Category specific expertise is at the core of the procurement procedure. The characteristics of the category of supplies, services or works to be acquired need to be well understood, including by involving experts and stakeholders (professionals and end-users). The procurement strategy and documents have to be tailored to fulfil the identified need and maximise value for money.

This competence requires knowledge of the features and specificities relevant to one or more categories of supplies, services or works, including suppliers, technical parameters and market conditions.

TRAINING TOPICS

This training module should cover:

- Advanced market research techniques and sources
- Category management strategies and analyses
- Sourcing processes and how to apply them to different sectors
- Legal and regulatory requirement applying to the category of supplies, services or works
- The process of collecting, classifying and analysing the historical purchasing data of the organisation

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Identify the legal and regulatory requirements applying to the category of supplies, services or works of a specific category
- Prepare a tailored sourcing plan and execute sourcing processes
- Collect and segment spend on suppliers of a specific category
- Develop technical specifications that exploit category specific knowledge
- Develop procurement category price index for a specific category
- Collect, classify and analyse the historical purchasing data of a category of procurement
- Identify market drivers and factors impacting category management
- Develop an organisational category management strategy, defining the relevant categories and monitoring results
- Design systems, tools and guidance for implementing category management best practices

TRAINING MODULE 8. SUPPLIER MANAGEMENT

COMPETENCE DESCRIPTION

Supplier management involves building and maintaining effective relationships with current and potential future suppliers. It is essential to ensuring the successful delivery of current contracts and of future calls for tender. In addition, increased understanding of suppliers can help procurement professionals drive more robust, ethical, responsible and economically advantageous supply chains through open channels of communication with suppliers, especially SMEs. Providing information, guidance and potentially support and training to suppliers (e.g. on the use of e-procurement) are efficient ways to achieve these objectives, while ensuring that communication with economic operators during the tendering phase is in accordance with public procurement principles (i.e. non-discrimination, transparency, and equal treatment) and ethical standards.

This competence requires knowledge of strategies and processes to develop and manage relationships with suppliers in accordance with public procurement principles.

TRAINING TOPICS

This training module should cover:

- Key concept and tools of supplier management and supplier performance management
- Appropriate communication strategies with suppliers
- Public procurement principles important in supplier management
- Tools and techniques to monitor, analyse and promote supplier performance

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the benefits, risks and key success factors to supplier management
- Apply appropriate tools and techniques to monitor, analyse and promote supplier performance
- Provide feedback to suppliers and economic operators in an appropriate manner
- Build and maintain sound relationships with suppliers
- Anticipate and mitigate risks related to supplier performance
- Handle potential disputes with suppliers
- Identify opportunities to adjust organisational policies and practices to accommodate suppliers needs
- Develop strategies and tools for promoting constructive supplier engagement
- Leverage strategic supplier relationships to have a positive impact on the market, e.g. by promoting ethical supply chains
- Design content training to suppliers and economic operators

TRAINING MODULE 9. NEGOTIATIONS

COMPETENCE DESCRIPTION

Negotiations can be used to secure and advance the interests of the organisation, and ultimately of the final beneficiary, in achieving best value for money. They aim at reaching a mutual agreement between the contracting authority and the supplier, despite potentially opposing interests, on how to improve the submitted tenders to better satisfy the terms and conditions stated in the procurement documents. Negotiations must respect the general procurement principles (i.e. non-discrimination, transparency and equal treatment), as well as ethical and integrity standards.

This competence requires knowledge of negotiation strategies during the procurement phases and contract management, in accordance with public procurement principles.

TRAINING TOPICS

This training module should cover:

- Negotiation process and steps
- Negotiation techniques and strategies
- Different negotiation styles and possible biases to avoid in negotiations
- Anticipating and managing risks in negotiations

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand what negotiation means in public procurement and when it can be done
- Understand key concepts and techniques in the negotiation process
- Support the negotiation process by collecting supporting data
- Define negotiation objectives
- Plan and prepare a negotiation strategy
- Open, conduct, and conclude negotiations
- Recognise and adapt to different negotiation styles
- Identify and anticipate risks in negotiations
- Anticipate and avoid bias in negotiations
- Carry out complex negotiation strategies
- Apply game theory principles in negotiations

TRAINING MODULE 10. NEEDS ASSESSMENT

COMPETENCE DESCRIPTION

The **needs assessment** is the process of determining the needs, including possible impacts in terms of value for money or environmental impacts, regarding the subject matter of the procurement by various means, including:

- Liaising with internal and external stakeholders, within the organisation itself or third parties to identify their needs;
- Translating identified needs into procurement planning of supplies, services, or in line with the organisation's budget plan;
- Considering aggregation of needs related to the same subject matter.

