



**Highways England Company Limited**

**Smart Motorways Alliance**

**Scheme Scope**

**M6 J19-21A Knutsford to Croft Extra  
Capacity – PCF Stages 1&2 only**

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## Section A: Scheme Client Requirements

The Client's requirement is to review the options to upgrade the M6 between junction 19 (Knutsford) and junction 21a (M62) to provide extra capacity.

This is a Roads Investment Strategy 3 (RIS3) proposed scheme, and therefore the requirement is to progress the scheme to a position where the Department for Transport can determine whether to commit to the scheme as part of RIS3.

This Scheme Order is for the SMA to undertake activities commensurate with delivering National Highways Project Control Framework (PCF) Stages 1- Options identification & Stage 2- Option Selection (current at 1<sup>st</sup> March 2022), except for those items of scope which deliver any public communication, public consultation or publication, to allow National Highways to present a report at Ministerial Decision Point (MDP) 2 in March 2023.

The document entitled '**Supporting document to Scheme Client requirements**' appended to the Scheme Order provides a detailed breakdown of scope to be delivered.

This is considered a Non-defined solution for the SMA and is not represented in the ALR ABPM.

The Client in consultation and agreement with the SMA may amend the delivery and scope requirements of PCF Stages 1 & 2 post award of this Scheme Order.

External engagement and consultation is likely to be required to develop understanding of scheme impacts and also other developments in the area; all requests for such engagement shall be submitted for approval by National Highways.

The Client shall prepare and deliver a handover, to the Alliance, of all documentation associated with any previous work undertaken for this scheme.

The Client's existing authority from the Department for Transport is to progress the scheme to PCF 'Stage 2' only by March 2023.

Further to this milestone, DfT and Ministers will review the Roads Period 3 portfolio; therefore, there will be a pause in the Scheme at this point.

The Client may issue a further Scheme Order to the SMA for PCF Stages 3-7 for the Scheme should it be approved for delivery in RIS3.

## Section B: Scheme Scope Requirements

The *scheme* Scope is to be delivered in conjunction with Volume 2.2 of the Alliance Contract, the Alliance Scope. The sections of the Alliance Scope are detailed below, the requirements of these sections are set out within Volume 2.2 of the Alliance Contract.

Scope Section	Description
S100	Description of the Works
S200	General Constraints
S300	Alliance's design
S400	Scheme handover
S500	Programme
S600	Quality Management
S700	Tests and inspections
S800	Management of the works

S900	Working with Others
S1000	Services and other things to be provided
S1100	Health and safety
S1200	Subcontracting
S1300	Title
S1400	Accounts and records
S1500	Commercial management
S1600	Transfer of rights
S1700	Information management
S2000	Project Bank Account (Y(UK)1)
S2100	Client's work specification

Below identifies the additional description of the works included in the *scheme* Scope.

## **S100 Description of the Works**

This upgrade is on the M6, between Junction 19 and Junction 21A to provide extra capacity

This scheme will be developed on the assumption that the resurfacing of all lanes will be delivered in scope. Engagement with HS2 is required to identify potential future proofing to enable the delivery of HS2 across the M6 e.g. the provision of footings for a future overbridge. The scheme should also consider including the provision of an improvement at the southbound M6 J19 entry to alleviate the identified future congestion issue.

Following issue of the draft scope the pre-order optimisation of this Scheme Order to the Alliance Partners is summarised below:-

### **Lot 2 DED scope**

Jacobs will deliver 50% of the scope as the Responsible Partner.

WSP will deliver 50% of the scope as Support Partner.

### **Lot 3 OSAP scope**

Balfour Beatty will provide the Pre-construction leadership for the Scheme Order

BMJV will provide the management support and technical / buildability support for the Scheme Order.

