

Work Package Scope

A27 East of Lewes Study

1. Introduction

- a) The requirements for the A27 Strategic Corridor Study, sponsored by the Department for Transport (DfT), were set out in the first Road Investment Strategy (RIS), published in December 2014, which announced a programme of new Strategic Studies to explore options to address some of the biggest challenges facing the Strategic Road Network (SRN) that are too large and too complex to fix in a single 5 year Road Period. The studies may involve major new network connections or fundamental choices about the future of transport in congested parts of the country. The results of these high-level studies will inform the development of the next RIS.
- b) The Government announced it would identify and fund solutions, initially through feasibility studies. The DfT commissioned Highways England to undertake the studies on its behalf.
- c) The scope of the A27 Corridor Feasibility Study was published in 2014 and the aim of that study was as follows:

“To identify the opportunities and understand the case for future investment solutions on the A27 corridor, particularly at Arundel and Worthing, which are deliverable, affordable and offer value for money.”
- d) The A27 Corridor Feasibility Study was published in February 2015 and the Government subsequently announced in their Road Investment Strategy for the 2015/16 - 2019/2020 Road Period, published in March 2015, that a new dual carriageway bypass would be provided at Arundel, with on-line improvements to be provided at Worthing / Lancing.
- e) For the A27 east of Lewes (i.e. between the A27 / A26 junction at Southerham and the A27 / A22 junction at Polegate), the report stated that “funding would be set aside pending further work on capacity increases following review of long term growth plans in light of any recommendation made by the Airports Commission.”
- f) Now that the Airports Commission has reported, and given other recent changes in growth plans, with significant additional housing in the south Wealden area, particularly in Hailsham, Polegate and Stone Cross, through the emerging Wealden Plan, together with the availability of the South East Regional Transport Model (SERTM) which was not available for the previous A27 Corridor Feasibility Study, an additional study is required to re-evaluate the need (or otherwise) for a longer-term improvement to that section of the A27 and to undertake a preliminary evaluation of potential corridors. The additional work would build upon the work undertaken to date and will ultimately inform the completion of a Strategic Outline Business Case (SOBC) for the better performing corridor(s) and hence satisfy the requirements of Stage 0 of Highways England’s Project Control Framework (PCF) process.
- g) This specification is for the transport-related technical and engineering advice, research and consultancy services required for the delivery of the A27 East of Lewes Study.

2. Background

- a) The A27 is the only east-west Trunk Road south of the M25. From west to east, the A27 provides access to Portsmouth (and its port), Havant, Chichester, Bognor Regis, Littlehampton, Arundel, Worthing, Lancing, Shoreham (and its port), Brighton, Lewes, Newhaven (and its port) and Eastbourne. The A27 joins the M27 at Portsmouth to provide access to Southampton, Bournemouth and areas further west, whilst near its eastern end it provides access to Hailsham and Polegate. At Pevensey, it joins to the A259 to provide access to Bexhill, Hastings and Ashford. It also provides businesses and residents in the area with access to the wider Strategic Road Network.
- b) The local economy has strengths in advanced engineering, tourism and other sectors. The area has also accommodated substantial population and housing growth over the last decade, particularly in the urban areas.
- c) The A27 runs alongside and across the South Downs National Park (SDNP). East of Lewes, the SDNP is initially located on both sides of the A27, but then further east is located only to the south. In the west, the SDNP is generally located to the north of the A27. The A27 is also constrained in general to the south by urban areas and the sea.
- d) There have been long-standing calls to improve the A27 corridor. Infrastructure enhancements along the A27 and beyond were previously considered in the South Coast Multi-Modal Study (SoCoMMS), which reported in 2002. SoCoMMS concluded that there was little justification for a long distance strategic south coast route between Southampton and Margate, but did identify a number of investments along the A27. However, whilst some investments have been developed by Local Highway Authorities and the Highways Agency (the predecessor organisation to Highways England), some of them have not been progressed due to the difficulties in delivering major road schemes in environmentally sensitive areas. For example, with regard to the A27 East of Lewes section, a Preferred Route Announcement was made in the mid-1990s for an off-line dual carriageway to the north of the existing A27, but that scheme was subsequently cancelled and following the outcomes of SoCoMMS was replaced by three smaller schemes at Wilmington, Selmeston and Southerham to Beddingham, of which only the latter was implemented, built as a Wide Single 2 carriageway standard with two lanes uphill westbound and 1 lane downhill eastbound, to replace the level crossing with a bridge over the East Coastway rail line.
- e) In summary, the remaining unimproved sections of the A27 are those where improvements are the most difficult to deliver.
- f) The A27 Corridor Feasibility Study in 2014/15 looked at the entire A27 corridor, including the unimproved sections. It was undertaken in three stages, as summarised below, and was undertaken in accordance with WebTAG and with stakeholder engagement throughout:-
 1. Evidence Base: Understanding the current and future situation, establishing the need for intervention, identifying and refining scheme-specific objectives and defining the geographic area of impact;
 2. Assessment of Options: Long list of options, initial sifting to produce shortlist of options, development and assessment of the shortlisted

- options, production of an Option Assessment Report and clarification of the modelling and assessment methodology; and
3. Further appraisal: develop Strategic Outline Business Case, document further work required and make recommendations for investment decisions.

g) A summary of the recommendations of the Study is shown below:-

- A27 at Arundel: an investment case existed for a new dual carriageway bypass;
- A27 at Worthing / Lancing: an investment case exists for on-line improvements; and
- A27 East of Lewes: there is not currently an option that presents a clear investment.

h) As mentioned above, the Government subsequently announced in their Road Investment Strategy for the 2015/16 - 2019/2020 Road Period that, for the A27 East of Lewes, “funding would be set aside pending further work on capacity increases following review of long term growth plans in light of any recommendation made by the Airports Commission.” The Government then announced in December 2014 a package of improvements to the existing A27 for the section East of Lewes, including junction improvements and the potential provision of laybys and facilities for pedestrians, cyclists and other non-car users, and this scheme is being progressed as part of the first RIS programme (RIS1).

