# Project Information Memorandum

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|---|---|
| *For* | ***Formation of HSE Design Team Services Framework 2024*** |
| *By* | ***Restricted Procurement Procedure*** |
| *For* | ***Health Service Executive*** |
| *For* | *Framework Category 01: Minor Capital Works – project value €0M - €1M excluding VAT.*<br>*Framework Category 02: Acute Capital Works – Project value €1M - €15M excluding VAT.*<br>*Framework Category 03: Non-acute Capital Works – Project value €1M - €15M excluding VAT.*<br>*Framework Category 04: Acute Capital Works – Project value €15M - €60M excluding VAT.*<br>*Framework Category 05: Non-acute Capital Works – Project value €15M - €60M excluding VAT.* |
| *For* | *Frameworks established on a regional/sub-regional basis for the following Capital & Estates Offices (alphabetical order):*<br>***Cherry Orchard; Carrickmines; Cork; Galway; Kells; Kilkenny; Limerick; Sir Patrick Dun's (Corporate Estates office); Sligo + Letterkenny; Swords and Tullamore.*** |
| *For* | *All Framework Categories noted above, and all Lots associated those Framework Categories.* |
| *Version Nr.:* | *V1.0**4**-2026* |
| *Reason for Update* | 1. Clause 2.1.5: additional information clarifying the quota relating to the top ranked firms and the awarding of actual work from the framework.<br>2. Clause 2.1.5: clarification on HSE right to amend restrictions for eligibility to Framework 2024 Categories and Design Disciplines.<br>3. Clause 2.1.6: further information regarding rules of engagement for Employer's Representative.<br>4. Clause 2.1.7: reference in relation to Specialist Skills Providers as part of the Integrated Architect Team (IAT). |

# Project Information Memorandum

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# Section 1: Introduction – General Items

# Project Information Memorandum

Section 1: Introduction – General Items:

## 1. INTRODUCTION

### 1.1 General:

This document is provided as guidance to Applicants of the new Health Service Executive Design Team Services Framework 2024 and should be read in conjunction with the Suitability Assessment Questionnaire documentation issued.

The purpose of this document ("Project Information Memorandum" or "PIM") is to provide Applicants with general information in relation to the structure of this competition and how the frameworks will operate. Further details in relation to submission of tenders will be issued to shortlisted applicants as part of an Invitation to Tender pack following the Initial Stage.

Implementation of the Health Service Executive (**HSE**) Capital Plan is the responsibility of the Capital & Estates Directorate as part of the Health Service Executive which ensures that the individual projects are assessed and managed in accordance with the DPER's *Infrastructure Guidelines* (previously *Public Spending Code*) and *Capital Works Management Framework* (CWMF).

### 1.2 Contracting Authority (CA):

The Health Service Executive (HSE) ("Contracting Authority" or the "CA") through this competition, is procuring multiple operator framework agreements (the "Framework Agreements 2024") to facilitate the CA in its provision of design team services on its own behalf and on behalf of **HSE Group** comprising publicly funded healthcare bodies such as (a) all service providers to the HSE falling (now or in the future) under (or considered and/or treated by the HSE as falling under) Section 38 of the Health Act 2004 (as amended) ("a Section 38 Body"), (b) all bodies/entities falling (now or in the future) under (or considered and/or treated by the HSE as falling under) Section 39 of the Health Act 2004 (as amended) ("a Section 39 Body") and (c) all other bodies corporate, statutory corporations, hospitals, partnerships, unincorporated associations, charities and other entities operating as part of the Irish Health Service and funded in any way directly or indirectly by the HSE or other public funding sources or any local, national or supra-national government or regulatory authority, as well as any employees or contractors of any of the foregoing and any other persons or hospitals assisting in the provision of the Irish health service.

It is envisaged that **Tusla**, the Child & Family Agency under the auspices of the Department of Children and Youth Affairs, and although not directly funded by the Health Service Executive and the Department of Health, shall utilise the frameworks to the extent of the frameworks' formation and intent.

### 1.3 HSE Capital & Estates Offices:

There are ten (10Nr.) regional/sub-regional Estates offices and one (1Nr.) corporate office. The current Estates offices in alphabetical order are Cherry Orchard, Carrickmines, Cork, Galway, Kells, Kilkenny, Limerick, Sir Patrick Dun's (Corporate office), Sligo + Letterkenny, Swords, and Tullamore.

New HSE Regional Health Areas (RHA) are currently being formed and the HSE Capital & Estates function will serve these health areas. The new HSE Regional Health Areas are:

Table Nr. 1: New HSE Regional Health Areas:

| Regions: | Location: |
|---|---|
| HSE Dublin and North-East: | North Dublin, Meath, Louth, Cavan, and Monaghan. |
| HSE Dublin and Midlands: | Longford, Westmeath, Offaly, Laois, Kildare, and part of Dublin South and Wicklow. |
| HSE Dublin and South-East: | Tipperary South, Waterford, Kilkenny, Carlow, Wexford, Wicklow, part of South Dublin. |
| HSE Mid-West: | Limerick, Tipperary, and Clare. |
| HSE South-West: | Kerry and Cork. |
| HSE West and North-West: | Donegal, Sligo, Leitrim, Roscommon, Mayo, and Galway. |

## 1.4 HSE Design Team Services Framework 2024:

It is now proposed to create five (5Nr) 'category specific' Frameworks based on project complexity and monetary value. The framework(s) will to be established on a regional/sub-regional HSE Capital & Estates Office basis.

Each regional/sub-regional office will be responsible for forming their own design team framework(s) as and when a relevant 'real' project emerges within each office aligning with the framework categories/types detailed elsewhere in this document. The HSE Capital & Estates Corporate Office will assume overall responsibility for the governance and assurance of the frameworks.

# Project Information Memorandum

Section 1: Introduction – General Items:

1.4.1 Framework Categories:

The five (5) HSE Design Team Services Frameworks 2024 categories are:

Table Nr. 2: New HSE DT Services Frameworks:

| Nr. | Framework Type: | Framework Description: |
|---|---|---|
| 1 | Framework Category 01: | Minor Capital Works – project value €0M - €1M excluding VAT (no delineation between acute/non-acute capital works). |
| 2 | Framework Category 02: | Acute Capital Works – Project value €1M - €15M excluding VAT. |
| 3 | Framework Category 03: | Non-acute Capital Works – Project value €1M - €15M excluding VAT. |
| 4 | Framework Category 04: | Acute Capital Works – Project value €15M - €60M excluding VAT |
| 5 | Framework Category 05: | Non-acute Capital Works – Project value €15M - €60M excluding VAT. |

1.4.2 Framework Categories and associated Design Disciplines:

Each framework category will have a prescribed and differing set of Principal Service Providers and subject to there being a relevant 'real' project within an Estates Office, a separate framework will be put in place for each design disciple (Lot) under each framework category for that HSE region. The Architect as Principal Service Provider will include a varying list of approved named Specialist Skills Providers. The named Specialist Skills Providers can be in-house specialisms to the Architect or external consultant firms. The principal and specialist skills providers by framework category are listed under the Architect in each Framework Category below. The HSE reserves the right to use the frameworks for Technical Advisor (TA's) services if required (for example for a Design & Build project).

