Call-Off Schedule 20 (Call-Off Specification)

INTRODUCTION

This Schedule sets out the characteristics of the Deliverables that the Supplier will be required to make to the Buyer under this Call-Off Contract.

The Deliverables and any Standards set out may be adapted by a Buyer during a Competitive Selection Process to reflect its Deliverables requirements for entering a particular Call-Off Contract.

**[Buyer Guidance**:

Where there is text in square brackets in a green highlight, Buyers are advised to provide additional information if applicable or follow the guidance contained within each section.

Following completion of this schedule, Buyers should remove any guidance notes, highlighting and square brackets**]**

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[The Buyer is to list additional appendices here and add the documentation and/or details within the appendices section. If no further appendices are required by the Buyer, please consider either replacing the text with NOT USED or amend accordingly]

## Introduction

* 1. This Schedule sets out what we and our Buyers want.
  2. The Supplier must only provide the Deliverables for the Lot that they have been appointed to.
  3. For all Lots and/or Deliverables, the Supplier must help Buyers comply with any specific applicable Standards of the Buyer.
  4. The Deliverables and any Standards set out below may be refined (to the extent permitted and set out in the Order Form) by a Buyer during a Competitive Selection Process to reflect its Deliverables requirements for entering a particular Call-Off Contract.

## Mandatory Social Value

* 1. This framework contract requires the Supplier to embed social value into all Call-Off Contracts, in line with the Social Value Act 2012 or subsequent government initiatives to enable the effective implementation of the Act.
  2. As a condition of participating on this Framework Contract, CCS requires Suppliers to demonstrate they are committed to report on the impact of social value throughout the lifetime of the Framework Contract to CCS, every 12 months from the Framework Start Date
  3. Suppliers must provide evidence of their commitment to social value and demonstrate an ability and willingness to work with Buyers to identify and help further their social value requirements in all Call-Off Contracts. Suppliers must agree to provide or deliver reasonable and proportionate social value benefits within all Call-Off Contracts. Suppliers should consider the following policy themes, as a minimum:

3.3.1. Tackling economic inequality;

3.3.2. Fighting climate change;

3.3.3. Equal opportunity; and

3.3.4. Wellbeing

* 1. Suppliers are expected to act with these priorities in mind, and CCS may discuss these priorities as part of Framework management meetings.
  2. The Buyer’s requirements will be set out in the Call-Off Procedure. The Supplier shall comply with and/or identify proposed social value initiatives, proportionate and relevant to each Call-Off Contract.

[The Buyer is to define such requirements here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*. If no further details are required by the Buyer, please consider either replacing the text with NOT USED or amend accordingly]

* 1. The Supplier shall deliver measurable benefits and impacts in respect of the social value priorities, when identified in the Call-Off Contract.
  2. The Supplier shall record and report performance against the social value requirements, when detailed in the Call-Off Contract.

## The Lots

* 1. The Services are divided into 11 Lots:

1. Total Estate Management
2. Estate (Property) Management
3. Agency and Lease Management
4. Surveying and Strategic Advice
5. Valuation and Compulsory Purchase Orders
6. Business Rating Services
7. Workplace Services Performance Partner

8A. PFI Technical and Strategic Advice Services

8B. PFI Surveying Services

8C. PFI Fire Safety and Audit

8D. PFI Specialist Commercial and Financial Advice

* 1. The Services within each Lot are contained below, this Specification is not an exhaustive list. Buyers may require other similar Services, which will be detailed in the Call-Off Procedure. The scope of the Services for each Lot shall remain as described in this Specification and the contract notice placed in the Find a Tender Service (FTS).
  2. Any service Standards and Key Performance Indicators (KPIs) that apply to the Services for each Lot are not set out in this Specification as it is the Buyer’s responsibility to set these as appropriate in the Call-Off Procedure.

