外部委託業者の募集

References: IO/24/OT/70001112/KJT

"Business Intelligence Global Support"

（ビジネスインテリジェンスのグローバルサポート）

IO 締め切り 2024 年 6 月 24 日(月)

○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、次回の入札に先立って、これらのサービス/工事を提供することができる企業、機関またはその他の団体が入札の詳細を事前に通知する前に、この情報を公表するよう求められます。

○背景

ITER は平和利用の核融合発電の科学的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 の敷地はフランス南東部のブーシュデュローヌ地区にあり、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。

○作業範囲

この枠組み契約の目的は、以下のものを調達することである。

-A- サービスカテゴリカテゴリ:ビジネスインテリジェンススタックを対象とします

> データウェアハウスの進化と保守;

> データ統合サービスの進化と保守;

> データ可視化サービスの進化とメンテナンス:ページ分割されたレポート、モバイル;レポート、KPI、ダッシュボード、Power BIレポート;

> マスターデータ管理サービスを含むデータ管理サービスの進化と保守;

> データ分析サービスの進化とメンテナンス。

-

-B- サービスカテゴリ（オプション）には、サービス、技術環境、およびプログラミング言語が含まれますが、次のリストには限定されません。

> プラントライフサイクル管理;

> サービスデスク;

> ITセキュリティ;

- ➢ ITネットワーク;
- ➢ IT通信;
- ➢ データベース管理;
- ➢ システム管理。

詳細については、技術仕様のリファレンスITER_D_AW6UCR v1.0（このPINに添付）を参照してください。。

○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で以下の情報を提出し、競争プロセスへの関心を示すよう正式に要請します。
  - 会社名
  - 登録の国名
  - 担当者名、email アドレス、肩書および電話番号

  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

  PIN の発行から 10 作業日経過後、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 6 月 10 日の週
関心表明フォームの提出	2024 年 6 月 24 日
iPROC での提案リクエストの発行	2024 年 7 月 12 日の週
明確化のための質問（もしあれば）の締め切り	2024 年締め切りの 15 日前
明確化のための質問への回答締め切り	2024 年締め切りの 10 日前
iPROC での入札提出	2024 年 9 月 6 日の週
入札評価	2024 年 10 月
契約授与	2024 年 12 月
契約調印	2024 年 12 月
契約開始	2025 年 1 月（タスクオーダーを通して）

○契約期間と実行

ITER機構は2024年の12月ごろ供給契約を授与する予定です。予想される契約期間は3年で、２つオプション期間としてそれぞれ1年の延長を含む予定です。

○経験

契約者は、少なくとも 350 万ユーロの売上高を伴う同様のプロジェクトにおいて、少なくとも 5 件の顧客参照を持つビジネスインテリジェンススタックのソリューションを提供した豊富な経験を持つ必要があります。

契約者が提案するソリューションは、次のような受け入れ基準ドメインに沿って、IO のビジネスニーズに対応するものとします。

- データウェアハウスの進化とメンテナンス;
- データ統合サービスの進化と保守;
- データ視覚化サービスの進化とメンテナンス:ページ分割されたレポート、モバイルレポート、KPI、ダッシュボード、Power BI レポート;

- マスターデータを含むデータ管理サービスの進化と保守
- 管理サービス;
- データ分析サービスの進化とメンテナンス。

契約者が提案するソリューションは、データ入力、CAD 環境、データストレージ、および IT セキュリティに関する技術仕様に記載されている IO 技術コンテキストに準拠し、統合するものとします。

○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。ITER 加盟国は欧州連合(EURATOM メンバー)、日本、中華人民共和国、インド共和国、大韓民国、ロシア連邦、アメリカ合衆国です。

法人は、単独で、またはコンソーシアムパートナーとして、同じ契約の複数の申請または入札に参加することはできません。共同事業体は、恒久的な、法的に確立されたグループ又は特定の入札手続のために非公式に構成されたグループとすることができます。

コンソーシアムのすべての構成員(すなわち、リーダーと他のすべてのメンバー)は、ITER 機構に対して連帯して責任を負います。

コンソーシアムとして許可されるために、その点で含まれる法人はコンソーシアムの各メンバーをまとめる権限をもつリーダーをもたなければなりません。このリーダーはコンソーシアムの各目メンバーのために責任を負わなければなりません。

