

Call for Expertise

TECHNICAL SPECIFICATION

Expert Services Contract

Procurement Technical and Administration Support

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1 Abstract

The Technical Specification describes the technical and administrative support to be provided by the Contractor to The ITER Organization (IO) Vacuum Section.

The scope of this contract is to provide the following support:

- Technical & Administrative support in the preparation and execution of Procurement Arrangements (PA)
- Technical & Administrative support in the preparation and execution of Task Agreements (TA)
- Technical & Administrative support in the preparation and execution of Direct (cash) Contracts
- Organization and execution of design related processes, including design reviews

2 Background and Objectives

2.1 Contract Related Background

It is envisaged that the following types of procurement will require support from the Contractor during the duration of the Expert Services Contract.

2.1.1 Contract Types

2.1.1.1 Procurement Arrangement

A PA is a contractual document between the ITER Organization (IO) and the Domestic Agency (DA)¹ responsible for the supply of (vacuum) system(s) intended for use on the ITER machine.

The DA manages all aspects of the PA after the PA signature. This includes the placing and management of sub-contracts with industry. The DA reports the performance of the PA to IO Technical Responsible Officer (TRO) who, in turn, reports to the IO management team.

The IO Vacuum Section is responsible for procuring the main vacuum systems for use on the ITER machine under Procurement Arrangements.

These systems include, amongst others;

- Torus and Neutral Beam Pumping
- Cryostat Pumping
- Service Vacuum
- Cryogenic Guard Vacuum
- Primary Vacuum leak Detection and Water Leak Localization

2.1.1.2 Task Agreements

A Task Agreement (TA) is a contractually binding agreement between the IO and the DA for a work package to be performed by the DA. The scope of the work package usually includes a design or R&D

¹ Europe, China, Russia, USA, Korea, Japan, India

task in support of the ITER design. Equipment supplied under a TA is not intended for use on the ITER machine. The IO prepares the TA technical Specification. Once the TA is placed the DA is responsible for placing sub-contracts and for the management of the TA. The DA reports progress on the execution of the TA to the IO.

2.1.1.3 Direct (cash) Contracts

A direct contract is a contract between the Supplier and the IO for the supply of services and/or equipment. The IO prepares the required tender documentation, manages the call for tender and awards the contract. The management of the contract is the responsibility of the IO. Direct contracts include frame-work contracts for which, in addition to the required tender documentation, the IO is also responsible for preparing Task Orders (TO) describing the work to be performed under the scope of the frame-work contract.

2.2 Design Review Related Background

The ITER design is peer reviewed at system level as part of the design process. Depending on the type of PA the responsibility to perform the design review is either with the IO or the DA. In the case of direct contracts any design review is the responsibility of the IO.

It is envisaged that the following types of design review will require support from the Contractor during the duration of the Expert Services Contract.

2.2.1 Conceptual Design Review (CDR)

A formal design review meeting conducted at an early stage of the design phase to assess that the requirements of the system have been properly identified, the concept selected minimises the overall construction and operation risks and that the boundaries of the systems have been established.

2.2.2 Preliminary Design Review (PDR)

A formal design review meeting conducted during the development phase of the design to monitor the progress of the design and to assure that the requirements are properly defined and documented; the layout and interfaces have been fixed; a design concept that meets those requirements has been developed and supporting analyses and R&D are being carried out; and a firm basis exists to proceed with final (detailed) design.

2.2.3 Final Design Review (FDR)

A formal design review meeting conducted to assure that the detailed design is complete and properly documented.

2.3 Objectives

The objectives of the contract are outlined as follows.

- 1) The Contractor shall support the preparation and subsequent management of PBS 31 contracts. This support shall include the following tasks;
 - Preparation/review of specifications and call for tender documentation
 - financial and schedule reporting
 - supplier follow-up
 - preparation, review & distribution of meeting minutes
 - preparation & review of Task Agreements

- preparation & review of technical specifications required for Task Orders to be placed against existing frame-work contracts
- 2) The Contractor shall support IO Vacuum Section design review activities. This support shall include the following tasks;
- Preparation of required authorization to proceed documentation
 - logistics management
 - preparation, review and distribution of agendas
 - prepare, review and distribution of meeting minutes

In mutual agreement between the Contractor and the IO other objectives may be defined during the execution of the contract.

3 Work Description

The work described in this technical specification includes technical and administrative support for PBS 31 procurement activities and administrative support in the organization of required PBS 31 design reviews.

Work is organized over a two-year period, with specific tasks and deliverables defined on a quarterly basis (section 5.1).

3.1 Scope of work:

This section describes the scope of the work to be performed under the awarded contract.

The exact tasks will be agreed upon between IO and the expert (or company providing the expertise) on a quarterly basis. In accordance with section 5.1 of this technical specification, based on the priorities of the IO, a work plan will be agreed upon, including deliverables for the period at the beginning of each three month period.

