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CALLS FOR TENDER AND MARKET SURVEYS – ROLES AND PROCEDURES

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Abstract

ST division has implemented certain procedures to handle the calls for tender and market surveys. In January 1998, the division leader set up the ‘call-for-tender co-ordination office’ to check and approve each technical document leaving the division. The mandate of the call-for-tender co-ordination office is to check the quality of the documents, in order for these documents to be as clear as possible in terms of both content and structure. The role of this office is to contribute positively and give service to the people writing the documents, and not to give negative criticism. The aim of this paper is to present the mandate of the office, how papers are processed, and to draw up a first result summary.

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1 BACKGROUND

To assure the quality of the outgoing ST-division technical documents, the division leader set up the call-for-tender co-ordination office in January 1998 to check and approve each of them. The idea was to make sure that the technical documents are understandable/readable and do not contain errors when they reach the people outside of ST division.

The need for this office arose because many of the people in the ST division are at present quite young and therefore professionally still inexperienced and may need assistance in writing technical documents. Another reason was that many of the CERN documents are nowadays written in English, whereas the ST division's main language is French.

2 OBJECTIVES

The mandate of the call-for-tender co-ordination office is to check the quality of the documents, in order for these documents to be as clear as possible in terms of both content and structure. A further objective is to harmonize the ST-division documents wherever possible, for example by always having a similar introduction to CERN or the same document format. ST-division templates for market surveys and calls for tender are currently under development.

3 APPROVAL CIRCUIT

The call-for-tender co-ordination office checks and approves each technical document leaving the division. The approval circuit is presented on the following web site: <http://nicewww.cern.ch/st/di/Coordination/circuit.htm>. The circuit presented in Fig. 1 is an English version of the one presented on the web. The different people and their roles in the circuit are given in Table 1 below.

Table 1: Roles of different people in the approval circuit

People	Roles
Writer	Creates the document
Group secretary	Controls the format and spelling, forwards the document to the division secretary
Division secretary • Sylvie Prodon	Circulates the document between the writer and reader until it is approved, keeps a record of each version
Reader • Leena Annila • Katy Foraz • Yvan Jacquemyns	Checks and approves documents before they are sent out of the ST division English/Translations (French → English) French/English French