i) Now that the Airports Commission has reported, and with the significant housing growth planned in the south Wealden area arising from the emerging Wealden Local Plan, together with the availability of the South East Regional Transport Model (SERTM) which was not available at the time of the previous A27 Corridor Feasibility Study, the strategic aim of the A27 East of Lewes Study is to re-evaluate the need (or otherwise) for a longer-term improvement to that section of the A27 and to undertake a preliminary evaluation of potential corridors.

j) Timescales for the new study are heavily influenced by the need to identify schemes and budgets for the 2nd round of the RIS (“RIS2”) programme.

k) The transport-related technical and engineering advice, research and consultancy services required are set out below.

3. Requirements

3.1. Objectives

a) The previous Feasibility Study identified different scales of options for the A27 East of Lewes section, largely based on historic schemes and ranging from dual and single carriageway options for the entire section, through to individual bypasses and localised improvements. The previous study showed that the larger schemes made a significant contribution to achieving the objectives but were not good value for money, whereas conversely the smaller schemes were good value for money but did not make a significant contribution to achieving the objectives.

- b) The main objective of the A27 East of Lewes Study is therefore to investigate whether a potential corridor(s) would make a significant contribution to achieving the objectives and be deliverable, affordable and offer value for money. Such a corridor should also consider their ability to facilitate local economic growth aspirations in terms of delivering housing and job creation in accordance with Government priorities set out in their Industrial Strategy and Housing White Paper, as well as their contribution towards Highways England's Performance Specification.

3.2. Work Required

- a) Principles: Delivery outputs have been explicitly designed around HE's PCF, simplifying the process to submit the findings and pursue them to subsequent stages. For the purposes of this Study, the appropriate PCF Stage is Stage 0.
- b) All work should therefore be undertaken in accordance with PCF Stage 0 (Strategy, Shaping and Prioritisation), which in turn should be in accordance with WebTAG Stage 1 (Option Development) and in accordance with Highways England's Analytical Assurance Framework (AAF).

- c) The Study should

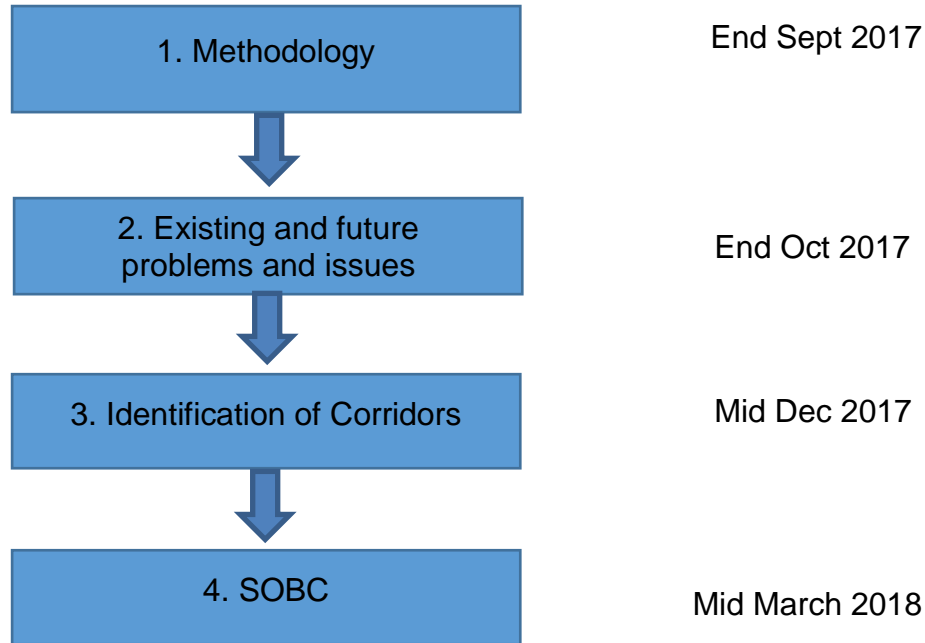
Consider:

- The reports for the strategic study (A27 Corridor Feasibility Study); and
- Any local transport and spatial strategies/studies that have been, or are likely, to be undertaken that may have an effect on future problems and issues (and hence may affect the identification, assessment or choice of corridor / carriageway standard). This includes, but is not limited to, the A27 East of Lewes Modelling Report, dated October 2016, undertaken by WSP Parsons Brinkerhoff on behalf of East Sussex County Council (which is available from the Highways England Project Manager).

Take account of:

- Planned growth in the relevant Districts and (if relevant) surrounding areas; and
- Committed transport schemes, including but not limited to, other A27 schemes.

- d) Research and consultancy is required to complete 8 key tasks which will allow completion of an SOBC and all PCF Products for Stage 0 in accordance with the associated Product Description sheets, as summarised below and detailed in the subsequent sections. Deliverables and milestones are shown in section 6.

Study tasks and indicative programme


- e) The study will be reviewed by the Project Board at the end of each task to confirm the value of proceeding and to review the scope of the subsequent phases of work.
- f) The Consultant will also assist the Highways England Project Manager with all Governance meetings, both internal within Highways England, such as (but not limited to) Stage Gate Assessment Reviews (SGARs), and external with the Department for Transport, such as (but not limited to) the Independent Assurance Review (IAR) meeting and assistance with the production of the related Integrated Assurance and Approvals Plan (PCF Product). Such assistance is likely to include the preparation of all relevant material, attendance at all such meetings and drafting of Minutes afterwards, together with their subsequent finalisation.
- g) The Consultant shall also assist the Highways England Project Manager with all project management meetings, such as (but not limited to) the Value Management workshop, to enable the production of associated PCF Products (such as the Value Management Workshop Report and Value Management Plan). Such assistance is likely to include the preparation of all relevant material, attendance at all such meetings and drafting of associated Minutes / reports afterwards (such as those mentioned above), together with their subsequent finalisation.
- h) The tasks are described in more detail below.

