



.....2016

**TRANSPORT FOR LONDON
and
IBI Group**

**TRAVEL DEMAND
MANAGEMENT –
CONSULTANCY SUPPORT**



Travel Demand Management – Consultancy Support

Terms & Conditions

Framework Number: tfl_scp_000471

Call-Off Contract Number: tfl_scp_000471_co019

THIS CALL-OFF CONTRACT is made the _____ day of _____ 2016.

BETWEEN:

- (1) Transport for London (“**the Authority**”) a statutory corporation whose principal place of business is at Windsor House 42 – 50 Victoria Street, London SW1T 0LT (“**the Contracting Authority**”); and
- (2) IBI Group, a company registered in England and Wales (Company Registration Number 315441) whose registered office is at 87 – 91 Newman Street, London, W1T 3EY (“**the Service Provider**”).

RECITALS:

- A. The Contracting Authority and the Service Provider have entered into a framework agreement dated 19 February 2014 which sets out the framework for the Service Provider to provide certain Services to the Contracting Authority or the Authority (“**the Agreement**”).
- B. The Authority wishes the Service Provider to provide the specific Services described in this Call-Off Contract pursuant to the terms of the Agreement and this Call-Off Contract and the Service Provider has agreed to provide such Services on those terms and conditions set out in the Call-Off Contract.

THE PARTIES AGREE THAT:

1. CALL-OFF CONTRACT

- 1.1 The terms and conditions of this Agreement shall be incorporated into this Call-Off Contract.
- 1.2 In this Call-Off Contract the words and expressions defined in this Agreement shall, except where the context requires otherwise, have the meanings given in this Agreement. In this Call-Off Contract references to Attachments are, unless otherwise provided, references to attachments of this Call-Off Contract.

2. SERVICES

- 2.1 The Services to be performed by the Service Provider pursuant to this Call-Off Contract are set out in Attachment 1.
- 2.2 The Service Provider acknowledges that it has been supplied with sufficient information about this Agreement and the Services to be provided and that it

has made all appropriate and necessary enquiries to enable it to perform the Services under this Call-Off Contract. The Service Provider shall neither be entitled to any additional payment nor excused from any obligation or liability under this Call-Off Contract or this Agreement due to any misinterpretation or misunderstanding by the Service Provider of any fact relating to the Services to be provided. The Service Provider shall promptly bring to the attention of the Call-Off Co-ordinator any matter that is not adequately specified or defined in the Call-Off Contract or any other relevant document.

- 2.3 The timetable for any Services to be provided by the Service Provider and the corresponding Milestones (if any) and Project Plan (if any) are set out in Attachment 1. The Service Provider must provide the Services in respect of this Call-Off Contract in accordance with such timing and the Service Provider must pay liquidated damages in accordance with this Agreement of such an amount as may be specified in Attachment 1. The Service Provider shall be liable for the ongoing costs of providing Services in order to meet a Milestone.
- 2.4 The Service Provider acknowledges and agrees that as at the commencement date of this Call-Off Contract it does not have an interest in any matter where there is or is reasonably likely to be a conflict of interest with the Services provided to the Authority under this Call-Off Contract.

3. CALL-OFF TERM

This Call-Off Contract commences on the date of this Call-Off Contract or such other date as may be specified in Attachment 1 and subject to Clause 4.2 of this Agreement, shall continue in force for the Call-Off Term stated in Attachment 1 unless terminated earlier in whole or in part in accordance with this Agreement.

4. CHARGES

Attachment 2 specifies the Charges payable in respect of the Services provided under this Call-Off Contract. The Charges shall not increase during the duration of this Call-Off Contract unless varied in accordance with this Agreement. The Service Provider shall submit invoices in accordance with this Agreement and the Charges shall be paid in accordance with this Agreement.

5. CALL-OFF CO-ORDINATOR AND KEY PERSONNEL

The Authority's Call-Off Co-ordinator in respect of this Call-Off Contract is named in Attachment 1 and the Service Provider's Key Personnel in respect of this Call-Off Contract are named in Attachment 2.

This Call-Off Contract has been signed by duly authorised representatives of each of the Parties.