## S200 General Constraints

The engineering constraints include, but will not be limited to the following:

- Existing highway profile:
  - Thelwall Viaduct 4 lanes in each direction, plus hard shoulder
  - Thelwall Viaduct is 1400m long and the new GD301 standards require EA's at no further apart than 1200m.
  - Two Thelwall Viaduct structures, which limit options for making best use
  - Croft Interchange land constraints
- Thelwall Viaduct elevation:
  - Possible high wind conditions limit options
  - Physical capacity enhancement requires structure(s)
- Junction separation:
  - J20 / J20A and J20-J21
  - On/off slip separation limits potential reprofiling
  - Cliff Lane flyover (J20A) is approx. 57m across at M6 floor level and could limit options
- Waterways:
  - Bridge structures
  - Manchester Ship Canal and required elevations
  - Flood plain and hydrological considerations

There is a proposal for planned HS2 works within the *scheme* limits, for which the *scheme* will be required to liaise and engage with the HS2 team as the works required has a potential impact on the profiling and location of apparatus. The *scheme* will need to consider the potential of footings for a bridge over the M6.

The scheduling constraints include:

- The Client's existing authority from the Department for Transport to progress the scheme only to 'Stage 2' by March 23;
- Further to this milestone DfT and Ministers will review the Roads Period 3 portfolio, therefore there is the likelihood of a 'pause' in the scheme at this point

Environmental constraints include, but are not limited to the following:

- **Air Quality and Greenhouse Gases:** Parts of the route are within AQMAs.
  - J19 is within the Chester Road AQMA and the junction and link between J20 to J21A is within an AQMA. Both AQMAs have been declared due to exceedances of the annual mean nitrogen dioxide (NO<sub>2</sub>) objective.
  - There is a high risk of exceedances of the annual mean objective for NO<sub>2</sub> at roadside sites within the AQMAs close to the proposed scheme.

- Potential schemes to improve capacity may lead to slight changes in road alignment meaning some properties may be closer to the roadside. Furthermore, there are likely to be increases in traffic flow and changes in speed which may increase emissions. There is likely to be a high risk of significant impacts, both improvements and deterioration at these sites and at other sensitive receptors on adjoining routes as traffic is attracted to the improved scheme route.
- **Cultural Heritage:** There are 42 identified heritage designations and potentially more within close proximity of the study area.
  - There are two scheduled monuments within 1km of the route.
  - 40 'Grade II' and 'Grade II\*' listed buildings are located within 1km of the study route.
  - There may be a potential for previously unrecorded archaeological remains to be present in the vicinity of the route which may be directly affected by the development of the route. There is potential to enhance archaeological understanding in this respect.
- **Noise and Vibration:** Noise Important Areas (NIAs) and residential receptors are identified.
  - Fifteen NIAs are located along the route.
  - There are a number of residential individual properties and clusters of residential properties in close proximity to the route.
- **Road Drainage and the Water Environment:** Flood zones and road surface runoff are key considerations.
  - The route crosses the River Mersey and Manchester Ship Canal by means of the Thelwall Viaduct.
  - The route passes through the larger area of flood Zone 2 and 3 associated with the River Mersey and small areas of flood Zone 2 and 3 are present along the route.
  - Potential improvement schemes may encroach into small areas of flood zones 2 and 3. Suitable storage capacity may need to be provided within the *scheme* design to avoid displacement of flood water.
  - Opportunities to improve existing drainage systems by providing new or enhanced treatment of highway runoff could be considered as part of scheme design.
  - The opportunity exists to incorporate sustainable urban drainage systems into the design of improvement schemes which will provide biodiversity enhancements.
- **Nature Conservation and Biodiversity:** Ancient woodland and Woolston Eyes Site of Specific Scientific Interest (SSSI) are within close proximity of the study area among other sensitive habitats.
  - The M6 passes over Woolston Eyes SSSI located close to the Thelwall Viaduct and J21. Woolston Eyes SSSI is designated as a nationally important site for

its breeding bird assemblage of lowland open waters and their margins, and for wintering wildfowl.

