



Transport Initiatives for Edinburgh Edinburgh Trams

Consultants Brief Ref. FM/05/001

Original Date

28 January 2005

Doc Reference

A0

For the attention of

Faber Maunsell

Version Control

For Action

Investigation Services and Works

Preparation of paper detailing the gap between investigation services and works undertaken in relation to the Edinburgh Tram Network (ETN) to date and that required for the purposes of detailed design.

Description of Issues to be addressed

The Edinburgh Tram Network project (the Project) is engaged in Parliamentary leading to Royal Assent at the end of 2005. The Project is also in the process of engaging Technical Support Services (TSS) and System Design Services (SDS). It is anticipated that TSS and SDS contracts will be awarded around the end of May 2005.

This document (the Brief) describes the Project's requirements for technical assistance from technical consultants engaged in the Parliamentary process to advise on Investigation Services (IS) and Investigation Works (IW) that might be undertaken before the appointment of the SDS to assist an expeditious start to detailed design.

IS should be understood to include the determination of all physical characteristics of sites as they affect design and construction of the ETN and integrity of neighbouring infrastructure and property. IS includes desk study and the design, planning, supervision and interpretative reporting of IW. IW encompasses the exploration and recording of the location and characteristics of soil, rock and ground conditions, environmental matters, utilities, clearances and adjacent infrastructure (for example, third party structures on the shoreline section, city centre basements and all assets on Network Rail Controlled Infrastructure).

In view of the time constraints placed on the Project, the procurement process will proceed in three phases.

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Phase 1 – Preparation of a Position Statement that records the following:

1. The IS and IW that has been undertaken to date by yourselves in respect of the Parliamentary process;
2. The level of confidence in respect of this information for use in detailed design (Yes or No);
3. What data and information (including any outline design development) would be required, in your opinion, for the purposes of detailed design;
4. An assessment of the gap in data and information (the difference between items 1 and 3);
5. A recommendation of what remaining aspects of IS and IW should be prioritised during the period up to appointment of the detailed design contract for the ETN. These recommendations should also give guidance on Enabling Actions, required to facilitate the items of IS and IW identified for action (for example, access to Network Rail Controlled Infrastructure for the purpose of ground investigation works).

The recommendations shall be presented in the format attached to this Brief. The purpose of Phase 1 will be to focus areas of IS and IW for detailed consideration during Phase 2.

Phase 2 – Building on Phase 1, Phase 2 will provide the following in respect of the IS and IW items recommended for progress at the end of Phase 1:

1. A detailed statement of prioritised IS and IW items to be executed prior to the appointment of the detailed designer;
2. A +/-10% cost estimate of each item of IS and IW identified (this estimate will inform budgetary requests to the Scottish Executive);
3. A Work Breakdown Structure (WBS);
4. A list of recommended suppliers for the execution of IW works identified;
5. Procurement and delivery programme taking due cognisance of the timescales noted below (Microsoft Excel or Project format will suffice).

For the purpose of Phase 2, the Consultant shall assume that it will act as tie's agent for the design, procurement, supervision and reporting of any IW identified. The Consultant shall also be required to act as Planning Supervisor.

Phase 3 – Subject to funding, during Phase 3 the Consultant shall:

1. Execute all items of IS identified (this shall include interpretative reporting on all aspects of IW);
2. Act as tie's agent in directing, procuring, administering and supervising all IW contracts.

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Aim and Objective of Brief

The objective of this Brief is to improve the data and information available to the SDS such that:

1. The time available to the SDS for detailed design is maximised prior to novation to the ETN contractor, and;
2. The incidence of variations due to unforeseen site conditions is reduced during both design and construction.

Current position

The data and information currently available to the successful detailed designer has been produced primarily for the purposes of the Parliamentary process. It is considered there are gaps between this and that required for the purposes of detailed design.

