

## 外部委託業者の募集

References: IO/24/OT/10028208/EBT

### “Open tender related to HRD survey.”

(人材開発調査に関する公開入札)

IO 締め切り 2024 年 5 月 13 日(土)

## 〇はじめに

本事前情報通知 (PIN) は、作業契約の入札授与および実行につながる公開入札調達プロセスの最初のステップです。

本文書の目的は作業範囲と入札プロセスに関する技術的な内容の基本的な要約を提供することです。国内機関は本情報を入札に先立って、以下のサービスを提供できる企業、研究機関その他の法人に入札プロセスの詳細について周知をお願いします。

## 〇背景

ITER は平和利用の核融合発電の科学的小および技術的な実現可能性の実証を目的とした、国際共同研究開発プロジェクトです。ITER 機構の 7 つのメンバーは、欧州連合 (EURATOM が代表)、日本、中華人民共和国、インド、大韓民国、ロシア連邦、および米国です。

ITER の敷地は南フランスにあり、ITER 本社 (HQ) もあるフランス CEA サン・ポール・レ・デュランス に近いところに位置しています。詳細については、ITER のウェブサイト <http://www.iter.org> を参照して下さい。

## 〇作業範囲

本入札プロセスは人材開発調査に関する枠組み契約を締結することを目的にしています。

詳細は添付資料 II の技術仕様書ref 8UMAGX version 1.1を参照してください。

## 〇調達プロセスと目的

目的は、競争入札プロセスを通じて供給契約を落札することです。

この入札のために選択された調達手続きは公開入札手続きと呼ばれます。

オープン入札手順は、次の 4 つの主要なステップで構成されています。

### ➤ ステップ 1-事前情報通知 (PIN)

事前情報通知は公開入札プロセスの第一段階です。IO は、関心のある候補企業に対し、以下の概略日程に示された期日までに担当調達担当官に添付の関心表明フォームの情報を提出し、競争プロセスへの関心を示すよう正式に要請します。

### 特に注意:

関心のある候補企業は、IO Ariba の電子調達ツール「IPROC」に登録してください (まだ登録していない場合)。手順については、<https://www.iter.org/fr/proc/overview> を参照してください。

Ariba (IPROC) に登録する際には、お取引先様に最低 1 名の担当者の登録をお願いします。この連絡担当者は、提案依頼書の発行通知を受け取り、必要と思われる場合は入札書類を同僚に転送することができます。

➤ ステップ 2-入札への招待

関心のある候補企業の完全登録後、提案依頼書 (RFP) を「IPROC」に掲載します。この段階では、担当の調達担当者に関心を示し、かつ IPROC に登録している関心のある候補企業は、RFP が公表された旨の通知を受けることができます。その後、RFP に詳述されている入札説明書に従って提案書を作成し、提出します。

このツールに登録されている企業のみが入札に招待されます。

➤ ステップ 3-入札評価プロセス

入札者の提案は、IO の公平な評価委員会によって評価されます。入札者は、技術的範囲に沿って、かつ、RFP に記載された特定の基準に従って作業を実施するために、技術的遵守を証明する詳細を提供しなければなりません。

➤ ステップ 4-落札

認定は、公開されている RFP に記載されている、コストに見合った最適な価格または技術的に準拠した最低価格に基づいて行われます。

## ○概略日程

概略日程は以下の通りです：

マイルストーン	暫定日程
事前指示書 (PIN) の発行	2024 年 4 月 22 日
関心表明フォームの提出	2024 年 5 月 13 日
入札への招待 (ITT) の IPROC での発行	2024 年 5 月 22 日
入札提出	2024 年 7 月 3 日
入札評価	2024 年 7 月-8 月-9 月
入札結果連絡	2024 年 9 月初旬
契約調印	2024 年 10 月初旬

## ○契約期間と実行

予想される契約期間は固定期間4年を予定しています。それに2年のオプション期間を設けています。ITERでの使用言語は英語です。詳細な要件は技術仕様書を参照ください。

## ○経験

入札者は、IOの技術的要件に沿った期待される支援を提供するにあたり、その知識と経験と能力があることを示す必要があります。詳細な技術的評価の基準は I P R O C のRFPの元、後日通知される予定です。

