

Contracts Documents

PIN for Project Control Support Services to IO

This is the PIN (Prior Indicative Notice) for contract procurement of project control support service to IO.



china eu india japan korea russia usa

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PRIOR INDICATIVE NOTICE (PIN)

OPEN TENDER SUMMARY

IO/25/OT/70001261/EBT

for

Project Controls Support Services

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 project management support services.

1 Introduction

This Prior Indicative Notice (PIN) is the first step of an Open Tender Procurement Process leading to the award and execution of 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 selected Contractor will have to provide Project Management services to the IO, for the planning, monitoring, managing, controlling and reporting of the ITER baseline execution performance and the detailed underlying executions schedules.

The Contractor executing the scope of work described will follow IO approved framework of management plans, policies, procedures, work instructions and guidelines. Note that often this framework deviates from usual project control practice due to the unique governance of the ITER project. The ITER Project Management Plan sets out the main governance and process framework.

The IO baseline structure is illustrated in figure 1 below.

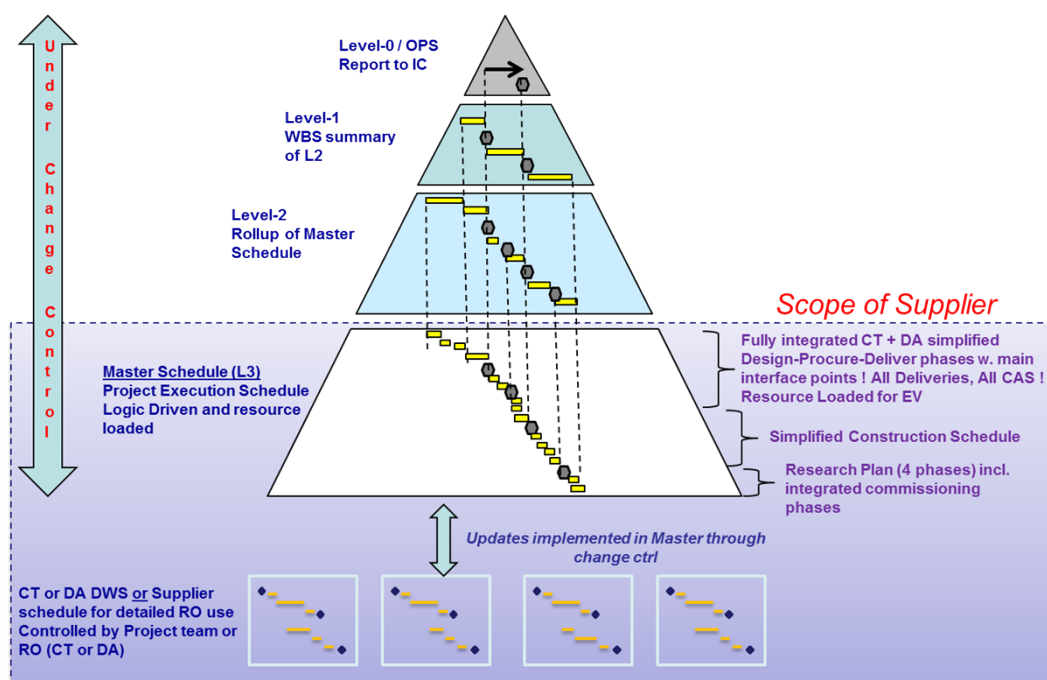


Figure 1 – ITER baseline structure

IO follows a monthly progress update and reporting cycle. The relevant monthly tasks have to be completed respecting this calendar.

The IO Finance and Project Services Division (FPS) will assign staff and Contractor services through the Construction Project Office (CPO) in support of to the Construction Programs (9) and Projects (47) to continuously support the Project Leaders in controlling, monitoring, scheduling, forecasting and reporting detailed execution and Baseline performance. The FPS has IO staff (Service area Responsible Officers - SRO) assigned leading the project management support services for each technical area and a Project Controls Expert (PCE) assigned leading the associated execution of Contractor work for each Program. The IO Organisation and Construction Programs is available on our website at

https://www.iter.org/sites/default/files/media/2025-02/iter_organizational-chart_02-2025_final.pdf

The anticipated level of service personnel defined for each technical area is the current estimate from IO. The volume of activities will be further detailed in the Technical Specification provided for the Request for Proposal (RFP), allowing refined assessment of the level of service personnel at this stage.

The different Technical Areas are further described in the next sections.

3.1 Scheduling Control Services

The required Scheduling Control services shall support the development, maintenance and execution of the time-phased, resource-loaded Master Schedule for the ITER work scope directly assigned to the construction programs and projects and some transversal functions. The service also supports the continuous rolling wave development and execution and control of their near term detailed work schedules.

The Master Schedule reflects the integration of scope, schedule, and cost, and is used for work forecast, earned value performance measurement, analysis, and reporting as well as for baseline change management. The Master Schedule is under formal change control. It is developed and maintained by the ITER Organization using Primavera software. It is developed and maintained with a rolling wave approach with work packages in the execution year N and N+1, and planning packages in the future years.

It is further underpinned by IO and DA Detailed Working Schedules (DWS) and Supplier Schedules, which are the detailed execution plans for IO and DA procurements for specific systems and components as well as installation and commissioning work schedules on site (the C-DWS). The DWS are not under formal change control.

