

Pre-Qualification Questionnaire

Volume 2 — Response Templates and Questionnaire

Asset Management Platform

Document Control	
Reference	Pro410 CFT: 8746621
Procedure	Competitive Procedure with Negotiation
Type	Single-supplier contract for a Software-as-a-Service (SaaS) Asset Management Platform
Volume	2 of 2 (Response Templates and Questionnaire)
Contracting Authority	The Land Development Agency
Timetable	As set out on eTenders

Contents

Definition of Terms

1. Selection Criteria, Weightings and Thresholds
2. General Instructions
3. Page Limits and Format
4. Clarifications, Missing Information and Non-Compliance
5. Evaluation and Shortlisting Methodology

Part A — Details about the Applicant (Compliance check / Pass–Fail)

Part B — Eligibility (Pass/Fail)

Part C — Financial Robustness and Insurances (Pass/Fail)

Part D — Capability (Scored — 1,000 marks — used to shortlist)

D1 Similar Experience (400 marks)

D2 Organisational Experience, Resources and Capability (200 marks)

D3 Implementation, Onboarding and Data Migration (150 marks)

D4 Software Support and SaaS Service Model (150 marks)

D5 Sustainability (100 marks)

Part E — Accreditations and Certifications (Pass/Fail)

Part F — Data Protection and Information Security (Pass/Fail)

Part G — Confirmations and Acknowledgements (Pass/Fail)

Definition of Terms

Defined terms used in this Volume 2 have the meaning given to them below, and otherwise as set out in the Definition of Terms in Volume 1. Terms which are capitalised in this Volume 2 but are not defined below or in Volume 1 have their ordinary meaning.

“Applicant” means the entity which submits a Submission in response to this PQQ, which may be a single entity or a Consortium.

“Applicant’s Authorised Representative” means the person authorised by an Applicant and identified in Part A to act on its behalf in dealings with the Contracting Authority.

“Capability” means the Applicant’s demonstrated past experience, track record, organisation and resources, evidenced by reference to contracts already delivered or substantially delivered.

“Consortium” means two or more entities which submit a single Submission jointly, whether as a joint venture, partnership, grouping or other unincorporated association.

“Contract” means the contract for the provision of the Platform and Services to be awarded under this Competition.

“Contract Notice” means the contract notice published by the Contracting Authority in the Official Journal of the European Union and on eTenders in respect of this Competition.

“Lead Applicant” means the entity which, if the Applicant is successful, will enter into the Contract with the Contracting Authority and which is responsible for the Submission.

“Minimum Quality Threshold” or “MQT” means the minimum number of marks stated in Table 2 which an Applicant must achieve in respect of each of sub-criteria D1 to D5 in order to be eligible for shortlisting.

“Minimum Requirements” means the pass/fail requirements set out in Parts A, B, C, E, F and G, each of which must be satisfied.

“Platform” means the off-the-shelf Software-as-a-Service Asset Management Platform described in Part 3 of Volume 1.

“Regulations” means the European Union (Award of Public Authority Contracts) Regulations 2016 (S.I. No. 284 of 2016), as amended.

“Requirement” means the requirement described in Part 3 of Volume 1.

“Scored Criteria” means the criteria D1 to D5 set out in Part D, which are scored and used to rank and shortlist Applicants.

“Selection Criteria” means collectively, the Minimum Requirements and the Scored Criteria.

“Services” means the implementation, data migration, hosting, maintenance, support and related services described in Part 3 of Volume 1.

“Stage 2” means the invitation to participate and negotiate stage of this Competition, at which the RFT will be issued to shortlisted Applicants.

“Submission” means an Applicant’s completed response to this PQQ, including all attachments.

“Supplier” means the Applicant appointed to provide the Platform and Services under the Contract.

“Working Day” means any day other than a Saturday, Sunday or public holiday in Ireland.

1. Selection Criteria, Weightings and Thresholds

1.1 The Selection Criteria comprise Parts A to G. The table below sets out, for each Part, the basis on which it is assessed and the maximum length of the response. Part D is scored; the marks and Minimum Quality Thresholds for sub-criteria D1 to D5 are set out in Table 2 and paragraph 5.

Ref	Criterion	Assessment	Max. length
A	Details about the Applicant	Compliance check; A6 and A7 Pass/Fail	Form; charts 1 page each
B	Eligibility	Pass/Fail	Form; B1.1 max 2 pages
C	Financial Robustness and Insurances	Pass/Fail	Form
D	Capability	Scored — 1,000 marks; used to rank and shortlist Applicants to Stage 2	20 pages
E	Accreditations and Certifications	Pass/Fail	Form
F	Data Protection and Information Security	Pass/Fail confirmations; narrative for information only	Form; narrative as stated
G	Confirmations and Acknowledgements	Pass/Fail	Form

1.2 Parts A, B, C, E, F and G are assessed on a pass/fail basis. Part D is scored and is used to rank Applicants and determine the shortlist.

1.3 An Applicant which fails to satisfy a Minimum Requirement, or which fails to achieve the Minimum Quality Threshold for any of D1 to D5, will not be shortlisted and its Submission will not be evaluated further. This is subject in every case to paragraph 4 (Clarifications, Missing Information and Non-Compliance).

1.4 The Total MQT of 600 marks is the arithmetic sum of the individual Minimum Quality Thresholds. An Applicant which achieves the Minimum Quality Threshold for each of D1 to D5 will necessarily achieve the Total MQT; the Total MQT is stated for completeness only and is not a separate hurdle.

2. General Instructions

2.1 Applicants may add lines to the response tables as required but must not alter the headings or questions as they appear.

2.2 Information must be submitted in English. Where original documents are in another language, a complete and accurate English translation must be provided; the English version prevails in the event of any discrepancy.

2.3 The Submission must be completed in full and structured in the order of Parts A to G, with each Part clearly marked.

2.4 Each Part must be completed. Where a question expressly permits a “not applicable” response (for example question A5, where the Applicant is a single entity not relying on the capacity of any other entity), the Applicant must state “not applicable” and give the reason. No other Part or question may be marked “not relevant” or left blank.