### ○候補

参加は、個人またはグループ/コンソーシアムに参加するすべての法人に開放されます。法人とは、法的権利及び義務を有し、ITER 加盟国内に設立された個人、企業又は機構をいいます。

【※ 詳しくは添付の英語版技術仕様書「**Technical specifications - staff surveys 2025-2029**」をご参照ください。】

ITER 公式ウェブ <http://www.iter.org/org/team/adm/proc/overview> からアクセスが可能です。

「核融合エネルギー研究開発部門」の HP : <http://www.fusion.qst.go.jp/ITER/index.html>  
では ITER 機構からの各募集（IO 職員募集、IO 外部委託、IO エキスパート募集）を逐次更新しています。ぜひご確認ください。

## イーター国際核融合エネルギー機構からの外部委託 に関心ある企業及び研究機関の募集について

### ＜ITER 機構から参加極へのレター＞

以下に、外部委託の概要と要求事項が示されています。参加極には、提案された業務に要求される能力を有し、入札すべきと考える企業及び研究機関の連絡先の情報を ITER 機構へ伝えることが求められています。このため、本研究・業務に関心を持たれる企業及び研究機関におかれましては、応募書類の提出要領にしたがって連絡先情報をご提出下さい。

## **PRIOR INDICATIVE NOTICE (PIN)**

### **OPEN TENDER SUMMARY**

IO/24/OT/10028208/EBT

*for*

**IO staff surveys 2025-2029**

#### **Abstract**

The purpose of this summary is to provide prior notification of the IO intention to launch a competitive Open Tender process in the coming weeks. This summary provides some basic information about the ITER Organization, the technical scope for this tender, and details of the tender process for the provision of IO staff surveys.

## 1 Introduction

This Prior Indicative Notice (PIN) is the first step of an Open Tender Procurement Process leading to the award and execution of a Service Contract. The purpose of this document is to provide a basic summary of the foreseen scope of the contract and the tendering process.

The Domestic Agencies are invited to publish this information in advance of the forth-coming tender giving companies, institutions or other entities that are capable of providing these services prior notice of the tender details.

## 2 Background

The ITER project is an international research and development project jointly funded by its seven Members being, the European Union (represented by EURATOM), Japan, the People's Republic of China, India, the Republic of Korea, the Russian Federation and the USA. ITER is being constructed in Europe at St. Paul–Lez-Durance in southern France, which is also the location of the headquarters (HQ) of the ITER Organization (IO).

For a complete description of the ITER Project, covering both organizational and technical aspects of the Project, visit [www.iter.org](http://www.iter.org).

## 3 Scope of Work

The present tender process is aiming to set up a Framework Contract for HRD staff surveys. Please find the attached Technical Specifications ref. 8UMAGX version 1.1.

## 4 Procurement Process & Objective

The objective is to award a Service Contract through a competitive bidding process.

The Procurement Procedure selected for this tender is called the **Open Tender** procedure.

The Open Tender procedure is comprised of the following four main steps:

### ➤ Step 1- Prior Indicative Notice (PIN):

The Prior Indicative Notice is the first stage of the Open Tender process. The IO formally invites the Domestic Agencies to publish information about the forth-coming tender in order to alert companies, institutions or other entities about the tender opportunity in advance.

**Interested tenderers are kindly requested to return the expression of interest form (Annex I) by e-mail by the date indicated in the procurement timetable below.**

### **Special attention:**

Interested tenderers are kindly requested to register in the IO Ariba e-procurement tool called "IPROC". You can find all links to proceed along with instruction going to: <https://www.iter.org/fr/proc/overview>.

When registering in Ariba (IPROC), suppliers are kindly requested to nominate at least one contact person. This contact person will be receiving the notification of publication of the Request for Proposal and will then be able to forward the tender documents to colleagues if deemed necessary.

➤ **Step 2 - Invitation to Tender (ITT) :**

Following the PIN and the interests shown by the tenderers, the Request for Proposals (RFP) will be published on our digital tool “IPROC”. This stage allows interested bidders who have indicated their interest to the Procurement Officer in charge AND who have registered in IPROC to receive the notification that the RFP is published. They will then prepare and submit their proposals in accordance with the tender instructions detailed in the RFP.