指名されたコンソーシアムのリーダーは、入札段階で、コンソーシアムのメンバーの構成を説明する予定です。その後、候補者の構成は、いかなる変更も ITER 機構に通知することなく変更してはなりません。かかる認可の証拠は、すべてのコンソーシアムメンバーの法的に授権された署名者が署名した委任状の形式で、しかるべき時期に IO に提出しなければなりません。

どのコンソーシアムメンバーも IPROC に登録する必要があります。

【※　詳しくは添付の英語版技術仕様書「**Business Intelligence Global Support**」をご参照ください。】
ITER 公式ウェブ　http://www.iter.org/org/team/adm/proc/overview からも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。

To: Domestic Agencies (DAs)

Date: 10 June 2024

IO Tender Reference: IO/24/OT/70001112/KJT

Title: Business Intelligence Global Support

Subject: Prior Indicative Notice (PIN)

Dear colleagues,

The ITER Organization intends to launch an Open Tender process in the coming weeks as indicated above and in accordance with the details in the attached Prior Indicative Notice (PIN). In this regard, and to provide some introductory information about the forth-coming tender, we kindly request the attached PIN to be published on your DA website with immediate effect until 24 June 2024.

The advance notification is to alert companies, institutions or other eligible entities to the forth-coming tender, and provide information to promote healthy competition, allowing interested parties time to decide whether to participate in the tender or not.

Please could you kindly acknowledge receipt of this e-mail and confirm once the PIN is published on your website.

Yours sincerely

Kristel Jeanmart
Assistant Buyer

Annexes:
- Prior Indicative Notice
- Technical Specifications
- Expression of Interest Form

IT Technical Specifications

TECS_2024-04_CFT_Business Intelligence_Global Support

TECS_2024-04_CFT_Business Intelligence_Global Support

Approval Process			
	Name	*Action*	*Affiliation*
Author	**Chaumette C.**	**05 Apr 2024:signed**	**IO/DG/SID/CID**
Co-Authors	**Kappes K.**	**11 Apr 2024:signed**	**IO/DG/SID/CID/ITAD**
	Zins ritter E.	**03 Apr 2024:signed**	**IO/DG/SID/CID/ITSO**
Reviewers	**Jeanmart K.**	**11 Apr 2024:recommended**	**IO/DG/ADM/PRD/ESOC/PACD**
Approver	**Bartels H.- W.**	**12 Apr 2024:approved**	**IO/DG/SID/CID**
Document Security: Non-public - Unclassified			
RO: Fernandez David			
Read Access	**LG: IT Procurement, AD: External Collaborators, AD: IO_Director-General, AD: External Management Advisory Board, AD: OBS - IT Application and Development Section (ITAD), AD: OBS - IT System and Operation Section (ITSO), AD: IDM_Controller, AD: OBS - Data Managment Section (DAM), AD: Auditors, AD: IT...**		

SERVICE

Table of Contents

SERVICE

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

These technical specifications address the set-up of a framework contract. The **IO CID** (ITER Organization Central Integration division) desires to acquire services in the field of **Enterprise Information Systems (EIS)** as a primary objective ("A-Service"), and in any other information technology areas as optional objective ("B-Service").

Once the framework contract is in place, IO CID will set up task orders through the following process for A-Service and eventually for B-Service:

This document relates to a new FRAMEWORK contract.

3   Acronyms & Definitions

3.1   Acronyms

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

Abbreviation	Description
CRO	Contract Responsible Officer
GM3S	General Management Specification for Service and Supply
IO	ITER Organization
PRO	Procurement Responsible Officer
TRO	Technical Responsible Officer

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	0.0

5 Scope of Work

5.1 General presentation

5.1.1 IT Organization

The IO CID division (IO/DG/SID/CID) is part of the Science & Integration Department (SID), which is under the Director General.

The IO CID Division has 3 sections:
- IT Systems and Operation Section (IO/DG/SID/CID/**ITSO**);
- IT Application and Development Section (IO/DG/SID/CID/**ITAD**);
- Data Management Section (IO/DG/SID/CID/**DAM**).