Assumptions/Constraints/Boundaries

The following assumptions have been made in the preparation of this Brief:

1. The Consultant shall limit its activities to the general geographical extent of the Project that it has been engaged with during the Parliamentary process (Line 2 only);
2. The Consultant shall give due consideration to potential changes to the route / swept path that are being or may be considered as part of the run-time improvement review and any other influences;
3. The Consultant has full access to all material previously produced for or on behalf of tie;
4. The Consultant will immediately advise tie any issues that may limit or prevent the execution of this Brief;
5. The Consultant will advise of any outline design development work required to inform the direction and design of IW (for example, in relation to any major structures contemplated by the ETN project);
6. Electronic and hardcopy formats of all deliverables shall be provided.

Deliverables required/answers needed

The Phase 1 Position Statement shall be provided in the format attached.

Under Phase 2 the Position Statement shall be augmented, as necessary, to provide the additional

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information required.

Phase 3 deliverables shall be determined during Phase 2, but it is expected that these will include both factual data and interpretative reporting.

Timescales

The Phase 1 Position Statement shall be provided for the attention of Ian Kendal, Procurement Director, by 12 noon, Tuesday 8 February 2005.

Phase 2 deliverables shall be provided by 12 noon, Tuesday 15 February 2005.

Although the timing of Phase 3 deliverables are a function of the work undertaken during Phase 2, the Consultant shall give due cognisance to the timescales for the appointment of the detailed designer. The minimum duration of Phase 3 shall require that IS and IW activities are complete upon the anticipated appointment of the detailed designer at the end of May 2005. However, in order to obtain full benefit from this exercise, it is recognised that some activities may necessitate a longer duration for completion. In this respect, the Phase 2 recommendations shall highlight priority activities that take longer than the proposed Phase 3 duration. To be clear, IS and IW activities should not be eliminated from the proposed list on the basis that they do immediately comply with the proposed timescales.

Transport Initiatives for Edinburgh	Edinburgh Trams	Consultants Response
Date	Doc Reference	For the attention of Ian Kendall, TIE

Approach

Consultant to complete

Resource required

Consultant to complete

Fee Proposals

Committed Timescales

Any other comments

**TIE's response and
Authorisation to proceed**

Phase 1 – Position Statement – Investigation Services and Works

Item No.	Details of IS and IW Activities Already Undertaken						Details of Proposed IS and IW Items to Facilitate Detailed Design						Comment ¹²	
	Generic Activity (IS or IW)	Specific Activity ¹	Location (named and chainage) ²	Drawing / Report Reference Number	Current Information / Data Sufficient for Detailed Design? (Yes / No) ³	Reason for Inadequacy / Risk Retained ⁴	Recommended IS / IW for purpose of detailed design ⁵	Risk Mitigation ⁶	Can recommended IS / IW be undertaken by end May 2005? (Yes / No) ⁷	Approximate Timescale for Activity (whether or not possible before end May 2005) ⁸	Approximate Cost ⁹	Output Deliverables ¹⁰		Enabling Actions ¹¹
1														
2														
3														

¹ Examples of IS might include Desk Study, Interpretative Reports. Examples of IW might include topographical survey, geotechnical ground investigation, basement and void surveys and so on.

² For consistency with reports produced so far, continue to use the existing site reference system.

³ Only if the existing data or information will not be revisited at all, should the answer be 'Yes'.

⁴ For example, existing topographical survey may be called into question by new developments on, or adjacent to, the proposed route. Existing desk study information may require site confirmation.

⁵ Please provide reasonable detail of the activities identified. For example, for topographical survey, identify the extent and detail of the survey required.

⁶ To what extent is the risk mitigated by the proposed activity? Is the proposed activity justifiable?

⁷ The Consultant shall assume that all reporting deliverables shall be provided by end May 2005.

⁸ Once Phase 2 is completed a decision will be made whether or not to proceed with items that cannot be delivered by end May 2005.

⁹ Assume -0+20% for approximate cost for the purpose of Phase 1. -0+10% will be required at the end of Phase 2.

¹⁰ Consultants shall be asked to present their proposed report formats for consideration to provide a consistent approach for deliverables provided for both Lines 1 and 2.

¹¹ Enabling items may include, for example, a Service Agreement with Network Rail, City of Edinburgh Council (or other third party) to enable attendance at meetings, access to information, access to property and so on. This item is considered to be of particular importance.

¹² The Consultant is encouraged to highlight any additional items for action that he considers important in to assist the SDS upon its appointment.