**Framework Category 01: Minor Capital Works – project value €0M - €1M ex. VAT (no delineation between acute/non-acute capital works).**

**Lots (DT Disciplines):**

1. Architect (AR): with the following Specialists domestic sub-consultants, or in-house specialisms:
   (a) Planner (PL).
   (b) Project Supervisor Design Process (PSDP).
   (c) Employer's Representative (ER).
   (d) Fire Safety Consultant (FSC).
   (e) BIM Information Manager (BIM).
2. Quantity Surveyor (QS).
3. Building Services Engineer (M&E).
4. Civil / Structural Engineer (C&S).
5. Energy Efficient Design Facilitator (EEDF).
6. Assigned Certifier (AC).

# Project Information Memorandum

Section 1: Introduction – General Items:

**Frameworks Category 02 + 03: Acute/Non-acute Capital Works – Project value €1M - €15M ex. VAT.**

**Lots (DT Disciplines):**

1. Architect (AR): with the following Specialists domestic sub-consultants, or in-house specialisms:
   (a) Planner (PL).
   (b) Project Supervisor Design Process (PSDP).
   (c) Fire Safety Consultant (FSC).
   (d) BIM Information Manager (BIM).
2. Quantity Surveyor (QS).
3. Building Services Engineer (M&E).
4. Civil / Structural Engineer (C&S).
5. Employer's Representative (ER).
6. Energy Efficient Design Facilitator (EEDF).
7. Assigned Certifier (AC).

**Frameworks Category 04 + 05: Acute/Non-acute Capital Works – Project value €15M - €60M ex. VAT.**

**Lots (DT Disciplines)**

1. Architect (AR): with the following Specialists domestic sub-consultants, or in-house specialisms:
   (a) Planner (PL).
   (b) BIM Information Manager (BIM).
2. Quantity Surveyor (QS).
3. Building Services Engineer (M&E).
4. Civil / Structural Engineer (C&S).
5. Project Supervisor Design Process (PSDP).
6. Employer's Representative (ER).
7. Fire Safety Consultant (FSC).
8. Energy Efficient Design Facilitator (EEDF).
9. Assigned Certifier (AC).

# Project Information Memorandum

Section 1: Introduction – General Items:

1.4.3 Range of Projects as part of the Framework 2024:

HSE Design Team Services Frameworks 2024 are likely to include the following project / building types (this is not an exhaustive list and project types will vary on a region-by-region basis and will be subject to requirements at that time):

(a) Hospital ward blocks.
(b) Multi-department hospital – new build.
(c) Extension projects.
(d) Healthcare building – new build.
(e) Refurbishment / Renovation projects.
(f) Primary Care Centres.
(g) Community Nursing Units.
(h) Residential Units.
(i) Administration Departments.
(j) Enabling Works.
(k) Infrastructural Campus Upgrade Works.

1.4.4 Types of Design Services as part of the Framework 2024:

It is envisaged that the design team services being procured from each discipline under the applicable National Framework 2024 may comprise the following types of design services (not an exhaustive list):

(a) Full Design Team services.
(b) Partial Design Team services.
(c) Replacement Design Team services.
(d) Technical Advisory services.
(e) Outline Development Control Planning (ODCP).
(f) Feasibility Studies.
(g) Procurement Support & General Advisory Services.
(h) Project Analysis.
(i) Floor Area Analysis.
(j) Other services of a similar nature required by the Client such as:

- Supporting the CA through each of the various project life cycle stages and approval gateways as defined with DPER's Infrastructural Guidelines (previously the *Public Spending Code*).
- Input into the various deliverables (as set out in the Technical Requirements (TR) document) regarding the HSE achieving its Net Carbon Zero obligations, the HSE obligations in terms of Life Cycle Cost Assessment and reductions of Embodied Carbon as part of the HSE design and delivery of our Capital Build programme.

# Project Information Memorandum

Section 1: Introduction – General Items:

1.4.5 Acute / Non-acute Healthcare Definition:

The following table describes 'Acute' and 'Non-Acute' healthcare services. Some 'Non-Acute' healthcare services may be provided on an 'Acute' healthcare site/campus in which case the 'Non-Acute' healthcare service shall be considered an Acute healthcare project due to the healthcare status of the project and/or its relationship with the site/campus on which it resides.

Table Nr. 3: Acute Hospital and Non-Acute Healthcare Definitions:

1. Definition of Acute Hospital Project:

**'Acute Hospital'** project is defined as a healthcare facility catering for tertiary and secondary healthcare services with in-patient and out-patient facilities.

'Acute care' facilities include but are not limited to and are for short-term medical care:

(a) Emergency Department,
(b) Intensive Care / Theatres,
(c) Coronary Care / Cardiology,
(d) Diagnostic Imaging,
(e) Maternity / Neonatal Intensive Care,
(f) Hospital Ward Accommodation, etc.

Tertiary healthcare facilities/service are:

(a) Fully departmentalised and equipped facilities with the service capabilities needed to support the provision of specialised medical services in the field of Medicine, Paediatrics, Obstetrics and Gynaecology, Surgery, Radiation Oncology, their sub-specialties, and ancillary services.

Secondary healthcare facilities/services are:

(a) Facilities equipped with the service capabilities needed to support the provision of medical services in the field of Medicine, Paediatrics, Obstetrics and Gynaecology, Medical Oncology, General Surgery, and other ancillary services.

2. Definition of Non-acute Healthcare Project:

**'Non-Acute Healthcare'** project is defined as a healthcare facility catering for long term medical care, rehabilitation care and out-patient care other than that provided in an acute setting i.e. delivering non-hospital services. Typical facilities would be primary care services, community nursing units, and residential units. Non-Acute Healthcare projects may be provided on an acute hospital site, but the categorisation shall be at the discretion of the CA.

*End Section 1*

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

Section 2: Formation of Design Team Services Framework(s) 2024

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

## 2.1 Framework Formation:

2.1.1 Framework Formation – Contractual documentation:

Each Framework will be formed by:

(a) The Consultant's signed Form of Tender.

(b) Contract of Engagement (CoE1) signed and executed.

(c) The CA's written notification to the Consultant of his/her inclusion on the list of Participants.

Framework Agreement 2024 (separate document as part of this tender pack) sets out the Framework Agreement and Framework Rules.

2.1.2 Framework(s) 2024 Operational Period:

It is intended that the framework duration will be three (3Nr.) years with an additional one (1Nr.) year extension (maximum four (4Nr.) years duration) and this period will run from the official formation of each of the frameworks as they are established by each of the Estates offices.

2.1.3 Framework(s) 2024 Timeline / Timeline for Award of Framework(s):

Each framework will have differing commencement dates and concluding dates as frameworks will be established by each of the HSE Capital & Estates regional/sub-regional office as and when a relevant capital project emerges in that Estates office.

2.1.4 Application for Appointment for more than one Framework or more than one Lot:

Applicants / Tenderers are permitted to submit expressions of interest / tenders for each and every framework (category specific) and each and every lot should they deem that they meet the minimum criteria for that framework and that lot. This also applies to Specialist Skills Providers.