2.5 Where the same information is required for more than one question, it need only be provided once, but the cross-reference must identify the Part, page and paragraph in which the information appears. Evaluators will follow a cross-reference which complies with this paragraph. Cross-referenced material counts once only against the applicable page limit, in the Part in which it physically appears. Where material is relevant to more than one Scored Criterion, it will be scored only under the criterion to which it is allocated by paragraph 5.7.

2.6 Applicants must provide all detail necessary to give a sufficient response to each question. Applicants should not assume that the LDA has any prior knowledge of them, their experience or their organisation. Insufficiency of detail in a response to a Scored Criterion will be reflected in the mark awarded and is not a ground for exclusion. Failure to provide information which this PQQ requires to be provided will be dealt with in accordance with paragraph 4.

2.7 This PQQ is provided on the same basis to all Applicants. Applicants may submit clarification questions through the messaging facility on eTenders by the deadline stated in Volume 1. The LDA will publish its responses, together with the questions in anonymised form, to all Applicants simultaneously through eTenders. Save for clarifications issued in accordance with this paragraph, and for any request made by the LDA under paragraph 4, no further information will be provided until the RFT is issued to shortlisted Applicants.

2.8 Applicants are strictly prohibited from entering into any agreement, arrangement or concerted practice with any other Applicant or economic operator which is aimed at, or has the effect of, distorting competition in this Competition, including any agreement or arrangement as to price, as to the content of a Submission, or as to whether or not to participate. Where the LDA has sufficiently plausible indications that an Applicant has engaged in such conduct, it will put the matter to the Applicant in writing and afford it a reasonable opportunity to respond before reaching any conclusion and will act proportionately having regard to that response.

2.9 Paragraph 2.8 does not prohibit an Applicant from engaging a sub-contractor, supplier or other entity which is also engaged by another Applicant, provided that no information about the content of any Submission is exchanged. An Applicant which becomes aware of such a shared engagement must disclose it at A5 and confirm that arrangements are in place to prevent the exchange of information.

3. Page Limits and Format

3.1 The following page limits apply to Part D and are mandatory. The limits are per sub-criterion; unused pages in one sub-criterion may not be carried into another.

Sub-criterion	Max. pages
D1 Similar Experience	8
D2 Organisational Experience, Resources and Capability	4
D3 Implementation, Onboarding and Data Migration	3
D4 Software Support and SaaS Service Model	3
D5 Sustainability	2
Total — Part D	20

3.2 Elsewhere in this PQQ the following limits apply:

Response	Max. length
A1 Consortium organisational chart	1 page
A6.1 Conflict of interest details (if any)	1 page
B1.1 Self-cleaning evidence (if applicable)	2 pages
D2 Organisation chart (excluded from the 4-page D2 limit)	1 page
E1 Equivalent information security measures (if applicable)	1 page
F2.2 Data protection compliance arrangements	1 page
F3.1 Data residency and hosting	1 page
F4.1 Information security measures	2 pages

3.3 Format. Responses must be submitted as A4 portrait pages, in Arial 11pt for body text, with a minimum of 9pt in tables, charts and diagrams, and margins of not less than 2cm on all sides. Where a document is produced double-sided, each side counts as one page. Headers and footers may contain only the Applicant's name, the question reference and page numbering, and may not contain substantive response content.

3.4 What is counted. All narrative text, tables, charts, diagrams, images, screenshots and captions forming part of the substantive response to a question count towards that question's limit.

3.5 What is excluded. The following do not count towards any page limit:

- the D1 reference contract table;
- the charts and responses listed in the table at paragraph 3.2, each of which is subject to its own separate limit;
- the completed Parts A, B, C, E, F and G;
- certificates, insurance documents, ESPDs, undertakings from entities whose capacity is relied upon, and any other supporting evidence which this PQQ requires to be attached; and
- a cover page and a contents page, provided neither contains substantive response content.

3.6 Partial pages. A page containing any content counts as a full page. There is no proportionate counting of partially completed pages.

3.7 Hyperlinks and external material. Hyperlinks, QR codes and references to external material (including websites, video, cloud storage and embedded or linked files) are not permitted and will not be opened, followed or evaluated. Each response must be self-contained.

3.8 Consequence of exceeding a limit. Where a response exceeds the applicable page limit, evaluators will disregard all material appearing from the first word following the end of the last permitted page, and that material will not be evaluated. The limit will be applied identically to all Applicants. The LDA will not reject a Submission solely because a page limit has been exceeded, save where the extent of the non-compliance is such that the response cannot meaningfully be evaluated within the permitted pages, in which case the LDA will first seek clarification under paragraph 4.

3.9 Format non-compliance. Where a response does not comply with paragraph 3.3, the LDA may reformat it solely for the purpose of applying the page limit and will notify the Applicant that it has done so and of the effect. The LDA will not otherwise penalise a formatting non-compliance.

3.10 Consortia and sub-contracting. Where an Applicant needs to explain Consortium or sub-contracting arrangements, that explanation should be given in Part A (which is not subject to a page limit) and cross-referenced from Part D in accordance with paragraph 2.5. Applicants will not be disadvantaged by the page limits by reason of their structure.

4. Clarifications, Missing Information and Non-Compliance

Clarification and missing information

4.1 The LDA may, but is not obliged to, request an Applicant to submit, supplement, clarify or complete information or documentation which is incomplete, erroneous or missing. Any such request will be made in writing through eTenders. Where more than one Applicant is in the same position, the LDA will make the same request of each of them.

4.2 An Applicant must respond within five (5) Working Days, or within such longer period as the LDA specifies. Where an Applicant does not respond within the period specified, its Submission will be evaluated on the basis of the information originally submitted.

4.3 A request under paragraph 4.1, and any response to it, may not be used to: (a) introduce information which alters the substance of the Submission; (b) substitute or add a reference contract or project not identified in the Submission as originally submitted; (c) improve, expand or re-write a response to a Scored Criterion; or (d) remedy a failure to submit any response at all to a Scored Criterion. Requests will be confined to genuine ambiguity or obvious clerical error, documentation which demonstrably existed and was capable of being provided before the deadline, and certificates, declarations, undertakings and supporting evidence relating to the Minimum Requirements.

4.4 Where a Submission omits information required by a Minimum Requirement, the LDA will seek clarification under paragraph 4.1 before determining that the requirement has not been satisfied.