- There is the potential for localised direct and indirect effects on habitats of potential high biodiversity value and on protected or notable species if they are present.
- Opportunities include planting and landscaping around the margins of the proposed scheme to provide ecological habitats. Improvements to create or enhance existing sites of nature conservation interest along the route.
- **Landscape:** The route is located within a landscape which is low lying, flat or gently undulating with line of sight considerations.
  - The route is located within a landscape which is low lying, flat or gently undulating.
  - Loss of existing trees and hedgerows around route has the potential to lead to a reduction on the functionality and effectiveness of the green infrastructure and may alter views of the route from receptors.
  - Key visual receptors include residential properties in close proximity to the route, users of the public rights of way network and visitors to Tabley House and Arley Hall Registered Historic Parks and Gardens.
  - Between J19 and J21, the route is located within the green belt.
  - There is the potential for considerate design for future improvement schemes. Landscape design to replace vegetation lost during the construction phase to provide visual screening and integration with the landscape while also providing and biodiversity enhancements.
- **Population and Human Health:** A number of public rights of way (PRoW), residential areas and agricultural land uses lie within close proximity to the study area.
  - The soils in the area surrounding the study corridor are classified as Grade 3 (good to moderate quality agricultural land) agricultural soils with some localised areas of grade 2 (very good quality agricultural land) in close proximity to the *scheme* and at J19, J20, J21 and J21A. Potential schemes involving widening may result in the loss of some agricultural land.
  - There are a number of PRoW in the area surrounding the study corridor. At several points, PRoW run adjacent to and cross the route. It may be necessary to temporarily or permanently divert or alter the route of PRoW.
  - A number of residential properties, commercial properties and golf courses are located in close proximity to the route and may be impacted by works, although it is likely that some impacts will be temporary, some impacts may be permanent
- **Geology, soils and materials:** Sensitive ground conditions require consideration in the options for the study section.
  - Part of the route is bordered by fields and potential improvement schemes may result in the loss of agricultural land some of which may be best and most versatile.

- It is anticipated that made ground will be encountered during the construction phase for potential improvement schemes.

### **S225 Protection of Existing Structures and Services**

The following represents the potential structures requiring pier protection identified at PCF Stage 0, but will need further work through the stage development.

J19-20 = 7 bridges pier protection

J20-20A = 1 bridge pier protection

J20A-21 = 1 bridge pier protection

J21-21A = 6 bridge pier protection

### **S305 Design responsibilities**

The Alliance undertakes all design activities in accordance with the Alliance Scope and the *scheme* Scope.

### **S320 Design submission procedures and acceptance criteria**

The Alliance develops the design in accordance with standards. These agreements shall prevail over the requirements of S2100. The Alliance will undertake an impact assessment to assess the implications of full compliance with the S2100 and make a recommendation to the Alliance Board detailing which changes should / should not be adopted.

### **S502 Scheme Programme Requirements**

The following summarises the Milestone Key Dates for inclusion in the programme and the performance table as detailed in the Implementation plan.

Milestone Key Date	Date
PCF Gate 2 Report available to submit to DFT	31 <sup>st</sup> March 2023

## S665 Risk Management

The following matters will be included in the Early Warning Register.

Risk		Mitigation Actions
1	Engineering limitations of Thelwall Viaduct	Undertake a structural survey to establish any limitations associated with the viaduct. Determine if existing gantry locations are suitable for re-use for proposed gantries. Explore digital solutions
2	Increase in vehicle flow and speed increases vehicle emissions - scheme results in significant effect on air quality in the identified AQMAs	Undertake quantitative assessment for air quality at an early stage to identify potential for significant effects. Typically carried out at PCF Stage 3 but for this scheme consider undertaking at PCF Stage 1 or 2 in order for early engagement with stakeholders to agree suitable mitigation.
3	Scheme does not improve noise emissions in the Noise Action Planning Important Areas	A qualitative noise impact assessment will be undertaken during PCF stage 1, with a quantitative assessment being undertaken during PCF stage 2 and 3. The assessments will identify the potential for significant effects at sensitive receptors along the route and recommendations for mitigation measures such as acoustic fencing or noise insulation will be provided.
4	Widening of paved width between J20a and Thelwall Viaduct increasing impermeable area and therefore the current drainage layout may be insufficient for proposed impermeable area	Assess current drainage capability. Increase capacity if needed, consider additional balancing ponds if required.
5	Retaining walls may be needed at proposed gantry locations	Assess the proposed MS4 locations, adjust as necessary to avoid extensive retaining walls.