## Mandatory Service Requirements: All Lots

* 1. The Supplier must be capable of delivering all the Mandatory Services relevant to their given Lot as set out in the tables below, during the Framework Contract Period and until any Call-Off Contracts established under this Framework Contract expire.
  2. Where the Buyer is referenced this shall also be interpreted to include the Buyer’s client.
  3. The Supplier shall provide advice to the Buyer in relation to best practice, and the most efficient and cost effective methods of conducting the disclosure exercise as a whole.
  4. The Supplier shall consider the quality, cost-effectiveness and efficiency of any proposed solution, and shall work to review and improve its systems with regard to these elements on an ongoing basis throughout the duration of the Framework.
  5. The Supplier shall provide professional management, advice, guidance, negotiation and assistance on land, property and estates issues, including but not limited to those Services set out in the Tables below.
  6. The Supplier shall meet deadlines agreed with the Buyer at Call-Off and is expected to manage its staff and internal processes to achieve this.
  7. The Buyer will confirm their required Services during the Call-Off Procedure.
  8. Suppliers appointed to Lots 1, 2, 3, 4, 5, 6 & 8b shall hold and maintain a Royal Institution of Chartered Surveyors (RICS) regulated status throughout the duration of the Framework and the duration of any applicable Call-ff Contracts.
  9. Suppliers appointed to Lot 8c shall hold and maintain accreditation for at least one of the following; Institute of Fire Engineers (IFE), Institute of Fire Safety Managers (IFSM) or The Society of Fire Protection Engineers (SFPE).

## General Service Requirements

* 1. Suppliers shall deliver the Services relevant to and in support of Buyers’ property strategies and/or [Government Property Strategy](https://www.gov.uk/government/publications/government-property-strategy-2022-2030).
  2. Prior to, or upon receipt of an Order to undertake Estates Management Services, the Supplier shall provide an initial report that sets out their understanding of the brief, proposed approach to the task and fee proposal. An agreement must be made on the level of expertise and experience of the personnel to be involved with the Buyer. Whilst wishing to retain continuity within instructions, it is recognised that there may be occasions where a change in personnel is required, or even desirable. The Supplier shall ensure that any replacements are agreed with the Buyer and that suitable arrangements are made to enable a smooth handover transition thus minimising any detrimental effect and avoiding any additional costs to the Buyer.
  3. For recommendations or advice given on financial settlements or valuations, the assessments shall be supported with relevant data. This will include comparable information of market transactions and costed breakdowns of other factors that have an effect on the value.
  4. When terms are recommended for settlement, the Supplier shall provide the Buyer with a clear and unambiguous written statement before the terms are accepted. The terms shall be the best terms available and represent open market value. Any departure from these terms shall be set out in a written statement and issued to the Buyer before they are accepted.
  5. Where the Buyer requires a conclusion to be legally formalised, the Supplier shall work with the Buyer’s appointed legal advisor, providing all necessary information and guidance to ensure a timely and satisfactory conclusion to the transaction.
  6. If agreement cannot be reached on a dispute, then mediation will be through RICS.
  7. Where the Services result in any changes to the Buyer’s estate, the Supplier shall provide all necessary assistance and information to update the Buyer’s property records.
  8. In all leasehold transactions, reporting must take full account of the effect of the transaction on both the landlord’s and tenant’s interests, the scope for creating marriage value and the extent to which this has been obtained for the Buyer.
  9. A formal Order has to be issued by the Buyer to the Supplier before any chargeable Services are to be undertaken. The Supplier cannot accept such an Order without a Framework access agreement number being present.
  10. The Supplier shall provide a senior representative to the Authority, departmental property or sector forums, including general property.
  11. The Supplier shall develop and deliver training courses, knowledge transfer, and industry best practice to the Authority and the Buyer to develop and improve intelligent client functionality.
  12. The Supplier shall provide regulation focussed awareness sessions for the Authority and Buyer on new and emerging strategies and regulations.

**Specification**

## Lot 1 - Total Estate Management

* 1. Operation and management to support the occupation of the Government estate, providing technical due diligence where required, providing an end to end service provision for the lifecycle of a property.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line (Number)** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant:** |
| --- | --- | --- |
| **Example**  **1.1.01** | **Estate, asset & property management** | **Asset management of the commercial, retail, industrial, residential, institutional, land, agricultural or other estate, integrating and liaising with current estate suppliers as necessary (including maximising revenue, managing maintenance and repair, interaction with occupiers and key service providers, budget management and forecasting).** |
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1.3. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 2 - Estate (Property) Management

* 1. Operation and management to support the occupation of the government estate, providing both technical and operational due diligence where required, including providing an oversight of the property to include policy, maintenance, capital works and strategic asset management plans in support of the Buyers’ property strategy.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line (Number)** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant:** |
| --- | --- | --- |
| **Example**  2.01 | **Estate, asset & property management** | **Asset management of the commercial, retail, industrial, residential, institutional, land, agricultural or other estate, integrating and liaising with current estate suppliers as necessary (including maximising revenue, managing maintenance and repair, interaction with occupiers and key service providers, budget management and forecasting).** |
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2.3. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 3 - Agency & Lease Management