**Only companies registered in this tool will be invited to the tender.**

➤ **Step 3 – Tender Evaluation Process :**

Tenderers’ proposals will be evaluated by an impartial, professionally competent technical evaluation committee of the ITER Organization. Tenderers must provide details demonstrating their technical compliance to perform the work in line with the technical scope and in accordance with the particular criteria listed in the RFP.

➤ **Step 4 – Contract award :**

A service contract will be awarded on the basis of best value for money according to the evaluation criteria and methodology described in the RFP.

## **Procurement Timetable**

The tentative timetable is as follows:

Milestone	Date
Publication of the Prior Indicative Notice (PIN)	22 <sup>nd</sup> April 2024
Submission of expression of interest form	13 <sup>th</sup> May 2024
Invitation to Tender (ITT) launched in IPROC	22 <sup>nd</sup> May 2024
Tender Submission	03 <sup>rd</sup> July 2024
Tender Evaluation	July-Aug-Sep 2024
Award Notice	Beg. Sep. 2024
Contract Signature	Beg. Oct. 2024

## **5 Quality Assurance Requirements**

Prior to commencement of any work under this Contract, a “Quality Plan” shall be produced by the selected Contractor and submitted to the IO for acceptance, describing how they will implement the ITER Procurement Quality Requirements.

## **6 Contract Duration and Execution**

The duration of the Contract will be four years with an option to extend for two additional years.

The working language of ITER is English, and the detailed requirements for language are specified in the attached Technical Specifications.

## **7 Experience**

The tenderer shall demonstrate their technical and industrial experience related to the scope of work as detailed in the technical specifications. The detailed technical evaluation criteria will be informed to tenderers at later stage under RFP at IPROC.

## **8 Candidature**

Participation is open to all legal entities participating either individually or in a grouping/consortium. A legal entity is an individual, company, or organization that has legal rights and obligations and is established within an ITER Member State.

Legal entities cannot participate individually or as a consortium partner in more than one application or tender of the same contract. A consortium may be a permanent, legally-established grouping, or a grouping which has been constituted informally for a specific tender procedure. All members of a consortium (i.e. the leader and all other members) are jointly and severally liable to the ITER Organization.

In order for a consortium to be acceptable, the individual legal entities included therein shall have nominated a leader with authority to bind each member of the consortium, and this leader shall be authorised to incur liabilities and receive instructions for and on behalf of each member of the consortium.

It is expected that the designated consortium lead will explain the composition of the consortium members in a covering letter at the tendering stage. Following this, the Candidate's composition must not be modified without notifying the ITER Organization of any changes. Evidence of any such authorisation shall be submitted to the IO in due course in the form of a power of attorney signed by legally authorised signatories of all the consortium members.

Any consortium member shall be registered in IPROC.





IDM UID

**8UMAGX**

VERSION CREATED ON / VERSION / STATUS

**16 Feb 2024 / 1.1 / Approved**

EXTERNAL REFERENCE / VERSION

## Technical Specifications (In-Cash Procurement)

# Technical specifications - staff surveys 2025-2029

Technical specifications for IO staff surveys

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### 1 Preamble

This Technical Specification is to be read in combination with the General Management Specification for Service and Supply (GM3S) – [Ref 1] that constitutes a full part of the technical requirements.

In case of conflict, the content of the Technical Specification supersedes the content of Ref [1].

### 2 Purpose

The ITER Organization's (IO) purpose is to demonstrate fusion energy as a viable future commercial energy source. Achievement of this purpose is broken into project phases. We are currently in the first project phase, namely to design, construct and commission the fusion facility. This facility is being built in southern France with components provided on an 'in kind' basis from the contributing members; namely China, EU, India, Japan, Korea, Russia and USA.

IO staff are recruited from the contributing member countries, the agreed working language is English. The nationality of staff is limited to contributing member countries, and all staff work on site, at the construction site in Saint Paul Lez Durance in southern France.

The IO is relatively young, having grown from a very small number of staff in 2007 to the existing compliment of around 1100 staff at the end of 2023.

After having launched a first staff survey in 2020 followed by additional surveys in 2021 and 2023, the IO would like to repeat periodic surveys with the aim of getting staff feedback on pre-identified areas related to the work environment and culture, and if appropriate, for follow-up actions to be carried out. More specifically, the aim of the surveys will be to:

- Find out staff opinions and assess employee engagement and enablement.
- Observe results of actions implemented and trends between surveys;
- Validate areas where there may be potential or observed gaps between ITER values and work environment, and obtain detailed information to anticipate difficulties or define necessary prioritise issues and actions.
- Establish metrics and a frame for administration of future surveys.

