



## **Invitation for Expression of Interest Major Revision of BEAM Plus Existing Buildings**

### **1. Introduction**

- 1.1. BEAM Society Limited (BSL) is seeking expression of interest from consultants to conduct a revamp for our environmental assessment method for existing buildings – BEAM Plus Existing Buildings Version 3.0.
- 1.2. BSL, owner of Building Environmental Assessment Method (BEAM), is a non-profit public organisation committed to developing and implementing BEAM assessment tools, assess green buildings and train BEAM Professionals. BEAM assessment tools have certified green building developments for nearly 2,000 projects. On per capita basis, BEAM is one of the most widely used voluntary green building labelling schemes of its kind in the world.

### **2. Background**

- 2.1. Based on the assessment results of the completed projects on Existing Buildings, a preliminary study was conducted to identify the major issues of BEAM Plus Existing Buildings. The study has analysed particular credits and proposed direction of changes.
- 2.2. This consultancy study is to build on the results of the preliminary study and the discussion outcome of expert panels/ working groups / task force to further investigate how to enhance the scheme and to execute the necessary change and enhancement to the rating tool.

### **3. Scope of Work**

- 3.1. The current version of BEAM Plus assessment tool for Existing Buildings Version 2.0 (EB v2.0) was launched in June 2016. After 6 years of operation, the tool is due for a revamp as part of the structured review process. Apart from updating it to meet the latest statutory and technological requirements, changes will include the measurement of green standards and match the diverse aspirations of the industry partitioners. As a result, the tool will be more appealing to applicants.
- 3.2. The revision should at least include the following framework-
  - a) The layout of the assessment criteria shall be in the same format as the previous version with updated requirements. However, the new version shall consist of only ONE manual instead of TWO separate manuals for comprehensive and selective schemes for the previous version.
  - b) Apart from the BEAM Plus EB Assessment Manual, the Consultant shall prepare a BEAM Plus EB Technical Guidebook to be read in conjunction with the Manual. The intention of the Technical Guidebook is to provide the background and elaboration on the credit requirements. This Technical Guidebook shall form an essential reading for professionals involved in the BEAM Plus process including BEAM Professionals, BEAM assessors and all



those with a professional interest in the interpretation and implementation of this BEAM Plus assessment tool.

- c) The Consultant shall prepare a separate Commentary that records the considerations and rationale during the development of each credit. The Commentary shall provide comprehensive record for the decision-making process of the Consultant in establishing the credit requirements.
- d) The Consultant shall aim for the simplification of the certification process/ submittal so that the number of records would not be laborious to the extent which would pose a deterrent to applicants to seek certification. In this connection, the new tool will only call for relevant, essential and definitive evidence to demonstrate compliance.
- e) The Consultant shall structure the new EB tool towards the enhanced Environmental, Social and Governance (ESG) reporting framework which is a rising global trend as well as requirements under the Companies Ordinance (Cap 622) and the Hong Kong Stock Exchange.
- f) The Consultant shall incorporate credit requirements which can facilitate applicants in exercising green finance.
- g) In tandem with the government's roadmap to achieve carbon neutrality by 2050, the credit requirements shall facilitate the industry stakeholders with various approaches in meeting the goal.
- h) The Consultant shall also include credit requirements to cater for climate risk/ adaptation. This should encompass elements such as consequences, likelihoods and responses to the impacts of climate change and how societal constraints shape adaptation options.
- i) Other than ESG, Green Finance, Climate Risk and Carbon Neutrality, the Consultant shall study and identify any other needs of the market and include relevant elements in the pool of credits to allow for different green attainment of BEAM Plus EB certification.
- j) The design of the credit regarding environmental achievement shall as far as possible be quantifiable.
- k) The credit requirements shall mandate the provision of actual monthly energy consumption data and other quantifiable environmental performance every 12 months to keep the EB certificate active throughout the 5-year certification period.
- l) The Consultant shall produce the English, Traditional Chinese and Simplified Chinese versions for the BEAM Plus EB Assessment Manual and the BEAM Plus EB Technical Guidebook.



