

SERVICE SPECIFICATION

Digital Safety File & O&M Handover Service

Expert-Led Compilation • Managed Platform • Full Lifecycle Support

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1. Purpose & Background

Every residential and commercial construction project in Ireland requires a compliant Safety File under the Safety, Health and Welfare at Work (Construction) Regulations 2013 (S.I. No. 291 of 2013) and, where applicable, the Building Control (Amendment) Regulations 2014 (S.I. No. 9 of 2014). Coordinating multiple stakeholders, chasing contractors for documentation, and verifying completeness is time-consuming and frequently results in incomplete handovers and ongoing compliance gaps.

This specification defines the requirements for the appointment of a specialist Digital Safety File and O&M Handover provider. The appointed provider must offer an expert-led, managed service – combining qualified personnel, a structured digital platform, and active stakeholder coordination – to ensure every project achieves full regulatory compliance with complete, verified, and accessible documentation at Practical Completion and beyond.

2. Scope of Service

The appointed provider shall deliver a fully managed Digital Safety File and O&M Handover service encompassing the following core components:

- Expert-led gap analysis and document compliance review by qualified Information Managers
- Active coordination with all design teams, contractors, and subcontractors throughout the construction lifecycle
- A structured, uniform digital platform for document management, review, and approval
- Real-time progress reporting and milestone tracking throughout the project
- A fully verified, compliant Digital Safety File and O&M Manual delivered at Practical Completion
- Post-handover platform access and lifecycle support for Facilities Management teams

NOTE

The provider must deliver an active, managed service – not simply a software platform or passive document repository. The client requires human-led coordination and quality assurance throughout the construction and handover process.

3. Service Delivery Models

The provider shall offer a minimum of three service delivery models to accommodate varying project types and client requirements. The client shall select the appropriate model at the time of appointment, based on the complexity and programme of the project:

Model 1 Post-Construction Upload	Model 2 Collaborative Construction Phase	Model 3 ★ Recommended Full Coordination Service
<i>Best for: Projects where a digital safety file has already been received from a developer.</i> • Upload of documentation to a secure, structured platform • Optional gap analysis, asset register creation, and lifecycle review • Verified, accessible Safety File for the Facilities Management team	<i>Best for: Projects with engaged, capable construction teams.</i> • Platform configured with upload rights for the construction team • Expert review and commenting on all uploaded documents • Real-time dashboard updates and compliance monitoring throughout construction	<i>Best for: Complex multi-unit developments requiring highest assurance.</i> • Complete control of the Safety File compilation process • Direct coordination with all design teams and contractors • Proactive stakeholder management throughout construction • Early gap identification and resolution • Highest quality assurance and compliance outcomes

4. Personnel & Qualifications

The provider's delivery team must include the following competencies to ensure effective management of the Safety File compilation process. Evidence of qualifications shall be provided at the time of appointment:

Role	Minimum Requirement
Information Manager / Coordinator	Qualified Information Manager with demonstrable experience in Safety File and O&M Manual compilation on Irish construction projects; BRE or BSI ISO 19650 certification desirable.
DFM Champion (Project Lead)	A named individual assigned as single point of contact for each project, responsible for stakeholder engagement, progress reporting, and quality assurance throughout the construction and handover period.
Technical Reviewers	The team shall include professionals with building services, architectural, or construction management backgrounds capable of assessing technical document compliance and identifying gaps in submitted content.
Document Controllers	Experienced document controllers to manage upload workflows, version control, naming conventions, and platform configuration.
IT & Platform Support	Dedicated IT professionals ensuring platform reliability, data security, and GDPR compliance.