The standard survey content should be presented in the offer. In addition, the offer should explain how the surveys and their results would help achieve the aim of measuring and improving IO work environment and improve efficiency.

The pricing structure for changes to the number of respondents to be surveyed should be included in the offer.

The survey should be customized to address specific IO issues and situations. The content of the survey must allow for specific input from IO senior management, notably for specific closed or opened questions and the offer should explicitly state the cost for this bespoke survey content.

The survey language will be English, and all respondents have individual professional email accounts.

The survey responses must be confidential, i.e. an individual's reply should not be traced back to that individual. The offer submitted to the IO must explain how confidentiality will be secured. The quote must also include what approach will be used to gain staff confidence in this regard. The surveys are coordinated by the Human Resources Division (HRD) and will focus on following areas:

- General questions on the individual;

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- Dissemination of project, managerial and safety cultures;
- Assessment of internal communication channels and practices;
- Assessment of individual work environment;
- Other conditions of employment as specified.

## 3 Acronyms & Definitions

### 3.1 Acronyms

The following acronyms are the main one relevant to this document.

Abbreviation	Description
COM	Communication
CRO	Contract Responsible Officer
GM3S	General Management Specification for Service and Supply
HRD	IO's Human Resources Division
IO	ITER Organization
PRO	Procurement Responsible Officer

For a complete list of ITER abbreviations see: [ITER Abbreviations \(ITER\\_D\\_2MU6W5\)](#).

### 3.2 Definitions

**Contractor:** shall mean an economic operator who have signed the Contract in which this document is referenced.

## 4 Applicable Documents & Codes and standards

### 4.1 Applicable Documents

This is the responsibility of the Contractor to identify and request for any documents that would not have been transmitted by IO, including the below list of reference documents.

This Technical Specification takes precedence over the referenced documents. In case of conflicting information, this is the responsibility of the contractor to seek clarification from IO.

Upon notification of any revision of the applicable document transmitted officially to the contractor, the contractor shall advise within 4 weeks of any impact on the execution of the contract. Without any response after this period, no impact will be considered.

Ref	Title	IDM Doc ID	Version
1	General Management Specification for Service and Supply (GM3S)	82MXQK	1.4

### 4.2 Applicable Codes and Standards

Not applicable

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### 5 Scope of Work

This section defines the specific scope of work for the service, in addition to the contract execution requirement as defined in Ref [1].

#### 5.1 Description

The survey will be administered online by the contractor, based on questions prepared together with IO in line with the majority of questions of the previous surveys, to be evaluated, refined and improved to achieve effective survey results with the selected contractor. The questions will be repeated in successive surveys, and upon IO's request, adaptations or additional questions may be required. For all surveys, the contractor is expected to:

- Invest in understanding the unique situation of IO as a project, gaining insights on the IO's challenges, constraints and organisational structure.
- Propose a project plan with steps and timing.

Then for each survey, the contractor is expected to:

- o Complete the pre-survey communication activities and engagement with senior management as specified in the offer;
- o After consultation with HRD, develop, propose, and obtain IO approval of the items/questions to assess the areas of interest to the Organization;
- o Manage the technical administration of the survey;
- o Collect answers of up to 1400 respondents (with options to extend the number of respondents);
- o Consult with IO to evaluate and analyse the results and what they represent in terms of effective strategies;
- o Prepare a presentation and written report with analysis of the results and recommendations for follow-up actions and communication with staff. The written report should include statistical results according to the agreed organizational unit breakdown;
- o Deliver the presentation remotely or in person to senior management;
- o Provide the full detailed results (matrix report by item for each organizational unit) to the Director-General and the survey's coordinators;
- o Provide an online tool for the managers to visualize their team's results, sort them by categories (age range, seniority, gender, nationality, category...) and extract them (preferably in PPT format) for being shared with their teams. The anonymity threshold under which results are not shown shall be at least 5 respondents for close questions and 8 respondents for open questions;
- o Provide presentations or visual tools to share the results with staff (e.g. infographic or power point) and deliver them remotely to staff;
- o Produce post survey support, as agreed prior to contract award.
- Keep all data confidential, to be the property of the IO, accessible during the entire contract duration, and give an extract of all data at the expiration of the contract, while preserving respondents' anonymity.