4.5 Where the LDA identifies a manifest arithmetical or typographical error, it may correct it and will notify the Applicant. Where the correction is material, the Applicant will be given the opportunity to confirm or reject it; if rejected, the Submission will be evaluated as originally submitted.

4.6 Verification. The LDA may verify any information provided, including by reference to publicly available records, the Companies Registration Office, Revenue's online facility, e-Certis and the referees identified at D1 in accordance with D1. Where verification discloses a material discrepancy, the LDA will put it to the Applicant in writing and afford it a reasonable opportunity to respond before drawing any conclusion. A written record of every request and response under this paragraph 4 will be retained on the procurement file.

Non-compliance, exclusion and disqualification

4.7 In this PQQ, "exclusion" means exclusion on one or more of the mandatory or discretionary grounds set out in Regulation 57 of the Regulations. References to an Applicant not being shortlisted, or to a Submission not being evaluated further, are references to the consequence of non-compliance with the requirements of this Competition and do not constitute exclusion.

4.8 Exclusion grounds and self-cleaning. Where a mandatory or discretionary ground for exclusion applies to an Applicant, to a Consortium member, or to an entity on whose capacity the Applicant relies:

- the Applicant may submit evidence under B1.1 that measures it has taken are sufficient to demonstrate its reliability notwithstanding the ground;
- the LDA will evaluate any such evidence having regard to the gravity and the particular circumstances of the conduct concerned, and will give written reasons if it considers the evidence insufficient;
- discretionary grounds will be applied proportionately, on the individual facts, and will not be treated as automatically resulting in exclusion;
- where a mandatory ground applies to an entity on whose capacity the Applicant relies, the LDA will require that entity to be replaced; where a discretionary ground applies to such an entity, the LDA may require its replacement; and
- a mandatory ground applies for a maximum of five (5) years from the date of conviction by final judgment, and a discretionary ground for a maximum of three (3) years from the date of the relevant event.

4.9 Misrepresentation. Where an Applicant is found to have provided seriously misrepresentative information, or to have withheld information required to verify the absence of grounds for exclusion or the satisfaction of the Selection Criteria, the LDA may exclude the Applicant under Regulation 57(8)(h) at any stage. Before doing so it will put the matter to the Applicant in writing and afford it a reasonable opportunity to respond.

4.10 Conflicts of interest. Where a conflict of interest is disclosed or identified, the LDA will assess whether it can be effectively remedied by measures less intrusive than exclusion, including screening, replacement of

personnel or ring-fencing. The LDA will exclude an Applicant on this ground only where the conflict cannot be effectively so remedied.

5. Evaluation and Shortlisting Methodology

Stages of evaluation

5.1 Submissions will be evaluated in the following order:

- (a) Administrative check — whether the Submission was received through eTenders by the deadline, is in English, and includes a response to each Part;
- (b) Minimum Requirements — assessment of the pass/fail requirements in Parts A, B, C, E, F and G;
- (c) Scored Criteria — scoring of D1 to D5; and
- (d) Ranking and shortlisting.

5.2 Only Submissions which satisfy every Minimum Requirement will proceed to be scored under Part D. A Submission which does not satisfy a Minimum Requirement will not be scored and the Applicant will not be shortlisted. This is subject in every case to paragraph 4.

Scoring

5.3 Each of D1 to D5 will be awarded a single rating from 0 to 5 in accordance with Table 3, and a mark within the band shown for that rating in Table 2. Each band spans 20% of the marks available for that sub-criterion, and the mark awarded within the band reflects the extent to which the response meets the rating descriptor. The mark for each sub-criterion is agreed by the evaluation panel as a single consensus mark and will not be averaged across evaluators or adjusted after the consensus record is signed.

5.4 Minimum Quality Thresholds. An Applicant must achieve the Minimum Quality Threshold shown in Table 2 for each of D1 to D5, which in each case corresponds to a rating of 3 (60% of the marks available). An Applicant which fails to achieve the MQT for any sub-criterion will not be shortlisted, irrespective of its total marks.

Ranking and shortlist

5.5 Applicants which satisfy every Minimum Requirement and achieve every Minimum Quality Threshold will be ranked by total marks awarded under Part D (out of 1,000). The three (3) highest-scoring admissible Applicants will be invited to Stage 2.

5.6 Tie-break. Where two or more Applicants are tied on total marks at the shortlist boundary, they will be separated by reference to the marks awarded for D1. If they remain tied, by reference to D2, then D3, then D4, then D5, in that order. If they remain tied after that sequence has been applied in full, all Applicants tied at the boundary will be invited to Stage 2.

5.7 Single scoring of evidence. Each sub-criterion is scored only on the evidence submitted in response to it. Where evidence is relevant to more than one sub-criterion, it will be scored only under the sub-criterion under which Part D requires it to be submitted and will not be scored twice. In particular, data migration and integration evidence is scored under D3, and live-service, support and service-level evidence is scored under D4.

5.8 Insufficient qualifying Applicants. If fewer than three (3) Applicants satisfy every Minimum Requirement and achieve every Minimum Quality Threshold, the LDA will decide whether to proceed with those Applicants which qualify or to terminate the Competition, and will notify all Applicants of its decision. The LDA will not admit to Stage 2 an Applicant which has not satisfied the Minimum Requirements or achieved the Minimum Quality Thresholds.

Evaluation panel, moderation and record

5.9 Evaluation will be carried out by a panel appointed by the LDA, each member of which will have confirmed in writing that no conflict of interest arises. Each evaluator will read and score every Submission independently and record a preliminary rating with reasons before any panel discussion. The panel will then meet and agree, by discussion, a single consensus rating and mark for each sub-criterion of each Submission, together with a written rationale identifying the specific content of the Submission on which the rating is based. The consensus record, signed by each panel member, constitutes the LDA's evaluation. Individual preliminary scores are working documents and are not aggregated or averaged.

How past experience is assessed

5.10 Part D is assessed solely on the Applicant's relevant past experience and demonstrated track record. Each response must be evidenced by reference to contracts already delivered or substantially delivered. A response must not consist of a description of proposed methodology, approach or solution design, which is a

matter for the RFT and award stage and will not be scored here. Where a standard, technology or certification is named, an equivalent will be accepted.

5.11 A contract is “substantially delivered” if go-live has been achieved and the Platform has been in live service for the client for at least six (6) months.

