

## Document C – Specification and Scope of Services

For Tender 28/25

Public Computerized (Online) Tender

For Provision of Services for Developing Guidelines for Conducting

Feasibility Studies for Mass Transit Projects for Netevei Ayalon Company

Project: Guidelines for Mass Transit Feasibility Studies

**For the avoidance of doubt, in the event of discrepancy between the original Hebrew version to the English translation, the Hebrew version shall prevail**

### 1. Purpose, Services, and Work Background

#### 1.1. Background:

The Ministry of Transport is leading the future of public transportation in Israel with national and metropolitan strategic plans, often including innovative mass transit projects. Many of these plans are still at the conceptual stage, but to transform them into reality, feasibility studies are required to assist in determining priorities and advancing the Ministry's transportation vision—all while making intelligent use of public resources.

#### 1.2. Purpose of the Work:

The development of a guidelines document and methodology for conducting feasibility studies for mass transit projects will assist in identifying and selecting the optimal implementation alternatives. The guidelines will ensure uniformity and transparency in the assessment processes, while integrating various considerations such as engineering, economic, social, and environmental factors, alongside considerations of passenger experience and needs.

### 1.3. Required Services Include:

1.3.1. Mapping of mass transit project types according to service, technology, and service area.

1.3.2. Review of guidelines in Israel and internationally, and case studies of mass transit projects from the last decade.

1.3.3. Needs mapping, problem characterization, and definition of feasibility study fields (such as transportation, engineering, economic).

1.3.4. Development of a uniform methodology including study fields, required outputs, and deliverables for each stage.

1.3.5. Writing the guidelines document.

1.3.6. Writing a final report documenting the work.

### 2. Project Duration

The work shall be completed within 9 months.

### 3. Required Deliverables

#### 3.1. Guidelines Document for Conducting Mass Transit Feasibility Studies

3.1.1. The guidelines document in accordance with the methodology chapter in the Services Appendix.

3.1.2. The document shall undergo editing and linguistic proofreading by an expert, subject to approval by the work commissioner.

3.2. Final Report describing the work process, according to the chapters described in the service specification below:

3.2.1. Definition scope, literature review, and case studies (including sources)

3.2.2. Conclusions, insights, and recommendations from the review

3.2.3. Stakeholders identification, their needs, and requirements from the guidelines

3.2.4. The methodology

### 3.3. Compensation

Compensation for performing the services is in the form of a lump sum/global payment that will be paid according to the payment phases and milestones below. The winner will be required to meet the timelines, execution phases, and milestones as stated.

### 4. Detailed Services

The project shall not commence prior to receiving a company approval/work commencement order for project execution. It is hereby clarified that there may be changes in the schedule and/or milestones according to Ministry of Transport directives and in light of various constraints.

Before beginning work on each phase, company approval must be obtained to commence execution and proceed to the next phase.

#### 1. Phase A – Scope Definition, Literature Review, and Case Studies

1.1. Scope Definition – Defining project types, according to service, technology, or service area.

1.2. Literature Review of feasibility study guidelines conducted in Israel and worldwide, with emphasis on mass transit projects in the last decade.

1.3. Case Studies Review of feasibility studies conducted in Israel and worldwide, with emphasis on mass transit projects in the last decade.

1.3.1. Regarding 'feasibility studies', these will also include (but are not limited to) viability assessments, preliminary planning, and economic feasibility studies.

1.3.2. The case studies review will include, at minimum, reference to the following subjects:

- 1.3.2.1. Methodology and planning approach
- 1.3.2.2. Challenges that arose and solutions proposed

#### 1.4. Recommendations and deliverables

1.4.1. Whether a comparative examination was made between the feasibility study recommendations and the plan that was ultimately implemented

### 2. Phase B – Analysis of Feasibility Studies Currently Conducted in Netivei Ayalon Projects

2.1. Examination and analysis of feasibility studies for mass transit projects currently being advanced by Netivei Ayalon Company.

2.1.1. The examination will include, at minimum, reference to the subjects appearing in Section 1.3.

2.2. Comparative analysis – Comparison of case studies (Section 1.3) against feasibility studies in Netivei Ayalon (Phase B), to identify interface points, gaps, conclusions, insights, and recommendations.