In addition, the contractor may be requested by the IO to potentially provide ad hoc analysis on specific aspects of the survey.

Subject to IO's decision, the duration shall be renewed as appropriate, for period(s) of four years, for follow-up surveys subject to the same work description as for the initial surveys, plus comparative analysis with respect to previous survey(s).

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### 5.2 Service Duration

The maximum expected duration for this activity is six years (three on demand surveys from 2024 to 2029) – renewable if appropriate for follow-up surveys for up to four years (three surveys from 2030 to 2035).

## 6 Location for Scope of Work Execution

Contractor can perform the work at their own location.

If relevant and requested by the CRO, some meetings or presentations may take place on the ITER Site.

## 7 IO Documents

The results of previous staff surveys will be shared with the selected provider.

## 8 List of deliverables and due dates

The Supplier shall provide IO with the documents and data required in the application of this technical specification, the GM3S Ref [1] and any other requirement derived from the application of the contract.

The offer should include the series of activities to be performed, from contract award through to completion of the survey and any post survey support. Activity durations should be included.

IO intends to place a contract for this work in 2024 so that the survey is administered during the last quarter of 2024 or the first quarter of 2025, and plans to receive the survey report and executive presentation within four months from each survey's completion. The offer should explain if this timescale can be met or indeed reduced, and the major risks in achieving the timescales.

For each survey, the indicative timescale of deliverables shall be as follows:

Deliv #	Deliverable Description	Expected date (T0+x)*
1	Survey preparation: <ul style="list-style-type: none"> <li>- Kick of meeting</li> <li>- Agreement on the content</li> <li>- Preparation of platform</li> <li>- Structure of distribution</li> </ul>	T0+3
2	Survey administration <ul style="list-style-type: none"> <li>- Online survey made available to 1100+ staff for 3 weeks (possible extension depending on response rate)</li> <li>- Response rate progression made available to contract manager and senior managers</li> <li>- Results compiled</li> </ul>	T0 + 6
3	Global presentation of results (in remote mode) and answering questions: <ul style="list-style-type: none"> <li>- To DG + HRD (2 hours)</li> <li>- To senior managers (1.5 hours)</li> </ul>	T0+7

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	- To staff (1.5 hours)	
4	<p>Teams' results made available to managers in a dedicated platform, including visuals so that they can share results with their teams.</p> <p>Full results made available to contract manager.</p> <p>The results platform shall include comparison with previous surveys and higher levels of units.</p>	T0+7,5

(\*) T0 = Commencement Date of the contract; X in months.

Supplier is requested to prepare their document schedule based on the above and using the template available in the GM3S Ref [1] appendix II ([click here to download](#)).

## 9 Quality Assurance requirements

The scope of the contract does not imply the application of specific quality requirements.

## 10 Safety requirements

The scope of the contract does not imply the application of safety requirements.

### 10.1 Nuclear class Safety

Not applicable

### 10.2 Seismic class

No specific safety requirement related to PIC and/or PIA and/or PE/NPE components apply.

## 11 Specific General Management requirements

Requirement for [Ref 1] GM3S section 6 applies in full.

## 12 Appendices

Not applicable

# ANNEX I

## EXPRESSION OF INTEREST & PIN ACKNOWLEDGEMENT

To be returned by e-mail to: [emilie.blanchet@iter.org](mailto:emilie.blanchet@iter.org) copy [chloe.perret@iter.org](mailto:chloe.perret@iter.org)

TENDER No. **IO/24/OT/10028208/EBT**

DESIGNATION of SERVICES: **IO Staff surveys 2025-2029**

OFFICER IN CHARGE: **Emilie Blanchet – Procurement & Contracts  
Division ITER Organization**

☐ WE ACKNOWLEDGE HAVING READ THE PIN NOTICE FOR THE ABOVE  
MENTIONED TENDER

☐ WE INTEND TO SUBMIT A TENDER

☐ WE WILL NOT TENDER FOR THE FOLLOWING REASONS:

.....

Signature:

COMPANY STAMP

Name: .....

Position: .....

Tel: .....

E-mail.....

Date: .....