SIGNED

For and on behalf of *Transport for London*

Signature: _____

Name: _____

Title: _____

Date: _____

SIGNED

For and on behalf of *IBI Group*

Signature: _____

Name: _____

Title: _____

Date: _____

Attachment 1

1. Services to be provided

The services to be provided are described in Appendix 1 Service Requirements (Part A - TfL's requirements and Part B - the bidder's submission)

2. Timetable

Commencement date: 28/10/2016

Call-Off Term: The duration of this contract will be twenty-four (24) months.

Completion Date: 28/10/2018

3. Liquidated Damages

As stated in the Framework Agreement

4. Expenses

As stated in the Framework Agreement

There shall be no additional expenses outside the charges detailed in Attachment 2 of this contract.

5. Authority Account Details

Transport for London
Accounts Payable,
Pier Walk,
London,
SE10 0ES
Email: AccountsPayable@tfl.gov.uk

6. Authority Call-Off Co-ordinator

Name: REDACTED
Address: REDACTED
Email: REDACTED

7. Availability of Key Personnel

The Service Provider's Key Personnel shall be available at the following period of notice: 28/10/2016

8. Other information or conditions

N/A

Attachment 2

1. Charges

REDACTED

2. Key Personnel

Refer to Appendix 1, Part B, Section 2.2

3. Proposed sub-contractors (if any)

N/A

4. Proposed completion date

Refer to Attachment 1, Section 2

Attachment 3

1. Special Conditions for Call-Off

Terms & Conditions – Attachment 1, Section 8.



Travel Demand Management – Consultancy Support

Specification

Appendix 1 Service Requirements

Part A: TfL's Requirements

ORGANISATIONAL OVERVIEW

1.1 Transport for London (TfL)

TfL is an executive body of the Greater London Authority, created in 2000 as the integrated body responsible for the Capital's transport system. Its primary role is to implement the Mayor of London's Transport Strategy and manage transport services across the Capital. TfL is made up of many predecessor organisations covering almost all transport modes in London, and therefore has the ingredients and accumulated experience to provide one of the largest integrated transport systems in the world.

TfL comprises of different modes. The modes are Surface Transport, Corporate, London Underground and Rail. TfL is a partner in Crossrail. TfL manages London's transport network and is responsible for London's buses, the Underground, the Docklands Light Railway (DLR), London Overground, London River Services, Barclays Cycle Hire, electronic vehicles and policing. TfL also runs Victoria Coach Station and the London Transport Museum.

TfL is responsible for 360 miles (580km) of main roads, and all of London's 4,600 traffic lights. In addition, it manages the London Congestion Charging scheme and regulates the city's taxi and private hire trade. TfL also promotes a range of walking and cycling initiatives across the Capital.

1.2 Business Unit

The Travel Demand Management (TDM) team has objectives to:

- Contribute to positive and improving customer experience of travel in London and make most efficient use of London's transport capacity by enabling and encouraging customers to avoid times and locations where demand may exceed transport capacity or where regular/routine customer travel patterns are significantly affected by planned events, maintenance or network changes; and,
- Working with the business, TDM will actively seek to achieve targeted changes in travel behaviour in order to support operator requirements and optimise the use of network capacity.

