

ITER for Professional Organizations



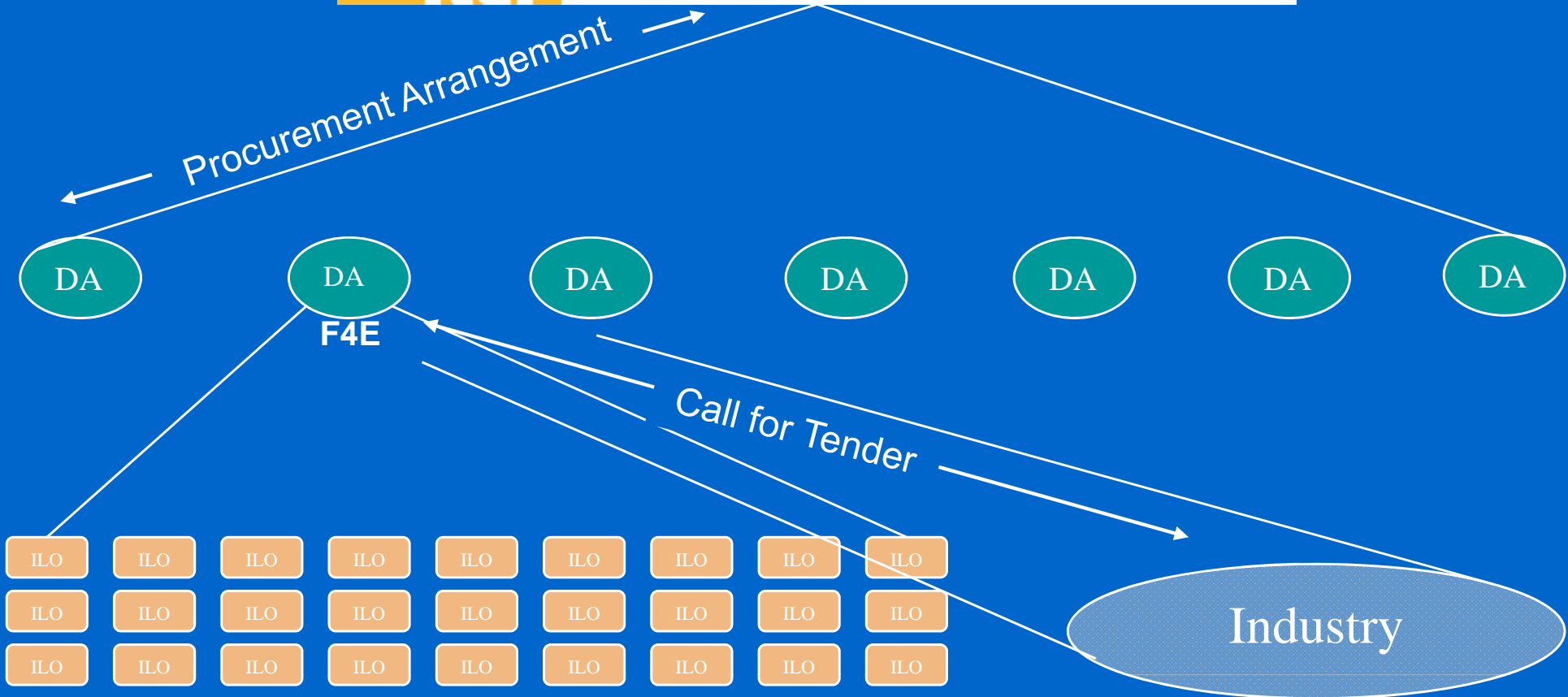
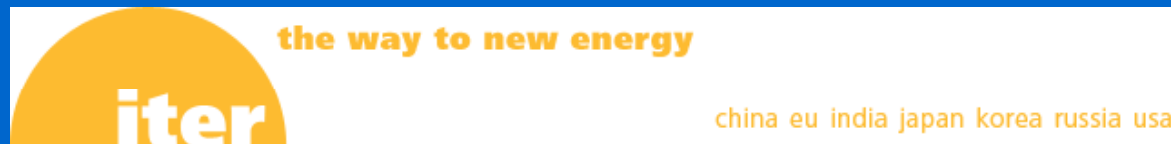
Procurement Procedures