CIRCUIT D'APPROBATION D'UNE SPECIFICATION TECHNIQUE ET D'UN MARKET SURVEY

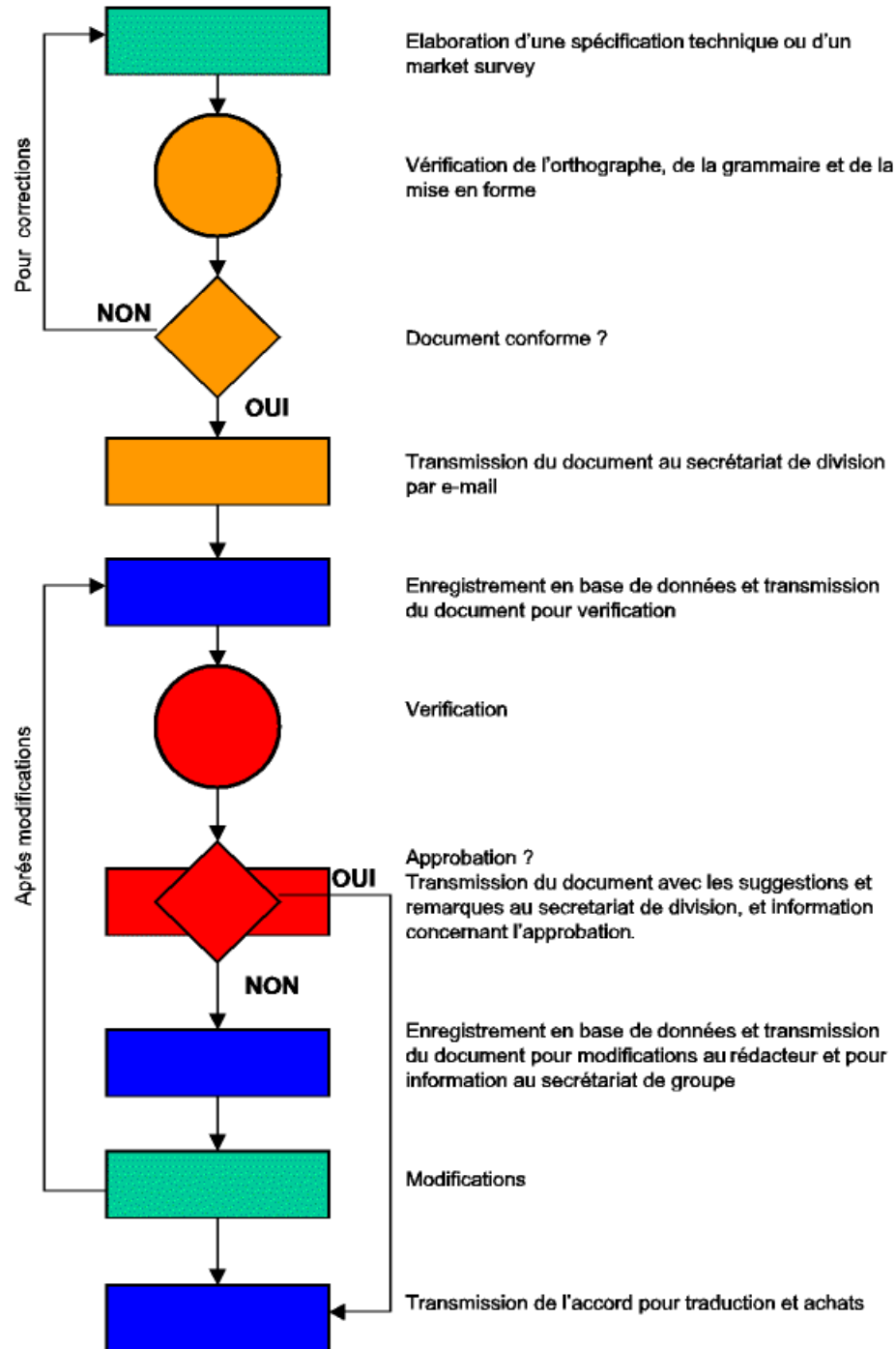
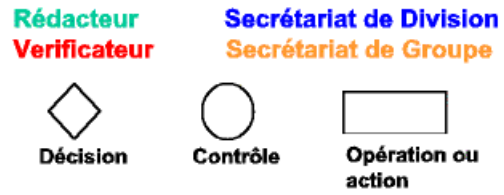


Figure 1: Approval circuit of technical documents in the ST division.

4 REQUIREMENTS FROM ST DIVISION

4.1 Market surveys

Table 2 gives a list of the documents a CERN market survey must contain and the division (ST or SPL) responsible for submitting them.

Table 2: Market survey documents

Document name	Responsibility
Technical description	ST
Qualification criteria	ST
Questionnaire	ST
Cover letter	SPL
Selection and adjudication criteria for supply/industrial service contract documents	SPL

4.2 Calls for tender

Table 3 gives a list of the documents a CERN call for tender must contain and the division (ST or SPL) responsible for submitting them.

Table 3: Call-for-tender documents

Document name	Responsibility
Cover letter	SPL
Technical specification	ST
The general conditions governing invitations to tender and tenders	SPL
Set of criteria to be used in the assessment of tenders	SPL
For industrial services full information about the amount of work to be carried out	ST + SPL
Tender form	SPL + ST
General conditions of CERN contracts	SPL
Specific/special conditions	ST + SPL
Other required documents that enable bidders to draw up clear and precise tenders	ST

4.3 Important points

Some important aspects to consider when writing technical documents can be summarized.