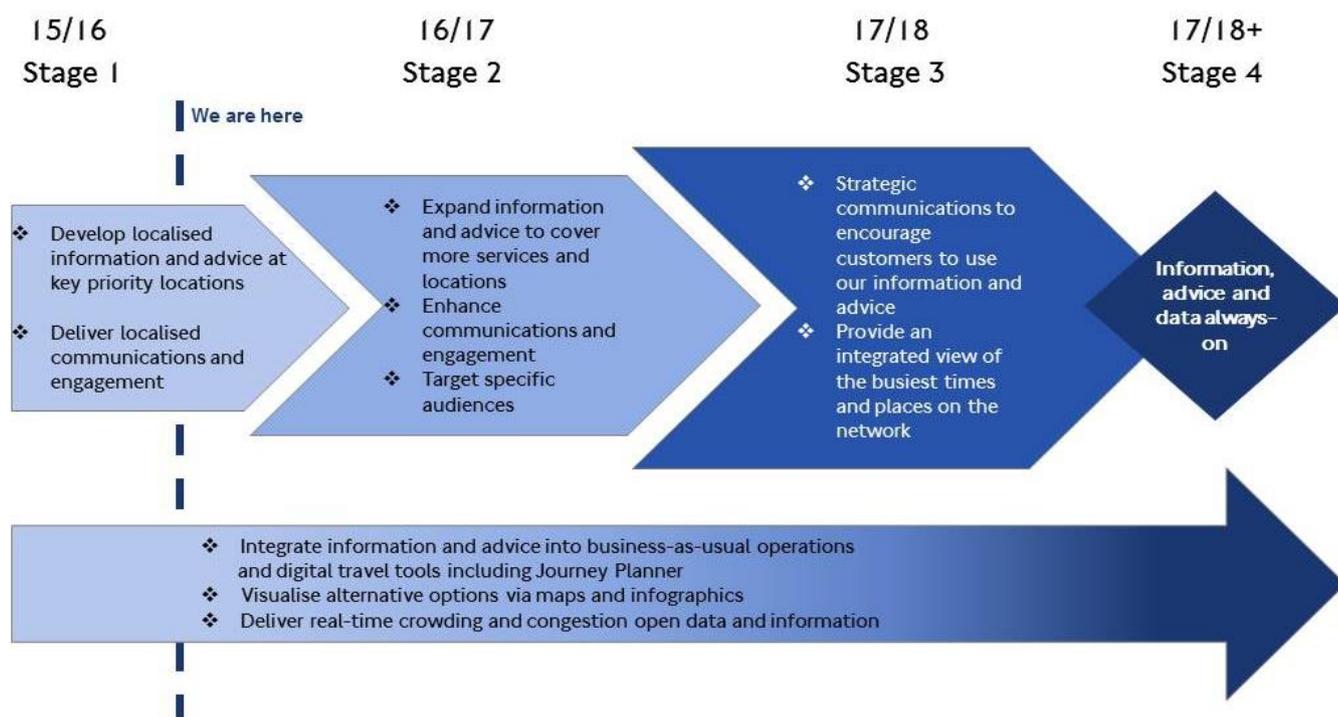
INTRODUCTION

1.3 Background

Within TfL, the Travel Demand Management (TDM) programme requires specialist data and transport systems support, which will be essential to the delivery of TDM's goals and achieving customer and operational benefits.

The TDM team wish to appoint a number of professionals to provide specialism as and when required for a number of projects including (but not limited to):

- **Recurring Congestion Programme** – strategic portfolio of initiatives and projects coordinated by TDM and delivered collaboratively across the organisation. It is designed to mitigate the impacts of everyday congestion across our networks and services thereby getting capacity out of our networks, improving customer care and improving reliability. The programme



overview can be illustrated as below:

- **Localised information and advice** – providing customers and roads users with localised and relevant information on how they can avoid the busiest times and places where possible and describing the options available for quicker and more comfortable journeys.

- **Enhancing journey planning tools, products and open data** – integrating information and data into existing journey planning tools and offer new products to help customers plan journeys avoiding crowding and congestion.
- **Partnership working** – engaging with businesses and other partners to deliver practical information and advice, relevant to specific audiences, about the most congested times and areas on both the roads and rail networks, to reduce demand in the peaks and encourage organisations to share this information with their users or members. This will launch with an initial pilot in November 2016 and will work in the areas covered with key Business Improvement Districts to develop and promote packages of information relevant to their operations and transport footprint on public transport and roads in their area.

Partnership working also includes developing new ways of working with other travel information providers to increase our speed to market and offer greater diversity in information products at less cost. TfL have worked with TomTom and other road network information providers, to provide their customers with better road closure data, in order to avoid areas of congestion or disruption. Road closures around this year's London Marathon have been used to test this and early system analysis suggests a significant reduction in congestion around this year's event.

