

E-mail: [Chris.Kenneford@Oxfordshire.gov.uk](mailto:Chris.Kenneford@Oxfordshire.gov.uk)

15<sup>th</sup> January 2020

Dear Potential Supplier,

**Request for Quotation for the Appraisal of Spatial Options and the provision of advice about the Transport Evidence Base for the Oxfordshire Plan 2050**

Quotations are invited in respect of the above requirement. The successful Supplier will be responsible for fulfilling this requirement and liaising closely with the Contract Manager.

The detailed requirements are defined in the Statement of Requirements section of this document. The Statement of Requirements should be read in conjunction with Schedule One: Instructions and Guidance for Suppliers.

Suppliers responding to this opportunity should carefully consider how their response can align with the following corporate priorities:

- Vibrant, sustainable economy
- Meeting housing needs
- Strong, active communities
- Cleaner, greener Oxfordshire
- Efficient, effective Council

As a minimum, we expect potential Suppliers to respond with market leading pricing structures which reflect the scope of the commercial opportunities we offer. Additionally, wherever there is an opportunity for a sustainable solution, suppliers are strongly encouraged to offer such solutions where permitted within the scope of the individual contract requirements.

Yours faithfully,



Chris Kenneford

On behalf of the Oxfordshire Plan 2050

# Statement of Requirements

## Introduction

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1. The City and District Councils of Oxfordshire<sup>1</sup> have collectively agreed to produce a Joint Statutory Spatial Plan (known as 'the Oxfordshire Plan 2050'), which will build upon existing joint working and partnership arrangements through the Oxfordshire Housing and Growth Deal and provide a transformational strategic planning policy framework for Oxfordshire to 2050. An initial consultation stage for the new plan was completed in Spring 2019<sup>2</sup>.
2. On behalf of the above authorities, Oxford City Council now wishes to commission some specialist transport advice to supplement other sources of transport evidence (refer later in this brief) and inform the preparation of the Plan. This commission will be in two parts.
3. Part One will be a high level appraisal of a set of Spatial Development Options for Oxfordshire against key transport, movement and connectivity criteria and associated indicators.
4. Part Two will provide advice (drawing on best practice together with the experience and expertise of the appointed consultant) on the scope, form and content of the transport evidence that would be appropriate to support the Oxfordshire Plan at Examination, having regard to the substantive differences between this Plan and a typical Local Plan.

## Background

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### The Oxfordshire Plan

5. The Oxfordshire Plan will cover the administrative area of Oxfordshire. The City and District Councils have committed to this process as they see the benefits of collectively agreeing the overall level of growth, the broad spatial distribution and location of that growth and aspirations for place-making at a strategic level. All five Councils will be formally asked to agree each decision-making stage of the process and the final adoption stage.
6. The Oxfordshire Housing and Growth Deal<sup>3</sup> is a recognition by government of the track record of successful joint working in Oxfordshire and its potential to contribute towards the successful sustainable growth of the country. The production of the joint Plan is one of the commitments of the Housing and Growth Deal.
7. The Local Authorities are already planning for 100,000 new homes in Oxfordshire between 2011 and 2031, as established by the Oxfordshire Strategic Housing Market Assessment (SHMA 2014) and subsequently embodied in the Growth Deal. Existing and emerging Local Plans in the county collectively make provision for these homes and allocate specific sites for new development as necessary<sup>4</sup>, with Neighbourhood Plans providing further detail in those parts of the county for which they have been or are being produced.

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<sup>1</sup> Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council, West Oxfordshire District Council

<sup>2</sup> Refer para 10 below

<sup>3</sup> Oxfordshire Housing and Growth Deal (Nov 2017)

<sup>4</sup> The status of District Local Plans in Oxfordshire (as of mid-December 2019) was as follows: **Cherwell**: Consultation on Proposed Main Modifications to the Partial Review of the Cherwell Local Plan (Oxford's Unmet Housing Needs) due to close on 20<sup>th</sup> December 2019; **Oxford City**: Submitted Plan at Examination in December 2019; **South Oxfordshire**: MHCLG Temporary Direction issued on the emerging Plan. Letter subsequently received from MHCLG in January 2020 setting out various options. SODC's response invited by 31 January ; **Vale of the White Horse**: Local Plan Part 2 adopted October 2019. A timetable for a new Local Plan is currently being prepared; **West Oxfordshire**: Local Plan adopted September 2018. Work is currently progressing on a number of related work areas, including: Oxfordshire Cotswolds Garden Village (Draft AAP to be submitted early 2020); West Eynsham, East Chipping Norton and East Witney (Draft SPDs expected in the coming months); & North Witney (Issues Paper consultation to take place in due course). For further details, refer District Council websites.

