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

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