



## Clyde Metro – Professional and Technical Services Framework

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**Date of meeting** 28 June 2024

**Date of report** 18 June 2024

**Report by Head of Policy & Planning**

### 1. Object of report

The object of this report is to:

- Recommend approval of the Clyde Metro Professional and Technical Services Framework and the appointment of companies to the Lots within the Framework; and
- Provide a brief update on progress on the Clyde Metro programme.

### 2. Background to report

Further to the previous Committee update<sup>1</sup>, the Metro project partners (SPT (lead), Glasgow City Council (GCC) for Glasgow City Region (GCR), and Transport Scotland (TS) (project assurance)) are progressing work to develop and deliver the Case for Investment (CFI) for the Clyde Metro, comprising the following stages:

- CFI Stage 1a – Case for Change & Initial Option Development
- CFI Stage 1b – Client Advisory Services
- CFI Stage 2 – Programme Level Business Case

CFI Stage 2 will deliver a Programme Level Business Case based upon the findings and outcomes of CFI Stage 1. The scope of workstreams for CFI Stage 2 are noted below:

- CFI Stage 2A: STAG (Scottish Transport Appraisal Guidance) Appraisal (including Transformation) and related Technical & Transformation Workstreams – this workstream will assess the costs and benefits of the Clyde Metro interventions in a manner consistent with the transport appraisal process, and also the impact of the interventions from a transformation perspective e.g. economic development, housing, regeneration and others.
- CFI Stage 2B: Strategic Environmental Assessment and Habitats Regulations Assessment.
- CFI Stage 2C: Non-Environmental Impact Assessments.
- CFI Stage 2D: Programme Business Case, Transformation and related Technical Workstreams – this workstream will set out the evidence base for the Clyde Metro programme in a manner consistent with and to the required level of detail necessary to fulfil the needs of HM Treasury's Green Book guidance.

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<sup>1</sup> [https://www.spt.co.uk/media/5b2cndtw/sp241123\\_agenda8.pdf](https://www.spt.co.uk/media/5b2cndtw/sp241123_agenda8.pdf)

- CFI Stage 2E: Programme Business Case Audit.
- CFI Stage 2F: Preliminary Engineering Statement.
- CFI Stage 2G: Land-use and Placemaking/Housing Assessment Technical Workstreams.

In scoping CFI Stage 2, it was identified that current procurement frameworks available were insufficient for the specialist professional and technical services required, and potential financial costs of any commissions for CFI Stage 2, and potentially beyond. The Clyde Metro Technical Services Framework is therefore a necessary step to meet these requirements.

At this stage it is worth highlighting that funding for the Clyde Metro project is currently being provided by GCR via GCC. At its meeting on 6 December 2023, the GCR Cabinet approved an allocation of £12.155m to support the development of the Clyde Metro project. Currently, up to £600,000 has been allocated to delivery CFI Stage 1, with £5.4m allocated for CFI Stage 2. A Grant Agreement between GCC and SPT for funding Stage 2 has been agreed, and a Memorandum of Understanding (MoU) has been drafted and is under review. The MoU is between all the project partners to establish arrangements for transfer of funding, confirmation of partners roles, remits and any related agreements necessary for future development of the project.

### **3. Clyde Metro Framework - Outline of proposals**

The Clyde Metro Framework has been designed to be collaborative, meaning that, for example, GCC, as a project partner, can use the new Framework, as well as SPT, for consultancy commissions relating to Clyde Metro.

The estimated total value of the Framework (excluding VAT) is set at £20 million in order to provide sufficient scope for further commissions beyond those currently outlined in section 2 above. The duration of the framework will be three years with an option to extend for a further twelve months at the sole discretion of SPT.