Task 1: Methodologies

- a) The Consultant shall produce the Project Implementation Document, outlining how the project will be taken forward, within two weeks of being commissioned. Highways England will produce the Analytical Requirements Report (ARR) (PCF Product) with the assistance of the Consultant. The Consultant will then produce the Appraisal Specification Report (ASR) (PCF

Product) and the Project Schedule (PCF Product) within two weeks of being commissioned.

- b) Highways England will be responsible for the production of the ARR at the start of PCF Stage 0. It will identify the work to be undertaken during PCF Stage 0. The ARR will also be updated at the end of Stage 0 by Highways England, with assistance from the Consultant (if required), such that it identifies the work to be undertaken during the following PCF Stage i.e. Stage 1.
- c) As mentioned above, all work should be undertaken in accordance with PCF Stage 0 (Strategy, Shaping and Prioritisation), which in turn should be in accordance with WebTAG Stage 1 (Option Development) and in accordance with Highways England's Analytical Assurance Framework (AAF).

Task 2: Understand the existing and future traffic patterns and problems / issues

- a) There are four main sub-tasks associated with Task 2:-
 - 1. Understand the robustness of the traffic model;
 - 2. Understand the existing traffic patterns and problems / issues;
 - 3. Understand the future traffic patterns and problems / issues; and
 - 4. Make a recommendation on whether an alternative mode could solve the identified problems / issues.
- b) Regarding understanding the robustness of the traffic model, the A27 Corridor Feasibility Study made use of the available traffic model for the South Wealdon and Eastbourne Transport Study (SWETS). The SERTM is now available and the intention is that all local Highways England studies should make use of the Regional Transport Models to ensure consistency across all schemes and studies.
- c) The Consultant shall review the robustness of the SERTM in the vicinity of the A27 EoL section, including any relevant competing routes. The purpose of this exercise is simply to understand how robust (or otherwise) the existing SERTM is for flows and journey times in the vicinity of the A27 EoL.
- d) Best use shall be made of the existing results available from the validation of the SERTM i.e. extracting the validation results for the A27 EoL and any competing routes from those for the entire SERTM area, for both flows and journey times. It should be noted that the SERTM uses an average 3 hour Weekday AM period, an average 6 hour Weekday Inter-Peak period and an average 3 hour Weekday PM period, all for March 2015.
- e) New data collection is available and the consultant for the modelling for the RIS1 scheme will make best use of that new data to strengthen the robustness of the SERTM. Further details on the traffic modelling required for this new study, and its inter-relationship with that for the RIS1 scheme, is described later in this scope.
- f) The Consultant will use the results of their assessment to draw a conclusion on the robustness (or otherwise) of the SERTM in the vicinity of the A27 EoL.
- g) Regarding the understanding of the existing traffic patterns and associated problems / issues, to date there has been limited quantification e.g. 2011 Journey to Work census data rather than outputs from a traffic model. The

Consultant shall therefore provide information to demonstrate a clear understanding of the existing situation and problems / issues, such as (but not limited to) those items listed below:-

- 1. O/D desire line diagrams. The purpose of these would be to demonstrate where traffic is coming from and going to and hence build up a picture of the proportion of traffic that is long-distance (strategic) and the proportion that is short distance (local) on the A27 east of Lewes. The information should be presented in such a way that, when the individual movements are combined, they broadly reflect the associated link flows on each section of the A27 east of Lewes from independent counts. Diagrams to be presented for Weekday AM, IP and PM for the surveyed current year (preferably for a single hour each);
 - 2. Journey speeds / delays. Use the Tom-Tom data (available from the RIS1 Project Manager) to produce diagrams for a single hour each for current Weekday AM, IP and PM for the A27 east of Lewes, including non-A27 approaches to each A27 junction (i.e. to give an idea of delays to traffic on roads joining the A27). The information should be compared to the equivalent outputs from the traffic model to demonstrate that the traffic model is broadly reflecting current journey times and delays;
 - 3. Combine the results of 1 and 2 above to give an indication of which volumes of traffic incur which amounts of delay i.e. do the greatest volumes of traffic get the greatest amounts of delay? Results to be presented for current Weekday AM, IP and PM for the A27 east of Lewes as a whole e.g. in a table or a diagram, one for each time period (preferably for a single hour each);
 - 4. Update (and provide additional information as appropriate) to clearly demonstrate the current problems and issues, such that it can be included within the Strategic Case of the SOBC to demonstrate the need for intervention. In particular, quantification should be provided wherever possible. Updates should include (but not be limited to)
 - a) Accident plots (latest complete 5 year period of Personal Injury Accidents (PIAs) should be available, either from the RIS1 Project Manager or from Sussex Safety Road Partnership)
 - b) Durations of closures when accidents occur (information from National Incident Liaison Officers (NILO) is available from the Highways England Project Manager).
- h) Regarding the understanding of the existing traffic patterns and associated problems / issues, the Consultant shall provide information to demonstrate the change in traffic flows and journey times / delays if no improvement scheme is implemented, such as (but not limited to) those items listed below.
- i) Traffic modelling for this new study will need to be consistent with that for the RIS1 scheme in order to avoid two sets of forecasts being in the public domain for two closely-related schemes. The traffic modelling for the RIS1 scheme will be undertaken using SERTM and in accordance with the guidance set out in “Regional Traffic Model Data Provision General Outline, June 2017” (available from the Highways England Project Manager). For the RIS1 scheme, SERTM will be used to identify the area of influence of the scheme, and then a local model will be cordoned, strengthening undertaken for both the network and matrices (as required), validation undertaken, Uncertainty Log developed and forecasts produced in accordance with WebTAG for a Do Minimum scenario

representing the future situation with / without the RIS1 scheme in place. The Consultant for this new study must therefore work closely with the modelling consultant for the RIS1 scheme to ensure that the modelling for both studies are consistent with each other e.g. the area of influence assessment should be undertaken once only such that only one cordoned model is produced and one local model is developed for both schemes, one Uncertainty Log used and the Do Something forecasts with the RIS1 scheme in place will act as the Do Minimum forecasts for this new study. Forecast years will be confirmed in due course, but for pricing purposes it should be assumed that forecasts will be needed for one Opening Year and one Design Year for this new study, both of which will be different (later) than those for the RIS scheme.