2.1.5 Number of Frameworks to which a company may be a participant:

To engender fairness and regionalism, the intention is that HSE Capital & Estates will look to establish fifty number frameworks for Design Team services nationally over the lifetime of the frameworks (3 years + 1 year) in the following manner detailed below.

It should be noted that HSE Capital & Estates is not obliged to establish some or all of the before mentioned framework category types. The applicants to the frameworks process will be determined through the restricted procurement procedure. Through the shortlisting process eight (8) of the applicants will be invited to submit a tender for the initial project that will be used to establish the frameworks. The top five (5) ranked tenderers will be admitted, and will constitute the framework participants for each of the framework category types listed above. The award process for various framework category types is as follows:

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

Framework Category types:

1. Minor Capital – project value - €0M-€1M: Rotational.
2. Acute Services – project value - €1M-€15M: Cascade.
3. Non-Acute Services – project value - €1M-€15M: Cascade.
4. Acute Services – project value - €15M-€60M: Cascade.
5. Non-Acute Services – project value - €15M-€60M: Cascade.

For the avoidance of doubt applicants will be eligible to win two (2) of the framework category types noted above nationally and as outlined below:

1. Be on only two (2) of the proposed ten (10) Minor Capital Frameworks (all five (5) parties on Rotational Framework are considered a winner).

2. Be the number 1 ranked position on only two (2) of the proposed ten (10) Acute Services €1M-€15M framework(s).

3. Be the number 1 ranked position on only two (2) of the proposed ten (10) Non- Acute Services €1M - €15M framework(s).

4. Be the number 1 ranked position on only two (2) of the proposed ten (10) Acute Services €15M - €60M framework(s).

5. Be the number 1 ranked position on only two (2) of the proposed ten (10) Non-Acute Services €15M - €60M framework(s).

For the cascade frameworks only, those ranked two to five on the individual framework may still apply to win a first placed position on two other frameworks within that framework category type.

Being 1st ranked in two Frameworks category types or being on two Minor Capital Frameworks does not preclude a firm from competing for Frameworks in another framework category type.

Once a firm accepts work off a cascade framework as 1st ranked or off the Minor Capital Framework it cannot remove itself to be 1st ranked on two other frameworks within that framework category type or be on two other Minor Capital Frameworks.

Should a firm be on two Minor Capital Frameworks (and have accepted work) or be 1st ranked on two Cascade Frameworks (and have accepted work) their submission will be excluded from future tenders within the Framework category type.

For absolute clarity:

a) If a firm ranks #1 on more than two frameworks in a category but has not yet been awarded actual work, they may temporarily hold those rankings. However, once the firm officially accepts work on two of them, they will be automatically removed from the third framework.

b) Following their removal from that third framework, the offer for the 1st place position will immediately go to the 2nd-placed tenderer, provided that the 2nd-placed firm has not already won and accepted work on their own limit of two frameworks within that category, at which point it would go the next placed firm that have not reached their framework limit in that category.

The restrictions apply should a firm win as part of a joint venture, and this will count towards all parties in the joint venture as one of each of their two wins allowable for that Framework category type.

The restrictions apply to the firm as a single entity regardless of the number of teams or number of different offices.

Should there be a difficulty in filling the frameworks the HSE reserves the right to amend the above restrictions on some or all the Framework Category Types and certain design disciplines (Project Supervisor Design Process (PSDP), Employer's Representative (ER), Fire Safety Consultant (FSC), Assigned Certifier (AC) and Energy Efficient Design Facilitator (EEDF)).

2.1.6 Employer's Representative – Rule for Engagement:

The following only relates to Framework 02 – Framework 05 inclusive: Where a company applies for several design services Framework Lots and wins and is awarded top place on any of the Framework Lots, they cannot also be awarded top place on the Employers Representative Service Lot. For example, a firm who is awarded top place on the Architectural, Quantity Surveying, Building Services Engineering, Civil & Structural Engineering, or Fire Consultancy Service Lots cannot also be awarded top place on the Employers Representative Service Lot. A firm may be admitted to multiple service lot frameworks and be ranked two to five. If, however, through the cascade process a firm is being requested to provide Architectural, Quantity Surveying, Building Services Engineering, Civil & Structural Engineering, or Fire Consultancy Services, as well as Employers Representative the firm is required to choose which service they wish to provide as they cannot provide both to a Framework Call-Off project.

2.1.7 Integrated Architect Team (IAT):

Refer Clause 3.1.3 for further information.

## 2.2 Framework Agreement 2024:

The framework rules will be set out clearly within the Framework Agreement 2024. It will be an absolute requirement of the Framework Participants to adhere to the rules which govern the HSE Design Team Services Framework 2024 which will include Key Performance Indicators (KPIs). Should Framework Participants not adhere to these rules the Contracting Authority (CA) will have the ability to remove such Framework Participants from the framework process for a defined period of time or permanently. The Framework Agreement will be issued to the shortlisted candidates / tenderers.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

## 2.3 Framework 2024 Procurement Process:

2.3.1 General:

Appointment to the HSE Design Team Services Framework(s) 2024 will be in accordance with the requirements of:

(a) The European Treaty.

(b) European Directive 2014/24/EU and 89/665/EEC as amended by Council Directive 2007/66/EC.

(c) S.I. Nr. 329 of 2006, S.I. 284 of 2016 and S.I. Nr. 130 of 2010.