8. The Oxfordshire Plan 2050 will build on the foundations set by the suite of existing and emerging Local Plans<sup>5</sup> in the first part of the plan period, taking into account all of their existing commitments and proposals, together with other permitted developments<sup>6</sup>, and address key strategic planning issues over its thirty-year lifespan.
9. The Oxfordshire Plan 2050 will thus:
  - Set out an overarching spatial strategy for development in Oxfordshire to 2050;
  - Identify the number of new market and affordable homes that will be needed to 2050;
  - Identify broad locations for further strategic-scale development based upon an understanding and appreciation of the environmental quality and natural capital of Oxfordshire; the implications of global climate change imperatives; the needs of the economy; and the housing needs of the county;
  - Identify the strategic transport and other infrastructure that will be needed to help facilitate, manage and support sustainable growth in the county
10. The Plan underwent its first public consultation stage<sup>7</sup> during February and March 2019. The consultation document included a set of thematic spatial options to stimulate debate on possible locations for growth<sup>8</sup>. In March and April, a 'Call for Ideas' consultation also took place, which generated many suggestions for additional strategic development locations in the county. The next formal consultation stage (Regulation 18, Part 2) will include a set of actual (not thematic) spatial options for housing and employment growth in Oxfordshire.
11. To assist with the plan making process and to help inform the next stage of consultation, the Local Authorities now wish to commission an appraisal of draft spatial options against a set of critical transport, movement and connectivity criteria. This will be high-level, commensurate with the strategic nature of the Plan and this stage of the Plan making process.

### **Other relevant strategies and initiatives in Oxfordshire**

12. As indicated above, the Oxfordshire Plan 2050 will build on existing and emerging Local Plans that cover the five local authority areas within Oxfordshire<sup>9</sup>, together with their supporting evidence<sup>10</sup>. However, work is also being undertaken by other local and national partners around connectivity and movement in the county, including strategic road and rail infrastructure and within the wider Oxford-Milton Keynes-Cambridge corridor. Key partners in delivering new/improved transport infrastructure for Oxfordshire will be Oxfordshire County Council, Highways England, Network Rail, the England's Economic Heartland strategic alliance<sup>11</sup> (see also para 19), the bus companies and the Oxfordshire Local Economic Partnership (OxLEP). There is accordingly a wealth of background material documenting the work of local and national partners, including specifically within Oxfordshire. It is anticipated that this material will provide much of the information required by the chosen consultant to carry out the tasks outlined in this commission and will be shared as such. Some of the key projects and initiatives which these partners are involved in are identified below.

#### *The Oxfordshire Local Transport Plan*

13. As the Local Highway Authority for Oxfordshire, the County Council has a duty to prepare the Local Transport Plan<sup>12</sup> (LTP). The current LTP was adopted in 2016 and sets out the County

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<sup>5</sup> Refer Footnote 4

<sup>6</sup> Other extant planning permissions, decisions allowed on appeal etc.

<sup>7</sup> [Introducing the Oxfordshire Plan](#) (Regulation 18 Part 1)

<sup>8</sup> For further details, refer the Oxfordshire Plan 2050 website.

<sup>9</sup> Refer Footnote 4

<sup>10</sup> Which includes their existing Infrastructure Delivery Plans and Air Quality Strategies, together with the Oxfordshire Infrastructure Strategy (OxIS), and the Oxfordshire Local Transport Plan (LTP).

<sup>11</sup> The Sub-national Transport Body for this part of England

<sup>12</sup> [Connecting Oxfordshire](#) (2016) Oxfordshire County Council.

Council's policies and strategies for developing the transport system in Oxfordshire to 2031. This was developed with input from Oxfordshire's District and City councils, local businesses, MPs and stakeholder groups and through extensive public consultation.

14. The LTP also has regard to the ambitions of OxLEP in its Strategic Economic Plan (SEP 2016) for Oxfordshire and the aspirations of the England's Economic Heartland (EEH) strategic alliance – see below. Hence, it identifies and supports a wide range of transport schemes across Oxfordshire including the critically important “Knowledge Spine” that runs through the county from Didcot and the Science Parks of the south (Science Vale) through Oxford to Bicester and beyond, with some important connections off this spine to adjoining areas where key developments are planned. Home to some of the greatest concentrations of knowledge-based employment in the country, the Spine builds on the large research and business parks which are driven by the universities and innovation-led growth, supported by the public sector and infrastructure investment. This Spine has more recently been embraced as a fundamental component of the Oxford-Milton Keynes-Cambridge Arc initiative promoted by the National Infrastructure Commission<sup>13</sup>.
15. The County Council is now updating the Local Transport Plan (to be re-titled The Local Transport & Connectivity Plan or LTCP in short). The proposals and outcomes in the new document will both inform and be dependent on the emerging and approved Local Plans and the spatial options identified in the Oxfordshire Plan 2050, as well as the wider transport, connectivity and movement ambitions for the Oxford–Milton Keynes-Cambridge Arc and England's Economic Heartland (see para 19 below), which will include the opening of the key East-West Rail line and realising the opportunities which this presents in terms of new development. This will further need to consider the growth that is taking place within adjacent local authority areas and the future planned infrastructure solutions which will impact upon the local and strategic highway network within Oxfordshire.
16. The new LTCP will also have close regard to initiatives currently being developed by Highways England for the strategic highway network within and adjacent to Oxfordshire, including (but not limited to) the strategic A34 corridor, as well as the implications for that corridor of decisions yet to be taken about the route of the Oxford-Cambridge Expressway scheme<sup>14</sup>. Likewise, the LEP's new Local Industrial Strategy (refer para 18 below) will be a further consideration for the preparation of the new LTCP.
17. The County Council's current timetable for the new LTCP assumes a Stage 1 consultation exercise in January 2020, to be followed by a Stage 2 consultation in the Spring and adoption at the end of that year. The expectation is that the first part of the process will include provision for a workshop to agree a joint vision and wider narrative that will inform work on the LTCP, the Oxfordshire Plan and other planned key consultations, such as the Expressway route. The outcomes of that workshop should thus also be available to help inform the appraisal of spatial options.