j) Suggested information required:-

- 1. O/D desire line diagrams. Same diagrams as those described above, but for one future year;
- 2. Use the traffic model to demonstrate the increases in delays between the current year and the one future year with no improvement scheme in place, for each of the Weekday AM, IP and PM for the A27 east of Lewes, including non-A27 approaches to each A27 junction;
- 3. Combine the results of 1 and 2 above to give an indication of which volumes of traffic incur the greatest increases in delays between the current year and the one future year with no improvement scheme in place i.e. is it the A27 or side roads that get the greatest increases in delay? Results to be presented for Weekday AM, IP and PM for the A27 east of Lewes as a whole e.g. in a table or a diagram, one for each hour (preferably for a single hour each);
- 4. Accidents and delays. Estimate the change in delays due to accidents between the current year and the one future year with no improvement scheme in place; and
- 5. Provide any other additional information associated with the future situation with no improvement scheme in place to further demonstrate the future problems and issues, such that it can be included within the Strategic Case of the SOBC to demonstrate the need for intervention. Include quantification wherever possible. Such information should include (but not be limited to) land use change that would be unlikely to receive consent due to the future problems and issues on the A27 east of Lewes i.e. identify dependent development.
- 6. A recommendation should then be made by the Consultant on whether an alternative mode could solve the identified problems / issues.

Task 3: Identify and Assess Potential Corridor(s)

a) There are three main sub-tasks associated with Task 3:-

- a) Identify a potential corridor(s);
- b) Obtain cost estimate(s);
- c) Assess potential corridor(s).

b) The Consultant shall identify a potential corridor(s) from a review of the historic options and, where relevant, refine them. In particular, consideration should be given to any measures that would reduce the cost of a potential corridor without significantly reducing the benefits.

- c) Regarding a cost estimate, an Order of Magnitude Estimate (PCF Product) or Strategic Magnitude Estimate (imminent new PCF Product) is required for each potential corridor / carriageway standard. Such cost estimates are needed for budgetary purposes, but not just for an individual scheme basis but as part of a total budget for all schemes within the relevant 5 year Road Period. It is therefore absolutely critical that cost estimates are robust and they cover the “whole project” costs, not just scheme costs i.e. they need to cover the total costs of preparing and delivering the scheme many years into the future.
- d) The Consultant shall therefore work with Benchmark to review the cost estimates for the previously identified options and, where appropriate, challenge them to allow a robust assessment to be undertaken. If a new corridor is identified in Task 2, new cost estimates should be produced by Benchmark. All the cost estimates will need to be provided on a like-for-like basis so that they are directly comparable with each other.
- e) It is essential that the Consultant makes early contact with Benchmark. This is because Benchmark can require up to 12 weeks to undertake their cost estimating work. However, for this study, the corridor(s) / carriageway standards that will need to be costed are likely to be the same as, or very similar to, those identified from the previous A27 Corridor Feasibility Study i.e. Benchmark are likely to have a good starting point to produce the required Order of Magnitude Estimates or Strategic Magnitude Estimate (imminent new PCF Product) for each option. Early liaison with Benchmark, together with the lack of significant change to previous options, should allow the 12 week period to be significantly reduced.
- f) The Consultant will also need to liaise with the District Valuer Services to enable a robust land and property cost to be established, including any compensation such as (but not limited to) Part One claims and any environmental mitigation compensatory land requirements.
- g) Ultimately, any proposed corridor(s) / carriageway standard generated by this study will need to be supported by drawings and information sufficient to enable an Order of Magnitude Estimate or Strategic Magnitude Estimate (imminent new PCF Product) to be produced by the Highways England Commercial Team. Equally, this will need to be the case if District Valuer Services are required for any third party land cost estimates.
- h) The Consultant will assess the identified corridor(s) / carriageway standard to enable an Appraisal Summary Table(s) (ASTs) (PCF Products) to be produced. The assessment would be part quantitative / part qualitative, as explained below. The assessment should be undertaken in accordance with WebTAG Stage 1 (Option Development) i.e. appropriate for PCF Stage 0. The Consultant should explain within the ASR how each of the elements of an AST will be assessed proportionately.
- i) It should be assumed that a maximum of four options are assessed i.e. two corridors with two carriageway standards (single carriageway and dual carriageway), all assuming that the RIS1 scheme is in place.
- j) The Early Assessment and Sifting Tool (EAST) was used in the previous A27 Corridor Feasibility Study to inform a preliminary assessment of the 5 shortlisted options for the A27 East of Lewes and, where possible, monetary benefits were derived using industry-standard TUBA and COBA-LT software for User Benefits and Accidents respectively. However, EAST applies equal weighting to all the

inputs. This meant that an option's contribution to the scheme-specific objectives carried the same weight as the value for money for that option. This in turn meant that options that only made a neutral or marginal contribution to the scheme-specific objectives were progressed within the EAST assessment. The net result was that none of the 5 options achieved the scheme-specific objectives and also achieved value for money.