* 1. Management of freeholds or leaseholds to support the acquisition, occupation or disposal of the government estate, providing technical due diligence where required.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  3.01 | **Acquisition** of Land, Freehold or Leasehold Property (includes letting or other commercial arrangements) | * The preparation of lists of potential properties or land (including availability review of the government estate via the Government Property Agency); * Assistance in identifying appropriate terms; * Identification of any surveys that may be required; * Advice on the most appropriate solution; * Undertaking negotiations  Agreeing appropriate terms and conditions; and * Acquiring the recommended asset. * Liaising with the Buyer’s solicitors and with other relevant professionals providing all reasonably necessary input as required. |
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3.3. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 4 – Surveying and Strategic Advice

* 1. Provision of surveys, studies and strategic advice to support the occupation of the government estate, providing technical due diligence where required.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
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| Example  4.01 | **Development surveys, studies & strategy** | Access appraisals |
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4.3. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 5 - Valuation and Compulsory Purchase Orders

* 1. Valuation of built, physical, mechanical and electrical assets ranging from desktop to RICS Valuation - Global Standards (“Red Book”) methodologies to comply with IFRS, RICS or departmental internal accounting procedures and compliance for the government estate, including Services to support compulsory purchase orders.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  5.01 | **Valuation** | Valuations to be carried out fully in accordance with the latest edition of the RICS Valuation - Global Standards (“Red Book”) and any of the Buyer’s accounting guidelines, as superseded or replaced. |
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* 1. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 6 - Business Rating Services

* 1. Provision of rating support (Inc. payment) and rating appeal services as per Check, Challenge & Appeal process for England, Scotland and Wales and the rateable value services for Wales, Scotland and Northern Ireland for central government and wider public sector estate.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  6.01 | **General administration** | Provide professional advice, guidance and assistance on domestic or non-domestic rating issues, including a proactive strategy to mitigate liabilities arising from new properties or alterations to existing premises. |
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6.3. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 7 – Workplace Services Performance Partner

* 1. The purpose of the Workplace Services Performance Partner (WSPP) Lot is to allow the Buyer to develop a single point of contact (In-house under the light option or service delivery partner under the full Integrator option) to instruct and monitor the provision of those Services delivered by third party suppliers, and to facilitate asset, building and property data and management information to enable the Buyer to make informed decisions to support capital investment, estate strategy and cost/resource optimisation.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  7.01 | **System - support operational and strategic Workplace Management as configured to the Buyer’s requirements and shall provide the required IT systems, application hosting, implementation, training, support and security for the management of the Services.** | Functional requirements - configure the System to the Buyer requirements which shall be the focus of the delivery of the Workplace Management Services via task or work orders, providing an interface and or integration with all associated systems used across the Buyer estate to provide a single, all-encompassing view. |
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* 1. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 8A - PFI Technical and Strategic Advice Services

* 1. The purpose of the PFI Technical and Strategic Advice Services Lot is to provide strategic, technical, commercial, project, programme, operational and estates management advice and support, during the operation, expiry and future service delivery of the PFI estate. All services outlined in this framework scope fully support the delivery of standardised processes as defined in Infrastructure Project Authority (IPA) PFI guidance. This excludes legal advice.
  2. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  8A.01 | **Operational Contract Management** | A technical review and interpretation of the PFI contract , schedules, associated documentation and stakeholders (internal/external) working collaboratively with the PFI Co. The Supplier shall provide a summary of the information, documenting any gaps, ambiguities and/or lack of definition. The review shall include but not be limited to the following documentation:   * Project Agreement * Credit Agreement * Facilities Management Agreement * Variations |
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* 1. The standards, guidance or practises for PFI Technical and Strategic Advice Services may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

8.3.1. Preparing for PFI Expiry, Infrastructure and Projects Authority 8.3.2. The Sourcing Playbook HM Government

8.3.3. Delivery Model Assessment Guidance

8.3.4. Compliance with relevant RICS guidance

8.3.5. Asset Condition Playbook Infrastructure projects authority

8.3.6. Sector and departmental specific guidance (e.g. DHSC/ NHSE; DfE; OGP, GPA etc..)

8.3.7. Building Safety act

8.3.8. Codes of Practice, Healthcare Technical Memorandums and SFG20 maintenance guidance.

8.3.9. All relevant current Building regulations, including Fire Building Regulations 2010: Fire Safety Approved Document B-2019 framework

8.3.10. All relevant HTM guidance

8.3.11. All relevant BSI standards, including PAS 9980:2022 Fire risk appraisal

8.3.12. All relevant current Fire Safety Law, including the Fire safety act 2021

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 8B - PFI Surveying Services