#### *OxLEP Local Industrial Strategy (LIS 2019)*

18. The LIS<sup>15</sup> sets out an ambitious programme for economic growth across Oxfordshire. As part of this it recognises the challenges around infrastructure and seeks to improve connectivity through a range of initiatives, including the Digital Investment Plan and working with local and

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<sup>13</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/799993/OxCam\\_Arc\\_Ambition.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/799993/OxCam_Arc_Ambition.pdf)

<sup>14</sup> In an announcement on 20 November 2019, the Government indicated that it would conduct a “priority review” of the Expressway scheme if it returned to power after the General Election. That review would include looking at alternative plans to the Oxford to Milton Keynes and M1 section of the scheme.

<sup>15</sup> <https://www.oxfordshirelep.com/lis>

national partners to respond to strategic infrastructure requirements, including accessing funding (e.g. HIF).

#### *England's Economic Heartland Transport Strategy*

19. In July 2019, the England's Economic Heartland (EEH) strategic alliance published a new Outline Transport Strategy<sup>16</sup> for the Heartland area, much of which is co-terminus with the Oxford-Milton-Keynes-Cambridge Arc. The primary purpose of the new document was to start a wider conversation with stakeholders across the region about how the Heartland's transport system needs to develop over the next thirty years. As such, it set out the nature of the challenges and opportunities faced collectively by the region in shaping a transport system for the longer term. In doing so, it asked what needs to be done differently if connectivity is to be improved in ways that enable individuals, communities and businesses to realise their potential, whilst improving the quality of life and creating a 'net gain' for the environment<sup>17</sup>.

#### *Innovation & Digitalisation in "Smart" Oxfordshire*

20. With its global academic offer and the presence of many leading-edge research and development organisations and advanced technology businesses, Oxfordshire is at the very forefront of developing innovative solutions to some of the complex transport challenges which face the developed world, many of which employ state-of-the-art technologies pioneered in the local area.
21. The Oxfordshire LEP is developing a Living Lab Framework (which is still at draft stage) to help inject innovative ideas into planning policy and strategic site development. Oxfordshire is a testbed for innovation to solve the UK's Grand Challenges<sup>18</sup> and accelerate the adoption and accessibility of innovative solutions across the ecosystem. The foundations of this approach in terms of transport were laid by LTP4 and its commitment to the Science Transit programme. Innovative solutions will include pioneering places to future proof communities by preparing for technological and environmental change including the advent of connected and autonomous travel, green fuel solutions, integrated energy systems, healthier living, smart homes and sustainable living. This is a model that will continuously develop in Oxfordshire working with others throughout the UK. The rolling-out of these initiatives may be expected to radically transform movement and communications in Oxfordshire within the next 30 years. The new Oxfordshire Plan, with its long-term time horizon of 2050, will provide an appropriate platform to facilitate and capture the potential of these technological advances in the planning of new development.
22. A key enabler of innovation in Oxfordshire, as elsewhere, will be continuing advances in digital connectivity – advances which may also be expected to have a positive effect on reducing the need to travel. Over 96% of premises in the county currently have access to superfast broadband and considerable efforts are now being made to accelerate the roll-out of full fibre connectivity. In line with the requirements of the National Planning Policy Framework, the Oxfordshire Plan will look to support the expansion of all electronic communications networks, including next generation mobile technology (such as 5G) and full fibre broadband connections.

#### *Healthy Place-Shaping in Oxfordshire*

23. The concept of healthy place-shaping rests on the premise that significant population level benefits can be derived if multiple determinants of health such as housing, infrastructure (including green infrastructure), environmental services and other developments are specifically planned and coordinated with health and wellbeing in mind. Transport options,

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<sup>16</sup> <http://www.englandseconomicheartland.com/Pages/outline-transport-strategy.aspx>

<sup>17</sup> For Oxfordshire County Council's response to the EEH Outline Transport strategy, refer Item 10 of the Cabinet Report in <https://mycouncil.oxfordshire.gov.uk/ieListDocuments.aspx?CId=115&MId=5600>

<sup>18</sup> <https://www.gov.uk/government/publications/industrial-strategy-the-grand-challenges/industrial-strategy-the-grand-challenges>



digital connectivity and the choice of which transport modes are prioritized, are key determinants of health and wellbeing. These 'wider determinants' significantly influence physical activity/inactivity levels; the risk of loneliness and social isolation; levels of exposure to traffic generated noise and air pollution; the number of people killed and seriously injured whilst using the highway network; and the ability of patients, staff and emergency services to access health and care infrastructure and services. Socio-economically disadvantaged communities are more likely to be negatively affected by one or a combination of these issues. A key public health priority is thus to reduce health inequalities that these issues generally compound.