- k) The Consultant shall therefore refine the assessment of the identified corridor(s) using a spreadsheet-based approach that can apply different weights to achieving the scheme-specific objectives (and any other elements that may warrant a higher weighting).
- l) Separate Do Something forecasts will need to be produced for this new study compared to those for the RIS scheme i.e. for this new study, the Do Something forecasts will have both the RIS1 and RIS2 schemes in place and use different (later) forecast years.
- m) The results of the traffic modelling for each corridor / carriageway standard and for the associated Do Minimum should be used to enable the Consultant to undertake an informed qualitative assessment for traffic-related environmental indicators within each AST, such as Noise and Air Quality. The Consultant will also produce an Environmental Constraints Map for the corridor(s), which will enable the non-traffic related indicators within each AST to be proportionately assessed. The Consultant should identify the key environmental differentiators and then proportionately assess them accordingly, with the remaining elements of the AST(s) having a qualitative statement only.
- n) The Consultant shall produce an Option Assessment Report, which details the methodology used for the assessment of the options, the resultant ASTs for each corridor / carriageway standard and a recommendation on the corridor(s) to be taken forward.
- o) A key differentiator between carriageway standards (i.e. dual carriageway versus single carriageway) could be the potential for reductions in delays due to accidents i.e. increased resilience of the road network. For example, a new dual carriageway is likely to reduce the number of accidents in the first place, as well potentially allow a contraflow to be put in place if an accident were to occur, thereby significantly reducing delays due to accidents. In contrast, a new single carriageway is likely to have less of a reduction in accidents than a new dual carriageway, and the delays when an accident occurs could be the same as that for the existing A27.
- p) The issue of delays due to accidents is incorporated into one of the scheme-specific objectives and could also be incorporated into the scheme benefits. The Consultant shall estimate the monetary benefits of reduced delays due to accidents by estimating those for the future situation without the scheme in place and then for each corridor / carriageway standard.
- q) The Consultant shall provide a narrative on wider economic benefits, such as the land use change facilitated with and without the RIS2 scheme, and hence the dependent development and Gross value Added (GVA) facilitated by each corridor / carriageway standard.
- r) In summary, the Consultant shall produce ASTs for each corridor / carriageway standard, based on quantitative assessment where available, and qualitative assessment otherwise.

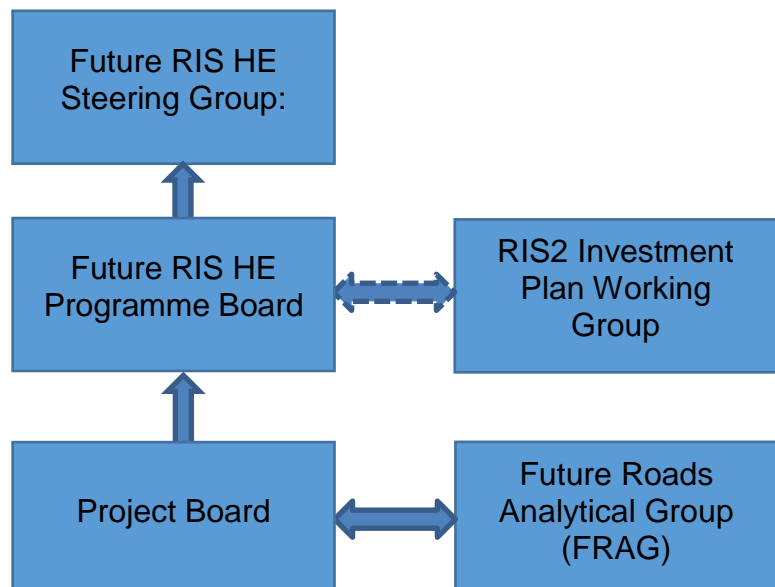
Task 4: SOBC, all PCF Products for Stage 0 and Way Forward

- a) The Consultant should produce all five Cases for the SOBC, based upon the above assessment and results. The Consultant will need to incorporate any feedback from Highways England and / or the DfT on the SOBC.
- b) The Consultant will produce all the PCF Products for Stage 0, except the ARR, for which some assistance by the Consultant may be required (but ultimate responsibility will rest with Highways England).
- c) The ARR will also be updated at the end of Stage 0 by Highways England, with assistance from the Consultant (if required), which will include a description of the work to be undertaken for PCF Stage 1, including (but not limited to) the quantification of potential environmental impacts identified in the Preliminary Environmental Risk Assessment (PERA).

4. Responsibilities

- a) The A27 Corridor Feasibility Study is being undertaken by Highways England. The Senior Responsible Officer (SRO) for the study will be [REDACTED]. DfT will act as Project Sponsor.
- b) Governance of the study will be provided by the Future RIS HE Programme Board, which will review and approve the recommendations of the study, and a Project Board, overseeing the day to day delivery of the study, as well as providing strategic oversight to the study and confirming that the terms of reference for the study are being addressed in the delivery of the Services. The Project Board will be chaired by Highways England and will include representatives from the Department for Transport and representative(s) from East Sussex County Council.
- c) The Consultant’s Project Manager and Project Director will attend the Project Board, which will meet on a monthly basis, and will be expected to report to, and provide information for, these Boards.
- d) Analytical assurance will be in accordance with Highways England’s Analytical Assurance Framework (AAF).

Outline Governance Structure



5. Skills/Experience

- a) The Consultant will identify the key people required to deliver the Services within its tender for the study project and will not voluntarily remove or change any of these key people without the agreement of the Project Manager.
- b) The Consultant shall name all key staff and provide CVs demonstrating that they have the necessary skills and experience to fulfil their roles.
- c) If for any reason any key staff need to be replaced during this commission, a suitable replacement must be offered, and approval must be sought from the Project Manager.
- d) The Consultant must specify any proposals for sub-contracting in its tender submission, explaining the reason why a sub-contractor is required and the scope of the services that are being sub-contracted.
- e) The Consultant will ensure that there are adequate resources to fulfil the study requirements within the agreed timescale and that there is effective leadership and management of the study by the Consultant's senior management staff.