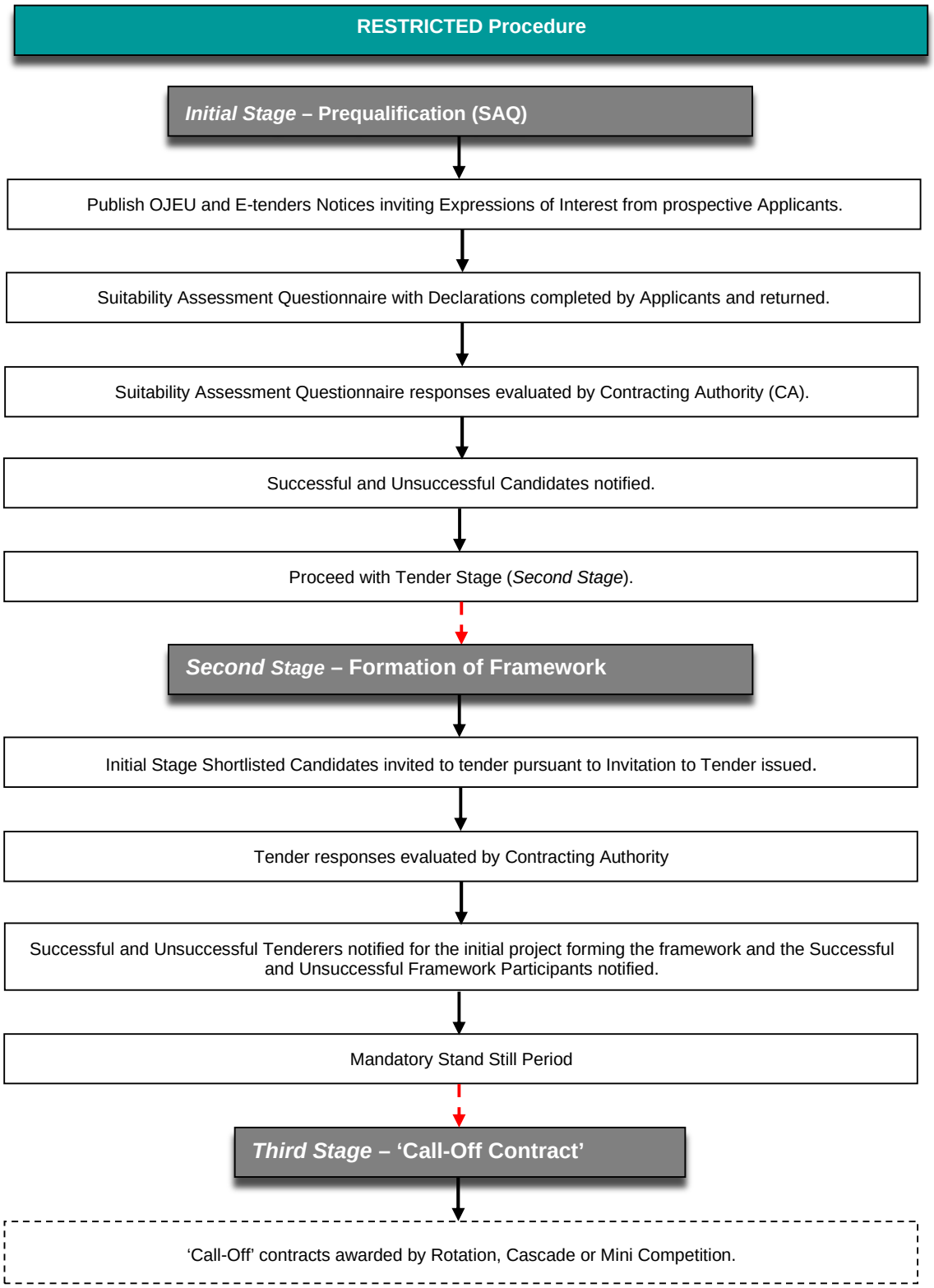
2.3.2 Restricted Procurement Process Flowchart Overview for Initial Project and forming the Framework:

The CA intends to use the Restricted Procurement Procedure for this competition and the initial process for forming the framework and the following is a flowchart representing the process:

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

**Restricted Procedure Process Flow Chart for Initial Project and forming the Framework:**



# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

2.3.3 Overview of Framework 2024 Procurement Process:

Framework(s) will be formed by HSE on an '**as required**' basis by the regional and corporate estates offices.

HSE Capital & Estates Corporate Office will have oversight of the establishment and operation of the Frameworks.

HSE Capital & Estates Corporate Office will meet with each Design Team discipline cohort once a year to ensure that the frameworks are achieving their intended function, and that both HSE and the framework participants are satisfied with the operation of the framework(s). HSE Capital & Estates Corporate Office may also meet with the professional bodies if deemed necessary.

The Estates office(s) as Contracting Authority ("**CA**") will dispatch a notice to the Official Journal of the European Union pursuant to the Restricted Procedure inviting Applicants to be prequalified (*Initial Stage)* for each tender process. Subject to project 'needs', Candidates for each relevant design discipline at each Estates Office will be shortlisted to eight (8) and invited to tender *(Second Stage).* The preferred tenderer (first ranked) from the competition will be offered the initial project on the framework and they and the next four (4) ranked tenderers will be placed on the framework. The next two (2) ranked tenderers will be nominated as 'Reserve' participants to the framework. These seven (7) ranked tenderers forming the framework will enter into a framework agreement contract with the CA. Where the 5th, 6th, 7th and/or 8th ranked participants have the same scores following the evaluation of tenders in which case such parties will be invited to join the Framework and, in such case, there will be no 'Reserve' participants.

The two (2) ranked '*Reserves*' per design discipline per framework category are on hand in case one or more of the first five (5) participants are removed from the framework due to a significant failure in performance, insolvency, refusal to accept the next project in line with the rules outlined in this document, or a material breach of the framework rules. The Framework Agreement will clearly state from the outset the rationale for the reserved placed framework participants as well as the specific framework rules which members must adhere to. A copy of the Framework Agreement 2024 will be provided to each of the shortlisted tenderers.

Once a framework(s) is formed, subsequent capital projects will be offered to the framework participants through a *Third Stage* process using three different methods as follows which depend on the applicable framework category:

(a) Rotational,

(b) Cascade, and/or

(c) Mini competition.

These *Third Stage* processes will be described later in this document.

2.3.4 Framework 2024 Evaluation Teams:

The Contracting Authority will establish technical evaluation teams to evaluate each framework and their design discipline independently. Evaluation team members will have the requisite skills and resources necessary to conduct the assessments. Assessments will be made using objective evidence and the professional judgment of the evaluation teams. This applies to both the prequalification stage (*Initial Stage)* and the tender stage (*Second Stage).*

## 2.4 Framework Process relating to Call-Off Projects:

Call-Off projects will be provided through three (3Nr.) different processes. The choice of process will be determined by the framework category and the CA can at their absolute discretion choose to run a mini competition through the framework(s).

(a) **Rotational:** this process will be used for all services delivered through Framework Category 01: Minor Capital Works – project value €0M - €1M ex. VAT due to the high volume of projects within this framework type.

(b) **Cascade:** this process will be used for all works delivered through the other four (4Nr.) framework (Framework Category 02 – 05 inclusive).

(c) **Mini competition:** HSE reserves the absolute right at any time to run a **mini competition** for any/all framework types and design disciplines.

As mentioned previously each framework will be formed on an individual design discipline basis with individual Principal Service Consultant appointments with the HSE.

2.4.1 Rotational (Framework Category 01):

For Framework Category 01 subsequent projects to the initial project forming the framework(s) will be awarded on a **rotational basis** to the next ranked framework participant. Refusal by the 'rotational' framework participant to accept the next project occurring will result in one or more of the following outcomes:

(a) Rotation to the next framework participant,
(b) Suspension of the framework participant if HSE is of the view that the refusal was illegitimate or in bad faith and/or,
(c) Running a mini competition tender.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

Where contracts are awarded on a **rotational basis**, the intention is that each participant will be awarded a minimum amount of work corresponding to a particular monetary fee value ex. VAT before there is rotation to the next participant. This is in order to promote more balanced distribution of contracts by value. The threshold value (€) will be made up of an accumulative number of awards (not the outturn value of the commission). This will apply for example where the rotational top Architectural company is in line for a very low value call-off project or that they are only required to provide one or a number of sub-consultancy services (not architectural) and which amount to one or two commissions which are cumulatively below the threshold value. This rule is included to be fair and equitable to that company. Where a company exceeds the threshold, they will automatically, through the rotational process, drop to the bottom of the list. This process will be monitored and managed by the Estates office(s) and overseen by Capital & Estates Corporate office.

The following tables denotes the threshold value (€) of consecutive projects allowable before a company will rotate to the bottom of the framework list.