5. Digital Platform Requirements

The provider's digital platform shall meet the following functional and technical requirements. Tenderers must demonstrate compliance with each requirement, with reference to a live environment or reference project:

5.1 Access & Usability

- Accessible via a standard web browser on desktop and mobile devices without requiring installation of any proprietary software.
- Mobile-accessible for on-site document review and upload by contractor teams.
- Role-based access controls enabling the client, design teams, contractors, subcontractors, and statutory authorities to be granted appropriate levels of access for review, upload, or approval.
- Hosted within the European Economic Area (EEA) with a documented uptime commitment of no less than 99.5% during standard business hours.

5.2 Document Management

- A uniform, structured document hierarchy applied consistently across all projects, organised by Safety File section, building system, and trade discipline.
- Support for all standard file formats including PDF, DOCX, DWG, XLS, and CSV, with content accessible without conversion loss.
- Controlled document versioning with a full, tamper-evident audit trail attributing every upload, revision, review, and approval to a named user with date and time stamp.
- Configurable review and approval workflows with automatic notification to named reviewers upon document submission or resubmission.
- The ability to issue, track, and close document queries or information requests within the platform, maintaining a complete record of correspondence.

5.3 Reporting & Visibility

- Real-time dashboards displaying document completion status by section, system, and overall project, accessible to all authorised stakeholders at any time.
- Exportable compliance matrices and progress reports suitable for inclusion in construction progress reports and board-level updates.
- Gap analysis reports identifying outstanding documentation, responsible party, and target resolution date.
- Milestone tracking aligned to the construction programme, with automatic flagging of items at risk of missing key dates.

5.4 Download & Export

- The client shall be provided with the facility to download the complete Safety File and O&M Manual as a single, self-contained package in PDF or equivalent open format, at any time during the project and at handover.
- All asset data shall be exportable in open formats (PDF, CSV, XLS) without data loss, ensuring no proprietary lock-in.
- An offline backup of the complete handover package shall be provided to the client on a secure storage device at Practical Completion.

5.5 Security & Compliance

- The platform shall comply with the General Data Protection Regulation (GDPR) as enacted in Irish law under the Data Protection Act 2018, with a written compliance statement provided at appointment.

- The provider shall hold or be working towards ISO 27001 certification or an equivalent recognised information security standard.
- Platform access for the client shall be maintained for a minimum of 10 years post-Practical Completion, with a documented data migration or export pathway in the event the provider ceases trading or the client wishes to change provider.

6. Deliverables by Phase

The provider shall deliver the following outputs at each stage of the project. All deliverables shall be produced and managed within the digital platform unless otherwise stated:

Phase	Required Deliverables
Implementation	• Lessons learned workshop with the client's Asset Management team to agree structure, templates, and workflows • Platform configured to the client's specific project templates, naming conventions, and approval workflows • Comprehensive role-based training for all platform users including contractor, design team, and client representatives • User Acceptance Testing (UAT) completed and sign-off obtained prior to live project go-live
During Construction	• Regular progress reports (minimum monthly) with real-time completion status by section and document type • Gap analysis reports identifying outstanding documentation, responsible party, and target resolution date • Milestone achievement tracking aligned with the construction programme • Direct coordination with contractors, subcontractors, and design teams for document collection and compliance • Proactive pursuit of outstanding items with escalation to the client where required
Practical Completion	• Fully verified and compliant Digital Safety File meeting all requirements of S.I. No. 291 of 2013 and BCAR 2014 • Complete asset register with asset tagging, metadata, and linked documentation for all installed plant and equipment • Maintenance schedules aligned with manufacturer recommendations for all building systems • Warranty and guarantee register with expiry dates, named guarantors, and claim procedures linked to individual assets • As-built drawings (architectural, structural, and M&E services) in PDF and native format where available • O&M manuals for all building systems and equipment, structured by system and trade discipline • All test certificates, commissioning reports, and statutory compliance documentation uploaded and indexed • Formal handover completeness report confirming document status by section and listing any agreed outstanding items • Offline backup of the complete handover package on a secure storage device
Post-Handover	• Role-based training for the Facilities Management team on platform access and use • Ongoing platform access for building lifecycle documentation and reference