5.1.2 Sizing

The IO CID gives support to 1500 users over more than 20 buildings on the Saint-Paul Lez Durance site and 3000 remote users spread over the ITER project member's territory.

We have a modern datacenter, which is hosting the technical infrastructure mainly composed by:

- 300 physical and 400 virtual servers;
- 1 petabyte of highly available storage (SAN, mirrored between buildings and DAS);
- 6000 ports and full Wi-Fi coverage are provided by the network infrastructure;
- 100 meeting rooms fully interconnected for voice and video-conferencing; and
- A complete telephony infrastructure (VIOP, PBX, mobile phones).

The selected Contractor will have to guarantee an adequate and efficient IT service level support to all ITER project users. It will have to be able to face evolutions and improvement requests including but not limited to the:

- Increase in the number of users;
- Increase in the number of interfaces with different libraries/database/servers;

SERVICE

- Customization of all environments in use;
- Response time in user incidents or requests;
- ...

5.1.3   Scope
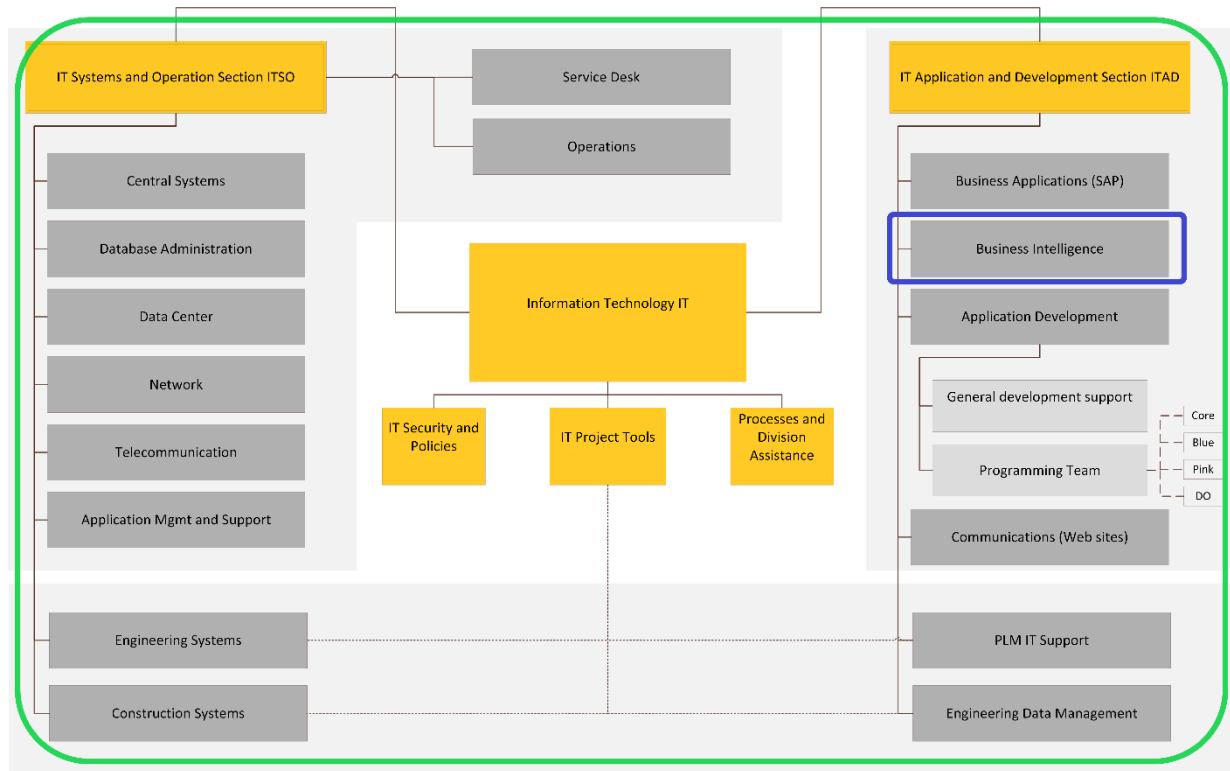
The scope of the A-Service is inside the blue rectangle. The optional B-Service scope covers all other CID areas.