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Procurements for ITER



Procurements carried out by F4E

- Administrative
- Operational
- Grants
- Management of “Call for Nominations” for IO
- Management of CfT for BA
- Calls for Experts

F4E: Operational Procurements

- High Value ($> \text{€ } 250'000$)
 - Open
 - Restricted
 - Competitive Dialogue
- Low Value ($< \text{€ } 250'000$)
 - Negotiated Procedure
 - $> \text{€ } 50'000$: at least 3 candidates, no publication of contract notice
 - $< \text{€ } 50'000$: at least 1 candidate, no publication of contract notice
 - $< \text{€ } 5'000$: no procedure, payment against invoice
- Any Information and IP ... generated in the course of the execution of the Contract including subcontracting (***“foreground”***) shall be transmitted without delay to F4E

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F4E: GRANTS

The Grant funding instrument is applicable to those cases in which there is a common and shared interest by the beneficiary/ies and F4E in the successful completion of the action

For research and technological development activities, Fusion for Energy's financial contribution may reach a maximum of 40% of the total eligible costs

For management activities Fusion for Energy's financial contribution may reach a maximum of 100% of the total eligible costs.

IP: ***Foreground*** shall be the property of the beneficiary carrying out the work generating that foreground.

F4E: Evaluation of offers

Exclusion Criteria

- does the tenderer have the right to participate?
- have all formal obligations been met?

Selection Criteria

- Does the tenderer have the technical, financial, resources, tooling, *capacity* and *experience* to carry out the work?

Award Criteria

- How good is the tender in terms of qualitative assessment and its price

F4E: Data Bank

Data Bank of F4E in preparation for:

- identifying best partners
- managing supplier portfolio
- adding efficiency to the procurement process
- spreading capacities around fusion

Data Bank of Swiss Firms will be

- completed with size and turnover
- integrated into F4E's data base

SME: < 250 employees < €50 Mio turnover < €43 BS

F4E intends delivering “bonus points” to offers including SME's as subcontractors

IO Procurements: catalog of procedures

- **Request for Quotation**

market research, particularly for products, equipments or services which have not been procured before

- **Restricted Tender**

RT procedure narrows competition to an ongoing short list of qualified suppliers

- **Call for Nomination**

PCD (Procurement and Contract Division) will formally invite the Domestic Agencies to nominate several potential tenderers

- **Call for Tender**

Call for Tender (CFT) is recommended for all contracts exceeding €100,000

- **Open Tender**

Initiated by an advertisement, an OT procedure is open to all companies

IO Procurements: customary procedures

Administrative Calls for Tender

for staff, consultants, upgrade/check design or assembly

> 100 k€ Call for Nominations

- Carried out through Domestic Agencies
- The nominated companies are either already short-listed, or
- Go through an initial prequalifying procedure
- followed by a Call for Tender

< 100 k€ Request for Quotation

to short-listed Companies

Just like F4E, IO is also contemplating the establishment of a company data base. ILO will transmit all registrations with F4E to IO.

Just like F4E, IO is also contemplating the publishing of future calls, thus enabling industry to prepare itself.

IO Procurements: particularities

Examples of IO procurements:

- CODAC
- Management support (management consulting, communication, SAP, etc.)
- Studies
- Control procedures, welding , QA, ...
- Insurance

Contract sizes:

- Contracts > €500k require the approval of the respective DA
- Contracts > €2,5 Mio are reported to MAC

Other possibilities for contributing to ITER

- Thru other DA's
- Thru CEA
- Thru direct contacts