5.12 Any reference to experience gained within a period of years means experience gained in that period prior to the date of issue of the Contract Notice, unless otherwise stated.

5.13 Higher marks will be awarded for experience on contracts that are more similar to the Requirement in size, nature and complexity. For these purposes, and by reference to Part 3 of Volume 1:

- “size” means the number of residential units or properties under management;
- “nature” means the management of a regulated residential rental portfolio, or an equivalent property or asset portfolio; and
- “complexity” means the number of distinct user groups served, the number of integrated enterprise and finance systems, and the breadth of functional modules deployed.

A contract will be regarded as more similar the more closely it corresponds to those factors.

5.14 Number of projects. Each of D1 to D4 requires exactly three (3) projects. Where more than three are provided, only the first three presented will be evaluated and any further projects will not be evaluated. Where fewer than three are provided, the response will be evaluated on the projects provided.

Notification and no undisclosed criteria

5.15 Applicants which are not shortlisted will be notified in writing of that decision and of the reasons for it, including the marks awarded to them for each of D1 to D5, in accordance with the European Communities (Public Authorities’ Contracts) (Review Procedures) Regulations 2010 (S.I. No. 130 of 2010), as amended.

5.16 No criterion, sub-criterion, weighting, threshold or method other than those set out in this Volume 2 will be applied in evaluating Submissions or in determining the shortlist. The LDA will not amend the Selection Criteria, the marks available, the Minimum Quality Thresholds, the rating scale or the shortlisting methodology after the deadline for receipt of Submissions.

Part A — Details about the Applicant

Compliance check. A6 and A7 are Pass/Fail. To be completed by the Lead Applicant, save that A5 must identify every Consortium member, sub-contractor and entity whose capacity is relied upon.

A1 Structure of the Applicant

Please confirm whether the Applicant is a single bidder or a Consortium. If a Consortium, provide an organisational chart clearly indicating the role of each member and identifying the Lead Applicant. The chart must not exceed one (1) A4 page, is excluded from the Part D page limits, and is not scored.

The Applicant is a single bidder	Yes	☐	No	☐
The Applicant is a Consortium (if Yes, attach organisational chart)	Yes	☐	No	☐

A1.1 Where the Applicant is a Consortium, the Applicant must provide a signed statement from each Consortium member confirming (a) its participation, (b) the role it will perform, (c) the identity of the Lead Applicant, and (d) the legal form the Consortium intends to adopt if awarded the Contract. The LDA may require the successful Applicant to adopt a specific legal form after award where this is necessary for the satisfactory performance of the Contract, but does not require any particular legal form as a condition of participation.

A2 Applicant Details

Legal Name	
Current Trading Name	
Previous Trading Name (if any)	
Registered Address	
Registered Number	
Country of Registration	
Legal Form (company, partnership, JV, sole trader, etc.)	
Year of Establishment	

A3 Applicant's Authorised Representative

Name	
Position	
Address	
Telephone	
Email	

A4 SME Status

Please confirm whether the Applicant is an SME as defined in Commission Recommendation 2003/361/EC (fewer than 250 employees and annual turnover ≤ €50m and/or balance sheet total ≤ €43m). This information is collected for statistical and reporting purposes only. It will not be evaluated and will have no bearing on the assessment of any Submission.

The Applicant is an SME	Yes	☐	No	☐
-------------------------	-----	--------------------------	----	--------------------------

A5 Consortium Members, Sub-Contractors and Entities Relied Upon

If the Applicant is a Consortium, or relies on sub-contractors or the capacity of other entities to meet the Selection Criteria, please list each below. Where the Applicant is a single entity not relying on the capacity of any other entity, state “not applicable”.

Where the Applicant relies on the capacity of another entity to satisfy any Selection Criterion, the Applicant must provide, for each such entity: (a) a completed Part B (Eligibility) in respect of that entity; and (b) a signed undertaking from that entity confirming that it will place the relevant resources at the Applicant's disposal for the duration of the Contract, and identifying the specific criterion and resources concerned.

Entity name	Role / element relied upon	Consortium member or sub-contractor	Undertaking attached (Y/N)

A5.1 Where an entity on whose capacity the Applicant relies is subject to a mandatory ground for exclusion, the LDA will require the Applicant to replace that entity. Where such an entity is subject to a discretionary ground for exclusion, the LDA may require its replacement.

A5.2 Where the Applicant relies on another entity in respect of relevant professional experience, that entity must perform the part of the Services for which its experience is relied upon.

A5.3 Where the Applicant relies on another entity in respect of the turnover requirement at C1, the LDA may require that entity to be jointly and severally liable with the Applicant for the performance of the Contract.

A6 Conflicts of Interest (Pass/Fail)

Please confirm that there is no conflict of interest, or potential conflict of interest, in respect of the Applicant or any entity comprising the Applicant, within the meaning of Regulation 24 of the Regulations. Where any such interest exists, provide full details below.

Where a conflict of interest or potential conflict of interest is disclosed, the LDA will assess it and will consider whether it can be effectively remedied by measures less intrusive than exclusion, including screening, replacement of personnel or ring-fencing. The LDA will exclude an Applicant on this ground only where the conflict cannot be effectively so remedied. Disclosure of a conflict does not of itself result in exclusion. Failure to disclose a conflict of which the Applicant is or ought reasonably to be aware may result in exclusion under Regulation 57(4)(e) or (i).

I/we confirm that there is no conflict of interest	Yes	☐	No	☐
--	-----	--------------------------	----	--------------------------

A6.1 If a conflict of interest exists or may arise, please provide details:

Maximum one (1) A4 page. Excluded from the Part D page limits.

Please provide your response here ...

A7 Off-the-Shelf Solution (Mandatory — Pass/Fail)

It is a mandatory minimum requirement of this Competition (paragraph 3.1 of Volume 1) that the proposed solution is an off-the-shelf, commercially available, market-ready product. The LDA will not consider bespoke or custom-built platforms. Please confirm both statements below.

The proposed solution is a pre-existing, commercially available, market-ready product	Yes	☐	No	☐
The proposed solution does not rely on bespoke or custom development, or on beta, pre-release or roadmap-dependent functionality, to meet the core requirement set out in Part 3 of Volume 1	Yes	☐	No	☐

For these purposes, “commercially available” means that the product is generally available for licence to customers on the date of the Contract Notice and has been implemented in live service for at least one customer. Configuration of a commercially available product to the LDA’s requirements (including configuration of workflows, fields, reports, user roles and interfaces) does not constitute bespoke or custom development.