This competence requires the knowledge of needs assessment techniques and tools for determining the underlying needs of the organisation and of the end-users regarding the subject matter of the procurement.

TRAINING TOPICS

This training module should cover:

- Needs assessment principles, strategies, techniques and tools
- Needs aggregation techniques and tools
- Best practices in data collection and collaboration
- Internal stakeholders' consultations and needs identification and analysis

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the definition of and the steps for carrying out needs assessment
- Understand the concept of aggregation of needs
- Consult with relevant internal stakeholders on procurement needs and requirements
- Prepare a basic needs assessment report
- Contribute to needs analysis and interpretation of data
- Identify opportunities for needs aggregation
- Apply advanced needs assessment techniques and tools
- Make decision about priority needs and needs aggregation
- Identify when to bring in technical expertise for complex procurement
- Define needs identification processes for the organisation
- Propose options for grouping related needs to encourage competition and realise economies of scale

TRAINING MODULE 11. MARKET ANALYSIS AND ENGAGEMENT

COMPETENCE DESCRIPTION

Market analysis provides an in-depth view of which supplies and services can or cannot be provided by the market, and under what conditions. It involves collecting information on key market drivers (e.g. political, environmental, technological, social) and on the potential bidders. This information can be used to define the procurement strategy (e.g. division into lots), the reference price, and selection and award criteria to better advance the organisation's objectives.

Market engagement is a consultation process that helps identify potential bidders and solutions, identify the gap between the procurement need and what the market is able to offer or inform the market about an upcoming procurement. Different market engagement techniques, such as questionnaires, technical dialogue, open days, and direct emails to suppliers, can be used as long as they are conducted in accordance with the public procurement principles (i.e. non-discrimination, transparency and equal treatment,), and ethical, privacy, confidentiality and integrity standards, in order to ensure genuine and fair competition.

This competence requires the knowledge of market analysis and market engagement techniques and tools that can be used to understand the characteristics of the supplier market as well as the market conditions and trends, in order to define the procurement strategy.

TRAINING TOPICS

This training module should cover:

- Key market analysis and engagement concepts in a public procurement context
- Key tools and techniques of market analysis and market engagement
- Relevant limits and restrictions on communication with potential suppliers
- Supplier sourcing strategies and processes

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Conduct prior market consultation in accordance with public procurement principles
- Perform supplier sourcing assessment report without engaging suppliers
- Analyse the results of the market analysis and engagement process and use them to design technical specifications
- Proactively identify market opportunities to meet current and future needs
- Design the market analysis and engagement strategy to reflect the procurement strategy
- Anticipate market risks to the procurement strategy
- Align the organisation procurement strategy to market trends
- Influence supplier markets through sustained market engagement

TRAINING MODULE 12. PROCUREMENT STRATEGY

COMPETENCE DESCRIPTION

The design of the **procurement strategy** is the deliberate use of different elements in the procurement lifecycle to reflect and exploit the conditions of the subject matter of the procurement and define the most appropriate and impactful process in order to reach the organisation's objectives and ensure genuine competition. It includes the identification of the most appropriate option between:

- Types of procurement procedures;
- Standalone or joint procurement;
- Features of the procedure, such as scope, duration, and division into lots;
- Techniques and instruments for electronic submission (electronic auctions and catalogues, and dynamic purchasing systems);
- Types of contract (e.g. direct or framework agreement) and contract performance clauses.

This competence requires the knowledge of the range of available procurement strategies and their components (e.g. in terms of choice and features of the procedures, instruments for submission, types of contracts) in order to reach the organisation's objectives.