24. With the above in mind, the preparation of the Oxfordshire Plan 2050 will embrace collaborative working between the County, District and City Councils and other relevant organisations to encourage modes, transport and connectivity options and spatial layouts that promote health and wellbeing. This will build on work already underway, which is being overseen by an Active and Healthy Travel Steering Group and associated Partnership Forum.

### **The Evidence Base for the Oxfordshire Plan & the requirements of this Commission**

25. The commitment of the partners to produce the Oxfordshire Plan provides a rare opportunity for the collective long-term planning of the county. However, whilst it will be subject to the same processes and statutory requirements as those governing Local Plans, the Oxfordshire Plan will be a very different product. It will look across local authority boundaries; it will be high-level and strategic in nature; and it will adopt a much longer time horizon than is generally the case for Local Plans. However, this also presents a number of challenges including providing the right kind of evidence to support a strategic plan covering a thirty-year period. Although the type, form and level of confidence in that evidence may vary throughout the plan period, the Examination-in-Public will still require evidence relevant to the whole timeframe. The partners are therefore aware that reliance solely on the forms of evidence that typically support Local Plans is unlikely to be sufficient. This commission is accordingly intended to provide both a bespoke transport appraisal of spatial options for the Plan and advice on meeting the challenges facing this very different project, in terms of the appropriate transport evidence base. It should also be noted in this context that the Oxfordshire Plan will be looking to articulate a holistic, integrated and very forward-looking approach to matters of movement, connectivity and transport in the county over the next thirty years, a period in which travel options and behaviours may change considerably and look quite different to those of today<sup>19</sup>. The outputs of this commission should accordingly be framed in that context.

## **Requirements**

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### ***Part 1: Options Appraisal***

26. The first (and main) part of the commission will be a high-level appraisal of the transport, movement and connectivity implications of a set of spatial options for future strategic-scale development in the county. This work will support the planned second stage Regulation 18 consultation on the Oxfordshire Plan 2050 and will be published as part of the consultation material.
27. The spatial options will be provided to the appointed consultants by the commissioning authorities during the study period. It is suggested that a "Red/Amber/Green" type of appraisal be carried out for each spatial option, with appraisal criteria and indicators embracing a range of social, economic and environmental concerns appropriate to the global, national and Oxfordshire contexts. However, alternatives to a "Red/Amber/Green" approach may be outlined in tendering proposals as consultancy teams wish. Whichever type of approach is

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<sup>19</sup> See also: <https://oxfordshireplan.org/wp-content/uploads/2019/02/Topic-Paper-8-Improving-Connectivity-and-Movement-Feb-2019.pdf>

taken, the proposed methodology should be clearly set out in the tender proposal, together with the appraisal criteria/indicators that are envisaged. It should be noted that the latter will need to be agreed at a workshop with the commissioning authorities and other key local partners at the start of the project.

28. The appraisal of options will further need to consider the individual and cumulative impacts of options on movement networks within and through Oxfordshire<sup>20</sup>, in order to help inform the selection of options to be taken forward in the Plan and the formulation of appropriate policies and proposals. Appraisals should also take account of changes in travel behaviour, such as the development of new travel modes, which are considered likely to emerge over the lifetime of the Plan. It is recognised, however, that this high level appraisal task will necessarily form only one element of the work that will be ultimately be required to select between options and identify upgrades or improvements to support policies in the Oxfordshire Plan and subsequent Local Plans
29. The authorities are keen that opportunities to further develop active and healthy travel, first/last mile connections and walking and cycling routes are prioritised, particularly where these link (or could link) to public transport connections and promote sustainable transport choices. Appraisals should take into account, but not be constrained in ambition by, the adopted Rail, Bus and 'Science Transit' strategies set out in the current Oxfordshire Local Transport Plan. They should further be informed by any changes to the existing strategic approach to public transport, specifically the emerging outcomes of the Oxfordshire Rail Corridor Study, the first stage of which (the Stage 1 Strategic Study) is due to report in January 2020. There will need to be engagement with key public transport infrastructure providers including Oxfordshire County Council, the main bus operators<sup>21</sup> and rail infrastructure providers and operators<sup>22</sup> in relation to opportunities, deliverability/viability and limitations of the spatial options with regards to public transport elements. Consideration should also be given to the opportunities that each spatial scenario presents with respect to public transport priority measures and other forms of public transport provision, such as Rapid Transit and Park & Ride, or other opportunities for sustainable travel or behaviour change that may emerge during the Plan period. As referenced earlier, the authorities are keen to facilitate innovation and that the Plan is not constrained to current technologies or travel behaviours, particularly where there are opportunities to tackle the challenges that will be faced over the Plan period, such as climate change and an ageing population. Opportunities that could be explored include the sharing economy, on-demand transportation, zero-emission and alternative fuel sources.
30. A 'check and challenge' workshop should be allowed for in the work programme, to present draft findings from the appraisals and discuss with representatives from the client side (see para 37 below).
31. A summary of key datasets and assumptions used to complete the appraisals should be included<sup>23</sup>, with cross-references to the evidence base so that the sources underpinning each criterion are clear. There should also be a review of the key characteristics and usage of the local and strategic highway, rail and bus networks. It is anticipated that appraising of scenarios for the latter part of the Plan period closer to 2050 may involve broader assumptions and less detail than for scenarios in the earlier part of the Plan.
32. Finally, Appendix A to this brief itemises a range of contextual matters and considerations (some of which are already referred to in the foregoing) to which reference should be made as appropriate during the course of the options appraisals.