A Submission which does not confirm “Yes” to both statements above will not be evaluated further and the Applicant will not be shortlisted. Before reaching that determination, the LDA will seek clarification in accordance with paragraph 4. The LDA may verify these confirmations by written clarification and by reference to publicly available product information. Any product demonstration will take place at Stage 2 and will be assessed only against criteria disclosed in the RFT.

Part B — Eligibility

Pass/Fail. Each entity comprising the Applicant, and each entity on whose capacity the Applicant relies, must complete this Part.

B1 Grounds for Exclusion / ESPD

I/we confirm that neither the Applicant nor any relevant person is subject to any of the mandatory or discretionary grounds for exclusion set out in Regulation 57 of the Regulations.

The LDA will accept a duly completed ESPD as preliminary evidence in place of this declaration; an Applicant which submits a complete ESPD is not required to complete this declaration separately. Where the Applicant is a Consortium or grouping, a separate declaration (and, where applicable, a separate ESPD) is required for each member and for each entity on whose capacity the Applicant relies. Supporting evidence must be provided within five (5) Working Days of a request, or such longer period as the LDA may specify.

Confirmed — no ground for exclusion applies	Yes	☐	No	☐
ESPD attached	Yes	☐	No	☐

B1.1 Self-Cleaning

If a mandatory or discretionary ground for exclusion applies to the Applicant, to any entity comprising the Applicant, or to any entity on whose capacity it relies, the Applicant may provide evidence that measures taken by it are sufficient to demonstrate its reliability notwithstanding that ground. Such evidence may include payment or an undertaking to pay compensation in respect of any damage caused, active co-operation with investigating authorities in clarifying the facts and circumstances, and concrete technical, organisational and personnel measures appropriate to prevent recurrence.

The LDA will evaluate any such evidence having regard to the gravity and the particular circumstances of the conduct concerned. Where the LDA considers the evidence insufficient, it will give the Applicant a written statement of the reasons for that decision.

A ground for exclusion is subject to a maximum period of five (5) years from the date of conviction by final judgment in the case of a mandatory ground, and three (3) years from the date of the relevant event in the case of a discretionary ground.

Does a ground for exclusion apply to the Applicant or to any entity identified at A5?	Yes	☐	No	☐
---	-----	--------------------------	----	--------------------------

B1.1 If Yes, provide details of the ground and of the remedial measures taken:

Maximum two (2) A4 pages. Excluded from the Part D page limits.

Please provide your response here ...

B2 Tax Compliance (Self-Declaration)

To be completed by each entity comprising the Applicant. Tax clearance may be verified through Revenue's online facility at www.ros.ie.

An Applicant or entity which is not registered for tax in Ireland must instead provide either (a) an equivalent certificate or declaration issued by the competent authority of the state in which it is established confirming that it has fulfilled its obligations relating to the payment of taxes and social security contributions, or (b) where no such certificate is issued in that state, a declaration on oath or a solemn declaration made before a competent judicial or administrative authority, notary or professional body of that state. Such evidence will be accepted as equivalent to Irish tax clearance.

Applicant / entity name	
-------------------------	--

Tax Reference Number (if registered for tax in Ireland)	
Tax Clearance Access Number (if registered for tax in Ireland)	
Equivalent evidence attached (non-Irish entities)	Yes ☐ No ☐
I/we acknowledge that the Contracting Authority will verify the Applicant's tax status via Revenue's online facility at www.ros.ie	Yes ☐ No ☐

Part C — Financial Robustness and Insurances

Pass/Fail. To be completed by the Lead Applicant and any entities being relied on.

C1 Turnover (Self-Declaration)

The Applicant must demonstrate a minimum average annual turnover of at least €11m over its last three (3) financial years. This requirement may be satisfied by the Lead Applicant alone, or by aggregating the turnover of the Lead Applicant with that of other Consortium members and of any entity on whose capacity the Applicant relies. Where the Applicant relies on the turnover of another entity, that entity must be identified at A5 and must provide the undertaking required by A5, and the LDA may require it to assume joint and several liability with the Applicant for the performance of the Contract.

Where the Applicant (or an entity whose turnover is relied upon) has been trading for less than three financial years, turnover for the period since its establishment, expressed as an annual average, will be accepted.

Financial Year	Turnover — Applicant (€)	Turnover — entities relied upon (€)
Year 1 (most recent)		
Year 2		
Year 3		
Average annual turnover (combined)		
I/we confirm the Applicant meets the minimum turnover requirement	Yes ☐ No ☐	

C2 Insurances (Declaration)

Applicants must confirm that they hold, or can put in place before appointment, the minimum levels of insurance set out below. A letter from the Applicant's insurer or broker confirming the cover held, or a certificate of insurance, will be accepted as sufficient evidence.

Insurance	Minimum level	Hold	Can put in place
Professional Indemnity	€2.6m any one claim	☐	☐
Cyber Liability / Cyber Security	€6.5m in the aggregate	☐	☐
Public Liability	€6.5m any one occurrence	☐	☐
Employer's Liability	€13m any one occurrence	☐	☐

An Applicant which confirms that it can put the required cover in place before appointment satisfies this requirement at PQQ stage. Failure to hold the required cover at the date of the Submission is not a ground for elimination.

A confirmation from the Applicant's insurer or broker will be required from the successful Applicant before, and as a condition of, appointment, and annually during the Contract term. The successful Applicant must notify the LDA promptly of any material adverse change to its insured status.

Part D — Capability

Scored — 1,000 marks. Used to rank Applicants and determine the shortlist for Stage 2. To be completed by the Lead Applicant, including in respect of any entities being relied on.

Part D is scored solely on the Applicant's relevant past experience and demonstrated track record in delivering an off-the-shelf SaaS Asset Management Platform of the nature described in Part 3 of Volume 1. The rules on how it is scored — Minimum Quality Thresholds, ranking and shortlisting, how similarity of past contracts is assessed, and the number of projects required — are set out at paragraph 5, and the page limits at paragraph 3.