5.2   A-Service

A-Service is mandatory. IO CID expects that the Contractor provides A-Service as requested in the Task Orders.

5.2.1   A-Service Scope

The scope of A-Service that the contractor is requested to provide, covers the business intelligence stack:

- Evolution and maintenance of Data Warehouse;
- Evolution and maintenance of Data Integration Service;
- Evolution and maintenance of Data Visualization Service: paginated reports, mobile ;reports, KPIs, dashboards and Power BI reports;
- Evolution and maintenance of Data Management service including Master Data Management Service;
- Evolution and maintenance of Data Analysis Service.

5.2.2   A-Service Activities

- Data modelling;
- Process modelling;

SERVICE

- Designing and implementing data visualizations;
- Designing and implementing data integrations;
- Designing and implementing data analytics;
- Designing business rules;
- Designing and implementing data warehouse;
- Engineering Data Management;
- Writing software code;
- Testing and quality assurance;
- Writing technical documentation;
- Writing user documentation.

IO CID may also request to the Contractor to perform the following activities: Collecting user requirements;

- Performing business analysis;
- Project management;
- Team coordination.

5.2.3   *A-Service Technical Environment*

The current configuration of the server and of the development environment on which the contractor will have to work is:

- Microsoft SQL Databases (On-Prem and Cloud);
- Microsoft Data Tools (SSIS);
- Microsoft Power BI Server (SSRS);
- Microsoft Analysis Services (SSAS);
- Power BI and MS Reports builder;
- SAP Hana Database;
- MS Visual Studio;
- Microsoft Azure Cloud Services for the categories:
  - Analytics,
  - Databases;
- Oracle Databases;
- C#;
- VB.NET;
- Talend Open Studio;
- IIS;
- Atlassian tools: JIRA, Confluence, Bitbucket, Bamboo;
- MS office applications: Office 365;
- All modern browsers (Chrome, Edge, Firefox etc.);
- Git;
- Generic
  - Windows Server OS,
  - Windows Desktop OS,
  - iOS and Android,
  - Microsoft Teams.

SERVICE

5.2.4 A-Service Programming Languages, Protocols, and Database technologies

- RDBMS;
- GraphDB (MSSQL, Neo4j, Apache Gremlin);
- NoSQL (Focus on Mongo / CosmosDB, Cassandra);
- Microsoft SQL (T-SQL);
- C#;
- C++;
- REST / gRPC;
- Python;
- Java;
- HTML;
- JavaScript;
- VB.NET;
- PL/SQL.

Please note that the programming languages are listed in order of importance.

5.2.5 A-Service Technical Profiles (Skills)

Here is a list of technical profiles covering the services mentioned in chapter 5.2.2:

- Business Intelligence Expert;
- Business Intelligence Developer;
- Business Analyst;
- Functional Specialist;
- Project Manager;
- Sprint Manager.

5.3 B-Service

B-Service is optional. IO CID will ask the Contractor to provide B-Service in case of emergency, or, when ITER project priorities change.

B-Service Scope, Services, Technical Environment and Programming Languages are not limited to the list below. Hence, IO CID is giving an overview of what it could request the Contractor to provide in addition to the A-Service.

5.3.1 B-Services Scope

- Plant Lifecycle Management;
- Service Desk;
- IT Security;
- IT Network;
- IT Telecommunications;
- Database administration;
- Systems Administration.

SERVICE

5.3.2   *B-Service Activities*

- User interface design;
- Software applications design;
- Testing and quality assurance;
- Building and release process;
- System maintenance;
- Configuration management;
- Change management.

5.3.3   *B-Service Technical Environment*

- SAP (ERP ECC8);
- Success Factors;
- Ariba;
- Exalead,
- Enovia/Catia V5;
- 3DExperience;
- RabbitMQ;
- SmartPlant;
- Primavera;
- AngularJS and Bootstrap.

5.3.4   *B-Service Programming Languages*

- Enovia/Catia API;
- Matrix PLM API;
- RabbitMQ API;
- Exalead API;
- Primavera API.