TRAINING TOPICS

This training module should cover:

- Types of procurement procedures
- Standalone or joint procurement
- Features of the procedure, such as scope, duration, and division into lots Techniques and instruments for electronic submission (electronic auctions and catalogues, and dynamic purchasing systems)
- Types of contract (e.g. direct or framework agreement) and contract performance clauses

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the main options for designing a procurement strategy and the corresponding needs and market context
- Support the implementation of the procurement strategy, identifying and applying the relevant procedures and tools
- Select the right procurement approach for each purchase
- Decide on the scope and duration of a procedure
- Implement the key steps of procurement strategy design
- Conduct joint cross-border procurement procedures
- Deploy the full range of available procurement strategy options in designing a strategy
- Tailor the procurement strategy to diverse market needs and circumstances
- Manage cross-functional purchasing approaches
- Manage risks of anti-competitive behaviours
- Develop strategies and tools for tailoring procurement strategies to diverse needs and market circumstances
- Monitor implementation and adapt the organisation strategy by incorporating lessons learnt from previous procurement procedures

TRAINING MODULE 13. TECHNICAL SPECIFICATIONS

COMPETENCE DESCRIPTION

Drafting technical specifications involves transforming the findings of the needs assessment and market analysis into concrete specifications and evaluation criteria that can be used in assessing bids and awarding the contract. This includes setting objective and not over-prescriptive minimum requirements for the subject matter to avoid unnecessarily limiting competition. Ensuring that technical specifications are outcome-focused and future-proofed is key to enable innovation and continuous improvement. When drafting the technical specifications, public buyers should already define the exclusion, selection and award criteria which will be used to evaluate the offers in order to identify to Most Economically Advantageous Tender (MEAT). Technical specifications can also contain references to standards in order to ensure common understanding, transparency and equal treatment..

This competence requires the knowledge of drafting technical specifications that enable potential bidders to submit realistic offers that directly address the underlying need of the organisation.

TRAINING TOPICS

This training module should cover:

- The role and format of technical specifications
- Adapting template models when drafting technical specifications
- The formulation of technical specifications using performance or functional requirements, or by referencing standards
- The design of selection and award criteria and how they interact with technical specifications
- Weighting and scoring mechanisms for non-price criteria

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the proper role and format of technical specifications in a procurement procedure
- Understand the implications of EU and national rules on the preparation of technical specifications
- Support the drafting of technical specifications
- Develop technical specifications that reflect the outcomes of the needs assessment and the market analysis
- Use performance or functional requirements or make references to standards in the technical specifications
- Define the weighting and scoring mechanisms used in the procurement procedures
- Conduct data collection to fine-tune specifications
- Adapt the approach to drafting technical specifications to different needs and markets
- Ensure that the technical specifications are adapted to the contract management phase
- Define organisational policies and guidelines for drafting technical specification in line with international best practices and in compliance with EU and national rules
- Monitor performance and identify lessons learned

TRAINING MODULE 14. TENDER DOCUMENTATION

COMPETENCE DESCRIPTION

To launch a procurement procedure, **tender documentation** has to be prepared and the exclusion, selection and award criteria that are the basis for the contract award decision must be defined. The tender documentation (in addition to the technical specifications) explains the administrative requirements of the procedure, justifies the estimated value of the contract, and specifies the terms and conditions under which tenders are to be submitted, evaluated and awarded. They may include other elements such as draft contract provisions, cancellation conditions for the tender, as well as modifications, performance and termination provisions, etc.

This competence requires the knowledge of the content of the tender documentation, including the exclusion, selection and award criteria that are the basis for the contract award decision, in order to run a successful procurement procedure.

TRAINING TOPICS

This training module should cover:

- Design of exclusion, selection and award criteria
- Administrative requirements of public procurement procedures
- Compliance with EU and national legislation
- Incorporate economic operators' perspective and the output of the market analysis and consultation

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Correctly identify documents that should be included in a tender dossier
- Use relevant templates and model documents that maximise the participation of economic operators to:
    a. Prepare selection, exclusion and award criteria
    b. Prepare instructions to tenderers
    c. Prepare other applicable tender documentation
- Set performance measures to be used in the contract management phase
- Determine the appropriate contract model
- Publish tender announcements
- Incorporate technical, commercial and environmental requirements in the tender documentation
- Incorporate functional requirements in the tender documentation
- Design a tender documentation strategy for the organisation in compliance with the relevant legal framework
- Conduct compliance review of a tender documentation

TRAINING MODULE 15. TENDER EVALUATION

The **tender evaluation** process must ensure that tenders are assessed in an objective and legally compliant way and against exclusion, selection and award criteria defined in the call for tender, in order to identify the Most Economically Advantageous Tender (MEAT). The evaluation committee should be led by experienced administrators who are well-versed in their roles, responsibilities and procedural obligations, supported by relevant technical experts in the field of the subject matter, including assessing standards and labels. The process should be documented to provide the evidence and the rationale for the award.