Where the Applicant relies on the experience of a Consortium member or other entity, the response must identify which entity performed the experience relied upon, and that entity must perform the corresponding part of the Services.

Table 2 — Evaluation Criteria and Marks

Each sub-criterion is rated 0 to 5 against the descriptors in Table 3 and awarded a mark within the corresponding band below, as provided in paragraph 5.3.

Criterion	Available marks	MQT	0	1	2	3	4	5	Max. pages
D1 Similar Experience	400	240	0-79	80-159	160-239	240-319	320-399	400	8
D2 Organisational Experience, Resources & Capability	200	120	0-39	40-79	80-119	120-159	160-199	200	4
D3 Implementation, Onboarding & Data Migration	150	90	0-29	30-59	60-89	90-119	120-149	150	3
D4 Software Support & SaaS Service Model	150	90	0-29	30-59	60-89	90-119	120-149	150	3
D5 Sustainability	100	60	0-19	20-39	40-59	60-79	80-99	100	2
Total	1,000	600							20

Note: The figures in bold are the Minimum Quality Thresholds — the minimum mark required for each of D1 to D5, equivalent to a rating of 3. An Applicant which fails to achieve the MQT for any sub-criterion will not be shortlisted; see paragraph 5.4.

Table 3 — Rating Descriptors

Rating	Response	Descriptor
5	Excellent	Every requirement of the sub-criterion is addressed, and each is evidenced by reference to a specific identified past contract with the outcomes achieved stated. The response is comprehensive, detailed and internally consistent, and gives full assurance of delivery to an excellent standard.
4	Very good	Every requirement of the sub-criterion is addressed and evidenced by reference to identified past contracts, with only minor gaps in evidence or detail. The response gives assurance of delivery to a high standard.
3	Good	Every requirement of the sub-criterion is addressed, but the evidence for one or more requirements is limited, generic, or not tied to an identified contract. The

		response gives reasonable assurance of delivery. This rating meets the Minimum Quality Threshold.
2	Fair	One or more requirements of the sub-criterion is not addressed, or is asserted without supporting evidence from an identified past contract. Reservations remain which the response does not resolve.
1	Poor	Several requirements of the sub-criterion are not addressed or not evidenced, or the response contains fundamental inconsistencies.
0	Unacceptable	No response is provided, or the response wholly fails to address the sub-criterion.

In applying Table 3, evaluators will have regard to paragraph 5.13, under which contracts more similar to the Requirement in size, nature and complexity attract a higher rating than less similar contracts.

D1 Similar Experience

Please provide details of exactly three (3) contracts, delivered or substantially delivered within the last five (5) years from the date of the Contract Notice, which are the same as or similar to the Requirement in Part 3 of Volume 1.

The LDA may contact the referees identified below to verify the factual accuracy of the information provided. Where it does so it will do so on a consistent basis in respect of all Applicants eligible for shortlisting. Referee contact will be used only to verify the accuracy of the information submitted and will not be used as a source of additional evidence for scoring purposes. Where a referee provides information which is materially inconsistent with the Submission, the LDA will put that inconsistency to the Applicant in writing and afford it a reasonable opportunity to respond before drawing any conclusion. Where a referee does not respond, that will not be held against the Applicant. Applicants must confirm that each named referee has been informed that their name and contact details have been provided to the LDA for this purpose.

Using those past contracts, the Applicant must demonstrate that it has:

- delivered and implemented a commercially available (off-the-shelf) SaaS asset, property or tenancy management platform for at least three (3) clients whose requirements are comparable to the LDA's (for example large residential rental portfolios, public sector bodies, social or affordable housing providers, property or asset managers, or organisations managing comparable regulated residential portfolios, or equivalent), stating for each the scale (number of units / properties) and geographic spread;
- provided, on those contracts, integrated coverage across the essential functions of tenancy schedules and rent roll, financial management, procure to pay, planned and reactive maintenance, compliance tracking and estate management;
- delivered against contractual milestones, KPIs and SLAs (including go-live), with evidence of the outcomes achieved; and
- held the contract to its scheduled conclusion or, where the contract is ongoing, retained it beyond its initial term, stating in each case the current status of the contract and whether any part of it was terminated, curtailed or the subject of a formal dispute.

For each reference contract, the Applicant's narrative must establish how the contract demonstrates past experience similar in nature, scale and complexity to the Requirement; the nature of the working relationship with the client, including governance and reporting and how issues were resolved; and how that past experience evidences the Applicant's capacity to deliver a contract of this type and scale.

Data migration and integration experience is scored under D3, and live-service and support experience under D4. Material on those topics submitted under D1 will not be scored under D1.

Reference contracts — complete one block per contract (exactly three). Excluded from the 8-page limit. Copy the block below for each additional contract.

Reference contract 1	
Client / contract name	
Dates and duration	
Contract value (€)	
Description — scope, scale and modules deployed	
Number of units / properties under management	
Geographic spread	
Go-live date	

Still in live service? (Yes / No — if No, state end date and reason)	
Applicant's role (prime / sub-contractor / Consortium member)	
Referee name, position and contact details	

Reference contract 2	
Client / contract name	
Dates and duration	
Contract value (€)	
Description — scope, scale and modules deployed	
Number of units / properties under management	
Geographic spread	
Go-live date	
Still in live service? (Yes / No — if No, state end date and reason)	
Applicant's role (prime / sub-contractor / Consortium member)	
Referee name, position and contact details	

Reference contract 3	
Client / contract name	
Dates and duration	
Contract value (€)	
Description — scope, scale and modules deployed	
Number of units / properties under management	
Geographic spread	
Go-live date	
Still in live service? (Yes / No — if No, state end date and reason)	
Applicant's role (prime / sub-contractor / Consortium member)	
Referee name, position and contact details	

D1 Narrative in support of the above (cross-referencing the reference contracts):

Maximum eight (8) A4 pages. The reference contract table above is excluded from this limit.

Please provide your response here ...