Table Nr. 4: Value (€) Thresholds associated with rotation.

| | **Principal Service Provider** | **Value (€) ex. VAT** |
|---|---|---|
| 1 | Architect** | 100,000 |
| 2 | Quantity Surveyor | 70,000 |
| 3 | Building Services Engineer | 70,000 |
| 4 | Civil / Structural Engineer | 70,000 |
| 5 | Fire Safety Consultant | 30,000 |
| 6 | Project Supervisor Design Processor | 30,000 |
| 7 | Employer's Representative | 30,000 |
| 8 | Energy Efficient Design Facilitator | 30,000 |
| 9 | Assigned Certifier | 30,000 |

** denotes a Principal Service Provider with associated named Specialist Skills Providers.

2.4.2 Cascade (Framework Categories 02 – 05 inclusive):

For Framework Categories 02 – 05 inclusive subsequent projects to the initial project forming the framework will be awarded on a **cascade basis** to the top ranked framework participant in every instance. Only where the top ranked framework participant refuses the project offered (for whatever reason) or is in breach of the framework rules will the next framework participant be offered the project.

2.4.3 Mini Competitions:

Where the Contracting Authority utilises their right under the Framework Agreement 2024 to run a **mini competition** in lieu of the rotation or the cascade processes, the mini competition can be run for:

a) A single discipline.

b) Multi disciplines or

c) All disciplines within a framework.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

2.4.4 'Drop Down' from higher value / Acute Frameworks:

The HSE at its own discretion, shall use what it considers to be the relevant framework within the Frameworks 2024 categories if, in the CA's opinion, the complexity and associated risks of the proposed projects (i.e. Call-Off projects) so warrants (notwithstanding the project may not fall within the value or complexity range of the framework category).

## 2.5 Design Team Services Fees:

In the main, frameworks will be formed on a percentage (%) fee basis, the exception being Minor Capital Frameworks projects with a capital build cost of less than €100k, in this case tendered hourly rates will apply. In all cases a Value for Money review will be conducted.

The % fee will be fixed upon successful completion of Office of Governments' ("**OGP**") Capital Works Management Framework ("**CWMF**") Stage (ii)B and will be based on a Client Approved Stage (ii)B cost report. Successful completion is defined as the completion of all Stage (ii)B deliverables as set out in the HSE Technical Requirements ("**TRs**") document and formal approval / sign-off of the Stage (ii)B report(s). For each of the Framework Categories, Tenderers will be requested in the pricing document to propose different % rates depending on the specified band values of the projects to be delivered under each of the five (5) Framework Categories. The following are the respective Framework Categories band values:

2.5.1 Minor Capital Framework (1Nr.; Category 01):

(a) Less than €100K – Tendered Hourly Rates apply.

(b) €100K to €500K - Tendered % fee.

(c) €500K to €1M - Tendered % fee.

(d) Where the scope of service being sought does not align with standard scope of services as defined within the TRs, the HSE has the option to use the Tendered Hourly Rates where it is considered this offers best value for money, and the value for money aspect can be clearly demonstrated.

2.5.2 €1M - €15M Frameworks (2Nr.: Acute & Non-acute; Category 02 + 03):

(a) €1M to €5M - Tendered % fee.

(b) €5M to €10M - Tendered % fee.

(c) €10M to €15M - Tendered % fee.

(d) Where the scope of service being sought does not align with standard scope of services as defined within the TRs, the HSE has the option to use the Tendered Hourly Rates where it is considered this offers best value for money, and the value for money aspect can be clearly demonstrated.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

2.5.3 €15M - €60M Frameworks (2Nr.: Acute & Non-acute; Category 04 + 05):

(a) €15M to €30M - Tendered % rate.

(b) €30M to €45M - Tendered % rate.

(c) €45M to €60M - Tendered % rate.

(d) Where the scope of service being sought does not align with standard scope of services as defined within the TRs, the HSE has the option to use the Tendered Hourly Rates where it is considered this offers best value for money, and the value for money aspect can be clearly demonstrated.

The tendered % fee for the project used to form the framework will apply to all projects in the relevant band value throughout the lifetime of the framework.

In addition, the tenderer will be required to tender hourly rates for various resource grades (set out in the initial tender used to create the framework). These rates will be used to agree fees for additional works that are demonstrably outside of the normal core design team service for the design discipline as clearly set out in the TRs document. The tendered hourly rates will be fixed for the duration of the framework (3 years + 1 year extension) but will be subject to inflation revision in accordance with CPI on each anniversary of the Framework Agreement. The CPI revision (up or down) will apply to the Framework hourly rates (and the hourly rates under live call-off contracts) only and no adjustment to the % fee will apply.

Design Team members will be paid on an interim milestone basis up to a % ceiling and subject to work completed being linked to clearly defined deliverables and in accordance with the agreed programme. The clearly defined deliverables will be set out in the TR document.

## 2.6 Public Works Contracts:

The main public works contracts being utilised for these frameworks are:

(a) PW-CF1 (Building Works designed by the Employer) for projects of construction value greater than €1M.

(b) PW-CF6 (Public Works, Short Form of Contract) for projects of construction value less than €1M, where there is no requirement for direct tendering of Reserved Specialists and no mandatory production of a fully measured Bill of Quantities.

However, the CA reserves the right to use other forms of public works' contracts and construction contracts.

## 2.7 Clarification of Information:

After the closing date of the prequalification stage and tender stage, Applicants/Candidates/Tenderers may be asked to clarify aspects of evidence supplied, by written submission, by interview or by both, for any of the information supplied by them in their submission. If such clarification is requested, any additional material supplied must be strictly to supplement material already provided in the original submission.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

## 2.8 Ambiguity in documentation:

After the closing date of the prequalification stage and tender stage, Applicants/Candidates/Tenderers may be asked to clarify aspects of evidence supplied, by written submission, by interview or by both, for any of the information supplied by them in their submission. If such clarification is requested, any additional material supplied must be strictly to supplement material already provided in the original submission.

## 2.9 General Data Protection Regulation (GDPR):

Applicants/Candidates/Tenderers, as part of their submissions in relation to the formation of frameworks under this process and/or 'Call-Off' tenders, must provide personal CVs for management, senior personnel, specialists, and supplemental staff as relevant to the criteria for each competition. In doing so, Applicants/Candidates/Tenderers are confirming that those whose personal data is provided by them have consented to the issuing of such data by the Applicant/Candidate/Tenderer to the CA, their Evaluation Teams and legal advisors, and the supplier of the etenders.gov.ie website for processing purposes for this Framework Formation competition and subsequent 'Call-Off' competitions. Applicants/Candidates/Tenderers shall provide this consent through signing Part2: Applicant Details & Declaration of QC1-Part-2.

## 2.10 Confidentiality:

This Project Information Memorandum and all accompanying documents for the prequalification, tender(s) and call-off processes shall be treated as private and confidential by the Applicant/Candidate/Tenderer, who shall not release details of this Project Information Memorandum and/or any documentation associated with HSE Design Team Services Frameworks 2024, other than on a confidential basis, to those who have a legitimate need to know or to whom they need to consult for the purpose of preparing their tender proposals.