The range of specialist professional and technical skills required to deliver the various components of CFI Stage 2 and potentially beyond were scoped by the project team, and defined in eight Lots:

- Lot One: Transport Planning & Modelling
- Lot Two: Transport Engineering
- Lot Three: Land Use Planning & Placemaking
- Lot Four: Business Cases & Economic Assessment
- Lot Five: Environment
- Lot Six: Impact Assessments
- Lot Seven: Legal & Commercial
- Lot Eight: Marketing, Branding & Communications

The tender objective was to identify suitably qualified consultants and technical experts to deliver the scope of each framework Lot and determine their commercial daily rates against a standardised grading structure.

To achieve this, an advert for an open procurement procedure was placed in Public Contracts Scotland (PCS-Tender) on 27 February 2024, to which Single Procurement Document (SPD) responses were received on 28 March 2024. During the tender period, 157 questions and/or points of clarification were submitted via the PCS-Tender portal. All questions were answered, with responses published and accessible to all organisations who registered interest in the Framework.

A supplier session consisting of a presentation and Q&A online session, facilitated by SPT, took place during the tender period on 7 March 2024 for the purposes of helping prospective tenderers to better understand Framework requirements. The session also offered the opportunity for potential suppliers to put questions to SPT and GCC on the Clyde Metro project and to understand expectations regarding potential future commissions. The online session was attended by 115 people representing 51 organisations.

By the submission deadline, 190 organisations downloaded the tender documentation with 38 organisations submitting a total of 80 bids across all Lots.

### **3.1 Evaluation Process**

All tenderers were asked to submit bids comprising qualification, technical and commercial responses. The qualification evaluations were concluded before the technical responses were opened, and in turn, these were next assessed before the commercial responses were opened and evaluated. The evaluation panel for each Lot consisted of SPT and GCC officers.

The qualification envelope contained the Single Procurement Document (SPD) questions, the response to which may have excluded potential bidders' submissions on compulsory and/or discretionary grounds. The compulsory/discretionary exclusion questions were based on legal and economic grounds as defined by the Scottish Government, financial thresholds and evidence of relevant experience as defined by SPT.

The criteria were evaluated on a pass/fail basis with 14 bids from 11 organisations were set aside following this initial qualification evaluation stage.

### **3.2 Technical Envelope**

The technical and commercial responses were evaluated on a Most Economically Advantageous Tender (MEAT) basis. The MEAT evaluation weightings were set as technical 60% and commercial 40%. In the technical section, tenderers were asked to provide a technical response to questions under the following structure:

- Methodology for Framework Management
- Quality and Resilience of Personnel
- Risks, Mitigations and Opportunities

Four suppliers were set aside following technical evaluation.

### **3.3 Commercial Envelope**

For all Lots apart from Lot 7 (Legal), the tenderers were asked to provide people rates per hour for designated salary bands. For Lot 7, tenderers provided day rates for designated professional grades. The commercial evaluation was undertaken by the SPT procurement team.

No suppliers were set aside following commercial evaluation. All suppliers confirmed they will provide community benefits, and all have fair work practices and policies embedded within their organisational governance arrangements.

### **3.4 Conclusion of Framework procurement process**

The final number of consultants appointed to each lot was at SPT's sole discretion. For the provision of the services defined for each Lot of this Framework, the organisations listed in Appendix 1 have been evaluated in line with The Public Contracts (Scotland) Regulations 2015.

#### 4. Clyde Metro Programme – Progress Update

For information, attached at Appendix 2 is the Clyde Metro Position Statement for June 2024. This has been agreed by the project partners as the official progress update on Clyde Metro and can be used for circulation to interested parties as necessary to ensure clarity and consistency in communications about Metro. It will be updated regularly as the CFI progresses, and members will be kept informed of latest versions and progress updates as work continues to deliver the Clyde Metro programme.

#### 5. Partnership action

The Partnership is recommended to:

- Approve the appointment of the consultancy organisations detailed in Appendix 1 for each Lot to form the Clyde Metro Professional and Technical Services Framework; and
- Note the Clyde Metro Position Statement for June 2024 attached at Appendix 2.