SCOPE

1.4 Key Information

- Call-off contract for twenty-four (24) months.
- TfL wish to award the contract to a single supplier that will be required to provide all of the resource requirements listed above.
- Work is expected to be on a part time basis, see section 3.4 for details.
- Work will vary depending on the requirement of specific projects and therefore the work commitments are indicative.
- Work is to be carried at TfL offices in Windsor House, St James's Park, London, SW1H 0TL.

3.2 Personnel

The TDM team wish to appoint a number of professionals to provide specialism necessary to but not currently held within the programme. These are:

- **A principal consultant** as a project coordinator to represent the team of consultants, take overall responsibility for the work and report directly to the TDM Programme Manager. The principal consultant should be an expert in the field of transport and transport information systems, have experience of TDM and communications, experience of working with the key transport organisations (both public transport and the Highways Agency) in and around London and the southeast, have experience of working with TfL and be able to represent TfL and the TDM Programme in a co-ordinated capacity.

A detailed description of required skills and knowledge can be found within Appendix 1.

- **A principal consultant** with expertise in transport data, transport information systems (e.g. journey planning) and extensive knowledge of London transport, operators and the business process to deliver travel information.
- **A senior consultant** with knowledge and experience of transport in London, project and risk management experience, experience of working with and liaising with stakeholders to deliver a programme of work.
- **Consultant** to support the TDM programme in a number of projects in a delivery capacity specifically in the delivery of products to support a number of TDM initiatives.

3.3 Outline

A summary of work is provided below, this is not exhaustive.

- Support the TDM Director and Delivery and Planning leads with Rail major works and closures, including those of other operators. This includes; London Bridge redevelopment, Wessex Waterloo closure and HS2 projects. Work will include, but not be limited to:
 - reviewing and inputting to the transport planning and modelling for each stage of the programme's milestones and to understand demand on the transport network;
 - develop customer routeing strategies and related information;
 - assist in the commercial ticketing acceptance business processes across TfL and their partners;
 - support the Transport Planning and Analysis Lead specifically to deliver customer information on TfL owned systems (e.g. Journey Planner);
 - support as required for the development of copy and content (routeing and advice);
 - work and effort will include the development of strategic routeing advice, high level messaging, its review with all stakeholders including train operating companies, communication teams, boards and operational teams with the TfL business; and
 - attend technical project meetings and programme boards as required.

- Support the TDM Director and Delivery and Planning leads with projects affecting the Roads function of the business, including work with:
 - datasets and systems such as Automatic Number Plate Recognition (ANPR), London Congestion Analysis Project (LCAP), DATEX 2;
 - creation of impact maps for major works and closures (TfL and other borough schemes); and
 - attend project and programme meetings as required including weekly project meetings and monthly TDM Board.

- Support the TDM Director and Delivery and Planning leads with planning and co-ordination of Major Events specifically in relation to:
 - using available data and developing new data where possible to analyse the customer impact of each event and develop strategic customer routeing strategies and related information;
 - developing content through data analysis and route planning and creating mapping and visualisation for use in our digital channels;
 - attend project meetings and technical briefings as required.

- Support the Customer Strategy manager and team to technically advise on the data and systems elements of our Recurring Congestion Programme. This includes work to develop solutions that calculate and communicate real-time and predicted levels of crowding on our Tube, Rail and Bus networks.
 - work will include support relating to data modelling and processing for customer information channels, integration with other systems and customer information channels such as journey planner, real time travel information, and data release;
 - work with the Customer Strategy Lead and data owners to develop the data strategies and delivery required to support the Recurring Congestion Programme;
 - support the strategic elements of our engagement with External Parties; and
 - attend project meetings and technical briefings as required.
- Support TDM programme as required:
 - work may include any additional tasks not specifically covered by the above deliverables. This is likely to relate to the support, advice, consultancy and management of customer information development (TfL and third party), data definition and management and support with systems which feed the delivery of customer information to support the TDM programme.