## 2.11 Amendments to and/or Clarifications to the Project Information Memorandum:

If the CA is of the opinion that a clarification or and/or amendment is required to be made to the Project Information Memorandum, and/or additional information is required to be issued, then the CA shall be entitled to make any such clarification and/or amendment to the Project Information Memorandum and issue such additional information, at any time, notwithstanding the time periods stated for any process(es) within the overall procurement processes forming this framework.

# Project Information Memorandum

Section 2: Formation of DT Services Framework(s) 2024:

## 2.12 Conflict of Interest:

Any conflict of interest or potential conflict of interest must be fully disclosed to the CA as soon as such conflict or potential conflict becomes apparent. In the event of any conflict of interest, the CA shall, in its absolute discretion, decide on the appropriate course of action.

Where a consultant or group of consultants propose to be on more than one team bidding for a competition, the relevant Applicants / Tenderers must provide a statement that they are aware of this multiple participation, and that it has been brought to the attention of all concerned.

The CA will then investigate the circumstances to see if this multiple participation could result in a distortion of competition. Where it is felt that competition may be distorted, the consultant (or group of consultants) will be informed of this and instructed that if it still wishes to participate in the competition, it must go forward on only a number of bidding teams considered appropriate by the Contracting Authority.

*End Section 2*

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

Section 3: Prequalification / Tender Processes

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

## 3.1 Procurement Process forming the HSE Design Team Services Framework(s) 2024:

3.1.1 General:

Applicants shall submit to the CA a complete and valid prequalification submission for the *Initial Stage* in accordance with Suitability Assessment Questionnaire documentation issued to them. Any omission on the part of the Applicant and/or an incomplete prequalification submission may invalidate their proposal.

Applicants/Tenderers shall advise the CA of any ambiguity between any of the documents comprising either the prequalification process and/or the tender process including the Contract Notice. Applicants/Tenderers shall be cognisant of the timescale applying to 'Queries' in this regard.

The Initial Stage is to evaluate applicants to assess whether they are suitable or capable to perform the services which will be required over the course of the frameworks. Applications will be assessed to see if they meet the minimum suitability requirements. This will be on a pass/fail and pass/fail (qualitative) assessment basis. Only those applicants who meet the minimum suitability requirements will have their Applications considered further. Applicants who fail to meet the minimum suitability requirements will be eliminated from further consideration.

Similarly, when requested to do so the shortlisted candidates for the tendering process shall submit to the CA a complete and valid tender submission and again failure to submit a full and complete tender may invalidate their tender.

3.1.2 The Shortlisting Process:

Prequalification submissions will be evaluated and a shortlist of eight (8) top ranked firms per design discipline who meet the minimum suitability requirements will then be formed and invited to tender for the initial project forming the framework against the specified Award Criteria in the Instructions to Tender/Invitation to Tender document.

The top five (5) ranked tenderers per design discipline will constitute the framework(s) with an additional two (2) *Reserve* framework participants (refer sub-clause 2.3.3 '*Overview of Framework 2024 Procurement Process*' section elsewhere in this document for further details).

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.1.3 The Specialist Skills Providers under the remit of the Architect:

The format of the Frameworks is such that the Architect as Principal Service Provider will be providing named Specialist Skills Providers as part of their team.

**Note:** Named Specialist Skills Providers can be in-house specialists within the Architect's firm or external consultants.

The Architect is required to provide the following in their prequalification submission for each of the Specialist Skills Provider whether or not these specialisms are required for the initial project forming the framework:

(a) ESPD for each Specialist Skills Providers.

(b) Name of the external consultancy company.

(c) Criteria 3.3e, 3.3f and 3.3g (Insurance Criteria) for the external consultancy companies.

(d) Names of their in-house specialists.

(e) MF2.4 for general designers as defined by the competition (Fire Safety Consultant as Specialist Skills Provider).

(f) MF2.5 for PSDP as Specialist Skills Provider.

In the case where the specialism is an external consultant firm, the named Specialist Skills Provider will be evaluated in line with criteria set for the initial project forming the particular framework. This approved named Specialist Skills Provider will be part of the Architect's team for the duration of the framework.

All named Specialist Skills Providers (sub-consultancies) under the remit of the Architect will be assessed at prequalification stage on a Pass/Fail basis therefore it is important for the Architectural firm that their proposed named Specialist Skills Providers qualify otherwise the Architect's submission **will not** be further assessed and they **will not** be considered for the *Second Stage* (tender).

For the formation of a framework the CA will endeavour to ensure that the initial project forming the framework(s) will include all of the named Specialist Skills so that a complete tendered fee is provided by the shortlisted tenderers at the initiation of the framework(s) for use in 'Call-Off' competitions. Where the CA cannot provide an initial project(s) meeting this criterion, the tenderers to the initial competition will be requested to provide a design discipline fee for those named Specialist Skills Providers not required for the initial project forming the framework but for use in subsequent 'Call-Off' competitions. This fee submission(s) will form part of the tender evaluation but will not form part of the fee proposal for the initial project.

Please note that the Principal Service Provider (Architect) providing the named Specialist Skills Providers as part of their team and where a named Specialist Skills Provider or number of named Specialists Skills Providers are not required for the initial project forming the framework, the Principal Service Provider will still be required to provide a full suite of documentation at set out in the prequalification documentation for evaluation. This applies to both in-house specialist and external consultants associated to the Architect. For clarity, these in-house personnel and/or external consultants and their nominated personnel shall form the Architect's team of the duration of the framework(s).

Where substitution is required for named personnel of the Principal Service Provider, named in-house specialist, and named external consultancy then the Principal Service provider must provide for evaluation purposes the required information pack for this individual(s)/company in accordance with the prequalification criteria set for the framework formation.

Where the Architect requires, through the unavailability (however this may be) of the approved sub-consultant firm to provide their sub-consultancy service to a call-off project, the Architect will be required to provide a substitute company who will be assessed on the basis of the criteria set for that sub-consultancy at the set-up of that framework (i.e., the prequalification process) and if passed the newly approved company will become the *permanent* sub-consultant to that Architect. Where the substitute company fails to meet the criteria set then the Architect will be requested to provide a company who will meet the criteria before the Architect can be awarded the call off contract; this type of request only relates to call-off competitions / mini-competitions. The approved sub-consultant company will become an approved member of that Architect's approved team. The percentage (%) fee proposal/tendered hourly rates for this substitute firm shall be equivalent to the fee proposal/tendered hourly rates for the unavailable approved sub-consultant firm.

3.1.4 Architect and their associated named Specialist Skills Providers – contractual relationship:

The external sub-consultants as a named Specialist Skills Provider company will be domestic sub-consultants to the Architect as Principal Service Provider. The CA will enter into a service contract (COE1) with the Principal Service Provider for the initial project forming the framework and for each of the subsequent call-off projects as they are awarded to the Principal Service Provider(s). The CA will provide written notification to the Consultant/Principal Service Provider of his/her inclusion on the list of framework participants. The Design Team Service Framework(s) Agreement 2024 in conjunction with the consultant contract (COE1) for the initial project and subsequent Call-Off projects will serve as the contractual bond between the parties for the formation of the framework(s).