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<sup>20</sup> Including the degree of fit with plans and proposals for the Oxford-Cambridge Arc and the EEH area

<sup>21</sup> Oxford Bus Company (which includes Thames Travel and Carousel Buses); Stagecoach Bus Oxfordshire

<sup>22</sup> Network Rail; GWR; Chiltern Railways; Cross Country

<sup>23</sup> It will be important to identify data which is District-specific, and which is of a countywide nature, such that it can also be used as evidence at the local level and for LTP purposes, as required.

## **Part 2: Transport Evidence Base**

33. The second part of the commission will be to put forward recommendations about an appropriate and proportionate transport evidence base to support the later (Regulation 19) stage of the Oxfordshire Plan and help to satisfy soundness requirements at its Examination. Because of the strategic nature of the Plan and its very long time horizon, it is anticipated that reliance on the conventional type of transport modelling used to support Local Plans will not be appropriate, especially in the later part of the plan period. In this context, the fact that Oxfordshire County Council is currently developing a new model - The Oxfordshire Mobility Model (OMM) - with the intention that it should be capable of modelling a wider range of transport choices is very welcome and should prove invaluable for the earlier part of the plan period but is likely to be need to be supplemented by further and different evidence for the latter part. Advice is accordingly sought as to what type, level and form of transport evidence would be appropriate, having regard to key statutory/legal requirements<sup>24</sup>. It will be important that the Inspectors carrying out the Examination of the Oxfordshire Plan can be satisfied that the level of evidence provided at examination is appropriate and sound. This advice will be used to commission further work (as a separate project) to develop the strategy and to help identify what transport interventions are likely to be required to support and accommodate sustainable strategic growth to 2050.

### **Timeline**

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34. The appointed contractor will be responsible for producing their own detailed programme for carrying out the work and for completion of the necessary stages by key target dates. This programme should include a detailed project plan describing:
- a) the proposed methodology
  - b) specific tasks/work streams
  - c) responsibilities and personnel<sup>25</sup>
  - d) estimated time / resources to complete each specific work stream
35. Details of three organisations that can be contacted for formal references should also be included in tender proposals.
36. Within the tender, provision should be made for an inception meeting; fortnightly written progress reports; a Check & Challenge workshop on Options Appraisals; and two full-day review meetings of the draft reports with the Client Group.

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<sup>24</sup> For example, the NPPF; the PPG "Transport evidence bases in plan making"; and HRA requirements

<sup>25</sup> Summary CVs of the staff who will work on the project should be included in tender submissions, with details of their qualifications, experience and examples of their involvement in similar projects, their roles and the number of days that each will contribute, including their hourly rates, ½ day rates and full day rates



37. Set out below are the key headline milestones which suppliers will need to factor in to their proposals. Further, intermediate milestones will be agreed with the contractor after appointment:

- Deadline for the return of quotations: **Wednesday 5<sup>th</sup> February 2020 (4pm)**
- Interviewing shortlisted tenderers: **w/c 24<sup>th</sup> February 2020**
- Appointment of contractor: **w/c 2<sup>nd</sup> March 2020**
- Inception meeting: **w/c 16<sup>th</sup> March 2020**
- 1<sup>st</sup> Draft Part 1 & Part 2 Reports for review: **w/c 27<sup>th</sup> April 2020**
- Submission of Revised Draft Part 1 & Part 2 Reports: **w/c 25<sup>th</sup> May 2020**
- Submission of Final Report: **w/c 15<sup>th</sup> June 2020**

### Core Outputs

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38. The following should be provided during the course of the commission:

- Detailed Meeting and Workshop minutes/notes including clear actions and deadlines
- Freestanding Part 1 & 2 reports, in MS Word and PDF format;
- Any new GIS shapefiles with attributes, produced as part of the commission (.shp format);
- Datasets/sources used in the options appraisals (refer also para 31 above)

39. The Local Authorities shall hold copyright of all presented material. The Local Authorities shall be able to distribute the material in part or whole to any organisation or individual it determines, at no extra cost, and any proceeds of sales will belong to the Local Authorities.