3.4 Breakdown

Principal consultant – (project coordinator)

Commitment: 3 days per week

Responsibilities: As per section 3.2

Principal consultant

Commitment: 2 days per week

Responsibilities: As per section 3.2

Senior consultant

Commitment: 2 days per week

Responsibilities: As per section 3.2

Consultant

Commitment: as and when required

Responsibilities: As per section 3.2

3.5 Transfer of Knowledge

- Work will be conducted at TfL offices in Windsor House, St James's Park
- Brief TDM programme frequently and as required as per Quality Control
- Store all documents on TfL network / corresponding SharePoint document control / TfL Pathway project management site

DELIVERABLES / MILESTONES

- Connected to TDM deliverables across specified projects on a project by project basis
- Billing monthly – itemised invoicing upon TfL’s approval of services delivered.

SERVICE LEVEL AGREEMENTS (SLAS) / KEY PERFORMANCE INDICATORS (KPIS)

During the contract, TfL and the Consultant Contract Managers will hold periodic performance meetings to discuss individual's contribution, progress, interaction and any other issues highlighted as well as offering an escalation route for both parties. TfL has an expectation of exceptional performance from all those seconded and the consultancy business that employs them. Any individuals working on the contract who are failing to perform will be reported to the Consultant Contract Manager in the first instance. If the individual's performance does not improve they will be removed from their team and a suitable substitute will be identified, for approval by TfL.

INDICATIVE PROJECT TIMESCALES

| Event | Date |
|---|----------------------------------|
| Issue of Invitation to Tender | 04/07/2016 |
| Last date for submission of clarifications | 15/07/2016 |
| Submission deadline for Quality Submission (A) and Financial Submission (B) | 22/07/2016 at 12.00pm GMT |
| Tender evaluation and selection | Late July – Mid August |
| Contract Finalisation and Award | Late August |
| Contract Commencement | 01/10/2016 |

APPENDIX 1 – Principal Consultant (Project Coordinator) Skills and Knowledge Requirement

| Technical Area | Service Area | Scope of work | Skills and knowledge required |
|--|-----------------------------------|---|--|
| Information Systems (Travel and Transport) | Customer Information Management | <p>Management of multiple (technical) projects in client project management role.</p> <p>Drafting of business and technical requirements for the delivery of specific TDM projects and products.</p> <p>Specification, design, development and operation of travel and customer information systems (particularly web and mobile information systems) and ownership of technical requirements in a 'client' role.</p> | <p>The ability to integrate a small client-side team of technical, transport and operational colleagues to deliver a series of products and outputs on time and on budget.</p> <p>Knowledge and expertise in traffic and traveller information systems and data.</p> <p>Driving forward programmes, while gaining consensus along the way and being ultimately accountable and able to demonstrate progress and indicative success of the wider TDM programme.</p> |
| | Website development | <p>Management of the business and technical requirements for a web site or system concept. Bringing together the marketing and communications concept and detailed technical and user delivery components for a specific campaign destination.</p> <p>Define full project scope and liaise with stakeholder to ensure agreement across the business and delivery of the project and product.</p> <p>Project and risk management for the delivery of web site or system.</p> | <p>Technical project management of web information site and systems.</p> <p>Technical knowledge of all aspects of web site and system development including information architectures, infrastructure, web accessibility, online mapping and non-functional requirements.</p> <p>Knowledge and expertise in the development of mobile web solutions.</p> <p>Knowledge of GIS, mapping and spatial information.</p> |
| | Journey Planning tool development | <p>Management of the TDM business and technical requirements for the development of journey planning products for public transport and road movements.</p> <p>Technical business requirements owner for the update to public transport and road journey planners to meet specific TDM objectives.</p> <p>Management of the complete programme from a client role,</p> | <p>Expert knowledge of the principles of journey planning and familiarity with the journey planners most commonly used in the UK. Particular knowledge of the "MDV" public transport journey planner used by TfL would be an advantage, although not essential.</p> <p>Knowledge and understanding of the underlying data and data models, including NAPTAN and JourneyWeb. The ability to interpret and validate XML files against a schema is</p> |

