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**Integrated and Smart Travel (IST) Programme**

**Instructions to join IST Market Engagement**

1. **Purpose of this document**

The purpose of this document is as follows:

1. Provide potential suppliers with an overview of IST’s approach to market engagement
2. Provide joining instructions for IST’s all-market conference call and supplier face-to-face meetings in June 2017

On 12th June 2017, IST published a Prior Information Notice (PIN), ref: 20170612-005493, setting out its intention to conduct market engagement in support of its upcoming procurement(s) for smart ticketing technology.

This document includes:

* an introduction to the IST Programme
* an overview of the approach to market engagement
* approach to transparency and fairness
* instructions to join market engagement conference call and face-to-face meetings
* key contact information

Should you have any queries relating to IST Market Engagement activity, please system…..

1. **Approach to market engagement**

Transport for the North (TfN) will be the UK’s first sub-national transport body. TfN is working in partnership with Transport Operators, Local Transport Authorities and the Department for Transport (DfT) to deliver the Integrated and Smart Travel (IST) Programme. The programme will deliver a smart and cEMV ticketing solution that makes it simple and easy to travel across the North of England with scope for nationwide services (excl. London) to encouraging customers to travel by public transport.

Central to achieving this proposition is an Account Based Back Office for Travel (ABBOT) that will allow passengers to make journeys on multiple modes of transport and across multiple operators and trust they will be charged the best price for their journey. ABBOT is the shared back office that will collect the data on all trips (across multiple operators and modes initially in the TfN area but possibly ultimately incorporating national scope exc. London), reconstruct the passenger journeys, charge the best price for the completed journeys, and disburse revenue appropriately to Transport Operators/Local Transport Authorities.

Soft market engagement will be used to inform the final procurement and lotting approach for ABBOT, Merchant Services, Qualified Security Assessor, and other associated services. Depending on the outcome of this engagement the programme will run one or more procurements using OJEU procedures or public sector framework agreements.

TfN’s IST programme is conducting a series of soft market engagement events for all potential suppliers. The objectives of these events are:

* Provide early visibility of the programme’s goals and vision to all interested potential suppliers
* Gain feedback from the market about the IST programme’s proposed approach to procurement and implementation of smart ticketing.
* Understand the market appetite to deliver smart ticketing in the TfN zone.
* Increase programme understanding of market capabilities and services.
* Test key elements of the lotting/sourcing approach to support the evolution of the Sourcing Strategy.

**Approach to market engagement**

The programme will use two principal methods to complete market engagement: an all market-engagement broadcast call and supplier face-to-face meetings.

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| All-market engagement call | Supplier face-to-face meetings |
| All suppliers that have registered interest will be invited to join the all-market engagement call, which will be a webcast.  All-market engagement call: will take place on Monday 19th June 2017 at 2:00pm.  During the conference call, TfN will provide an overview of the IST Programme and its current proposed sourcing approach.  All clarification questions asked during the call will be made available to all suppliers after the IST soft market engagement events.  Suppliers will be asked to respond to an engagement questionnaire to capture individual feedback. | Interested suppliers may be invited to attend face-to-face engagement meetings to provide further feedback to the programme.  There will be 5-7 available appointments per category based on the Europa SME definition (including micro, small, medium-sized and large companies). For fairness, suppliers will be selected on a first come first serve basis.  The information shared by the IST Programme during these meetings will be the same information shared in the all-market engagement call.  The meetings will follow a pre-defined format for all organisations, and the same questions will be asked of all organisations, meetings will be minuted. |

Please note that IST Soft Market Engagement does not represent the commencement of any formal procurement process and does not form part of the evaluation process. At this stage the programme is seeking advice and insight from the market to inform future procurement activity. Please note that positions stated during market engagement, are based upon current assumptions and may change as IST’s Sourcing Strategy developed further.

TfN is not liable for any costs, expenses or fees incurred by any party participating in the market engagement activity including (but not limited to) the preparation of expressions of interest responses and subsequent submissions and attendance at the market engagement events.