### 3. Phase C – Stakeholders

3.1. Definition of relevant stakeholders and meetings to map needs, characterize problems, and define requirements for guidelines, such as – Planning Administration, Ministry of Finance, local authorities, etc.

#### 4. Phase D – Methodology

4.1. Proposal for a methodology for the feasibility studies guidelines document based on insights from Phases A and B above.

4.2. Definition of feasibility study fields which will include at minimum the following areas: transportation feasibility, service concept, engineering feasibility (geometry + traffic), and economic feasibility.

4.3. Definition of study resolution – level of examination in each of the fields defined in 4.1.1.

4.4. Definition and characterization of stakeholders required for coordination and/or participation during the work.

4.5. Definition of outputs for each field proposed in section 4.1.1.

4.6. Definition of feasibility study deliverables.

4.7. Definition of required team to perform the feasibility assessment.

#### 5. Phase E – Writing the Guidelines

5.1. Guidelines should be written according to the methodology chapter in section 4, subject to the procedures of the work commissioner and/or authorized entity.

5.2. The guidelines writing process will include editing and linguistic proofreading by an expert subject to approval by the work commissioner.

#### 6. Final Report

6.1. The report will document the work process and will include at minimum reference to all sections defined above.

#### 5. Consultant Team on Behalf of the Bidder

Work team on behalf of the bidder:

5.1. For the purpose of providing the required services, the bidder who will be declared the winner in this tender commits to provide a group of consultants in the relevant fields for preparing the work, as detailed in this tender and all its appendices. They shall be approved by the Company (Work Commissioner) and shall provide all services related to the relevant job definitions detailed in the attached service specification, and as required by the Company from time to time.

5.2. The bidder must employ directly (in employer-employee relationships), or alternatively be contractually engaged (as subcontractors, "freelancers"), with the team members presented in their proposal, who are available to the bidder with full availability and meet the conditions detailed below.

5.3. The team members will engage in providing the services continuously, according to the requirements and work needs and throughout the entire contract period, unless otherwise specified. Replacement of team members is contingent upon the Company's approval only, according to the Company's sole and professional discretion.

5.4. All team members will allocate all the time required for the preparation and completion of the work, according to the guidelines and schedules set by the representative of Netivei Ayalon Company and will be obligated to personally participate in all steering and work committee meetings if any, and to personally present the deliverables submitted by them in all meetings.

5.5. If the winning bidder believes there is a need to employ additional and/or complementary team members beyond those detailed below, then the winning bidder must employ such team members to ensure full compliance with their obligations, all within the framework of the compensation proposed by them in their tender bid. For the avoidance of doubt, it is hereby clarified that the winning bidder will be fully responsible for managing quality assurance in the work in its entirety, end-to-end, including meeting quality targets, budget, schedule, and safety, all according to the highest standards, within the framework of the basic services.

5.6. It is clarified that the additional team members will be provided by the winning bidder for the purpose of providing the services at any stage of the engagement as required for the provision of services to the full satisfaction of the Company.

5.7. All additional team members on behalf of the winning bidder will be approved in advance and in writing by the Company, and will commence their work according to such approval, according to the timelines set by the Company, and in coordination with it, and will be employed in providing the services throughout the period determined by the Company.

5.8. The replacement of any of the additional team members is contingent upon the Company's approval only, which will be given according to its sole discretion and with regard to the provisions of any law. It is clarified that, in the event of replacement of a team member by the winning bidder, they will be required to provide an alternative team member with qualifications not less than those of the replaced team member.

5.9. Without derogating from the above and from the provisions of the engagement agreement, Netivei Ayalon will be entitled to demand the replacement of any of the team members employed in providing the services, and to impose any additional or other requirement, including the employment of additional consultants, which will ensure the provision of services in a proper and appropriate manner, all according to its sole discretion.

5.10. For the avoidance of doubt, it is clarified and emphasized that Netivei Ayalon Company is entitled to enter into a separate engagement with additional consultants, for the purpose of receiving consultation on the subjects of this tender, and the winning supplier undertakes to cooperate fully with these consultants, without additional compensation.

5.11. Throughout the entire engagement period, the bidder will continuously perform the tasks defined in the framework of preparing the work, under the guidance and accompaniment of a professional team on behalf of the client.