6	UK ministerial approval required for the operational concept	Alliance to provide a solution up to the milestones provided and are to only proceed beyond PCF Stage 2, once the Client has confirmed ministerial approval has been granted
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**S1010 Services and other things to be provided by the Client as a member of the Alliance**

None Identified.

**Section C: Allocation of Scheme Scope between Alliance Partners**

**S120 Core Responsibilities of the members of the Alliance**

**S120A Production Management Partner**

1. The Production Management Partner is responsible for

a. leading the integration of the members of the Alliance in the Production Hub to deliver the outcomes of the Production Hub including

- integration of the Partners' resources in the Alliance,
- programme management office,
- supply chain management,
- technology and information management,
- scheduling,
- people strategy,
- commercial management,
- governance and risk management,
- quality management and assurance, and
- business change, and

b. investing in the capability and competence development of the *Client*.

### **S120B Digitally Enabled Design Partner**

2. The Digitally Enabled Design Partner is responsible for
  - a. the outline and detailed civil engineering design of the *works* in accordance with S2100 *Client's* work specification,
  - b. the principal designer role for the *scheme* for which they are instructed in accordance with CDM Regulations,
  - c. maximising the use of the *Client's* Rapid Engineering Model (REM), digital design solutions including Building Information Modelling (BIM) and running digital rehearsals,
  - d. design knowledge management and promoting industry practice,
  - e. providing capability and capacity to the Production Hub, and
  - f. providing contingency in circumstances where a Digitally Enabled Design Partner is terminated.

### **S120C On-site Assembly Partner**

3. The On-site Assembly Partner is responsible for
  - a. the management and delivery of the construction of the *works* in accordance with S2100 *Client's* work specification,
  - b. the principal contractor role for the *scheme* for which they are instructed in accordance with CDM Regulations,
  - c. site level mobilisation, engineering and performance control,
  - d. on-site assembly of assets,
  - e. the installation, testing and commissioning of any infrastructure as part of handover to the *Client*,
  - f. providing capability and capacity to the Production Hub, and
  - g. providing contingency in circumstances where an On-site Assembly Partner is terminated.

### **S120D The *Client* as a member of the Alliance**

4. The *Client* as a member of the Alliance is responsible for

- a. playing an active role in the delivery of the SMP from within the Alliance in an integrated manner,
- b. providing capability and capacity to the Production Hub, the delivery hubs and improve its own capability over the duration of the contract,
- c. providing the services outlined in S1010 Services and other things to be provided by the *Client*, and
- d. providing contingency in circumstances where the Production Management Partner is terminated.

**KEY:**

- **Responsible** – The Lot Partner(s) responsible for delivering the activities as defined in the Alliance Scope
- **Support** – The Lot Partner(s) support the delivery of the requirements as defined in the Alliance Scope

The Alliance as a whole remains responsible for delivering the *scheme*.

<b>REFERENCE</b>	<b>The <i>Client</i> (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
<b>SECTION A: LOT SCOPE</b>				
<b>S100 Description of the works</b>				
S105 Introduction to Highways England				
S110 Introduction to the Smart Motorways Programme				
S115 The structure of the Alliance	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
S116 Alliance Objectives	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
S120 Core responsibilities of the members of the Alliance	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S120A Production Management Partner		<b>R</b>		