- 3.3. The ultimate goal is to make the rating tool more practical, flexible and user-centric in defining green building performance for BEAM Plus Existing Buildings, while maintaining the unique function in promoting green and sustainable buildings in Hong Kong. As a result, it would be more attractive to applicant to seek BEAM Plus Existing Buildings certification.
- 3.4. Based on the above framework, the major scope of the consultancy study is summarised below-
- a) The Consultant shall study the existing issues of BEAM Plus Existing Buildings as identified in the preliminary study and the consolidated report of improvement. The Consultant shall examine and recommend how the scheme should be improved to address these issues.
  - b) In recommending solutions, the Consultant shall make reference to the experience of worldwide assessment models related to green buildings, including but not limited to BREEAM, CGBL 3 Star, EDGE, Green Mark, Green Star, GRESB, LEED, WELL, requirements/ guidelines on climate related disclosures, ESG reporting, GRI reporting standards, Sustainability Linked Loan Principles, Climate Action Plan, Science Based Target Initiatives, etc..
  - c) Taking into account the outcome of the above study, the Consultant shall proceed to revise the BEAM Plus Existing Buildings and prepare the necessary technical manuals (English and Chinese Versions), Technical Guideline (English and Chinese Versions), Commentary, assessment templates, assessment flow chart and procedures.
  - d) With the proposed amendments, the Consultant shall carry out sensitivity analysis in the form of desktop studies using a number of representative sample premises to test the likely outcomes of assessment when applied to real cases including those certified premises. The sample premises shall include commercial, educational, government, industrial, office and residential buildings, hotels and shopping centres.
  - e) The Consultant shall undertake stakeholder engagement exercises to obtain feedback from the industry on the draft rating tool with a view to further fine-tuning it to a final version.
  - f) Upon completion of the draft final version, the Consultant shall perform certain number of pilot assessment(s) on critical aspect(s) or credit(s) using real case(s) including new case(s) and certified premises, to test the feasibility and effectiveness of the revised rating tool as an assurance in attaining high standard.
  - g) The Consultant shall develop presentation and examination materials on the new rating tool and conduct training sessions and public talks for the Employer's specified audience.



- 3.5. The whole consultancy excluding pilot assessment(s) as defined in item f) above is expected to be completed within 18 months from the date of consultancy commencement with interim stages in between. While pilot assessment(s) are expected to last from 6-9 months.

#### **4. Shortlisting Criteria**

- 4.1. The applicant will have to demonstrate the following-

- a) A proper approach to the assignment and adequate understanding of the requirements;
- b) Experience in research and awareness of the global trend on green building/ sustainability rating tools development, such as the inclusion of ESG reporting, green finance, carbon neutrality, etc.;
- c) Experience in green building design, green certification, environmental management, etc. and understanding and its application of relevant key performance indicators (KPIs) for material use, waste management, energy performance, water saving and quality, facility management and indoor environmental quality etc.; and
- d) Appropriate qualifications and working experience of key staff: the inclusion of architects, engineers, building energy specialist, surveyors, sustainability consultant, facility management professionals and BEAM Pro etc. in the team will be essential. Strategic teaming-up is permitted.

#### **5. Expression of Interest**

- 5.1. If you are interested in tendering for this assignment, please submit i) your written expression of interest and ii) Application Form for Supplier and Contractor **by email to [procurement@beamsociety.org.hk](mailto:procurement@beamsociety.org.hk) before 17:00 on 31 August 2022**. The application form must be completed and returned with the EOI response for BSL to be considered in the shortlisting process. The email subject title should be marked "EOI for BEAM Plus Existing Buildings Major Revision (Confidential)". Late submission will not be accepted.
- 5.2. Your expression of interest shall contain the following information on a maximum of four A4 pages (exclusive of appendices):-
- a) Your broad approach to the assignment;
  - b) Indicative Organisation Chart showing the lead consultant and sub-consultant(s) (if available);
  - c) Previous relevant experience; and
  - d) Your comment(s) to the scope of work of this assignment (if any).