This competence requires the knowledge of the appropriate evaluation process depending on the type of procurement procedures, including the role and responsibilities of the evaluation committee, in order to ensure that all tenders are assessed in an objective and transparent way against pre-defined criteria.

TRAINING TOPICS

This training module should cover:

- Steps of the evaluation process
- Role and responsibilities of the evaluation committee
- Public procurement principles

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the key roles and responsibilities in the tender evaluation process
- Prepare the relevant documentation for the tender evaluation process
- Participate in an evaluation committee
- Provide feedback to tenderers
- Verify the absence of conflict of interest among evaluation committee members
- Publish a contract award notice and a cancellation notice
- Identify and mobilise evaluation committees with the appropriate level of knowledge and experience
- Ensure that evaluations are conducted in a fair, transparent and systematic way
- Solve complex cases of conflict of interest during tender evaluations

TRAINING MODULE 16. CONTRACT MANAGEMENT

COMPETENCE DESCRIPTION

Contract management involves ensuring that the subject of the procurement is delivered according to the terms, conditions in the technical specifications and the contract, and in compliance with all legal requirements and technical specifications. This includes aspects related to governance, risk, performance (and Key Performance Indicators (KPIs), rules on modifications of contracts and financial management of contracts.

In the case of supply contracts, contract management also covers logistics and inventory management. This means ensuring that goods are delivered on time and meet quality standards, and that the availability of stocks is consistently and cost-effectively maintained.

This competence requires the knowledge of contract management principles to ensure proper delivery, in compliance with all legal requirements and technical specifications, as well as logistics and inventory management considerations.

TRAINING TOPICS

This training module should cover:

- Key concepts and steps of contract and inventory management
- Contract management plans
- Principles of contract law
- Management of technical non-compliance, corrective and preventive actions
- Contract modifications procedure and limits
- Documentation and record keeping during the contract management phase
- Supplier performance evaluation, including verifications and control checklists
- Civil liability procedures
- Contract termination

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Organise and support contract delivery functions in accordance with the scope, quality, time and budget provisions
- Understand the fundamentals of contract law as they apply to public procurement
- Organise and carry out all contract management steps
- Influence and apply risk and performance management strategies
- Verify that goods and services are up to technical specifications
- Understand the implications of contract modifications on scope, quality, time and budget
- Carry out contract closure
- Handle contract databases/registers
- Manage inventory and logistics
- Monitor and manage contract administration and performance
- Anticipate and react to unexpected changes and ensure flexible contract management
- Administer contract modifications in accordance with legal limitations
- Define contract management plan of the organisation in accordance with the procurement plan
- Draw key conclusions from the work achieved and perform contract management performance and effectiveness review

TRAINING MODULE 17. CERTIFICATION AND PAYMENT

COMPETENCE DESCRIPTION

Before proceeding with a payment to a contractor for the provision of supplies, works or services, the procuring organisation needs to **perform a verification check** to ensure alignment with the specifications of the terms and conditions of the contract and all applicable financial and accounting rules.

This competence requires the knowledge of the verification principles and the financial control framework which ensure that the relevant supplies, services or works are delivered in compliance with the terms and conditions of the contract and all applicable financial and accounting rules in order to proceed to the payment.

TRAINING TOPICS

This training module should cover:

- Key steps and procedures of the certification and payment process
- Verification principles and quality checks
- Financial control frameworks
- Functioning of bank transfers, letters of credit and other payment systems
- Risks and mitigating measures during the certification and payment process

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the key concepts, and procedures in the certification and payment process
- Understand how financial and accounting rules impact the certification and payment process
- Prepare the process forms and paperwork for certification and payment
- Verify that invoices match receipts and ordering transactions
- Use relevant techniques and tools to check for double payments
- Forward payment requests
- Anticipate risks and propose mitigating measures to address issues before they arise
- Design efficient certification and payment processes for the organisation/procurement function
- Leverage relevant systems and tools to create a culture of verification and compliance
- Resolve complex payment issues

TRAINING MODULE 18. REPORTING AND EVALUATION

COMPETENCE DESCRIPTION

Reporting and evaluation is the ex-post assessment of the deliverables and outcomes of a procurement process to assess the strengths and weaknesses and draw lessons for future calls for tender. It is done by collecting relevant data in line with organisational and national reporting obligations.