* 1. The purpose of the PFI Surveying Services Lot is to allow for the provision of asset condition surveys, studies and strategic advice to support with the operation, expiry and future service delivery of the PFI estate, providing technical due diligence where required. Services outlined in this framework fully support the delivery of standardised processes as defined in Infrastructure Project Authority PFI guidance and collaborative ways of working.
  2. The Services outlined in this framework scope are not an exhaustive list, the detail being specified by the Buyer in the Call-off Procedure. As a minimum the Supplier shall be capable of delivering asset condition surveys, as detailed within the service lines 8B.01/02/03/04/05, in accordance with IPA’s Asset Condition Playbook.
  3. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  8B.01 | **PFI surveying services** | Asset management compliance review, which will consist of an audit of the SPV/FMCo service provision. The review will include but not be limited to data and systems, health and safety risk review and compliance review. Provision of report(s) detailing risks, issues, non-compliances and actions required to rectify. |
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* 1. The following standards, guidance or practises for PFI surveying services may apply, or any subsequent versions including variations for England, Wales, Scotland or Northern Ireland:

9.4.1. Asset Condition Playbook Infrastructure projects authority

9.4.2. Compliance with relevant RICS guidance

9.4.3. Sector and departmental specific guidance (e.g. DHSC/ NHSE; DfE; OGP, GPA etc..)

9.4.4. Building Safety act

9.4.5. Codes of Practice, Healthcare Technical Memorandums and SFG20 maintenance guidance.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 8C - PFI Fire Safety and Audit

* 1. The purpose of the Fire Safety and Audit Lot is the provision of fire surveys, studies and strategic advice to support with the operation, expiry and future service delivery of the PFI estate, providing technical due diligence where required. Services outlined in this Framework Specification fully support the delivery of standardised processes as defined in Infrastructure Project Authority PFI guidance and the collaborative ways of working.

Collaboration between the parties involved is essential when carrying out the works detailed within this Lot.

* 1. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  8C.01 | Audit - Design | Desktop Review to determine the design intent  Fire documentation review, assessment and recommendations, including:  Review of the fire strategy, including reports, drawings and other associated documentation as required  Review of the original construction requirements  Assessment of compliance, using a risk based approach  Provision of a gap analysis identifies opportunities for using a risk based approach where there is a departure from compliance with standard guidance.  Recommendations for progressive sampling in the form of a report. |
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* 1. The following standards, guidance or practises for PFI Fire services may apply, or subsequent versions including variations for England, Wales, Scotland or Northern Ireland.

10.3.1. All relevant current Building regulations, including Fire Building Regulations 2010: Fire Safety Approved Document B-2019 framework

10.3.2. All relevant HTM guidance

10.3.3. All relevant BSI standards, including PAS 9980:2022 Fire risk appraisal

10.3.4. All relevant current Fire Safety Law, including the Fire safety act 2021

10.3.5. Asset Condition Playbook - Infrastructure projects authority

10.3.6. Compliance with relevant RICS guidance

10.3.7. Building Safety Act 2022

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

## Lot 8D - PFI Specialist Commercial and Financial Advice

* 1. The purpose of the PFI Specialist Commercial and Financial Advice Lot is to provide specialist commercial and financial advice in relation to privately financed projects that may be general advice or may relate to one or more specific transactions.
  2. Advice may consist of the development, appraisal or execution of suitable strategies, policies and options for privately financed projects , including the provision of research, technical or market analysis. It could concern the financing, refinancing or variation of privately financed projects . Alternatively, it could require option appraisal, feasibility studies, valuation, due diligence or deal execution in connection with privately financed public sector assets and services.
  3. Required service lines

[The Buyer is to complete this table by inputting their required service lines. A list of service lines for this lot can be found in RM6343 - Framework Schedule 1 - Specification. Please delete the example before publishing the document.]

| **Service Line** | **High Level Description** | **The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:** |
| --- | --- | --- |
| Example  8D.01 | **PFI Specialist Commercial and Financial Advice** | Advice on the financing aspects of privately financed projects and programmes (including corporate balance sheet financing and project finance). |
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11.4. Services should be delivered to the appropriate RICS standards, guidance or practises as currently published.

[The Buyer may define their required standards here or provide details of where such requirements can be located within the bid pack e.g. *“Please see Call-Off Schedule X for more information”*.]

# APPENDIX A - xxxxxx

# APPENDIX B - xxxxxxx