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S120B Digitally Enabled Design Partner			R	
S120C On-site Assembly Partner				R
S120D The <i>Client</i> as a member of the Alliance	R			
S130 Agile responsibilities of the members of Alliance				
Scoping of surveys				
Asbestos	S	S	R	S
Communications	S	S	R	S
Condition	S	S	R	S
Drainage and ducting	S	S	R	S
Environmental and ecology (e.g. protected species)	S	S	R	S
Lighting	S	S	R	S
Noise	S	S	R	S
Pavement	S	S	R	S
Structures and geotechnical	S	S	R	S
Topographical	S	S	R	S
Carrying out of surveys				
Asbestos	S	S	S	R
Communications	S	S	S	R
Condition	S	S	S	R
Drainage and ducting	S	S	S	R
Environmental and ecology (e.g. protected species)	S	S	S	R
Lighting	S	S	S	R

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
Noise	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Pavement	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Structures and geotechnical	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Topographical	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Preliminary design				
Gantries, structures and bridges	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Noises and environmental barriers	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Piling and foundations	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Power and lighting	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Retaining walls	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Technology and communications	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Detailed design				
Gantries, structures and bridges	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Noises and environmental barriers	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Piling and foundations	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Power and lighting	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Retaining walls	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Technology and communications	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
Traffic management	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Development of as-built records	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
Purchase and provision of				
Technology	<b>R</b>	<b>S</b>	<b>S</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
Traffic management	R	S	S	R
Any other products and services called off from CCS and other Client framework contracts	R	S	S	R
Consent and administrative activities				
Statutory and consent management (e.g. Statutory instruments, Statutory Undertakers, Distribution Network Operators (DNOs))	S	S	R	S
Environmental assessment	S	S	R	S
Customer service and external stakeholder management	S	S	S	R
Setting up and administering of PBAs	S	R	S	S
Supporting SMP delivery (e.g. Red-X campaign)	S	R	S	S
Production activities				
Logistics	S	S	S	R
Promoting use of off-site manufacture and standardisation	S	S	S	R
Continuous improvement and innovation	S	R	R	R
<b>SECTION B: GENERAL REQUIREMENTS</b>				
<b>S200 General constraints</b>				

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S201 Alliance behaviours	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
S202 Parent Company Guarantee	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S203 Conflict of interest	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S204 Anti Bribery and Anti-Fraud	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S205 Data Protection	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S208 Official Secrets Acts	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S210 Confidentiality	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S211 Insurance	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S215 Security and protection of the Site	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S220 Security and identification of people	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S225 Protection of existing structures and services	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S230 Cleanliness of roads	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S240 Network occupancy	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S241 Recovery services	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S245 Condition survey	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
S250 Considerate Constructor Scheme	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S251 Customer service	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S256 Project Control Framework	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S266 Energy Efficiency Directive	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S267 Environmental requirements	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S268 Aftercare / Management of landscape works	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S269 Site Waste Management plan	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S270 Sustainable development requirements	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S272 Air Quality Strategy	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S274 Discrimination, bullying and harassment	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S275 Equality, diversity and inclusion	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S276 Employment and skills	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S300 Design</b>	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
S305 Design responsibilities	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
S310 Design criteria	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
S320 Design submission procedures and acceptance criteria	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
S325 Design approval from Others	<b>S</b>	<b>S</b>	<b>R</b>	<b>S</b>
<b>S400 Scheme handover</b>				
S405 Scheme Open for Traffic	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S410 Scheme handover	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S415 Scheme Completion	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S445 Documents	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S450 Access to information following Completion	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
<b>S500 Programme</b>				
S501 Alliance programme requirements	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S502 Scheme programme requirements	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S515 Scheme programme quality	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S520 Methodology statement	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S525 Revised Alliance programme	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S535 Earned value management and reporting	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S600 Quality Management</b>	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S605 Alliance aligned/integrated management system	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S610 Lean	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S615 Quality planning	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S620 Authorised persons with adequate skills, knowledge and experience and training	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S625 Quality reviews	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S626 Audits	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S630 Registers	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S640 Non-conformity corrective action reports	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S645 Quality indicators	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S650 Deliverables	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S655 Alliance management review	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S660 Quality management points	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S665 Risk management	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S700 Tests and inspections</b>	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
<b>S800 Management of the works</b>				
S810 Communications	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S820 Disclosure requests	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S825 Information security	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S835 Business Continuity	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S900 Working with Others</b>	<b>S</b>			
S905 Requirements of Others	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S920 Utilities providers	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S1000 Services and other things provided</b>				
S1010 Services and other things to be provided by the <i>Client</i> as a member of the Alliance	<b>R</b>	<b>S</b>	<b>S</b>	<b>S</b>
<b>S1100 Health and Safety</b>				
S1105 Supply chain health and safety maturity matrix	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1107 Alliance's health and safety management system	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S1108 Subcontractor's health and safety management systems	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1111 Action to rectify breaches	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1112 Health and safety culture	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1113 Health and safety – exchange of information	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1114 Asbestos	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S1115 Health and safety advice	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1116 Health and safety inspections	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1117 Health and safety in construction	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S1118 Incident investigation, reporting and follow-up	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1119 Incident statistics	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1121 Health and safety management audit	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1122 CDM compliance	<b>S</b>	<b>S</b>	<b>R</b>	<b>R</b>
S1123 Health and safety – charity-based incentive Schemes	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1125 Management of road risk	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S1127 Substance abuse	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1128 Security	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1129 Employee safety	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>