Regarding market surveys, the qualification criteria state the conditions to be fulfilled by companies in order to be eligible to receive the call for tender following the market survey. In the questionnaire the requirements specified in the qualification criteria should be verified, and other things can be asked as well. In the technical description the scope of the survey should be clear so that the people receiving it understand immediately what it is about. The technical part of the market survey should not go into small details, but rather give an overview of the supply.

The technical specifications for calls for tender should be made such that the tenders received at CERN are comparable with each other. Important things to be included in technical specifications are outlined below.

- Introduction:
 - to CERN;
 - to the technical domain concerned.
- Scope of the project:
 - stating clearly and briefly what the project is about, where it takes place. (It should be noted that there is a difference between what the user wants and what the ST division wants from the supply.)
- Technical description:
 - clearly technical, giving references to the applicable technical standards.
- Limits of the supply between CERN and the contractor.
- Rules and standards to be followed.
 - e.g. TIS safety rules, French/Swiss norms to be followed.
- Quality requirements.
- Procedures before awarding the contract, including:
 - documents to be provided (possible quality plan);
 - visit to CERN;
 - subcontractors.
- Execution of the contract, including:
 - documents;
 - work procedures, management;
 - security, hygiene;
 - transport;
 - commissioning.
- Tests/inspection.
- Schedule.
- Relevant annexes.
- Possible questionnaire.

5 ANALYSIS AFTER 1.5 YEARS OF OPERATION

Between the start in 1998 and the end of 1999, 157 documents went through the approval circuit. Many of them were approved after the first check, but there have been cases where the documents have passed between the writer and reader 5–6 times before approval. Table 4 indicates how many documents each reader has controlled and of which type.

Table 4: Number of documents controlled by the readers by the end of 1999

Reader	Number of French documents	Number of English documents	Number of translations
Annala, Leena	–	50	40
Foraz, Katy	49	6	–
Jacquemyns, Yvan	52	–	–

The average time taken to control a document is quite difficult to define. It depends on the length, content, the way it has been written, whether it is a market survey or a call for tender, and so on. However, the readers spent at least 20% of their working time on this job. Table 5 shows the number of documents created in the different ST groups.

Table 5: Number of documents created in the ST groups by the end of 1999

Document type	AA	CE	CV	DI	EL	HM	MO	TFM
Market surveys	4	6	18	0	8	8	0	3
Share of all market surveys	9%	13%	38%	0%	17%	17%	0%	6%
Calls for tender	4	11	20	0	7	25	1	43
Share of all calls for tender	3.5%	10%	18%	0%	6%	22.5%	1%	39%

6 CONCLUSIONS AND FUTURE PROSPECTS

During the past 1.5 years that the call-for-tender co-ordination office has been operating, the quality of the documents has improved with regard to their structure and readability. Partially this is because of the LHC template, which is better known now and which many people use even in other projects' documents. It is also because of the feedback from the division leader and readers, who have been able to point out the possible deficiencies in the documents or things to which special attention must be paid. A very positive aspect is that once these deficiencies have been pointed out, the writers have clearly taken note, and avoided the same mistakes in their later documents. The reading procedure is relatively well known nowadays inside the division and the approval circuit operates faster than in the beginning.

However, it is obvious that even though there is a template for the LHC documents, we also need a template for pure ST documents. These are currently under development and will be based on Section 4 of this paper. The templates will be released on the web after the group leaders' approval.

The attitude inside the division towards the reading procedure is ambivalent. Some people think it is a waste of time, some think it is of great help. A couple of times deficiencies in the operation of the approval circuit have also been noted: There seems to be a particular need to refresh memories from time to time with regard to who is supposed to do what so that the final version ends up with the division secretary. Anyhow, this is a quality-assurance procedure comparable to the one that exists in the LHC division, and if our division intends to move towards the ST quality-assurance system, this procedure is likely to stay.