D2 Organisational Experience, Resources and Capability

Using exactly three (3) contracts delivered within the last five (5) years, the Applicant must demonstrate that it has the organisational experience, resources and capability required to deliver a contract of the size and complexity of the Requirement. Using those past contracts, the Applicant must demonstrate that it has:

- operated as an established provider of a market-ready product, stating the number of years the product has been commercially available and the number of comparable clients it has served;
- deployed the workforce, team and skills needed to deliver and support a comparable platform (including implementation, configuration, data migration, integration and support roles), and the balance of directly-employed and sub-contracted resource used;
- resourced, mobilised and scaled delivery and ongoing support for a client of a size and complexity comparable to the LDA, including a portfolio in the range of 3,600 to 11,000 units as set out in Part 3 of Volume 1;
- deployed an appropriate management and delivery structure on those contracts, including key roles, responsibilities and reporting arrangements; and
- engaged and managed any supply chain or sub-contractors on those contracts.

Please also provide an organisation chart illustrating the implementation and support structure the Applicant has deployed on a comparable past contract. The chart must not exceed one (1) A4 page and is excluded from the 4-page D2 limit. It will be assessed as part of D2.

D2 Response — exactly three (3) examples (attach your organisation chart):

Maximum four (4) A4 pages, plus a one (1) page organisation chart.

Please provide your response here ...

D3 Implementation, Onboarding and Data Migration

Using exactly three (3) contracts the Applicant has already delivered, the Applicant must demonstrate that it has a track record of implementing, onboarding and migrating clients onto its platform. Using those past contracts, the Applicant must demonstrate that it has:

- implemented its platform through a full implementation lifecycle (discovery, design, configuration, migration, testing, training, go-live and transition to support), stating the timescales actually achieved;
- onboarded multiple distinct user groups on those contracts — including internal client teams, third-party managing agents, contractors and residents / end-users — and managed differing authorisation and permission levels;
- migrated client data from legacy systems and spreadsheet-based processes (for example Excel or equivalent) while maintaining continuity of service during roll-out, stating for each the volume and type of data migrated and how data quality was validated; and
- achieved integration with client technologies such as Microsoft 365, SharePoint, the Power Platform, Power BI or equivalent (including single sign-on (SSO) and multi-factor authentication (MFA)) and with client finance systems, identifying the finance systems concerned and the integration method used.

All data migration and integration experience is scored under this sub-criterion. Such material submitted under D1 or elsewhere will not be scored under D1.

D3 Response (evidenced by past contracts):

Maximum three (3) A4 pages.

Please provide your response here ...

D4 Software Support and SaaS Service Model

Using exactly three (3) contracts the Applicant has already delivered, the Applicant must demonstrate that it has a track record of supporting its platform in live service under a SaaS model. Using those past contracts, the Applicant must demonstrate that it has:

- delivered its platform as a hosted SaaS service, stating the infrastructure or hosting provider used and the location(s) in which client data was hosted;
- achieved defined support service levels (support tiers, response and resolution times and availability / uptime), evidencing the performance actually achieved against those service levels for comparable clients;
- released product updates and upgrades to live clients with minimal disruption, evidencing how this was managed on those contracts;
- maintained business continuity, backup and disaster-recovery arrangements, evidencing their operation (for example a tested recovery or an actual incident); and
- operated security and vulnerability-management processes at a service level (relevant certifications are addressed in Parts E and F).

The Applicant's ability to host client data within the EU/EEA for this Contract is addressed at F3.1 and is a pass/fail requirement. It is not scored under this sub-criterion.

D4 Response (evidenced by past contracts):

Maximum three (3) A4 pages.

Please provide your response here ...

D5 Sustainability

In line with the Climate Action Plan (as updated from time to time) and the Green Public Procurement Strategy and Action Plan 2024–2027, and using its experience on comparable past contracts and its current arrangements, the Applicant must demonstrate that it has:

- implemented measures that reduce the environmental impact of its operations, its hosting and data-centre arrangements (for example energy-efficient or renewable / green hosting, or equivalent) and its supply chain, with evidence;
- held relevant environmental certification or reporting (for example ISO 14001 or equivalent); and
- applied documented environmental management procedures across its operations and supply chain.

D5 Response (evidenced by past contracts and current arrangements):

Maximum two (2) A4 pages.

Please provide your response here ...

Part E — Accreditations and Certifications

Pass/Fail. Where a certification is not held directly, it may be provided through an entity named at A5, which must provide the undertaking required by A5 and must perform the part of the Services to which the certification relates.

E1 Information Security (Pass/Fail)

It is a mandatory requirement of this Competition that the Applicant holds certification to ISO/IEC 27001 (or equivalent) in respect of the information security management system used to deliver services of the type described in Part 3 of Volume 1. Please confirm the position below by ticking one option.

The Applicant holds certification to ISO/IEC 27001	☐
The Applicant holds an equivalent certification (state which): _____	☐
The Applicant does not hold such certification but has implemented equivalent information security management measures, and had no possibility of obtaining the certification within the relevant time limits for reasons not attributable to it (provide details — maximum one (1) A4 page)	☐
The certification is held by an entity named at A5 which will perform the relevant part of the Services (state which): _____	☐
None of the above — an Applicant selecting this option will not be shortlisted	☐

Evidence of certification must be provided within five (5) Working Days of a request.

E2 Penetration Testing (Pass/Fail)

The Applicant must confirm that, if appointed, the systems and services used to deliver the Services to the LDA will be subject to an independent penetration test conducted by a qualified third party at least annually and following any significant change to the environment, and that a summary of findings and remediation will be made available to the LDA on request. This requirement will form a condition of the Contract.

Confirmed	Yes	☐	No	☐
-----------	------------	--------------------------	-----------	--------------------------

E2.1 Supporting detail (optional):

For information only — not evaluated at PQQ stage. Maximum half a page.

Please provide your response here ...

E3 Vulnerability Management (Pass/Fail)

The Applicant must confirm that it operates, and will operate for the duration of the Contract, a documented vulnerability management process which includes periodic vulnerability scanning of the systems, applications and infrastructure supporting the service, the timely deployment of security patches and remediation of identified vulnerabilities, and defined target remediation timeframes for Critical, High, Medium and Low severity findings. This requirement will form a condition of the Contract.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

E3.1 Supporting detail (optional):

For information only — not evaluated at PQQ stage. Maximum half a page.

Please provide your response here ...

Part F — Data Protection and Information Security

Pass/Fail. Questions marked “confirmation” are Pass/Fail. Questions marked “for information only” are not evaluated at PQQ stage and will inform the RFT and the Contract. No narrative response in this Part is scored.