The required Schedule Control services include:

- The integration of IO, and DA elements of the scheduling system, monthly forecast analysis of the integrated schedule, maintenance of the schedule baseline, reporting schedule status against the baseline to the Project Leaders (PLs) and Technical Responsible Officers (TROs) for their assigned WBS area and IO management.
- The management of monthly progress updates, critical path analysis and studies and implementation of formal changes to their respective WBS elements within the Master Schedule and the DWS.
- The weekly and/or monthly detailed installation work package execution scheduling, sequencing, analysis and coordination for near term on site construction work.
- The loading and maintenance of resources and costs in the Master Schedule.
- A major element of these services includes support to the PLs and TROs in the scheduling, forecasting, estimating and managing risk and opportunity mitigation for their respective specific WBS areas. Specifically the service will support producing forecast Estimate at Completion and budget cycle planning, and monthly variance analysis and reporting in support of their assigned WBS.
- The maintenance of Primavera and planning information in the other project control related systems such as:
 - The Issue Management Database
 - The Project Risk and Opportunity Register
 - The DWS Inter-Correspondence Management System
 - The Project Management Reporting System

In addition to the Master Schedule and DWS, the Schedule Control services cover the development and management of additional detailed working level schedules as directed by their respective IO PL and PCE as well as detailed near term scheduling work for on-site installation and commissioning activities.

A Detailed installation plan for Post SRO (post 2034) work will be developed with the IO Construction Project teams during the contract duration.

The Scheduling Control task also includes the monthly cycle administration and internal data transfer to and from the scheduling system as well system/user administration of Oracle Primavera.

Other scheduling tasks and systems, for instance 4D planning for specific sub-project studies, may be added to the scope during the execution of the contract.

It is anticipated that there will be a need of between 20-40 Schedulers to execute this service (varying over time).

3.2 Risk and Opportunity Management

The IO FPS is responsible of the development and monitoring of ITER's capabilities on Risks and Opportunities (R&O) by implementing methods, processes, tools and governance rules for R&O identification, assessment, prioritization and management planning, R&O reporting, R&O analyses as well as R&O response planning, monitoring and controlling. The Contractor will facilitate the execution of the P&O process.

There is a dedicated ITER Project Risk and Opportunity Register (PROR) to support R&O Management activities within the ITER Project. The Contractor will be responsible for maintaining the PROR by performing regular quantification of event R&Os, standardisation of event R&Os assessment across IO-CT and IO-DA, and to embed routine R&O reviews and their status update. The Contractor will provide support to PLs and TROs as a R&O expert in reviewing existing R&Os, identifying, assessing and recording new event R&Os and in monitoring the implementation of response plans.

The R&O assessments will be used as a management tool to optimize the project baseline planning and to prioritize key project activities and mitigation actions. The R&Os will be identified and quantified using an approach described in the Risk and Opportunity Management Procedure.

The Contractor may also perform Quantitative Risk Analysis -"Monte Carlo" simulations- using Primavera Risk Analysis software to identify potential areas of high risk and uncertainty and to calculate the appropriate amount of time and cost contingency that the project should retain. This is done once a year.

It is anticipated that there will be a need of between 2-5 R&O managers to execute this service (varying over time).

4 Procurement Process & Objective

The objective is to award 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 :
Within 14 days of the publication of the Prior Indicative Notice (PIN) the Request for Proposal will be sent in IPROC to the Tenderers who expressed their interests. 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 conference

An online tender conference will be organised in order to present to the tenderers the scope of work as well as the procurement and contracts rules.

➤ Step 4 - 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 5 – Contract award :

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)	10 Mar. 25
Submission of expression of interest form	24 Mar. 25
Request for Proposal (RFP) publishing on IPROC	31 Mar. 25
Tender Conference (online)	4 Apr. 25
Tender Submission in IPROC	12 May. 25
Tender Evaluation	May- Jun. 25
Contract Award	Jul. 25
Framework Contract Signature	Aug. 25
Task order 1 start	Sep.25

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 Framework Contract(s) around September 2025. The estimated contract duration shall be 6 years firm with the 3 months implementation and transition in Q4 2025.

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

7 Experience

The below detailed experience per service area is considered necessary to perform the required tasks. It will be further refined in the next stages of the Request for Proposal.

7.1 Planning & Scheduling scope

- development, maintenance and execution of complex schedules in an enterprise multi-project environment with Oracle Primavera P6 is mandatory, experience in using Oracle Primavera Cloud is preferred.
- rigorous change control process and management of schedule baselines with Primavera.
- experience in the management and administration of Oracle Primavera in a multiple user / multiple role environment.
- experience in the implementation and management of large complex projects using ANSI 748 or ISO 21508 Earned Value Management to measure, analyse and report project performance.
- Certification by PMI, APM, PRINCE or equivalent and knowledge of P6 and SAP is preferred.

7.2 Risk and Opportunity Management scope

- wide experienced in risk analysis for complex projects from a strategic level.

- experience in the development and implementation of risk and opportunity mitigation actions.
- Experience with risk modelling systems such as PertMaster and AtRisk.

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.