#### 6. Consequences

Policy consequences	<i>Clyde Metro is Policy 25 of the Regional Transport Strategy.</i>
Legal consequences	<i>All contracts awarded in terms of this framework will be subject to appropriate terms and conditions from the NEC suite of contracts.</i>
Financial consequences	<i>Any future spend through the framework will be dependent on appropriate budgets being available.</i>
Personnel consequences	<i>None at present.</i>
Equalities consequences	<i>Lot 6 of the new Framework - Impact Assessments - facilitates the procurement of consultants with specialist knowledge including equalities to assist in ensuring best practice and adherence to statutory requirements with regard to all SPT activities procured using the Framework for the purposes of delivering the CFI.</i>
Risk consequences	<i>None at present.</i>
Climate Change, Adaptation & Carbon consequences	<i>Lot 5 of the new Framework - Environment - facilitates the procurement of consultants with specialist environmental knowledge to assist in ensuring best practice and adherence to statutory requirements with regard to all SPT activities procured using the Framework for the purposes of delivering the CFI.</i>

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## APPENDIX 1

### Clyde Metro Professional and Technical Services Framework – Proposed Appointments

#### Lot One: Transport Planning & Modelling

No. of SPD responses received = 9.

No. of organisations shortlisted to the tender evaluation stage = 9.

No. of organisations awarded to lot = 5.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
Mott MacDonald Limited	60.00	26.72	86.72	1
SYSTRA Limited	52.94	31.80	84.74	2
Arcadis Consulting (UK) Limited	56.47	27.26	83.73	3
AECOM Limited	52.94	29.65	82.59	4
Jacobs UK Limited	52.94	27.12	80.06	5

#### Lot Two: Transport Engineering

No. of SPD responses received = 10.

No. of organisations shortlisted to the tender evaluation stage = 8.

No. of organisations awarded to lot = 6.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
Amey OW Limited	60.00	40.00	100.00	1
AtkinsRealis UK Limited	60.00	30.67	90.67	2
Mott MacDonald Limited	60.00	25.15	85.15	3
Egis Transport Solutions Limited	48.00	36.12	84.12	4
COWI UK Limited	60.00	23.70	83.70	5
WSP UK Limited	60.00	22.40	82.40	6

#### Lot Three: Land Use Planning & Placemaking

No. of SPD responses received = 11.

No. of organisations shortlisted to the tender evaluation stage = 11.

No. of organisations awarded to lot = 5.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
Ove Arup and Partners International Limited	60.00	35.46	95.46	1
Arcadis Consulting (UK) Limited	53.68	33.71	87.39	2
Mott MacDonald Limited	47.37	32.67	80.04	3
AtkinsRealis UK Limited	34.74	40.00	74.74	4
AECOM Limited	44.21	29.70	73.91	5

## Lot Four: Business Cases & Economic Assessment

No. of SPD responses received = 16.

No. of organisations shortlisted to the tender evaluation stage = 12.

No. of organisations awarded to lot = 6.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
SYSTRA Limited	60.00	31.80	91.80	1
Jacobs UK Limited	60.00	27.12	87.12	2
Ove Arup and Partners International Limited	57.00	28.02	85.02	3
Arcadis Consulting (UK) Limited	57.00	27.17	84.17	4
Amey OW Limited	42.00	40.00	82.00	5
AECOM Limited	51.00	29.54	80.54	6

## Lot Five: Environment

No. of SPD responses received = 9.

No. of organisations shortlisted to the tender evaluation stage = 8.

No. of organisations awarded to lot = 5.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
Amey OW Limited	60.00	40.00	100.00	1
Mott MacDonald Limited	60.00	28.18	88.18	2
AtkinsRealis UK Limited	47.37	34.45	81.82	3
WSP UK Limited	53.68	28.00	81.68	4
Ove Arup and Partners International Limited	44.21	30.60	74.81	5

## Lot Six: Impact Assessments

No. of SPD responses received = 6.

No. of organisations shortlisted to the tender evaluation stage = 4.