This competence requires the knowledge of monitoring tools and techniques for the implementation and performance of the contracts

TRAINING TOPICS

This training module should cover:

- Monitoring tools and techniques
- European and national reporting requirements and standards, and procedures for implementing them
- Audit trail and reporting systems and tools
- Ex-post verifications

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Implement internal, European and national reporting requirements and standards and procedures
- Understand the importance of ensuring an audit trail and the key stages of procurement linked to it
- Review and assess data on procurement performance
- Deal with recommendations of audit and ex-post verification reports
- Conduct ex post verification
- Monitor outcomes to identify lessons learned from completed procedures and contracts
- Engage suppliers and other stakeholder to collect feedback on past procedures/ contracts
- Propose improvements to incorporate lessons learnt
- Design systems to collect, analyse and incorporate lesson learnt from concluded procurement procedures

TRAINING MODULE 19. CONFLICT RESOLUTION / MEDIATION

COMPETENCE DESCRIPTION

Conflict resolution or mediation refers to the process of:

- Preventing and solving points of difference, disagreements and conflicts between parties, during all phases of the procurement process and contract management, in order to reach an agreement for the common interest of both parties; and
- Managing complaints filed against the organisation according to the national review system; and
- Understanding of the national review system and remedies system, and conflict solving mechanisms at different levels.

This competence requires the knowledge of conflict resolution and mediation processes, including managing complaints and procedures in the context of the national review system.

TRAINING TOPICS

This training module should cover:

- Complaint mechanisms
- Remedies regulated by national and EU legislation
- Conflict prevention tools
- Conflict resolutions, arbitration and mediation techniques

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Apply the main tools and techniques of conflict resolution relevant to public procurement
- Use practical tools enabling continuous improvement to facilitate conflict prevention in the long term (e.g. collecting and addressing feedback on areas for improvement suggested by economic operators)
- Objectively analyse the facts of the situation and present clear findings and recommendations for potential solutions
- Anticipate and implement different conflict resolutions, arbitration and mediation techniques
- Prepare responses to complaints and conflicts with suppliers
- Design procedures for avoiding and resolving potential conflicts

TRAINING MODULE 20. ADAPTABILITY AND MODERNISATION

COMPETENCE DESCRIPTION

Public procurement professionals need to **respond and adapt** to changing tasks and circumstances. Such changes can occur in terms of working methods (e.g. digitalisation), citizens' expectations (e.g. food safety), technological solutions and challenges (e.g. big data and cybersecurity), emergency scenarios (e.g. pandemics, natural disasters) and policy challenges (e.g. climate change).

Public procurement professionals must keep abreast of relevant changes in the regulatory, political, and technological environment of public procurement. They must keep an open mind to changing conditions, new ideas and viewpoints and working methods. They must adapt, be resilient to change, and even embrace change by looking for modern and innovative solutions to overcome new procurement challenges. They should be capable of reassessing their approach in emergency situations to ensure compliance while making full use of available flexibilities. They should identify learning and development opportunities that support agile adaptation to change and new tools.

This competence requires knowledge of change management techniques and tools.

TRAINING TOPICS

This training module should cover:

- Change management techniques and tools
- Organisational development techniques
- Key concepts of personal and organisational resilience
- Creative problem-solving
- Learning agility
- Design thinking

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Approach new situation with an open mind
- Work efficiently while facing uncertainty
- Apply specific techniques that help build up confidence when dealing with different tools and processes
- Apply effective change management approaches and tools
- Adapt personal behaviour to different situations
- Apply techniques that can help build more resilience
- Implement change management approaches that help turn ideas into actions
- Act as change management facilitator within the organisation
- Leverage and influence key stakeholders during the change process
- Encourage and create an environment conducive to action, innovation and learning
- Develop an organisation strategy for building organisational resilience
- Identify new trends and approaches on the market that encourage the modernisation

TRAINING MODULE 21. ANALYTICAL AND CRITICAL THINKING

COMPETENCE DESCRIPTION

Procurement professionals need **analytical and critical thinking** to evaluate information with accuracy and objectivity. In doing so, they use good judgment, anticipate opportunities and threats and solve problems in an efficient and creative way.