<b>REFERENCE</b>	<b>The Client (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
S1130 Fleet Operator Recognition Standard (FORS) Accreditation	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
S1131 Driving for better business	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S1200 Subcontracting</b>	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1205 Restrictions or requirements for subcontracting	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1210 Acceptance procedures	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S1300 Title</b>				
S1305 Marking	<b>S</b>	<b>S</b>	<b>S</b>	<b>R</b>
<b>S1400 Accounts and records</b>	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1415 Form of documents to be retained	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1420 Records and audit access	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1425 Retention of records	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>S1500 Commercial Management</b>				
S1505 Provision of cost information	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1510 Provision of price information	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1515 Cost verification	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>
S1520 Invoicing	<b>S</b>	<b>R</b>	<b>S</b>	<b>S</b>
S1525 Forecasting	<b>S</b>	<b>R</b>	<b>S</b>	<b>S</b>
S1530 Earned value for assessment	<b>S</b>	<b>R</b>	<b>S</b>	<b>S</b>
<b>S1600 Transfer of Rights</b>				

REFERENCE	The <i>Client</i> (as a member of the <i>Alliance</i> )	Lot 1 Fluor	Lot 2 Jacobs	Lot 3 Balfour Beatty BMJV
S1605 Alliance rights over material prepared for the design of the works	S	R	R	R
S1610 Other rights to be obtained by the Alliance	S	R	R	R
<b>S1700 Information management (Option X10)</b>	S	R	R	R
S1705 Information management requirements	S	R	R	R
<b>1S2000 Project Bank Account (Option Y(UK)1)</b>				
S2010 Project Bank Account tracker	S	R	R	R
<b>S2100 Client's work specification</b>	S	R	R	R
S2110 Drawings	S	R	R	R
<b>Annex A Reference documents</b>				
<b>Annex B Form of Parent Company Guarantee</b>	S	R	R	R
<b>Annex C Insurance Tables</b>	S	R	R	R
<b>Annex D Alliance Inclusion Action Plan</b>	S	R	R	R
<b>Annex E Alliance Employment and Skills Plan</b>	S	R	R	R
<b>Annex F Special activities and requirements</b>	S	S	R	S
<b>Annex G Continuous improvement/lean minimum requirements</b>	S	R	R	R
<b>Annex H Quality improvement process</b>	S	R	R	R

<b>REFERENCE</b>	<b>The <i>Client</i> (as a member of the Alliance)</b>	<b>Lot 1 Fluor</b>	<b>Lot 2 Jacobs</b>	<b>Lot 3 Balfour Beatty BMJV</b>
<b>Annex I Subcontractor Warranty</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
<b>Annex j Information management requirements</b>	<b>S</b>	<b>R</b>	<b>R</b>	<b>R</b>