### Working arrangements

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40. Representatives of the six Oxfordshire Councils will together comprise the Project Steering Group. The appointed consultants will be expected to work closely with the Project Steering Group and to provide a single point of contact. Day to day liaison will be through the Client Project Manager, Mr Chris Kenneford [chris.kenneford@oxfordshire.gov.uk](mailto:chris.kenneford@oxfordshire.gov.uk). Please note however that **all communication during the quotation stage must be via the South East Business Portal**.

41. The consultant will keep the Client Project Manager informed at all stages of the study and should provide a regular flow of information on the progress of the project against the timetable, any issues or difficulties arising, and proposals for their resolution, including details of their effect on the timetable.

## Spatial Options Appraisals

### Contextual Matters & Considerations

- i. National planning advice and guidance, as relevant;
- ii. Relevant sub-regional transport ambitions, strategies and proposals for the Oxford–Milton Keynes–Cambridge Arc and the England’s Economic Heartland area, including the Oxford to Cambridge Expressway<sup>26</sup> and East-West Rail;
- iii. Highways England’s plans and proposals for Oxfordshire and adjacent areas, including those in respect of the M40 and the A34 corridor;
- iv. The aims and objectives of Oxfordshire’s existing LTP and its emerging Local Transport & Connectivity Plan (LTCP);
- v. The initiatives and priorities being identified in the emerging Oxfordshire Rail Corridor Study as well as adjoining local authority areas within interconnecting rail networks;
- vi. The Oxfordshire Infrastructure Strategy (OXiS)<sup>27</sup>
- vii. Any additional capacity that may be afforded by existing transport infrastructure commitments and proposals;
- viii. Progress with transport innovation schemes and projects in Oxfordshire
- ix. The contents of existing and emerging Local and Neighbourhood Plans in Oxfordshire<sup>28</sup>, their associated evidence bases and their Inspector’s reports, as relevant;
- x. The fact that all five local authorities in Oxfordshire have recently declared a Climate Emergency<sup>29</sup>;
- xi. The existing Infrastructure Delivery Plans and Air Quality Management Strategies for each of the Oxfordshire Districts;
- xii. Green Infrastructure Plans;
- xiii. The outcome and contents of Council and Planning Inspectorate decisions, Section 106 and Section 278 Agreements and planning conditions in relation to decisions on major planning applications and appeals in Oxfordshire and in neighbouring authorities that impact on strategic transport infrastructure in Oxfordshire;
- xiv. The Oxfordshire Local Enterprise Partnership’s Local Industrial Strategy (LIS) and Strategic Economic Plan (SEP); and
- xv. Other relevant aspects of the emerging Oxfordshire Plan and its supporting evidence base, particularly regarding air quality.
- xvi. Examples of best practice across the country and internationally;
- xvii. Any lessons to be learned from elsewhere (e.g. West of England Plan).

<sup>26</sup> But see Footnote 14

<sup>27</sup> A brief for a review and update of OXIS (as required by the Growth Deal) is currently being developed, which is linked to the timetable for the Oxfordshire Plan.

<sup>28</sup> Refer Footnote 4

<sup>29</sup> All councils in Oxfordshire are now signed up to carbon reduction targets through the Oxfordshire Environment Partnership and inter alia are committed to a 50 per cent reduction in carbon emissions between 2008 and 2030.

### **GDPR: Schedule of Processing, Personal Data and Data Subjects**

The Supplier shall comply with any further written instructions with respect to processing by the Council.

Any such further instructions shall be incorporated into this Schedule.

<b>Description</b>	<b>Details</b>
Subject matter of the processing	<i>The commission may involve the gathering and use of personal data in relation to the interviewing of key stakeholders and the reviewing of responses to plan consultations.</i>
Duration of the processing	<i>The final report is due to be submitted by end of January 2020.</i>
Nature and purposes of the processing	<i>The commission may include consultation with transport bodies and organisations and the reviewing of consultation responses held by the Oxfordshire Plan team.</i>
Type of Personal Data	<i>Types of personal data in this commission may include names, personal and work addresses</i>
Categories of Data Subject	<i>Data subjects may include agents, members of the public, and transport bodies</i>
Plan for return and destruction of the data once the processing is complete UNLESS requirement under union or member state law to preserve that type of data	<i>Personal contact data should not be retained beyond the commission.</i>

## **Schedule One: Instructions for Completion**

Quotations must be submitted in accordance with the following instructions and conditions. Suppliers that do not comply with these instructions or conditions may have their Quotation rejected.

The Council reserves the right to disqualify any submission which is deemed incomplete.

Please answer all the questions in English, as accurately and concisely as possible, or mark those not applicable 'N/A' and provide an explanation.

The response boxes will expand to accommodate your answers, but if necessary continue on a separate sheet where space / layout on this form is restrictive but please ensure you are within any requested word count for your response.