5.3.5   *B-Service Technical Profiles (Skills)*

Here is a list of technical profiles covering the services mentioned in chapter 5.3.2:

- System Administrator;
- Database Administrator;
- Service Desk Staff;
- Telecommunications Expert;
- Multi-CAD Expert;
- Engineering Data Expert;
- Construction Data Expert;
- Networks Expert;
- Communications Expert.

5.4   **Estimated Duration**

The framework contract will be set up for duration of five years (three firm years plus two times one optional year) with establishing task(s) order(s) according to the needs identified by IO CID.

SERVICE

6   Work Description

IO CID team decides the scope of work for Contractors, then both IO CID team and Contractors work on describing a detailed scope of each activity and finally IO CID team assigns individual tasks.

Below are a few examples of work description for activities mainly from A-Service that the selected Contractor will have to deliver in the frame of the contract:

Evolution and maintenance of a data warehouse:

- Collect user requirements;
- Analyze data availability;
- Analyze user request in relation to IO data warehousing strategy;
- Write technical specifications;
- Design entity-relationship data model respecting data warehousing principles;
- Write SQL script to create and maintain database objects;
- Design processes to synchronize (import) external data into data warehouse;
- Import external data using various techniques: SQL scripts, SSIS packages, Web Services, bulk upload, etc.;
- Update technical documentation.

Deliverable: operational data warehouse solution; updated project (project initiation document, highlight reports, exception reports, closure report, meeting notes, release notes, etc.), technical (developer guide, administration guide, operations guide) and service (user, internal) documentation; description of tasks as JIRA tickets; updated user documentation.

Evolution and maintenance of a data integration project:

- Collect user requirements;
- Analyze data availability and data quality;
- Analyze user request in relation to IO data integration strategy;
- Write technical specifications;
- Update technical documentation;
- Update data integration service documentation.

Deliverable: master data model (entities, attributes, business rules, attribute groups, integration views and permissions) deployed in the production environment; updated project, technical and service documentation; description of tasks as JIRA tickets; updated user documentation.

Evolution and maintenance of a paginated report:

- Collect user requirements;
- Analyze data availability and data quality;
- Analyze user request in relation to IO reporting strategy;
- Write technical specifications;
- Update data warehouse if necessary;
- Design user interface (visualization) for the paginated report;
- Create or update scripts to collect data for the paginated report;
- Test paginated report in the development environment;
- Deploy paginated report to the production environment;
- Update access permissions if necessary;

SERVICE

- Update technical documentation;
- Update data visualisation service documentation.

Deliverable: *integration package deployed in the production environment; updated technical and service documentation; description of tasks as JIRA tickets; updated user documentation.*

Evolution and maintenance of master data project:

- Collect user requirements;
- Analyze data availability and data quality;
- Analyze user request in relation to IO data integration and data quality strategy;
- Write technical specifications;
- Create and maintain data sources and connections;
- Create and maintain project and package variables and parameters;
- Create and maintain control flows and data flows;
- Deploy projects and packages;
- Schedule and run packages;
- Manage catalogs (development, test, production) of projects and packages;
- Analyze and optimize performance of packages;
- Manage project and package security;
- Update technical documentation;
- Update master data service documentation;
- Update user documentation.

Deliverable: *data integration project and packages deployed in the production environment; updated project, technical and service documentation; description of tasks as JIRA tickets; updated user documentation.*

Evolution and maintenance of data analysis project:

- Collect user requirements;
- Analyze data availability and data quality;
- Analyze user request in relation to IO data analytics strategy;
- Write technical specifications;
- Create and maintain data sources;
- Create and maintain data source views;
- Create and maintain dimensions;
- Create and maintain measures and measure groups;
- Create and maintain attributes and attribute relationships;
- Create and maintain hierarchies;
- Create and maintain cubes;
- Update technical documentation;
- Update data analysis service documentation ;
- Update user documentation.

Deliverable: *data analysis project (data sources, data source views, dimensions, attributes, attribute relationships, hierarchies, and cubes) in the production environment; updated technical and service documentation; description of tasks as JIRA tickets; updated user documentation.*

7 Location for Scope of Work Execution

Contractor can perform the work at their own location or on-site.