5.1. Essential Skills

- Project management including progress reporting – this project needs to deliver in time to feed into the RIS2 route selection process and timelines are extremely tight.
- Previous strategy and policy development for Highways England;
- Previous strategy and policy development work for other strategic infrastructure authorities;
- Experience of major strategic road network study work;
- Economic Impact assessment using both WebTAG and non-WebTAG (HMT Green Book / GVA) methodologies
- Reporting and production/ presentation of study outputs
- Desk studies and appraisals of pre-existing reports and studies
- Appraisal / assessment of existing traffic and multi-modal transport models
- Economic appraisal of direct transport impacts and the wider economic impacts
- Transport planning
- Cost planning and estimation (in conjunction with Highways England)
- Engineering and environmental assessment
- Assessment of technological developments
- Analysis of distributional impacts
- Risk assessment
- Business case development

- Familiarity with the latest 2016 guidance and the principles of the HMT 5 case model.
- Stakeholder engagement and liaison

5.2. Desirable Skills

- Prior experience of working with Highways England.
- Public engagement and / or surveys

6. Deliverables

- a) The Consultant will prepare an initial Consultant's monthly report and a detailed schedule for delivering the study and will submit this to the Project Manager within two weeks of the Contract Date.
- b) The schedule will consider the overall scope of the study project and will identify interim and final milestones required to achieve the study outcomes. The schedule will use an appropriate work breakdown structure and be of sufficient detail to show the activities of each work-stream within the study team. It will identify the critical path for the study and all activities should have unique identifiers and activities should not be open-ended with at least one predecessor and one successor (with the exception of the start and end of the schedule).
- c) The schedule should incorporate the activities of Highways England and Benchmark to allow adequate time periods for technical approval and governance.
- d) The schedule will be reviewed and updated on a monthly basis by the Consultant and will be made available to the Project Board at each meeting.
- e) The schedule will be prepared using specialist scheduling software such as MSProject or Primavera P6. An Excel spreadsheet will be used to report key dates to Highways England.
- f) The Consultant shall write and submit a Progress Report every month to reach the Project Manager no later than the penultimate working day of each month. The Report template will be provided.
- g) The Consultant should allow for preparation of all material and attendance at weekly update / action log conference calls and monthly Project Board meetings.
- h) The Consultant will deliver the services in accordance with their schedule. All PCF Products must be delivered and approved by Highways England within the 6 month programme from commissioning.
- i) All deliverables must be also able to be used without proprietary software / equipment. The PCF Products to be delivered are listed below (in order as shown in the PCF Products Matrix, not the order in which they are to be delivered):-
 - a) Project Implementation Document (PID), including a Stakeholder Engagement Plan;
 - b) Analytical Requirements Report (ARR) (to be produced by Highways England, but with assistance from the Consultant (if required));
 - c) Appraisal Specification Report (ASR);
 - d) Risk Register;

- e) Risk Management Plan;
- f) Project Schedule;
- g) Value Management Workshop Report;
- h) Value Management Plan;
- i) Order of Magnitude Estimate or Strategic Magnitude Estimate (imminent new PCF Product) for each corridor / carriageway standard;
- j) Appraisal Summary Table for each corridor / carriageway standard;
- k) Option Assessment Report (OAR);
- l) SOBC;
- m) Updated Analytical Requirements Report (ARR) (that states what appraisal work will be required within the following stage i.e. PCF Stage 1, to be produced by Highways England, but with assistance from the Consultant (as required));
- n) Combined Modelling and Appraisal (ComMA) report
- o) Transport Data Package;
- p) Transport Model Package;
- q) Transport Forecasting Package;
- r) Economic Appraisal Package;
- s) Integrated Assurance and Approvals Plan;
- t) Preliminary Environmental Risk Assessment (PERA); and
- u) End of Stage Report.

7. Additional information

7.1 Stakeholders

- a) There are a number of stakeholders with an interest in this study, ranging from local authorities and Local Enterprise Partnerships to private businesses and trade associations and Environmental NGO's.
- b) The Consultant will work with Highways England and the Department for Transport to produce information for and to engage with stakeholders, to ensure a broad representation of views and opinions in the study outputs, and to support the Project Board in the development and management of these relationships.
- c) The Consultant will be required to engage in communications with public and private sector stakeholders and representatives of community groups in relation to this study. The Consultant will agree with the Project Manager its plans for engaging with such stakeholders in advance of such communications taking place. For this Study, it is expected that there will be one Stakeholder Reference Group (SRG). One already exists (known as the A27 Reference Group), but it is composed of local Members of Parliament, local authorities and Local Enterprise Partnerships (LEPs), hence there may be the need for additional representatives from non-political stakeholders, such as visitor attractions, business groups and so on. Given that

stakeholder liaison is already underway for the RIS1 scheme, there is therefore the opportunity for synergy between the two studies.

- d) The Consultant will be expected to prepare and attend separate workshops with the SRG three times (at the start of the Study, after corridor identification and at the end of the Study). The Consultant will make recommendations on venues requirements, investigate suitable venues and make the necessary bookings, produce the required material, facilitate the workshops and produce associated reports summarising the outcomes of each one.
- e) The Consultant should also prepare a presentation, attend a meeting and provide Minutes for one meeting with the A27 Reference Group (in case the SRG turns out to be different to the A27 Reference Group).
- f) It is important that early consultation is undertaken with local highway authorities to ensure that any limitations on local networks are fully understood before work commences on identifying corridors / carriageway standards.
- g) The Consultant will prepare a stakeholder engagement plan in conjunction with the Project Board and this plan will be applied in determining the most appropriate approach to engagement and in the carrying-out of engagement activities.
- h) The Consultant will keep detailed records of all engagement with stakeholders and will provide and maintain a database of engagement activity which is capable of being interrogated and reported upon by individual interest or by stakeholder group and type, area of subject interest or business activity, geographic area, political constituency, and other factors relevant to the study. The Consultant will seek the approval of the Project Manager in relation to the proposed choice of stakeholder database.
- i) Department for Transport will need to review and provide clearance before publication of any public facing documents, including any used in public engagement.
- j) As the local highway authority, and hence a key stakeholder, it is likely that East Sussex County Council will be included on the weekly progress conference calls with the Consultant and Highways England to aid consistent communications with other stakeholders by acting as a conduit.