This competence requires knowledge of analytical and critical thinking approaches and tools.

TRAINING TOPICS

This training module should cover:

- Key concepts of analytical and critical thinking and approaches and tools
- Qualitative data analysis
- Quantitative data analysis

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the importance of using critical thinking when resolving problems
- Think analytically and critically in numerous situations and identify obstacles to personal analytical and critical thinking
- Use qualitative and quantitative data approaches
- Draw data interpretations and correlations
- Implement advanced data analysis models
- Prioritise issues based on logical approach
- Draw complex data interpretations and correlations
- Lead collective brainstorming sessions using creative thinking
- Create systems and tools that help develop analytical and critical thinking throughout the organisation
- Use analytical and critical thinking to address complex situations that require effective solutions
- Maximise individual and organisational thinking power

TRAINING MODULE 22. COMMUNICATION

COMPETENCE DESCRIPTION

Communication aims to ensure that the goals and processes of procurement policy in general, and individual procurement procedures, are well understood by stakeholders. It relies on the use of appropriate communication channels (oral, written, electronic) in order to deliver relevant and accurate information in line with the public procurement principles of non-discrimination, transparency and equal treatment. In doing so, public procurement professionals need to adapt the communication medium and message to the target audience.

This competence requires knowledge of communication tools and techniques and how to apply the public procurement principles in various communication situations.

TRAINING TOPICS

This training module should cover:

- How to apply the public procurement principles in various communication situations.
- Impactful communication strategies and tools
- Various communication styles
- Public speaking
- Effective writing skills

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- How to apply the public procurement principles (i.e. non-discrimination, transparency and equal treatment) in various communication situations
- Summarise the essential points of a conversation or meeting
- Express yourself in an appropriate way, both orally and in written
- Identify and use various communication channels and tools
- Understand the importance of verbal and non-verbal communication
- Reduce complexity in verbal communication
- Use active listening and appropriate communication strategies during conversations or meetings
- Respond to economic operators about tender documentation requirements
- Prepare the communication of deliverables in a detailed and precise manner
- Be persuasive and use influential communication strategies
- Tailor and implement a communication strategy
- Adapt to different communication styles
- Write in an impeccable and professional manner
- Create an open and trusting environment to communicate honestly within the organisation
- Deal with complex situations remaining emotionally composed, factual and objective

TRAINING MODULE 23. ETHICS AND COMPLIANCE

COMPETENCE DESCRIPTION

Public procurement stakeholders must ensure **compliance** with all applicable rules, codes of conducts and guidelines and adherence to the principles of public procurement: equal treatment, non-discrimination, transparency and proportionality.

All stakeholders involved in public procurement must ensure verification throughout the full range of concrete tasks, making use of available tools to assess the risks of conflict of interest, corruption on the one hand, and anti-competitive practices by suppliers such as collusion and bid-rigging, or potential problems with compliance in their work on the other hand.

This competence requires knowledge of the applicable procedural rules and principles as well as tools, codes and guidance documents which help ensure adherence thereto.

TRAINING TOPICS

This training module should cover:

- Key ethical principles and acting with high standards of integrity
- Legal obligations and compliance
- Relevant risks in the public procurement process
- Public administration codes of conduct
- National anti-corruption strategy

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Key ethical principles and acting with high standards of integrity
- Organisational rules/code of conduct, anti-corruption/anti-collusion guidelines and ethical standards
- Apply self-audit protocol to assess their ethical behaviour
- Ensure that procurement projects and the supply chain comply with international ethical standards
- Provide recommendations and advice to improve compliance and ethical standards and policies
- Use of specific tools for prevention of fraud, corruption and conflict of interest in tender evaluations (e.g. self-declarations)
- Monitor actions that drive an effective compliance and constant improvement
- Create a culture that promotes and rewards compliance
- Create the code of conduct/ethics of an organisation
- Detect inefficient and unethical policies, practice and processes that prevent it from obtaining the best procurement results
- Develop self-audit protocols to challenge staff behaviours rather than processes

TRAINING MODULE 24. COLLABORATION

COMPETENCE DESCRIPTION

No public procurement professional works in isolation. To be successful, procurement professionals need to **collaborate** with each other and their environment. This means working in teams and encouraging the sharing of ideas and strategies and the gathering input and expertise. This is equally applicable for a small organisation where the public buyer will have to rely on both internal and external stakeholders, as well as for larger organisations and central purchasing bodies, where there is a conscious strategy for building multidisciplinary procurement teams for specific procurement procedures (e.g. lawyer, economist, specialist or subject-matter expert).