No. of organisations awarded to lot = 4.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
SYSTRA Limited	60.00	40.00	100.00	1
Jacobs UK Limited	60.00	34.12	94.12	2
Aecom Limited	49.41	35.77	85.18	3
Mott MacDonald Limited	49.41	33.61	83.02	4

## Lot Seven: Legal & Commercial

No. of SPD responses received = 6.

No. of organisations shortlisted to the tender evaluation stage = 6.

No. of organisations awarded to lot = 6.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
Anderson Strathearn LLP	57.00	40.00	97.00	1
Addleshaw Goddard LLP	60.00	29.02	89.02	2
Brodies LLP	45.00	30.49	75.49	3
Pinset Masons LLP	45.00	27.01	72.01	4
CMS Cammeron McKenna LLP	45.00	22.31	67.31	5
DLA Piper LLP	36.00	17.28	53.28	6

## Lot Eight: Marketing, Branding & Communications

No. of SPD responses received = 13.

No. of organisations shortlisted to the tender evaluation stage = 9.

No. of organisations awarded to lot = 6.

Supplier name	Quality Score	Price Score	Total Price + Quality	Ranking
WSP UK Limited	60.00	30.92	90.92	1
Frame Creative PR Limited	56.67	31.40	88.07	2
Jacobs UK Limited	46.67	40.00	86.67	3
April Six Limited	56.67	28.52	85.19	4
Big Partnership Limited	56.67	18.18	74.85	5
Deloitte LLP	50.00	21.58	71.58	6

## APPENDIX 2

### Clyde Metro Position Statement – June 2024

#### Background

Clyde Metro was a key recommendation from Transport Scotland's national Strategic Transport Projects Review 2 (STPR2) published in December 2022 and is also included in the statutory National Planning Framework 4 (NPF4) published in February 2023. It forms a key part of the new statutory Regional Transport Strategy approved by Scottish Ministers in July 2023 along with the Glasgow Transport Strategy and other relevant local strategies as well. This strategic alignment is important in giving the Clyde Metro a strong justification to build on.

STPR2 stated that; *"The STPR2 recommends that Transport Scotland continues to work with Glasgow City Council, Strathclyde Partnership for Transport and other regional partners in the development of Clyde Metro including the business case, design and governance. This would address the gap in public transport provision in the Region, allowing more effective rail operations, creating capacity for longer-distance high speed rail connections and providing connectivity between areas of deprivation and education, employment and leisure opportunities. Priority would be given to those solutions that can connect unserved and underserved areas. By integrating with the Region's current bus and heavy rail networks, as well as links with active travel, it would provide much improved connectivity between the city and the surrounding communities, and between the communities themselves. This would tackle deprivation issues in the Region and encourage a switch from private car use to public transport and other more sustainable travel options."*

#### Programme Partners

In line with the STPR2 recommendations the project partners responsible for taking forward the Clyde Metro are Glasgow City Council (GCC) on behalf of Glasgow City Region (GCR), Strathclyde Partnership for Transport (SPT) and Transport Scotland (TS). In November 2023, it was announced that SPT would act as the lead partner for the development of the Case for Investment (CFI) for the Clyde Metro, with TS taking a project assurance role.

#### Case for Investment

The CFI will develop the programme level business case and is an essential first step towards setting out the programme of projects which will make up the Clyde Metro over years to come. It will be prepared over circa 2 years between March 2024 and early 2026 and includes the following work packages:

- CFI Stage 1a – Case for Change & Initial Option Development
- CFI Stage 1b – Client Advisory Services
- Clyde Metro Framework
- CFI Stage 2 – Programme Business Case

The CFI process will be informed by a range of workstreams including a STAG<sup>2</sup> based appraisal, business case development, technical assessments, audit, assurance, engagement and consultation with the public and key stakeholders as well as statutory impact assessments.