7.2 Risks to the Study

- a) Following award of the contract at tender award, an initial Risk Register (PCF Product) will be produced by the Consultant in a PCF-compliant format and reviewed by the Employer and the Consultant at a risk reduction meeting within two weeks of the starting date of the contract. The Consultant will then produce the associated Risk Management Plan (PCF Product). The Risk Register should be reviewed at least monthly by the Employer and the Consultant and updated by the Consultant as required.

7.3 Submission of Documents

- a) All information will be provided in editable electronic format (MS-Word). All outputs will be branded as Highways England documents rather than that of the Consultant organisation.
- b) Drawings, specifications, software, designs, documents, reports and other data submitted for the acceptance of the Employer will be submitted in draft form for

comment two weeks before the date for submission shown on the accepted schedule. Following review of such materials the Employer will either accept it or return it to the Consultant with comments. Where there are comments, the Consultant will take appropriate action and re-submit to the Employer. The Consultant will provide the number of printed draft and final copies required by the Employer together with electronic versions of the material.

- c) The Consultant will comply with Highways England visual identity specifications and will use their branding on all documents produced in connection with the study that may be received by an external audience including stakeholders and the public.

7.4 Reporting

- a) The Consultant will be required to write monthly progress reports which include details of the work done in the preceding period and related achievements and outputs, information relating to performance indicators, the schedule for the next reporting period, health and safety matters, progress relative to the agreed schedule for the work, cost performance, issues and risks affecting the work, matters relating to stakeholders and stakeholder relations, and other information requested by the Employer.
- b) The Consultant will be required to make appropriate use of dashboard reporting methods so as to minimise the quantity of information provided at progress meetings and other meetings and boards.

7.5 Provision of Information

- a) The Consultant will assist the Employer in complying with Freedom of Information requests and in response to Parliamentary questions, Ministerial submissions and the like.

7.5 Working with the Employer and Others

- a) The Consultant will not enter into commitments when dealing with third parties that might impose obligations on the Employer except with the consent in writing of the Employer.
- b) The Consultant will engage and cooperate with the Department for Transport, Highways England and others involved in the preparation of other transportation studies in the vicinity of the scheme.
- c) The Consultant will ensure that there is regular communication with those involved in other studies and that there is a coordinated approach to publicity and stakeholder engagement.
- d) The Consultant will also need to engage specifically with other parts of Highways England and the Department for Transport; including but not limited to:
- Operations Division (OD) (HE)
 - Major Projects Division (MPD) (HE)
 - Safety, Engineering and Standards (SES) (HE)
 - Strategy and Planning (S&P) (HE)
 - DfT SRES teams (including RIS Futures team)
 - DfT Transport Appraisal and Strategic Modelling (TASM) team
- e) In addition, the Consultant will need to engage with all other stakeholders identified by the Employer as being relevant to this study. It may also be required to engage

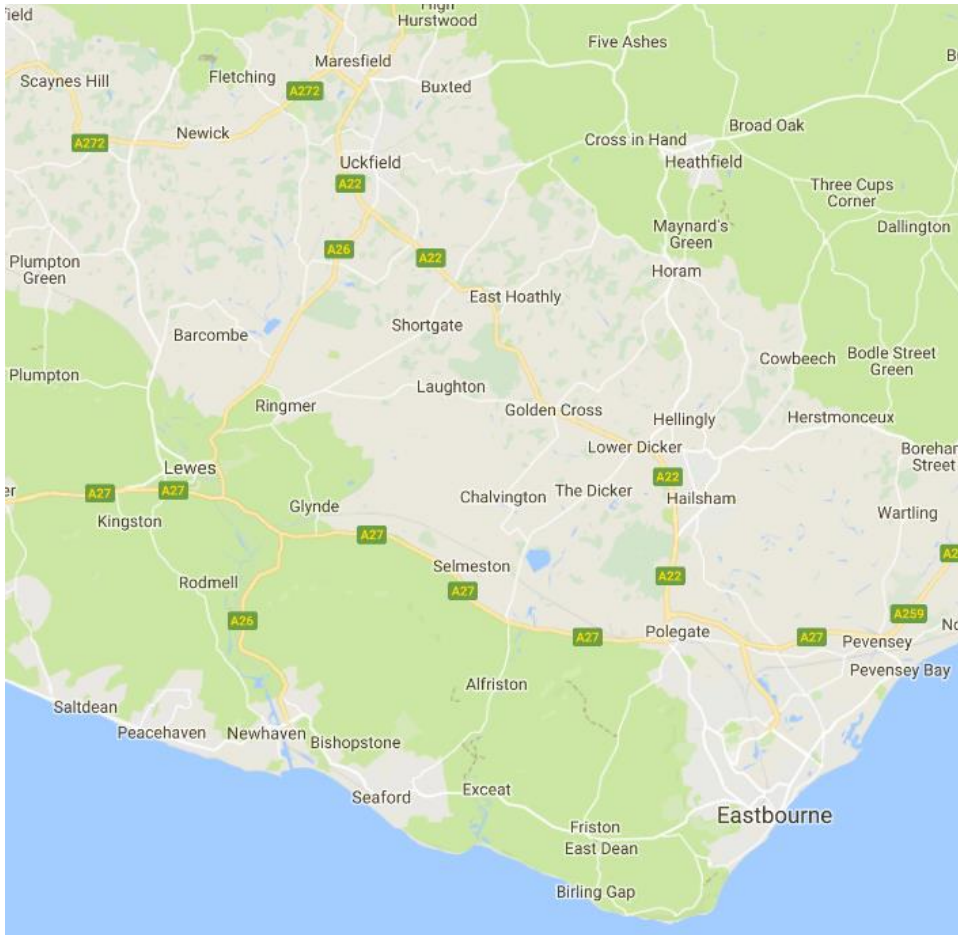
with Network Rail, the Environment Agency, Natural England and other statutory bodies.