8 IO Documents

No input is expected from IO, however documents will be provided if requested.

9 Deliveries, Acceptance and Performance

9.1 Deliverables

The Contractor shall propose an on-site / off-site team to perform the tasks described in each Task Order.

IO CID provides in-house developed tools to record descriptions of work completed, to log time spent and to record absence. These tools are mandatory to use as they provide a basis for accounting and invoicing.
- Descriptions of work completed: Jira work logs and Confluence pages;
- Logging of time spent: Jira work log weekly records;
- Records of absence: Confluence Team Calendars.

Monthly activity reports contain qualitative and quantitative detailed information about the issues the Contractor has been confronted to, about the solution proposed and implemented, the innovations introduced in the processes and the ideas to further improve the service. These reports shall be agreed and accepted from IO TRO to release the corresponding payment.

9.2 Acceptance of deliverables

- Coherence with requirements: does the Deliverable correspond to the specifications?
- Coherence with purpose: does the proposed Deliverable meet the objective and purpose?
- Completeness: does the Deliverable address all the required points?
- Level of detail: does the Deliverable address all points with the required level of appropriate detail?
- Consistency with the proposed architecture: the content of the Deliverable must be consistent with the principles of the basis of the system and the objectives requested;
- Formal aspects: Deliverables and their documentation shall be well written, understandable and exempt of language, drafting or typographical mistakes.

9.3 Performance Criteria

IO will evaluate and score the performance of the Contractor regarding Deliverables periodically (at least once a year). IO CID will focus on:
- Timeliness (max. 20 points): Did the Contractor produce Deliverables by the agreed deadline?
- Project execution (max. 20 points): Did the contractor follow a clear and transparent management process for completion of the Deliverables?
- Team Turnover (max. 10 points): Do the team members stay the same, or is there turn and frequent changes?
- Quality and demonstrated competence (max. 50 points).

SERVICE

After evaluation, IO will provide a detailed report to the Contractor to give evidence of the performance of the service and eventually to allow the Contractor taking all the necessary measures to improve it, in particular:

- When the performance score is below 45 points, the Contractor will be required to apply urgent improvement measures. If nonetheless the Contractor's performance remains unsatisfactory, ITER will apply measures that could lead to termination of the current task order or of the whole Framework Contract;
- If the performance score is not higher than 65 points, the Contractor will be required to apply improvement measures where necessary;

A performance score of above 66 (above 85) points will have a positive (very positive) impact on the decision whether to issue the task order or renew the Contract.

10 Quality Assurance requirements

The organization conducting these activities should have an ITER approved QA Program or an ISO 9001 accredited quality system.

The general requirements are detailed in ITER Procurement Quality Requirements (ITER_D_22MFG4).

Prior to commencement of the task, a Quality Plan must be submitted for IO approval giving evidence of the above and describing the organization for this task; the skill of workers involved in the study; any anticipated sub-contractors; and giving details of who will be the independent checker of the activities (see Procurement Requirements for Producing a Quality Plan (ITER_D_22MFMW)).

Deviations and Non-conformities will follow the procedure detailed in ITER Requirements Regarding Contractors Deviations and Non Conformities (ITER_D_22F53X).

Documentation developed as the result of this task shall be retained by the performer of the task or the DA organization for a minimum of 5 years and then may be discarded at the direction of the IO. The use of computer software to perform a safety basis task activity such as analysis and/or modelling, etc. shall be reviewed and approved by the IO prior to its use, in accordance with Quality Assurance for ITER Safety Codes (ITER_D_258LKL).

11 Safety requirements

The scope under this Contract does not cover for PIC and/or PIA and/or PE/NPE components.

12 Specific General Management requirements

12.1 Initial Estimation of Workload

IO CID estimates the initial needs in terms of workload as the following:
- BI-DEV-J: Junior BI Developer – 3 FTE;
- BI-DEV-S: Senior BI Developer – 1.5 FTE;
- BI-EXP-S: Senior BI Expert – 2.5 FTE.