#### What is Clyde Metro?

As part of the STPR2 proposals, Transport Scotland published an indicative plan for a potential Clyde Metro network. It identified a potential network map predominantly based around:

- Conversion of parts of the Heavy Rail network to Metro Rail
- Extensions to those converted Metro Rail routes to serve new destinations

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<sup>2</sup> Scottish Transport Appraisal Guidance



- Creation of new Light Metro lines

The STPR2 network map was developed to enable more detailed analysis to be undertaken and, whilst it represents an indicative potential Clyde Metro network, there are a number of potential network options which will be explored through the CFI process.

Whilst still in the early stages of development, the high-level scope of Clyde Metro can initially be defined as:

- ✓ Mass public transport system which could include a variety of modes.
- ✓ Long-term programme likely to span decades.
- ✓ Combination of infrastructure/services and complementary measures (e.g. integrated ticketing).
- ✓ Transformational in nature and more than just a transport project by delivering a wide spectrum of complementary benefits to society.
- ✓ Regional in scale, extent and impact across the Glasgow City Region.
- ✓ Multi-disciplinary.

However, it is worth noting that there are a number of things that Clyde Metro is not including:

- × The STPR2 network map which is purely indicative.
- × A 'tram project' as it encompasses a wide variety of modes.
- × An individual route/standalone transport infrastructure project as it constitutes a long-term programme.
- × Being considered in isolation – it needs to be considered alongside the transformational impacts it can deliver.

### Transformation

Clyde Metro offers potential for a step-change in transforming the life chances of communities stymied by the inequality challenges caused by unaffordable, unreliable and poorly connected local public transport. It will target improving connectivity whilst contributing to the City Region's ambitions to improve the health and wellbeing of its communities by helping to deliver an inclusive, net zero and climate resilient economy. Equally, the programme will capture the place-making, environmental, sustainable and economic benefits while also facilitating greater social inclusion, health improvements and equality by delivering truly integrated transport infrastructure, services and supporting measures.

### Current Status

Work on the CFI Stage 1 workstreams - 1a: Case for Change and Initial Option Development and 1b: Client Advisory Services) has begun and is progressing well with both workstreams due to complete on time in July and September respectively. Scoping of work required for CFI Stage 2 Programme Business Case is well underway and remains on target to commission required consultancy support in from early October onwards. The Clyde Metro Professional and Technical Services Framework which will be used to commission CFI Stage 2 work is being presented to SPT's Partnership Board for approval on 28 June 2024. Overall, the CFI remains on track and on budget to complete by early 2026.

In terms of progress in supporting work, a working group has been established within the project team to ensure the findings and recommendations of the Edinburgh Trams Inquiry are embedded within the Clyde Metro project and are taken into account throughout future development of the project. Scoping to define a clear and robust project assurance process is also currently underway with input from each partner, and CFI Stage 1b Client Advisory Services includes support to develop an assurance strategy and framework based on best practice from similar projects elsewhere.

A GCR councils Senior Officer Group (SOG) has also been established, to ensure consistent engagement with councils as the project develops. This group is complementary to the already established Metro Strategic Advisory Group (MSAG) which includes wider stakeholder representation from across the region. It is important that support for Metro is built as the project mobilises and, to that end, a series of engagement events with key stakeholders are being held, facilitated by major transport consultancies.

Co-location of the project team has been facilitated in SPT's head office at 131 St Vincent Street where 'Hot Desks' will be available for use by each project partner. Development of a Team Charter to support and facilitate coordinated joint working throughout the project is also underway.

A working group has been established between the project partners to take forward the development of the Clyde Metro brand. A key early deliverable has been the establishment of a dedicated microsite which is now live at [www.spt.co.uk/clydemetro](http://www.spt.co.uk/clydemetro). All relevant content will be housed on the site and continue to be populated as and when required, and interested parties will be directed to the site as the primary source of official information on the Metro project.

Given the scale and scope of Clyde Metro, wider workstreams being undertaken by the project partners and other stakeholders continue to be monitored to ensure any opportunities for integration and alignment are identified. Current examples of these include the Buchanan Bus Station Masterplan development process, West Street Subway Station Integration Technical Feasibility study, and the Strathclyde Regional Bus Strategy currently being undertaken by SPT.

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