- 5.3. The expression of interest must also contain the name, title, telephone number, e-mail and correspondence address of a contact person to which subsequent enquiries should be addressed.
- 5.4. Following the Expression of Interest, participants will be shortlisted by BSL for submission of detailed technical and fee proposals.

**6. Enquiries**

- 6.1. Should there be any enquiry regarding this EOI invitation, please contact Mr Leo Chan of BSL Secretariat at Tel No. 3610 5795 or e-mail address: [leochan@beamsociety.org.hk](mailto:leochan@beamsociety.org.hk).



**Marking Scheme for EOI**

**Consultancy on BEAM Plus Existing Buildings Major Revision**

**(Confidential)**

| Assessment Criteria   | Weighting (%) |
|---|---------------|
| 1. Approach to the assignment and appreciation of the requirements  | 10            |
| 2. Comprehension and/or experience in research of the global trend on green building/ sustainability rating tools development, such as the inclusion of ESG reporting, green finance, carbon neutrality, etc.   | 30            |
| 3. Experience in green building design, green certification, environmental management, etc. and understanding of relevant critical performance indicators for material use, waste management, energy performance, water saving and quality, facility management and indoor environmental quality etc. | 35            |
| 4. Qualifications and working experience of key staff (refer to paragraph 4.1d)   | 25            |

The passing mark shall be **60%**.

Among the consultants which pass the assessment, the **top five** consultants which score the highest marks will be shortlisted.

## APPLICATION FORM FOR SUPPLIER AND CONTRACTOR

| PART A COMPANY INFORMATION  |  |         |  |
|---|--|---------|--|
| Name of Company   |  |         |  |
| Registered Address  |  |         |  |
| Correspondence Address  |  |         |  |
| Business Registration No.   |  |         |  |
| Name of Proprietor/Director   |  |         |  |
| Company Web-site  |  |         |  |
| Telephone No.   |  | Fax No. |  |
| Contact Person  |  | Title   |  |
| Telephone Number  |  | Email   |  |
| <i>Please enclose the Company's Organizational Chart and a copy of the Business Registration Certificate.</i> |  |         |  |

| PART B PRODUCTS / SCOPE OF SERVICES         |
|---|
|   |
| <i>Please enclose a list of references.</i> |

| PART C AWARDS AND CERTIFICATIONS   |   |
|--|---|
| Certified Management Systems<br>(such as ISO9001, ISO14001 or ISO45001, etc.)                                      | <input type="checkbox"/> Yes. <b>Please list below and provide copy of certificates:</b><br><hr/> <input type="checkbox"/> No           |
| Have there been any Occupation Health & Safety or Environmental related incidents or accidents in the past 3 year? | <input type="checkbox"/> No   |
|  | <input type="checkbox"/> Yes. <b>State the incident and explain what actions have been taken to ensure they will not happen again?*</b> |
| Other Awards / Certifications received   | <b>Please list below and provide copy of certificates:</b>  |
| Additional Information   |   |

\* The application to become a BSL supplier / contractor may be approved even if incidents or accidents have occurred as long as appropriate actions have been implemented to prevent recurrence.

| PART D CONFLICT OF INTEREST  |   |
|--|---|
| Are any owners / employees of the Company currently employed by BSL?                         | <input type="checkbox"/> Yes <b>(Please provide details below)</b><br><hr/> <input type="checkbox"/> No |
| Do any owners / employees of the Company have a personal relationship with any BSL employee? | <input type="checkbox"/> Yes <b>(Please provide details below)</b><br><hr/> <input type="checkbox"/> No |
| Are any owners / employees of the Company former BSL's employees?                            | <input type="checkbox"/> Yes <b>(Please provide details below)</b><br><hr/> <input type="checkbox"/> No |



**PART E SIGNATURE**

- I hereby declare that the information provided above are accurate and truthful.
- I have read and understand the “Notice to all Visitors” as shown at BSL’s website:  
[https://www.beamsociety.org.hk/en\\_about\\_us\\_9.php](https://www.beamsociety.org.hk/en_about_us_9.php)

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

\_\_\_\_\_  
*Company Chop and Authorized Signature*

\_\_\_\_\_  
Date