## 6. Description of Roles and Team Members

6.1. The group of consultants will consist of a core team that will include the Team Leader and the following consultants: Economic Consultant, Traffic and Geometric Engineer, Transportation Planner, and Public Transportation Planner.

6.2. The group of consultants will consist, according to the bidder's proposal, of additional team members according to areas of specialization deemed necessary by the bidder for writing the guidelines (to be called: optional team).

6.3. The group of consultants will consist, according to the bidder's proposal, of team members with extensive international experience in promotion, planning, and/or consulting within the framework of programs in no less than 2 countries other than Israel.

### 6.4. Team Leader

Role Essence: The senior entity on behalf of the winning supplier who bears professional responsibility for performing all required services. Will serve as a leading and guiding entity, coordinator and advisor in all issues related to the work.

The Team Leader must be responsible for leading the work process from beginning to completion, both within the work team and vis-à-vis the client and the company (work commissioner).

Their role will include, among others, the following areas of responsibility:

- Professional management of work team members, so that each member performs their role in accordance with the tender requirements and work order
- Holding regular team meetings to advance the work, monitor performance, identify deviations, and implement corrective actions accordingly
- Manage the allocation of resources and inputs available to the work team efficiently while maintaining work quality and defined timelines

- Consolidation of team members' work products, accompaniment, integration, processing, and control of the work of various consultants, presentation of deliverables before work committees
- Regular and consistent reporting to the Netivei Ayalon Company representative regarding the status of activities and how the work team meets the milestones defined in the work order
- Personal participation is required in all work meetings and other meetings as required, and activating the work team in accordance with decisions made
- Continuously responsible throughout the entire work process for logistical management and consolidation of work documents
- Control and integration of work products from team members
- Ensure project progress according to the established timeline
- Coordination between the planning team and members of the steering and work committees, coordination with all relevant entities
- Participation in work and steering committees and other meetings as required
- Writing meeting protocols, correcting them, and distributing them only after receiving written approval from the Netivei Ayalon representative/planning team leader
- Monitoring implementation of decisions, coordinating schedules and convening meetings including determining meeting location, organizing technical aids, and organizing professional tours
- Producing deliverables and implementing decisions of the program initiator and/or work commissioner and/or steering committee members
- Responsibility contracts in the company systems, if any.
- Any additional required service within their area of responsibility

#### 6.5. Economic Consultant

- Responsible for the economic feasibility field of the guidelines
- Any additional required service within their area of responsibility/expertise for advancing the project according to the various phases

#### 6.6. Traffic and Geometric Engineer

- Responsible for the engineering feasibility field of the guidelines – in traffic and geometry
- Any additional required service within their area of responsibility/expertise for advancing the project according to the various phases

#### 6.7. Transportation Planner

- Responsible for the transportation feasibility field of the guidelines
- Any additional required service within their area of responsibility/expertise for advancing the project according to the various phases

#### 6.8. Public Transportation Planner

- Responsible for the feasibility field and service concept of public transportation in the guidelines
- Any additional required service within their area of responsibility/expertise for advancing the project according to the various phases

6.9. Besides the core team above, the bidder may propose additional team members as part of the proposal for this tender (hereinafter referred to as – optional team)

### 7. Work Execution Phases, Timelines, and Payment Milestones:

7.1. It is hereby clarified that the winner will be required to meet the timelines below. There may be changes in the schedule and project advancement pace.

- Each deliverable as detailed below requires Company approval.
- Do not proceed to the next phase/new milestone prior to approval and completion of the previous phase.
- Do not submit an invoice prior to receiving approval for milestone completion.
- Invoice submission only upon phase completion, subject to Company approval.
- Payment is conditional on meeting the payment milestone.

## 7.2. Execution Timeline and Payment Milestones –

Phase	Description	Payment Percentage	Cumulative
A	Scope Definition, Literature Review, and Case Studies	Up to 15%	Up to 15%
B	Analysis of Feasibility Studies Currently Conducted in Netivei Ayalon Projects	Up to 15%	Up to 30%
C	Stakeholders	Up to 10%	Up to 40%
D	Methodology	Up to 30%	Up to 70%
E	Writing the Guidelines	Up to 20%	Up to 90%
	Final Report	Up to 10%	Up to 100%

The project must be completed no later than 9 months from the date of the work commencement order.