This competence requires knowledge of collaboration tools and techniques.

TRAINING TOPICS

This training module should cover:

- Team work and team values
- Working in multi-disciplinary teams
- Collaborative techniques and approaches

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the importance of team work to create value
- Understand the value of and leverage on multidisciplinary teams
- Understand what culture is and the importance of active listening
- Use active listening to collaborate with other team members and to collect input from different services
- Adapt personal behaviour to others
- Build collaborative teams and networks based on the needs and the right mix of competences to support value-creating activity
- Manage and make the most of multidisciplinary working teams
- Act as a knowledge sharing facilitator among the various functions/ department of an organisation

TRAINING MODULE 25. STAKEHOLDER RELATIONSHIP MANAGEMENT

COMPETENCE DESCRIPTION

Stakeholder relationship management means creating and maintaining solid internal and external relations based on mutual trust and credibility. Public procurement professionals often need to engage with stakeholders to achieve organisational goals and contribute to the sustainable development of stakeholder relationships.

This competence requires knowledge of key concepts and methods of stakeholder relationship management.

TRAINING OBJECTIVES

This training module should cover:

- Internal and external stakeholders
- Stakeholder relationship management techniques
- Peer leadership and motivation

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Identify the organisation's internal and external stakeholders
- Apply structured tools to manage stakeholder relationships, such as data management systems
- Understand how stakeholders influence procurement decisions and projects
- Deal with multiple stakeholders with divergent interests
- Manage internal and external stakeholders' expectations
- Apply advanced stakeholder relationship management techniques (e.g. stakeholder register, stakeholder engagement matrix)
- Create a vision, mission and value for an organisation that speaks to all internal and external stakeholders
- Develop stakeholder relationship management techniques and tools

TRAINING MODULE 26. TEAM MANAGEMENT AND LEADERSHIP

COMPETENCE DESCRIPTION

Team management and leadership are key to setting a clear direction and achievable objectives for procurement teams and functions. They should be used to promote a collaborative environment and work towards common goals. This implies using methods and techniques that are tailored to the team to support its members, clearly defining roles and responsibilities; setting individual and group performance expectations; and encouraging the team to work together to achieve the set goals.

This competence requires knowledge of key concepts and methods of team management.

TRAINING TOPICS

This training module should cover:

- Key concepts of team management and positive leadership
- Team management methods and tools
- Behavioural analysis
- Management styles

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Apply team management methods and tools on a daily basis
- Identify team members' strengths and weaknesses
- Capitalise on and enhance team members' strengths
- Provide constructive feedback to the team and recognise its achievements
- Implement a positive-leadership management style
- Understand how the structure of the organisation influences leadership
- Understand their behavioural preferences and develop leadership skills accordingly
- Adapt their management style to different individuals and behaviours
- Persuade, involve and inspire others and get them on board for value-creating activities
- Promote and drive a culture of leadership and excellence
- Create team management and leadership approaches and tools

TRAINING MODULE 27. ORGANISATIONAL AWARENESS

COMPETENCE DESCRIPTION

Organisational awareness is the understanding of the administrative structure, organisational culture, as well as the legal and policy framework, that impacts the organisation. It allows one to understand the drivers and motivations of different stakeholders, and to take appropriate actions leading to securing value for money and the best outcome for the organisation.

This competence requires knowledge of the organisation's administrative structure, procedures and processes, internal culture and legal and policy framework.

TRAINING TOPICS

This training module, which should be delivered internally by the organisation, should cover:

- The organisation's history, vision and mission statement, policy priorities and strategic objectives
- The organisation's management structure, internal procedures, systems and tools
- Human resource aspects, including career development and training opportunities
- The organisation's legal framework and ethical and compliance standards

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the mission statement, policy priorities and goals of the organisation and how they relate to the procurement function
- Understand the values, internal culture and social aspects of the organisation that support successful team work
- Understand the structure of the organisation and the role of the different departments involved in the procurement function
- Apply the internal procedures, systems and workflows of the organisation
- Identifying the various internal and external stakeholders of the organisation, their needs, relationships and modes of communication
- Understanding the legal environment of the organisation
- Understand the career prospects within the organisation and training opportunities that support individual professional development

TRAINING MODULE 28. PROJECT MANAGEMENT

COMPETENCE DESCRIPTION

The effective delivery of a procurement project requires the understanding and application of key concepts, practices and tools to manage procurement procedures. These **project management** concepts can be used to ensure that procurement projects are delivered in line with the expected timeline, budget, quality, stakeholder involvement and risk mitigation.