12.2 Technical Profiles and Experience

IO CID maintains two categories (Senior and Junior) based on number of years of experience in a required technical domain for each technical profile (5.2.5 and 53.5):
- Senior – with university degree and at least 8 years of experience in a required technical domain;
- Junior – at least 2 years of experience in a required technical domain.

SERVICE

As an example, when a BI expert is provided with 12 years of experience then this profile is called Senior BI Expert.

13 Specific requirements and conditions

Unless specifically agreed, the Contractor shall render services duly detailed in a Task Order at both on site at IO premises and off-site.

The normal working hours at ITER are 40 hours/week, 5 days per week Monday to Friday and 225 days/year.

The ITER organization closes for one week around December 25. The Contractor shall include this week in the vacation planning for the on-site staff. Outside of the week of closure, the Contractor shall have at least 50% of its team available, unless a different arrangement is previously agreed by both parties.

At any time of a task order lifecycle, when requested by the IO CID, the Contractor shall be able to provide a specific number of days worked by its team.

The Contractor obligation is to ensure the service continuity all along the task order validity. IO CID will monitor the quantity and quality of the services provided by the Contractor. Especially, IO CID reserves the right to register and log the time and presence of contractors on site.

The Contractor is required to work in close collaboration with all current and future IO Sub-contractors.

For the execution of A-Services and/or B-Services, the Contractor must deploy in reasonable time the number of people (contractor's staff) with relevant profiles as proposed in the technical offer and agreed by IO CID.

The spoken and written language of all communications between the Contractor and the IO is English. Therefore, the Contractor shall deliver all <u>documentation deliverables</u>, <u>reports</u>, <u>drafts</u> and <u>other documents</u> <u>written in English</u>, and <u>conduct</u> or <u>participate</u> in <u>meetings using English language</u>.

In case of personnel change (turnover), when not requested by the IO CID, the Contractor covers the costs of on boarding time for the newcomers (i.e. two months of training). In case of IO CID requesting personnel change due to insufficient performance, the Contractor also covers the cost of on boarding. IO CID covers the on boarding time at the initiation of a new task order, unless it is a continuation of a previous task order.

The Contractor shall pay other needed education and training costs for their staff. Any travel, subsistence allowance, and other expenses shall be borne by the Contractor. IO CID and the Contractor shall agree on a case-by-case bases who covers costs for specific missions, when requested by IO CID.

The Contractor's staff on site and off-site shall follow IO CID internal processes using the IO CID tools for these activities:

- Periodic time and activity logging;
- Project management; and
- Ticketing follow-up.

The work environment of the off-site team shall be in accordance with the complexity of the tasks in general, and offer especially:

- A strong internet connection at least 15Mb/s download and 2.5 Mb/s upload with Marseille server (test can be performed by http://www.speedtest.net/).

SERVICE

- A workstation station with double screen of at least 22 inches diagonal and processor at least i7 or equivalent (4 core, 3GHz) and memory at least 16GB, 64bit OS, web cam and headset.
- Accessibility to meeting room equipped with white board and projector for 10 persons.

PRIOR INDICATIVE NOTICE (PIN)

OPEN TENDER SUMMARY

IO/24/OT/70001112/KJT

for

Business Intelligence Global Support

Abstract

The purpose of this summary is to provide prior notification of the IOs intention to launch a competitive Open Tender process in the coming weeks. This summary provides some basic information about the ITER Organisation, the technical scope for this tender, and details of the tender process for the provision of Business Intelligence Global Support.

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 Framework Contract(s).

The purpose of this document is to provide a basic summary of the technical content in terms of the scope of work, 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.

3 Scope of Work

The purpose of this framework contract(s) is to procure:
- A-Services category: Covers the business intelligence stack
  - ➢ Evolution and maintenance of Data Warehouse;
  - ➢ Evolution and maintenance of Data Integration Service;
  - ➢ Evolution and maintenance of Data Visualization Service: paginated reports, mobile ;reports, KPIs, dashboards and Power BI reports;
  - ➢ Evolution and maintenance of Data Management service including Master Data Management Service;
  - ➢ Evolution and maintenance of Data Analysis Service.