Please answer every question. Do not assume that the officers evaluating the quotation will know about your organisation or the work that you do, answer the questions as fully as possible within any given constraints.

The Council reserves the right not to accept the lowest or any quotation and to annul the Request for Quotation process and reject all quotations at any time prior to contract award, without thereby incurring any liability to the applicants.

In order to simplify this process, you should not provide supporting documents, for example, accounts, certificates, statements or policies unless specifically requested to do so. The Council may ask to see these documents at a later stage, so it is advisable that you ensure they are made available upon request. You may also be asked to further clarify your answers or to provide further details.

All communication with the Council must be made via the South East Business Portal.

The indicative timetable for this procurement is:

<b>Stage/activity</b>	<b>Date</b>
RFQ published	Wednesday 15 <sup>th</sup> January 2020
Deadline for receipt of clarification questions or request for additional information from Tenderers	Monday 27 <sup>th</sup> January 2020
<b>Deadline for receipt of tenders</b>	<b>Wednesday 5<sup>th</sup> February (4pm)</b>
Interviewing of shortlisted tenderers	w/c Monday 24 <sup>th</sup> February 2020
Contract award	w/c Monday 2 <sup>nd</sup> March 2020

Responses must be uploaded via the South East Business Portal.

Please note that the Council will not consider late returns.

Suppliers shall keep their quotations valid and open for acceptance by the Council until the expiry of 90 days from the date for return of quotations.

Please ensure that Appendices A, B & C (below) are completed and returned.

Tenderers shall not make any alterations, qualifications, additions or notes upon the text of the Contract Terms and Conditions except with the prior written consent of the Council. Any proposed amendments must be notified to the Council for consideration prior to Tender submission.

## **Evaluation of quotations**

The evaluation of quotations will be based upon two sets of criteria:

- Selection criteria; and
- Award criteria.

Those deemed not to meet the selection criteria requirements will not be considered further. Those quotations that pass the selection criteria will then be evaluated against the award criteria.

Suppliers should note that regardless of a quotation's overall merits, in the event that evaluating officers (acting reasonably) consider there to be a fundamental weakness which is likely to impact adversely upon the supply of the goods and/or services, then grounds will exist to exclude that quotation from further consideration.

<b>Ref:</b>	<b>Selection criteria</b>	<b>Assessment</b>
2.	Financial standing*	Pass / Fail
3.	Insurance**	Pass / Fail
4.	Modern Slavery Act 2015	Info Only

\*Financial standing takes into consideration a suppliers credit score, the estimated value of the contract, and the suppliers turnover. Any supplier who does not achieve a credit score of at least 81 and/or whose minimum yearly turnover is not at least twice the estimated value of the contract may be subjected to a more detailed assessment as to their financial standing. Any supplier who provides less than satisfactory accounts/figures or documentation which therefore give rise to concerns that cannot be satisfied regarding their financial standing, will fail.

\*\*Suppliers must have in place the levels specified or be willing to have the levels stated if they are successful on being awarded the contract.

The following award criteria and the relevant weighting for each will subsequently be used to evaluate the quotations received and shortlist contractors for interview.

<b>Ref:</b>	<b>Award criteria</b>	<b>Weighting</b>
AC1	Clarity of submission, understanding of the brief and quality of the proposed methodology	40%
AC2	Relevance and quality of previous experience	10%
AC3	Quality, experience and availability of staff	10%
AC4	Social Value	5%
	<b>Qualitative Total</b>	<b>65%</b>
	<b>Price</b>	<b>35%</b>
	<b>Overall Total</b>	<b>100%</b>

### **Financial (Price) criterion scoring system**

Each quotation will be awarded a weighting based on its relationship with the lowest priced quotation on the basis of the submitted lump sum fee. The quotation with the lowest lump sum fee will be awarded the full weighting available. Each of the remaining quotations will be awarded a weighting on a pro-rata basis according to the following calculation:

Lowest quotation price

\_\_\_\_\_ x 35

Potential supplier price

*Worked example:*

Potential supplier	Lump sum price (£)	Pro rata weighting (% Score)
A	£70,000	35
B	£80,000	31
C	£100,000	25

If a potential supplier is successful in its bid the fee submitted as part of this tender will form part of the contract.

Fees are to remain fixed for the duration of the contract.

### **Acceptance of quotation**

Unless otherwise stated, any contract or order placed as a result of this Request for Quotation will be on the Council's Standard Terms and Conditions of Contract.

The successful Supplier's submission together with relevant information will be binding and will form part of the Contract together with this document.



**Suppliers Response to the Statement of Requirements**

1. Please provide a brief history and outline of your organisation

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2. Please complete the table below detailing turnover for the last two financial years.

Financial year:	Total annual turnover (£)	Profit (as % of turnover before tax)
Company name and registered address:		
Company registration number (if applicable):		

3. Please provide details of all insurance cover currently in force.

Insurance cover required:	Insurer	Policy No	Cover (£)	Renewal Date
Public Liability Min £5m				
Employers Liability £5m				
Professional Indemnity £2m				

If your organisation does not currently hold the required insurance cover, please confirm that you would be willing to have the levels stated if you were successful on being awarded the contract.

