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**From:** Jim Harries [jim.harries@transdevplc.co.uk]  
**Sent:** 02 May 2007 10:44  
**To:** Geoff Gilbert  
**Cc:** Bob Dawson; Toby Kliskey; Alastair Richards - TEL; Miriam Thorne; Roger Jones (Transdev)  
**Subject:** RE: Infraco Evaluation Team Briefing

Geoff

Yesterday we discussed the contents of the email that I sent to you on 25 April. The outcome of this discussion is summarised below:

1. You explained your organisational structure for the Infraco Evaluation process.
2. The Infraco Evaluation Team Briefing sessions will be re-run for everyone involved in the evaluation process to ensure that the participants are properly briefed on the process and that the issues raised in my email are closed out
3. You will issue a document that defines the overall evaluation process, and you will ask me (and Roger Jones, who is particularly good at this) to review this document prior to its issue
4. I will brief Roger and Carl on this discussion [I did this on 1 May in the afternoon], and you will brief your reports plus Miriam and Mark advise them on the issues that I raised
5. Timing is of the essence, with the bids due on 8 May.

All the best  
Jim Harries

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City Point, 65 Haymarket Terrace, Edinburgh EH12 5HD

All the best  
Jim Harries

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**From:** Geoff Gilbert [mailto:Geoff.Gilbert@tie.ltd.uk]  
**Sent:** 27 April 2007 08:32  
**To:** Jim Harries  
**Cc:** Bob Dawson; Toby Kliskey; Alastair Richards - TEL; Roger Jones; Miriam Thorne  
**Subject:** RE: Infraco Evaluation Team Briefing

Jim

I understand that this did not go well. I have been through your comments and can answer your queries. That said I would welcome your support to fix some of this.

Regards

Geoff Gilbert - Project Commercial Director  
TRAM Project

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**From:** Jim Harries [mailto:jim.harries@transdevplc.co.uk]  
**Sent:** 25 April 2007 18:04  
**To:** Geoff Gilbert  
**Cc:** Bob Dawson; Toby Kliskey; Alastair Richards - TEL; Roger Jones (Transdev); Miriam Thorne  
**Subject:** Infraco Evaluation Team Briefing

Geoff

I attended this "Team Briefing", but in reality it was more of a process review that identified some potential gaps. The following issues emerged. I am sure that Bob will be discussing them with you.

If there is any way in which Roger or I can help to resolve any of these matters, please ask! We will do all we can to make the process succeed.

**Team Membership**

1. tie's new Engineering Directorate (David Crawley and Tony Glazebrook) are not represented in the process and should be
2. Debate over the membership of the teams. It was agreed by all present that the teams need reviewing and refining. It is Transdev's view that the membership of these teams should be signed off by the Tram Project Director.

**Attendees at briefings**

1. Those present were: Tracy Kinlock, Jim Harries, Roger Jones, Mark Bourke, Miriam Thorne, Barry Dawson, Toby Kliskey (presenter). Some people listed as being involved in the process were believed not to have been invited (e.g. Carl Williams).
2. Noted that the lawyers were not present. Apparently there is a lack agreement from the lawyers to the process being adopted by tie, and this may have resulted in the lawyers deciding not to attend the briefing session.
3. Toby commented that there is a significant number of people who are allocated to the process who have not attended a briefing, and consequently further briefings are needed. We would recommend that everyone involved is briefed again once the answers to the key points contained in this email are resolved and the review teams firmed up.

**Process ownership**

1. Lack of clarity about who is leading the negotiations – Toby thought it was Bob, but Bob was unable to confirm.
2. The "owner", (the person with overall responsibility for the delivery of the evaluation) was not known by any of the attendees. Without this, it is Transdev's view that the process is unlikely to succeed.
3. Administration and information management process owners are unclear.

**Evaluation Process**

1. No one at the meeting knew the status of the Evaluation process documentation. The attendees did not know if the to the TPB dated 6 Dec paper had been approved by the TPB or if further revision and/or further approval by the TPB is required prior to the start of the evaluation process.
2. Whilst Toby has a large spreadsheet to support the Evaluation process, the mechanics of using this across the Evaluation teams was not defined, and it was not known if or how the extranet would be able to support the process to provide an appropriate audit trail for the process.
3. It was Transdev's view that the process should be documented, set up and tested prior to its implementation in order to mitigate the risk of a catastrophic process failure.
4. The process by which bids for Phase 1b would be evaluated was not known by any of the attendees. This appears to be fundamental and time critical.
5. The bidders' responses to all questions are to be evaluated with equal weighting, resulting in dissimilar issues having the same weighting. This is compounded by all aspects of the bid (Technical, Insurance etc) having equal weightings too. It cannot be appropriate to give the same weighting to bidders' responses both on insurance and on technical issues, as that latter

is much more significant in the overall evaluation process. The attendees sought clarification and improved understanding.

**Legal issues**

1. It was understood the lawyers are of the view that we cannot have a BAFO process, but the process includes one.
2. It was understood that the weighting of the various aspects of the bid must be equal in the view of the lawyers, but the evaluation may actually be in overall financial terms. See item above.

**Other issues**

1. The use of "Roley" and "Scoop" was agreed to be flippant and lacking in suitable gravitas. Replacement names are appropriate.

Again, if there is any way in which Roger or I can help to resolve any of these matters, please ask! We will do all we can to make the process succeed.

All the best  
Jim Harries

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