**4. Instructions to join IST Market Engagement Conference Call**

The conference call will be held on the following date:

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| **Event** | **Date** | **Time** |
| All-market call | 19/06/17 | 14:00 – 16:00 |

The conference call will be broadcasted using Cisco WebEx meeting. To attend the conference, instructions are set below:

* Click the following Meeting URL: **- Details of the URL to follow prior to the 19th June**
* Click **Connect -** Another web browser opens and displays the Cisco WebEx meeting room. When you join a Cisco WebEx meeting, three browser windows open: Connect me window, Meeting in progress window (with a warning not to close), and Cisco WebEx meeting room.
* Establish and audio connection to the meeting
  + If your browser displays the Join Teleconference window > enter your area code and your phone number in the Number field.
  + If the Join Teleconference window does not automatically display, complete the following steps: click **Communicate** > **Join Teleconference** > enter your area code and telephone number in the Number field.
* Click **Ok**
* Answer the telephone when it rings and follow the prompts to record your name.

Through your web browser:

1. Open a web browser and enter the following URL: **- Details of the URL to follow prior to the 19th June**
2. Enter the meeting ID:
3. Click **Attend Meeting**
4. If prompted, enter the meeting password:
5. Click **Submit**
6. Click **Connect** – another web browser opens and displays the Cisco WebEx meeting room. When you join a Cisco WebEx meeting, three browser windows open: Connect me window, Meeting in progress window (with a warning not to close), and Cisco WebEx meeting room
7. Establish and audio connection to the meeting
   * If your browser displays the Join Teleconference window > enter your area code and your phone number in the Number field.
   * If the Join Teleconference window does not automatically display, complete the following steps: click **Communicate** > **Join Teleconference** > enter your area code and telephone number in the Number field.
8. Click **Ok**
9. Answer the telephone when it rings and follow the prompts to record your name.

**5. Instructions to join IST Market Engagement Face-to-face Meetings**

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| **Event** | **Dates** |
| Supplier Face-to-face meetings | Between 21st and 30th June 2017 |

Supplier face-to-face meetings: All face-to-face meetings with potential suppliers will follow a pre-defined format for each organisation and the same questions will be asked of all organisations. TfN will be seeking responses to specific questions and the meetings, if held, will be used to enable organisations to present relevant ideas for the future service.

Please note that face-to-face meetings will be minuted but not circulated. Minutes are in scope of the Freedom of Information Act (excluding commercial) and will be released in the event of procurement challenge.

Due to room capacity, attendance to the face-to-face meetings will be limited to a maximum of two representative per organisation.

Instructions to schedule face-to-face meetings are set below:

1. Potential suppliers can schedule a **1 hour meeting** from the available timeslots:

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| **Monday (19/06/17)** | **Tuesday**  **(20/06/17)** | **Wednesday**  **(21/06/17)** | **Thursday**  **(22/06/17)** | **Friday**  **(23/06/17)** |
|  |  | 9:00am | 9:00am | 9:00am |
|  |  |  |  |  |
|  |  | 11:00am | 11:00am | 11:00am |
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|  |  |  |  |  |
|  |  | 2:00pm |  | 2:00pm |
|  |  |  |  |  |
|  |  | 4:00pm |  | 4:00pm |
| **Monday (26/06/17)** | **Tuesday**  **(27/06/17)** | **Wednesday**  **(28/06/17)** | **Thursday**  **(29/06/17)** | **Friday**  **(30/06/17)** |
| 9:00am | 9:00am | 9:00am |  | 9:00am |
|  |  |  |  |  |
| 11:00am | 11:00am | 11:00am |  | 11:00am |
|  |  |  |  |  |
|  |  |  |  |  |
| 2:00pm | 2:00pm | 2:00pm |  |  |
|  |  |  |  |  |
| 4:00pm | 4:00pm | 4:00pm |  |  |

1. To schedule a face-to-face meeting please use the messaging functionality within ‘The Chest’ [www.thechest.nwce.gov.uk](http://www.thechest.nwce.gov.uk) to advise us of your preference for the date and time for attendance. TfN will advise whether your preferred slot will be available and if not, it will provide an accommodating slot available.