7.7 Services and other things to be provided

- a) The Consultant is not generally required to provide facilities and accommodation for the Employer and other parties. However, the Consultant is likely to host the monthly Project Board meetings and the three SRG workshops.
- b) The Consultant will support the SRO in preparing and participating in a PCF Stage 0 SGAR that is likely to be required after completion of all Tasks. This will involve circulation of reports and minutes to the assessors and participation in the review.
- c) The Consultant will support the SRO in preparing and participating in an Independent Assurance Review (IAR) that will be required after completion of all Tasks. This will involve circulation of reports and minutes to the assessors and participation in the review.
- d) The consultant will support the SRO in preparing for and participating in an internal Lesson Learnt session with the Project Board, to be held at the end of the study.

7.8 Geographic scope

- a) The geographic scope of this study includes the A27 from its junction with the A26 at Southerham near Lewes to its junction with the A22 at Polegate (Cophall roundabout). The Consultant will agree the overall limits of the study area with the Project Board during the project definition stage.
- b) A map of the proposed approximate geographical scope of the study is included below. The area of influence will be identified during Task 3.



7.9 Modal scope

- a) The study will be predominantly single mode in scope, covering strategic and local authority road networks.

7.10 Exclusions

- a) It is assumed that there will be no Public Consultation as part of PCF Stage 0.

8. Location

- a) The Consultant will provide the services required to deliver this study from its own offices within the United Kingdom, but will be required to attend meetings and workshops at the offices of the DfT or the Employer and at other locations in the south of England from time to time at the request of the Employer and to perform its duties under the Contract.
- b) In general, Project Board meetings and Programme Board and Stakeholder Reference Group meetings will be held in the south of England at locations yet to be agreed. It is noted, though, that Eastbourne could be a potential choice of venue due to its hotels and conference facilities.

9. Timescales

Start date: September 2017
 Duration: approximately 6 months

10. Evaluation Criteria

- a) The Consultant shall submit outline proposals (not more than 15 pages, 30 sides of A4, including ALL supporting information such as CV's / pen portraits, schedule and cover pages (where used)) of the method and approach for carrying out the work together with an outline schedule showing all the key activities involved and clearly stating any caveats or exceptions.
- b) The Consultant shall submit monthly spend profiles for each phase of work with his tender which shall relate to the submitted schedule of work.
- c) Tenderers are to provide details of the project team with a short summary of their experience and suitability to undertake this work.
- d) The quality of the tender will be evaluated using the following criteria:

Primary Criteria	Sub-criteria	Score	Weighting	Weighted Score
Resources and capabilities	Supplier's prior performance on this type of work.		1	
	Suitability of key personnel.		3	
	Capability and expertise of additional staff/resource.		1	
	Appropriate allocation of resource.		3	
Technical solution proposed and competence	Demonstrates understanding of the objectives, deliverables and what Highways England is trying to achieve.		2	
	Robustness of the proposal and methodology (how requirements will be achieved).		3	
	Proposed project management and quality control systems		1	
Suitability of proposed processes	Identification and management of risks		1	
Subtotal				
Total	Total Mark (Subtotal x 100/150*)			

- e) The assessment panel will use the marking system as shown below, to award marks for approach or evidence, as relevant to the sub-criteria in the previous table.

Score	Reason	Mark
Weak	The proposed approach fails to demonstrate an adequate understanding of the project objectives and fails to address adequately the risk management issues. There is little evidence that the proposed approach has been influenced by experience on other projects.	1-4
Acceptable	The proposed approach demonstrates an adequate understanding of the project objectives; it addresses the success factors and risk management issues to an acceptable standard. There is an adequate level of evidence that the proposed approach has been developed as a result of successful experience on other projects.	5-7
Good	The proposed approach demonstrates a good understanding of the project objectives; it addresses fully the success factors and risk management issues and provides for delivering continuous improvement over the life of the framework. There is substantial evidence that the proposed approach has been developed from other projects using formal continual improvement processes.	8-9
Excellent	The proposed approach has been tailored specifically to deliver the project objectives, and deals comprehensively with the risks to maximising performance against Key Performance Indicators and to delivering continuous improvement. There is substantial evidence that the approach has been developed using continual improvement processes, which are routinely used to develop approaches and deliver the objectives successfully on all projects.	10

- f) The proposal with the highest mark will be given a score of 100. The score of other competing suppliers will be calculated by deducting from 100 one point for each full percentage point by which their mark is below the highest mark. The minimum requirement for this Work Package is to reach a threshold of 60%. A submission that has failed to achieve the minimum quality requirements may not be considered further in the assessment.
- g) The lowest priced tender will be given a score of 100. The score of other competing suppliers will be calculated by deducting from 100 one point for each full percentage point by which their price is above the lowest price. The overall quality score and the finance score will be combined in the ratio 70:30 applied to the quality and financial scores respectively.
- h) Following receipt of your evaluation reports the rejection/acceptance letter will be sent out by the Framework team. Before the contract can be officially awarded, a 10 day “standstill” period needs to elapse.