The Architect as Principal Service Provider shall contract with the named Specialist Skills Providers (external sub-consultants) and both parties shall execute collateral warranties in favour of the CA.

## 3.2 Small & Medium Size Enterprises (SME) Participation:

HSE is committed to the participation of SMEs and 'Start-Up' entities in the HSE Design Team Services Framework(s) 2024. To encourage their participation, please refer to details in section entitled 'Start Up' Companies and the prequalification criteria within QC1-Part-1 relating to 'Start-Up' companies. For further details and alternative evidence permissible, please refer to the individual SAQ criteria for details and the following sub-clause.

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.2.1 'Start Up' Companies:

Where a company has commenced business no more than five (5) years prior to the publication of the notice to prequalify and are unable to demonstrate their company experience in line with Criterion 3.4c & 3.4.1c, then consideration shall be given to projects where the Applicant's management only (Criterion 3.4a & 3.4.1a) have gained relevant experience elsewhere. The projects for consideration/assessment under Criterion 3.4c & 3.4.1c must form part of the management's CVs under Criterion 3.4a & 3.4.1a (management). Applicants must complete the QC1-Part-2 in this regard also.

3.2.2 Prequalification Criteria – Management & Senior Personnel:

For the Prequalification stage of the formation of the framework(s) submissions will be assessed on a Pass/Fail and Qualitative (Pass/Fail) basis. Named Specialist Skills Providers to the Architect design discipline will be assessed on a Pass/Fail basis throughout the process.

Regarding personal CVs (Criteria 3.4a & 3.4.1a and 3.4b & 3.4.1b) there is a maximum number of management and senior personnel required for each framework category as follows and these thresholds will be reflected in the Suitability Assessment Questionnaire(s):

a) Framework Category 01: One (1Nr.) Management.

b) Framework Categories 02 + 03: One (1Nr.) Management and one (1Nr.) Senior Personnel.

c) Framework Categories 04 + 05: One (1Nr.) Management and two (2Nr.) Senior Personnel.

Applicants must meet the minimum standard sets in the Suitability Assessment Questionnaire (Pass/Fail) before their submission will be evaluated.

## 3.3 Qualifications and Experience:

In relation to prequalification criteria 3.4a / 3.4b / 3.4c the Contracting Authority is seeking Framework participant members with experience in providing Design Team services for projects that demonstrate similar characteristics to the proposed project types. Applicants will be measured against these characteristics on a qualitative pass/fail basis and the Contracting Authority requests that Applicants pay particular attention to the characteristics in preparing their submissions for the framework competition. Please refer to the separate sub-section of this section for description of '*Project Characteristics'.*

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.3.1 Project Characteristics:

Applicants are requested to pay particular attention to the framework project characteristics in preparing their submissions for these framework competitions.

(a) Complexity:
In relation to the complexity of the project types (i.e. acute hospital and non-acute healthcare), Applicants should consider the functional and operational requirement of the project types, the activities required to support the proper functioning of the project types, their hospital/healthcare settings, the required use of highly specialised equipment, technology and processes in controlled environments and design development of multi-storey facilities in urban environments.

(b) Size:
It is a matter for Applicants to put forward projects which, in their view, demonstrate similarity or equivalency in terms of size or scale given project and the value range of the framework category as part of the initial project forming the framework(s). Refer criteria 3.4a, 3.4b and 3.4c.

(c) Completed Projects:
In relation to criteria 3.4 a, 3.4 b and 3.4 c, the experience of an Applicant should be based on completed projects. Where an Applicant cannot provide evidence of the requisite number of relevant completed projects, the Contracting Authority shall consider the stage of the development of the project and/or other relevant factors when determining the score (i.e. qualitative pass/fail). Applicants are referred to the definition of 'completed' projects in criterion 3.4 c. Applicants are advised that the reference to the time period in criterion 3.4 c relates to criterion 3.4 c only. Time period for criteria 3.4a and 3.4b is career wide.

**N.B.1:** Applicants are reminded that assessment in respect of the requirements of criterion 3.4a and 3.4b will be based on the completed Appendix E, which is issued as part of this prequalification pack. The Contracting Authority may, at its absolute discretion, reject any modified version of this document, save to complete the various form fields.

**N.B.2:** Applicants are reminded that assessment in respect of the requirements of criterion 3.4c will be based on the completed Appendices B1 and B3, which are issued as part of this prequalification pack. The Contracting Authority may, at its absolute discretion, reject any modified version of this document, save to complete the various form fields.

(d) Combined Projects:
Applicants **are advised NOT** to combine multiple projects from a single campus in order to seek to demonstrate similar characteristics (in circumstances where the projects individually do not demonstrate similar characteristics). Project experience ought to be based on individual projects completed under a single contract. Phasing of projects is acceptable provided the works have been completed under a single contract.

(e) Scope of Services Performed:
Applicants should carefully consider the scope of service they have actually performed on the projects (i.e. personal CVs and company CVs) that are put forward as relevant experience. Delivering partial or non-relevant design team services (perhaps in the context of a larger, relevant project) will be judged on that basis and may fail to meet the particular criterion.

(f) Experience of Management Personnel, Senior Personnel and Applicant Company:
Applicants' response to criteria 3.4a, 3.4b and 3.4c will be judged solely on their response to each of these criteria. For example, scores awarded in respect of criterion 3.4c will be based solely on Applicants' response in respect of this criterion and Applicants cannot rely on the response presented in respect of either criterion 3.4a or 3.4b. This does not mean that projects used in response to criterion 3.4a cannot be used in response to criterion 3.4b or 3.4c and vice versa.

## 3.4 Applications by Consortium / Joint Venture / Sub-consultant:

3.4.1 Applicant Entity Applications and Legal Form:

It is a matter for an Applicant to determine the manner in which they submit their response to the competition. Where an Applicant comprises a number of companies, the Main/Lead Applicant is reminded to set out in their submission the relationship between the companies in a clear and unequivocal manner. While an Applicant (i.e. consortium / joint venture, etc.) is not required to assume any particular form for the purposes of making its Prequalification/Tender Submission, the Contracting Authority reserves the right, prior to the award of any contract for services under any particular Framework / Discipline, to require the successful tenderer to assume a particular form.

Where a joint venture/consortium is an incorporated body then:

- they and all their members shall sign the Form of Tender, and
- they and all their members shall be jointly and severally liable to the CA for the initial project forming the framework and all or any Call-Off contract for which they shall be engaged under the Framework Agreement 2024.

Where a joint venture/consortium is an unincorporated body then:

- they and all their members shall sign the Form of Tender, and
- all members of the joint venture/consortium shall be jointly and severally liable to the CA for the initial project forming the framework and all or any Call-Off contract for which they shall be engaged under the Framework Agreement 2024, and
- each member of the joint venture/consortium shall hold their own insurances and these insurances shall cover the activities of the joint venture/consortium.

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.4.2 Form of Submissions by Applicants/Tenderers:

Submissions shall be completed and submitted as follows:

**Single Entity Submission:** Where an Applicant is a single entity, the Applicant shall complete the QC1-Part-2 document on its own behalf.