**Yes / No**

4. Requirements under the Modern Slavery Act 2015:

4.1	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")? Which means do you operate at all within the UK with a turnover in excess of 36M	YES/NO
4.2	If you have answered yes to question 1 are you compliant with the annual reporting – please provide the relevant URL to view full statement	YES/NO URL:

- AC1 Please provide details of how you propose to meet the requirements outlined in the specification and deliver the project requirements.

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AC2 Please provide TWO case studies detailing current contracts (within last 5 years) of a similar nature or which show relevant previous experience

Case Study 1

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Case Study 2

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AC3 Please provide a statement indicating the resources available to you to support this contract and the qualifications, experience and availability (in FTE's) of each person that you would use.

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AC4 The District Councils will seek to engage with providers who will be able to promote and deliver to economic, social and environmental well-being in Oxfordshire as part of the contract, as covered under the Public Services (Social Value) Act 2012.

Please demonstrate where your organisation is able to meet Social Value considerations as part of the wider impact of goods, works or services, giving specific details of what will be delivered in line with this contract.

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**Pricing**

Please insert your fixed quotation price for the entire duration for the proposed contract **excluding VAT**. Please ensure that you have broken down the pricing to include all supplies/services/works required and any additional costs in proving the Service and include any added value such as early payment rebates.

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**Additional information required – not applicable for Goods only**

In addition to the Construction Industry Scheme (CIS), the Council has an obligation to comply with the Intermediaries Legislation, commonly known as IR35. The Council is responsible for identifying and determining which contractors fall within the scope of IR35. In making a decision the Council will consider the information provided by the contractor and will refer to guidance published by HMRC and apply the HMRC assessment tool as necessary.

Where services or works are being provided the following information must be supplied.

Question	Possible answer	✓
Which option best describes how the service/works will be delivered.	By one individual	
	If one individual, is there a substitute?	
	By more than one individual	
	Some of all elements will be outsourced	
	If Yes, please specify:	
Please confirm the employment status of anyone who would be working on the proposed contract.	Self-employed	
	If Yes, please provide your Unique Tax Reference No.	
	Employed and subject to PAYE	
	Other - please specify	
	No	

**Declarations**

As a public sector body, the Council has a number of obligations. Please tick the boxes with which you comply below and sign to confirm.

	✓
Please confirm that you have not canvassed or solicited any member, employee or agent of the Council in connection with this quotation.	
If the service/works are being delivered from within Oxfordshire, please tick to confirm that your employees are paid in excess of the Oxford Living Wage: 1/4/19 – 31/3/20 £10.02	
Please confirm that you have not colluded with any other person (person, body or association corporate or incorporate) in relation to this quotation.	
Please confirm that the information supplied in this document is accurate and complete and that no gift or offer of a gift or consideration as an inducement or reward has been made to any member, employee or agent of the Council.	
The Council is subject to freedom of information requests under the Freedom of Information Act 2000. Please confirm that if you consider any of the information in this quotation to be of a sensitive nature you have advised us of such sensitivity and the reasons for its sensitivity.	
The Council under the Transparency Agenda must publish all spend of over £500 in a single transaction, as well as details of contracts that it holds. Please confirm your understanding that information not exempt from disclosure under the Freedom of Information Act 2000 is not confidential information.	
Please confirm that your organisations directors or any other person who has powers of representation, decision of control has not been convicted of conspiracy, corruption, the offence of bribery, fraud, money laundering or any other offence within the meaning of Article 57(1) of the Public Contracts Regulations 2015.	

<b>Organisation name:</b>	
<b>Contact name:</b>	
<b>Signed:</b>	
<b>Position:</b>	
<b>Date:</b>	

**Confidential Information Statement**

We the undersigned, understand that we are allowed access to confidential information belonging to Oxford City Council ("Council") in order to prepare our quotation for the Contract. This may include personal information under the terms of General Data Protection Regulation (GDPR) (EU) 2016/679

This information will be kept secure at all times while in our possession. Only those staff within our organisation that are required to see the information in order to prepare the quotation, are to be given access to the information.

The information will not be used for any purpose, other than for which it is being supplied.

No part or parts of the information will be retained once the quotation has been submitted, save as that required to be retained for audit and compliance purposes. The recipient will retain the minimum confidential information that is required for the audit and compliance purposes and will treat such information with the same degree of care as we exercise for our own confidential information.

The Terms of this Agreement will also be applied to any other organisations, such as sub-contractors or consultants, who may work with us to provide information to prepare the tender.

Should any breach of the above take place, we will immediately notify the Council's Chief Technology & Information Manager by emailing [dataprotection@oxford.gov.uk](mailto:dataprotection@oxford.gov.uk).

<b>Company name:</b>	
<b>Signed:</b>	
<b>Name:</b>	
<b>Position:</b>	
<b>Date:</b>	