This competence requires knowledge of the key concepts and tools of project management relevant for the public administration.

TRAINING TOPICS

This training module should cover:

- Key concepts and tools of project management
- Planning and time management
- Tasks delegation
- Giving constructive feedback
- Management of project risks

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Identify key priorities and define appropriate action plan
- Identify and flag potential project risks
- Request support and advice
- Create and implement a project plan
- Delegate tasks and ensure monitoring
- Coordinate with project stakeholders
- Manage time and ensure deadlines are met
- Provide constructive feedback
- Ensure that projects' objectives are aligned with the overall organisation strategy
- Anticipate opportunities and problems through proactive planning and creative thinking
- Monitor and carry out complex projects in an uncertain/rapidly changing environment
- Anticipate project risks and implement mitigating measures
- Manage budgets and resources effectively
- Set up relevant project management system and tools for the organisation

TRAINING MODULE 29. PERFORMANCE ORIENTATION

COMPETENCE DESCRIPTION

Public procurement professionals need to focus efforts and prioritise work to **deliver value for money**, in line with public service guidelines and policies. Their role is to achieve cost savings and strategic and sustainable goals, proactively identify inefficiencies, overcome obstacles and adapt their approach to consistently deliver sustainable and high-performance procurement outcomes.

This competence requires knowledge of cost and performance management strategies and methods as well as Key Performance Indicators (KPIs) that help identify inefficiencies and monitor the financial performance of the procurement and the way it delivers value for money.

TRAINING TOPICS

This training module should cover:

- Concept and importance of value for money, performance, and efficiency
- Use of Key Performance Indicators (KPIs)
- Performance management tools and approaches
- Key concepts in economics and finance
- Budget and financial management

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Set priorities and apply time management techniques to maximise efficiency
- Identify opportunities to create value
- Be consistent in setting smart personal objectives and Key Performance Indicators
- Analyse team members' Key Performance Indicators and provide regular feedback on performance
- Manage budget and finance effectively to ensure value for money
- Define organisation goals and performance targets
- Design staff competency assessment and development tools
- Set an inclusive organisational culture that valorises public procurement as a strategic function

TRAINING MODULE 30. RISK MANAGEMENT AND INTERNAL CONTROL

COMPETENCE DESCRIPTION

Public procurement takes place at an intersection of public and private interests. It is subject to several layers of **internal and external oversight**, even including media attention, and is widely identified as a key risk area for fraud and corruption. As such, a big part of a procurement professional's job is managing a number of overlapping risks. This requires rigorous and thoughtful application of mitigation measures and controls, as well as a proactive approach to protecting the interests of the organisation and the public good.

This competence requires knowledge of the different types of risk in public procurement processes and mitigation measures, functions of internal control and audit from the procurement point of view.

TRAINING TOPICS

This training module should cover:

- Various risks in public procurement processes
- Risk mitigating measures in public procurement
- Internal control and risk management procedures
- Fraud risks assessments
- Steps in audit trail

LEARNING OUTCOMES

At the end of the training module, learners should be able to understand and/or perform the following at the desired level of proficiency:

- Understand the concept of accountability and liability in a contracting authority
- Understand the various risks that can occur in the public procurement process
- Apply basic internal control and risk management procedures
- Maintain change management and version control
- Prevent and detect common types of fraud and corruption risk
- Conduct a risk-based supplier relationship analysis
- Maintain a risk register and develop risk mitigating measures
- Perform fraud risks assessments
- Enhance internal control processes
- Review risk management processes and propose ways to improve them
- Review fraud risk assessments and monitor the effectiveness of mitigating measure
- Set up successful risk management strategies and processes
- Define fraud risk assessment strategies and tools for the organisation
- Incorporate lessons learned from previous risks detected to enhance and strengthen internal control and risk management procedures

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