 - B-Services category (optional) covers services, Technical Environment and Programming Languages not limited to the list below:
  - ➢ Plant Lifecycle Management;
  - ➢ Service Desk;
  - ➢ IT Security;
  - ➢ IT Network;
  - ➢ IT Telecommunications;
  - ➢ Database administration;
  - ➢ Systems Administration.

The details can be found in the Technical Specifications ref. ITER_D_ AW6UCR v1.0 (attached to this PIN).

4 Procurement Process & Objective

The objective is to award a Framework Contract(s) 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". The registration process is described at the following link: 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 – Request for Proposal :
The Request for Proposal will be sent in IPROC to the Tenderers who expressed their interests in accordance with the procurement timetable below. This stage allows interested bidders who have seen the PIN to obtain the tender documents and to prepare and submit their proposals in accordance with the tender instructions.

Special attention:
Only companies registered in the IPROC 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 Request for Proposal (RFP).

➢ Step 4 – Contract award :
A framework contract(s) will be awarded on the basis of Best Value for Money according to the evaluation criteria and methodology described in the Request for Proposal (RFP).

Procurement Timetable

The tentative timetable is as follows:

Milestone	Date
Publication of the Prior Indicative Notice (PIN)	Week of 10 June 2024
Submission of expression of interest form	24 June 2024
Request for Proposal (RFP) publishing on IPROC	Week of 12 July 2024
Clarification Questions (if any) and Answers	15 days before tender submission deadline
Answers to Clarifications	10 days before tender submission deadline
Tender Submission in IPROC	Week of 6 September 2024
Tender Evaluation	October 2024
Contract Award	December 2024
Contract Signature	December 2024
Contract Commencement	January 2025 (through Task Orders)

5 Quality Assurance Requirements

Prior to commencement of any work under this Contract(s), a "Quality Plan" shall be produced by the Supplier and Subcontractors and submitted to the IO for approval, describing how they will implement the ITER Procurement Quality Requirements.

6 Contract Duration and Execution

The ITER Organization shall award a Framework Contract(s) around December 2024. The estimated contract duration shall be 3 years with 2 optional periods of 1 year each.

The working language of ITER is English, and a fluent professional level is required (spoken and written).

7 Experience and Capacity

The Contractor has an extensive experience in providing solutions for business intelligence stack with at least 5 customer references in similar projects with at least 3.5M€ turnover.

The Contractor proposed solution shall answer to IO business needs in line with the acceptance criteria domains including:
- Evolution and maintenance of Data Warehouse;
- Evolution and maintenance of Data Integration Service;
- Evolution and maintenance of Data Visualization Service: paginated reports, mobile reports, KPIs, dashboards and Power BI reports;

- Evolution and maintenance of Data Management service including Master Data
- Management Service;
- Evolution and maintenance of Data Analysis Service.

The Contractor proposed solution shall comply and integrate with IO technical context as described in the technical specification for data inputs, CAD environment, data storage, and IT security.

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.

9   Sub-contracting Rules

All sub-contractors who will be taken on by the Contractor shall be declared with the tender submission. Each sub-contractor will be required to complete and sign forms including technical and administrative information which shall be submitted to the IO by the tenderer as part of its tender.

The IO reserves the right to approve any sub-contractor which was not notified in the tender and request a copy of the sub-contracting agreement between the tenderer and its sub-contractor(s). For each Contract, sub-contracting is allowed but it is limited to one level, and its cumulated volume is limited to 30% of the total Contract value. Two levels of sub-contracting may be considered for very specific activities which will be mentioned by the IO in the Tender documentation.

ANNEX I

EXPRESSION OF INTEREST & PIN ACKNOWLEDGEMENT

To be returned by e-mail to: Kristel.Jeanmart@iter.org copy Takakazu.Kimura@iter.org

> ITER Organization / ITER Headquarters
> Procurement Division
> Route de Vinon-sur-Verdon
> CS 90 046
> 13067 St. Paul Lez Durance Cedex
> France

TENDER No. **IO/24/OT/70001112/KJT**

DESIGNATION of SERVICES: **Business Intelligence Global Support**

OFFICER IN CHARGE: **Kristel Jeanmart – Procurement 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: ....