3.1.1 Procurement Related Activities

The Contractor shall perform the following tasks as outlined in

Task	Task Description
Preparation of procurement related documentation	<ul style="list-style-type: none"> i. The Contractor shall liaise with the IO PA Responsible Officer (PARO) and IO TRO to provide support in the preparation of Annex A, Annex B and main text required for PAs. ii. The Contractor shall organize the review of the Annex A, Annex B and main text and update, in conjunction with the PARO and TRO, the documents as a result of the review. iii. The Contractor shall prepare required administrative documentation for required for the call for tender process. This shall include the preparation of explanatory notes, and summary technical specifications derived from the full technical specifications. The Contractor shall contact perspective members of the evaluation committee and prepare the documentation required for the approval of the evaluation committee. iv. The Contractor shall manage the review of technical specifications, loading the required documentation to the ITER Document Management (IDM) System. The Contractor shall follow the review process ensuring that technical specifications are available in time.

	<p>v. The Contractor shall support the preparation of technical specifications required for Task Orders describing the work to be performed under the scope of IO Vacuum Section frame-work contracts. The Contractor shall liaise with the framework contract manager in defining the technical scope of the Task Order (TO). The contractor shall prepare a draft technical specifications describing the work to be performed and organize the review. The Contractor shall liaise with the IO contract Administrators and support the preparation of documentation required to place the TO with the frame-work provider (explanatory note etc.).</p>
Contract follow-up	<p>vi. In conjunction with Responsible Officers and the Technical Responsible Officer the Contractor shall prepare monthly reports on the status of PBS 31 contracts and Procurement Arrangements. The Contractor shall synopsise these reports and enter the data to the bi-weekly vacuum report (on SharePoint).</p> <p>vii. The Contractor shall ensure that contract deliverables are delivered are processed on time. The Contractor shall check the contract deliverables for administrative compliance (inventory check) and load the deliverables to IDM setting the required Reviewers and Approver. On completion of the review the Contractor shall inform the Supplier of the required changes to the deliverables and organize the subsequent re-review. By liaising with the supplier the Contractor shall ensure that the associated invoices are presented to the IO by the Supplier on schedule.</p> <p>viii. The Contractor shall organize meetings according to the Supplier/IO contract schedule. This shall include preparing and distributing agendas, requesting site access, preparing and distributing minutes.</p>
Preparation / management of design reviews	<p>ix. In accordance with IO procedures the contractor shall prepare the administrative documentation required to hold a design review. This includes preparation and review of the authorization to proceed, meeting agenda and distribution of final reports. In some cases the Contract may act as secretary to the review.</p> <p>x. The Contractor shall support IO Vacuum Section team member's participation of design reviews. The Contractor shall collate chits raised by PBS 31 and enter them to the chit tracking tool on behalf of the IO Vacuum team.</p>

4 Duration

The contract duration shall be one year. The IO may exercise the option to extend these services for a maximum of one additional period of one year beyond the original contract. ITER Organization shall establish the request for services on ad hoc basis and relative to the respective annual work plan, with specific tasks and deliverables defined on a quarterly basis.

5 Deliverables and Time Schedule

The specific work to be carried out is to be established quarterly (every three months). The IO will, in mutual agreement with the Contractor, establish tasks and priorities, along with the written reports to be produced, documentation to be reviewed etc.

Specific deliverables are:

- Procurement documentation prepared, meeting minutes, schedule and financial data or any other written report as specified in the work plan.

- Monthly reports with a summary of activities during the reporting period, including approximate time spent on each activity.

5.1 Management of the Work Plan

- The quarterly work plans will be prepared at least one month before a new quarter commences.
- Work plans will be uploaded to IDM for review and approval by the Vacuum Section Leader.
- The work plans will precise deliverables (documentation beyond the monthly reports).
- Work shall not start before approval of the work plan.

5.2 Acceptance Criteria (including rules and criteria)

The acceptance of the work is based on completion of the tasks and goals set on the work plan for each trimester, as well as on the completion of reports and documents specified in the work plan.

5.3 Payment schedule / Cost and delivery time breakdown

Payments to the Contractor shall be granted on a monthly basis following invoicing for actual work performed.

6 Experience

The Contractor proposed by the bidder to carry out the work described in Section 3 must have proven experience in the following areas:

- Experience in the preparation of procurement related documentation such as technical specifications, call for tender documents, meeting minutes
- Ability to work in a team and autonomously
- Ability to communicate fluently and write reports in English.

Curriculum Vitae showing evidence of the above-mentioned experiences is required.

7 Work conditions

- Work plan for every three months is established and agreed by IO.
- This contract shall be executed by one Contractor.
- The Contractor shall be present at the IO site for the entire duration of this contract.
- The Contractor shall have its own office and computer resources. The Contractor will be given access to the necessary data and documents either in paper or in computer files form at Cadarache ITER site. The contractor will also be allowed accessing to the necessary folders in the computer server at Cadarache ITER site via internet. The contractor shall be given temporary office space in the premises of Magnet Division for the purposes of working onsite.

8 Timetable

The tentative timetable is as follows:

Call for Expertise	October 2013
Award of Contract	November, 2013

9 Candidature

Participation is open to all individuals, companies or consortia which are legally registered in one or more of the ITER Member States. A consortium may be either 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.

The consortium groupings shall be presented at the tender submission stage. The consortium cannot be modified later without the approval of the ITER Organization.