**Consortium / Joint Venture Submission and Sub-Consultant Members:** Where an Applicant is a consortium, joint venture or where the Applicant is including a sub-consultant, the Main/Lead Applicant shall complete QC1-Part-2 on behalf of each member of the consortium, joint venture and/or the sub-consultant and sign the document in accordance with the document directions i.e. signature shall be that of a Director/Principal of the Main/Lead Applicant. One member of the Applicant shall be identified as and designated the Main/Lead Applicant, and the other members shall be designated consortium / joint venture / sub-consultant members. The Sub-Consultant shall not be designated the Main/Lead Applicant/Tenderer.

**Main/Lead Tenderer:** The Main/Lead Applicant shall be responsible for coordinating all parts of the team's application (regardless of whether it is a consortium / joint venture or other structure) and shall submit the proposal as a whole and complete submission in the format required by the CA. They shall also complete, sign and submit the QC1-Part-2 as part of their proposal.

**Specialist Service Providers (as stated in this document under Part 2:** Specialist Service Providers shall be defined as either Sub-Consultants or In-house specialists to the Applicant. In-house Specialist Service Providers shall submit, through the Applicant submission, the required information under Criteria 3.4a and 3.4b. of the prequalification documentation.

3.4.3 Reliance on Resources:

Where, in order to prove its financial, economic and technical standing with a view to being admitted to participate in the tendering procedure, an Applicant or a member of an Applicant Entity relies on the resources of entities or undertakings with which it is directly or indirectly linked, whatever the legal nature of those links may be, (including, for example, but not limited to, reliance on a parent company's resources), it must establish that the resources of the entities or undertakings, which are necessary for the performance of the contract, are available to it. Please refer *Appendix D: Letter of Undertaking from entity being relied upon* as part of the SAQ documentation for further details.

If sufficient evidence is not provided, the Applicant (and the Applicant member, where required) will be evaluated with regard to its own financial, economic, and technical standing. Please note that prior to entry into any contract for services, the Contracting Authority intends to request that any entity that is listed as providing resources upon which a Tenderer/framework participant is relying, enter into contractual arrangements which safeguard and promote the delivery of the services from the point of view of the Contracting Authority. Such contractual arrangements may include joint and several liability, lead/sub-contract structures, parent company guarantees, direct agreements or collateral warranties.

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.4.4 Collateral Warranties:

Prior to award of a 'Call-Off' contract, Sub-Consultants shall be required to execute a Collateral Warranty for Sub-Consultants (MF 2.3) in favour of the Contracting Authority.

MF 2.9 Reliance Guarantee shall be executed where the entity is being relied upon for financial or economic standing criteria.

MF 2.10 Reliance Warranty shall be executed where the entity is being relied upon for technical competency criteria. The CA may at their own discretion require a Collateral Warranty to be executed in favour of the CA (MF 2.3).

3.4.5 Multiple Participations of Consortium Members / Joint Venture Members / Sub-consultants:

If any individual Applicant or member of an Applicant's consortium or joint venture or a Sub-Consultant is included in more than one submission for the same discipline/service, a statement should be provided to the Contracting Authority confirming that the Applicant is aware of the multiple participation by the relevant member and that it has been brought to the attention of all the consortium/joint venture of which that individual or group is a member.

## 3.5 Compliant Submissions:

If an Applicant/Candidate/Tenderer fails to comply in any respect with the requirements of this competition, the CA reserves the right to reject the Applicant's/Candidate's/Tenderer's submission as non-compliant or, without prejudice to this right and subject to its obligations at law, to take any other action it considers appropriate including but not limited to:

(a) seeking written clarification from the Applicant/Candidate/Tenderer.

(b) seeking further information from the Applicant/Candidate/Tenderer; or

(c) waiving a requirement, which in the Contracting Authority's view, is non-material or procedural.

Evidence of Suitability Assessment Criteria stated as 'REQUIRED' shall be provided with the prequalification submission. Where Evidence is 'DECLARATION REQUIRED' Applicants will be requested to provide the required evidence in line with the criteria should they be the preferred bidder and / or form part of the framework shortlisted participants.

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

## 3.6 Electronic European Single Procurement Document (*eESPD*):

Applicants are required to complete, sign, and submit as part of their SAQ submission the electronic European Single Procurement Document ("e*ESPD*"). Alternatively, Applicants may submit an "*eESPD"* which has already been used in a previous procurement procedure PROVIDED THAT they confirm that:

(a) The information contained in it continues to be correct; and

(b) They satisfy the Selection Criteria for this Competition as set out in the SAQ.

All Joint Venture members must complete an *eESPD* on their own behalf and provide this document to the Lead JV member whose responsibility it will be to include all JV members *eESPD* in the JV's prequalification submission.

Access to *eESPD* by all JV members shall be through their own eTenders entity. The *eESPD* shall be completed by them and issued in pdf format to JV Lead Applicant who shall submit the document(s) as part of the JV submission to the CA.

## 3.7 'Call-Off' Contracts (*Third Stage*):

3.7.1 Generally:

Following the formation of the Frameworks, contracts for particular services will be awarded by using a 'Call-Off' procedure. It is intended for the purposes of the 'Call-Off' competitions (*Third Stage*) that projects will be procured on an individual basis, but projects of a similar nature and complexity may be bundled as one procurement competition. The nature, number and make up of any bundles will not be decided until the 'Call-Off' stage of the competition is initiated, and this will be at the CA's sole discretion.

Design Teams for Call-Off projects will be formed through all or a combination of design disciplines (Lots).
Framework Agreement 2024 will set out further information pertaining to 'Call-Off' contracts. And will be issued to the shortlisted candidates / tenderers.

# Project Information Memorandum

Section 3: Prequalification / Tender Processes:

3.7.2 Call-Off competition and Mini-competition documentation (*Third Stage*):

- Call-Off competition documentation: for both rotational and cascade processes it will be mandatory that the framework participant in prime position will be required to provide project specific information to the CA prior to award of contract. The following is not an exhaustive list of information/documents that will be required:
  - ❖ Confirmation that nothing has changed with the Framework Participant since the formation of the framework.
  - ❖ Confirmation that nothing has changed with the Framework Participant's eESPD.
  - ❖ Current "*eTax Certificate*".
  - ❖ Health and Safety Compliance Declaration by All General Services Providers (MF 2.4) completed and signed, or Health and Safety Compliance Declaration by PSDP/HSC (MF 2.5) completed and signed *(whichever is relevant to the contract)*.
  - ❖ Appendix D: CV for a substitute personnel if necessary.
  - ❖ Confirmation of Specialist Skills Providers / in-house specialists as part of the Architect's team.
  - ❖ Collateral Warranties (MF 2.3), Reliance Guarantee (MF 2.9), Reliance Warranty (MF 2.10) as relevant.
  - ❖ Appendix D: Letter of Undertaking from entity being relied upon.
  - ❖ Resource Allocation Schedule.
  - ❖ Evidence of insurance terms and compliance with insurance obligations in accordance with the Call-Off competition.
  - ❖ Form of Tender.
  - ❖ CoE1.

- Mini-competition documentation: A full suite of tender documentation for evaluation and approval will be required.

*End Section 3*

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***End.***