| Technical Area | Service Area | Scope of work | Skills and knowledge required |
|----------------|--|--|--|
| | | <p>identification of risk and issues and subsequent solutions and the coordination of delivery of the solution within a project team.</p> | <p>essential.</p> <p>Knowledge of GIS and mapping systems and their application to journey planners.</p> <p>Knowledge of routeing systems.</p> <p>Knowledge of traffic information systems and their underlying data structures and data sources (e.g. DATEX2, ANPR, RTDM).</p> <p>Knowledge and management of real time travel information.</p> |
| | <p>Stakeholder engagement / Delivery Partner Liaison</p> | <p>Project Management for the integrated delivery of specific TDM projects relating to customer and travel information through a wide number of stakeholders and partners.</p> <p>Coordinate consistent and managed approaches to customer information between TfL and stakeholders and partners, such as HA, Network Rail, TOCs, private organisations, local authorities, London Boroughs, etc.</p> | <p>Good working knowledge of the operations and role of the major transport operators in the UK.</p> <p>Proven experience of co-ordinating with a large number of transport operators in both the public transport and roads environment.</p> |
| | <p>Transport Operator Business Analysis</p> | <p>Develop methods and approaches to understand, analyse and present specific and global solutions (e.g. TDM routeing strategies) to meet the objectives determined by the wider TDM team.</p> <p>Work closely with modelling and analysis teams within TfL to develop efficient techniques and approaches to support ongoing analysis of transport operations.</p> <p>Support the business manager and communications manager with grounded and relevant analysis and solutions to facilitate the development of travel advice and campaigns.</p> <p>Work with TfL new media teams to support specific online</p> | <p>Good working knowledge of TfL and the various transport operating areas.</p> <p>Excellent knowledge of real time travel information.</p> <p>Good working knowledge of Marketing and Communications and social media.</p> <p>Proven ability in business analysis of transport and travel information business analysis.</p> |

| Technical Area | Service Area | Scope of work | Skills and knowledge required |
|----------------|--|--|---|
| | | <p>and digital customer interventions solutions (e.g. mapping and journey planners).</p> <p>Understand, contribute and work to shape wider transport industry discussions and projects specifically relating to transport data and models.</p> | |
| | <p>Analysis & new business development support</p> | <p>Develop a framework and business model for the analysis of transport challenges, a business case assessment and decision support process to support the TDM team and TfL leadership to make informed decision about the application of TDM solutions and their scope</p> <p>Work to develop a research and analysis framework that supports the front of supply chain business decisions and provides a continuous methodology for the analysis and insight into the success or otherwise of specific TDM interventions and the overall programme</p> <p>Facilitate the integration of the analysis and new business programme into the wider TDM programme, taking into account both the strategic objectives of the programme and TfL wide strategy</p> <p>Assist with the management, in particular the planning of future work and monitoring of the TDM programme</p> <p>Develop and regularly review market research analysis and results</p> | |
| | <p>General technical support</p> | <p>Support to the TDM Team in all areas of information technology design, specification, implementation and operation specifically to ensure the successful delivery of project briefs.</p> | <p>Good technical knowledge of information systems and web site design.</p> |

| Technical Area | Service Area | Scope of work | Skills and knowledge required |
|--------------------------------|----------------------------|--|--|
| Transport Planning | Market Research Analysis | NA | NA |
| | Physical Planning | During any physical planning (new facilities or planned refurbishments), work closely with TfL Strategic Planning, Property, Commercial, Urban and Interchange Design Units (and other relevant TfL departments) to design in TDM and customer information solutions. | Proven track record in urban design and architecture as applied to live operational environments. Proven ability to build consensus on delivery solutions among diverse stakeholder groups. |
| Programme & Project Management | Project Management support | <p>Work will include:</p> <ul style="list-style-type: none"> • Project initiation, specification and business case development • Scope and change control management • Progress monitoring and control • Quality control and management • Programme Gantt charts • Technical and design documentation • Progress reports to help keep the programmes on track • Financial reports to ensure that costs are controlled and remain within budget • Risk registers to ensure that risks and issues are managed appropriately • Action logs for actions which may have an impact on the programmes | Proven record of technical project management. |



Travel Demand Management – Consultancy Support

Appendix 1 – Part B

Service Provider's Solution

REDACTED



Travel Demand Management – Consultancy Support

Financial Solution

REDACTED