

## Investments in advanced research equipment with SRF funding (SRFIV)

### **Steps for applicant**

1. **Contact SRF:** The applicant contacts SRF to discuss the investment idea.
2. **Contact FB-Procurement office:** Upon agreement, the applicant contacts FB Procurement ([Jasper van Kasteren](#)) to discuss the required procurement process.
3. **Discuss financial aspects together with SRF:** The applicant and SRF meet again to work out the financial aspects together, based on the quotations of possible suppliers gathered by the applicant, and SRF draws up a draft tariff calculation.
4. **Contact interested parties for co-investing:** The applicant consults with interested parties (WUR groups and/or external partners) about their intended commitment to the device. Commitment by two or more partners (min 10% each), preferably at least one company, is obligatory for investment. All commitments need to be officially confirmed. The draft tariff calculation indicates the minimum required commitment by all parties for the investment.
5. **Write business plan:** The applicant writes the investment application (business plan). It is recommended to first write 1A4 until 2.3 and include which parties have been contacted and what other applications the device has. This A4 will be used by SRF to inform interested parties (SAB, external members steering group and Caroline Bijkerk). It is advised to write the other parts of the business plan once it is confirmed that sufficient commitment can be secured.

### **Steps for SRF**

6. **Seek advice from Scientific Advisory Board (SAB):** SRF consults the SAB who provides content-based advice on the final business plan, checks for duplications and other interested parties.
7. **Ask Steering Committee for approval:** The SRF requests the SRF Steering Committee to approve the business plan. For investments below the European tender threshold, the process may proceed directly to step 8 and subsequently to step 11. For investments above the European tender threshold, approval from the Executive Board is also required, and steps 9 and 10 must be completed in addition to the other steps.
8. **Confirm commitment and approval:** SRF seeks confirmation of commitment from all investing partners (authorized representative of WUR groups and/or external partners). Also, for WUR-groups, the management board of the involved Science Group is asked to confirm commitment by email. For external partners, a commitment contract is drafted and signed.
9. **Seek additional advice<sup>1</sup>:** SRF seeks advice from Corporate Finance & Control (on financial aspects of the investment) and FB Procurement (on the required procurement process).
10. **Submit documents:** SRF submits all documents, including collected advice to the Executive Board for a decision (for investments that are above the European tendering threshold (in 2026 = €216,000). After approval by the EB, SRF informs applicants, management board, CFC and Purchase department about the outcome and next steps.

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<sup>1</sup> Only for investments that require European Tendering.

11. **Ordering process:** Ordering by Oscar de Vos (SRF) occurs after final approval by the SRF Steering Committee<sup>2</sup> or Executive Board and completion of the procurement process, including signed delivery contract.
12. **Introduce co-investors to the Research Equipment Platform (WURREP):** Oscar de Vos (SRF) prepares a device record in WURREP to be filled out by the applicant and introduces all co-investors to WURREP.

### **Steps for applicant**

13. **Update SRF on delivery and installation:** Inform SRF (Oscar de Vos) on the status of the device (delivery, installation, SAT/takeover) to cover corresponding invoicing steps.
14. **Guide Site Acceptance Test (SAT) performed by supplier:** After installation, the applicant signs the SAT, confirming the device meets technical and functional specifications. Please note: **ONLY SIGN** when the device meets all the demands. Signing the SAT transfers ownership to SRF and starts the warranty period.
15. **Send SAT to SRF:** The applicant sends the signed SAT to SRF (Oscar de Vos) for device activation in the next quarter.
16. **Discuss Joint PR actions with SRF:** Joint PR actions (website and WURREP information, photos of the device, possible seminar, newsletter etc.) occur after installation.
17. **Attend annual account Meeting:** SRF will reach out to the applicant to schedule a yearly meeting to discuss the utilization of the equipment and use of WURREP.

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<sup>2</sup> For investment below threshold of European tendering process.