Phase	Required Deliverables
	- Capability to add post-handover documentation including inspection reports, maintenance records, and updated warranties - Maintenance scheduling and warranty expiry tracking with notification capability

7. Safety File & O&M – Minimum Content

The completed Digital Safety File and O&M Handover package shall contain, as a minimum, the following content, structured and indexed within the digital platform:

Safety File

- Project description, PSDP and PSCS declarations, and key project team contacts
- As-built drawings reflecting the completed works (architectural, structural, M&E services)
- Description of construction methods and materials where relevant to future maintenance or alteration
- Hazardous materials survey and management records (asbestos, lead, contaminated ground)
- Details of concealed, buried, or non-visible structural and service features
- Fire safety strategy, compartmentation drawings, fire door schedules, and cause-and-effect matrix
- Emergency procedures and key contact details for all principal building systems
- Residual risks for persons carrying out future maintenance, alteration, or demolition
- Structural calculations and geotechnical information relevant to future works

O&M Manual

- Manufacturer installation, operation, and maintenance instructions for all plant and equipment
- Commissioning records and test certificates for all mechanical, electrical, and public health systems
- Statutory inspection and maintenance schedules for all plant subject to periodic inspection
- Warranties and guarantees individually linked to asset records with expiry dates and claim procedures
- Planned Preventative Maintenance (PPM) schedule by system, with frequencies and required competencies
- Emergency shutdown and isolation procedures with diagrams showing isolation point locations
- Spare parts schedules and recommended stock-holding quantities for critical plant items
- Cleaning and housekeeping specifications for all finishes, materials, and specialist components
- Completed asset register with tagging, metadata, and linked documentation for all installed assets

8. Performance Standards

The following performance standards apply to the appointed provider throughout the duration of the engagement:

Standard	Requirement
Documentation completeness at Practical Completion	95% or greater of required documents uploaded, reviewed, and approved at the date of Practical Completion.
Response to document queries	All document queries or information requests issued by the provider to be acknowledged by the relevant party within 5 working days; escalation to client within 10 working days of non-response.

Standard	Requirement
Progress reporting frequency	Written progress report issued to the client no less than monthly, with real-time dashboard access available at all times.
Gap analysis	Initial gap analysis completed within 10 working days of project commencement; updated gap analysis issued at each agreed construction milestone.
Handover completeness report	Formal handover completeness report issued to the client no later than the date of Practical Completion.
Platform availability	99.5% uptime during standard business hours (08:00–18:00 Monday to Friday, excluding Irish public holidays).
Post-handover platform access	Client access maintained for a minimum of 10 years post-Practical Completion.

9. Why a Specialist Provider Matters

The compilation of a compliant Digital Safety File is a specialist service requiring a combination of regulatory knowledge, construction expertise, document management capability, and active stakeholder coordination. It is not a task that can be effectively delivered by a general contractor, a software platform alone, or administrative staff without relevant construction expertise.

A qualified specialist provider delivers measurable outcomes that protect the client's investment and regulatory position:

- ✓ Regulatory protection – Compliant Safety Files from day one, reducing exposure to HSA enforcement action and insurance complications.
- ✓ Time savings – The provider chases contractors and manages document collection, freeing client and design team resource for higher-value activities.
- ✓ Quality assurance – Human expert review catches contextual compliance issues that automated software alone will miss, delivering 95%+ documentation completeness at Practical Completion.
- ✓ Long-term asset value – A structured, verified digital Safety File supports effective facilities management, reduces reactive maintenance costs, and provides a permanent, accessible repository for the lifetime of the asset.
- ✓ Data security – EEA-hosted, GDPR-compliant platform with full audit trail and access controls, protecting sensitive building and asset information.
- ✓ Proven delivery – Demonstrated track record with leading Irish developers, contractors, and asset managers including appointment as Digital Safety File provider for the Land Development Agency.

End of Specification – DSF-SPEC-001 v1.0