F1 In delivering the Platform and Services under this Contract, the Supplier will process personal data and confidential information relating to the LDA, its residents, employees, contractors and stakeholders. Applicants are accordingly required to demonstrate appropriate data protection, cyber security and information governance arrangements, and to complete the following in full.

F2 Data Protection Governance

F2.1 (confirmation — Pass/Fail) I/we confirm that the Applicant complies with the General Data Protection Regulation (“GDPR”), the Data Protection Act 2018 and any other applicable or equivalent data protection legislation.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F2.2 (for information only — not evaluated at PQQ stage) Please provide a brief overview of your organisation’s data protection compliance arrangements (including your Data Protection Officer or lead, records of processing, data protection impact assessments, retention, staff training and personal-data breach management).

Maximum one (1) A4 page. Excluded from the Part D page limits.

Please provide your response here ...

F2.3 (confirmation — Pass/Fail) I/we confirm the Applicant will, if appointed, enter into a data processing agreement under Article 28 of the GDPR and act as processor on the LDA’s documented instructions.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F2.4 (confirmation — Pass/Fail) I/we confirm that, on expiry or termination of the Contract for any reason, all of the Contracting Authority’s data will be exported in a commonly used, machine-readable and usable format within thirty (30) calendar days, and that all remaining copies of that data, including copies held in backups, will thereafter be securely deleted save where retention is required by law. The detailed exit and data-deletion process will be addressed in the RFT and in the Contract and is not evaluated at PQQ stage.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F3 Data Residency and Hosting

F3.1 (confirmation — Pass/Fail, plus information) Hosting of personal data within the EU/EEA, or under transfer safeguards which comply with Chapter V of the GDPR, is a mandatory requirement. An Applicant which cannot confirm this will not be shortlisted. The location of hosting within the EU/EEA confers no advantage; hosting in Ireland specifically is neither required nor preferred.

I/we confirm that personal data will be hosted and processed within the EU/EEA, or under transfer safeguards which comply with Chapter V of the GDPR	Yes	☐	No	☐
--	-----	--------------------------	----	--------------------------

F3.1(a) Please identify the hosting locations, any sub-processors used, and any international data transfers together with the safeguards relied upon.

Maximum one (1) A4 page. Excluded from the Part D page limits.

Please provide your response here ...

F3.2 (confirmation — Pass/Fail) I/we confirm that the Applicant will manage all aspects of the service, including engagement with any third-party hosting provider.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F4 Information Security Measures

F4.1 (for information only — not evaluated at PQQ stage) Please provide a brief overview of the technical and organisational security measures implemented to protect personal data and confidential information. This should include, where applicable: multi-factor authentication (MFA); role-based access controls for internal and external users; encryption in transit and at rest; secure software development and penetration testing; logging and monitoring; secure remote / mobile working; device management; backup; business continuity; artificial intelligence and automated processing; hosting model architecture; and incident response arrangements. Reference any ISO/IEC 27001 or other certifications held (see Part E).

Maximum two (2) A4 pages. Excluded from the Part D page limits.

Please provide your response here ...

F4.2 (confirmation — Pass/Fail) Please confirm that an effective and monitored security awareness training programme, whether formal or in-house, covering user access, data protection and data management issues (including multi-tenancy, cloud delivery model, segregation of duties implications and conflicts of interest), is in place and is monitored for all persons with access to customer data, and that user access policies are in place.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F4.3 (confirmation — Pass/Fail) Please confirm that the solution provides audit logging and monitoring sufficient to support security investigation, user access review, administrative oversight and compliance monitoring.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

F4.4 (confirmation — Pass/Fail) Please confirm that effective physical security is in place at both the primary hosting site and any associated business continuity / disaster recovery site.

Confirmed	Yes	☐	No	☐
-----------	-----	--------------------------	----	--------------------------

Part G — Confirmations and Acknowledgements

Pass/Fail. Where the Applicant is a Consortium, a separate signed declaration is required from each Consortium member and from each entity on whose capacity the Applicant relies.

G1 Declaration of Bona Fides and Statutory Obligations

I/we confirm, on behalf of the Applicant, that:

- the information provided in this Submission is true, accurate and complete, and I/we understand that the provision of false or misleading information may result in exclusion under Regulation 57(8)(h) of the Regulations;

- the proposed solution is an off-the-shelf, commercially available, market-ready product that meets the mandatory requirement in paragraph 3.1 of Volume 1, and no bespoke or custom-built development is required to meet the core requirement (as confirmed at question A7);
- the Applicant will comply with applicable obligations in the field of environmental, social and labour law established by European Union law, national law, collective agreements or the international environmental, social and labour law provisions listed in Schedule 4 to the Regulations, including the Safety, Health and Welfare at Work Act 2005, and with the GDPR and the Data Protection Act 2018;
- no attempt has been made to canvass, lobby or improperly influence this Competition, and there has been no collusion with any other Applicant within the meaning of paragraph 2.8;
- the Applicant acknowledges the LDA's obligations under the Freedom of Information Act 2014, and has identified any commercially sensitive information (with reasons) within its Submission. The Applicant acknowledges that the LDA cannot guarantee that information so identified will not be disclosed, and that any decision on disclosure will be made in accordance with the Freedom of Information Act 2014 following consultation with the Applicant where required by that Act;
- the Applicant, and any sub-contractor or entity on whose capacity it relies (where the value of that sub-contract exceeds 10% of the value of the Contract), does not fall within the category of prohibited economic operators under Regulation (EU) No 833/2014 (as amended by Regulation (EU) 2022/576 or any subsequent amendment), and the origin of any goods connected to the Submission is not subject to the prohibitions in that Regulation;
- the Applicant has a lawful basis under the GDPR for providing to the LDA and to the operator of eTenders the personal data contained in the Submission, has informed the relevant data subjects (including any named referee) that their personal data has been provided to the LDA for the purposes of this Competition, and will provide evidence of that lawful basis on request; and
- the Applicant accepts the rules of the Competition as set out in Volume 1 and this Volume 2.

Signed	
Name (block capitals)	
Position	
On behalf of (Applicant)	
Date	

This declaration may be signed electronically. Where the Submission is made through eTenders, the declaration must be signed and uploaded as a scanned or electronically signed document.