



Invitation for Expression of Interest -  
Independent Review on the Assessment Framework and Credit Criteria for the  
BEAM Plus Existing Buildings Assessment Tool for non-Hong Kong based Projects

Our Ref: EOI/BSA/2024/001

**Invitation to Expression of Interest (EOI)**  
**Agreement No. BSD 1/2024**

**Independent Review on the**  
**Assessment Framework and Credit Criteria for the**  
**BEAM Plus Existing Buildings Assessment Tool**  
**for non-Hong Kong based Projects**  
**for**  
**BEAM Society Limited**

**ASSIGNMENT BRIEF**

**January 2024**



Our Ref: EOI/BSD/2024/001

**Invitation to Expression of Interest (EOI) -  
Assessment Framework and Credit Criteria for the  
BEAM Plus Existing Buildings Assessment Tool  
for non-Hong Kong based Project  
for BEAM Society Limited**

**Table of Contents**

	<b>Page</b>
1. Background	3
2. Objectives of the Assignment	4
3. Scope of the Assignment	5
4. Presentations	8
5. Deliverables	8
6. Brief Timeframe of the Assignment	11
7. Requirements of the PSP	11
8. PSP Office and Staffing	12
9. Tentative Procurement Plan	14

Our Ref: EOI/BSD/2024/001

This document describes the requirements of the Independent Review on the Assessment Framework and Credit Criteria for the BEAM Plus Existing Building Assessment Tool for non-Hong Kong based Projects. It provides the foundation on which the Professional Services Provider ("PSP") shall base their proposals. PSP responding to the invitation for express of interests shall read and understand this document in entirety in order to assure compliance with the requirements, functionalities and objectives.

Words in singular form in this and the associated document shall be interpreted as singular or plural as suggested by the context of the statement in this document.

## **1. Background**

- 1.1 BEAM Society Limited ("BSL"), owner of the Building Environmental Assessment Method ("BEAM"), is a public body established in 2010. BSL plays a key role in the development and implementation of BEAM standards for practitioners in all related disciplines, and for individual construction projects. This voluntary initiative to benchmark building sustainability is designed to benefit the entire community in Hong Kong. In recognition of the importance of this work, BSL dedicates itself to continuously improving the overall quality of Hong Kong's built environment, both in terms of new buildings and existing buildings.
- 1.2 BSL is committed to developing and implementing BEAM Assessment Tool – BEAM Plus (former HK-BEAM), assessing green buildings and training BEAM practitioners – BEAM Professionals (BEAM Pro) and BEAM Affiliates.
- 1.3 BEAM Plus is tailor-made for the high-rise, high density-built environment of sub-tropical climate in Hong Kong, which embraces a range of good practices in planning, design, construction, management, operation and maintenance of building, and is aligned with local regulations, standards and codes of practice.
- 1.4 Appreciated by the Hong Kong Government and developers, BEAM Plus assessment and certification provide building users with a single performance label that demonstrate the overall quality of a building. A qualified BEAM Plus green building should be aimed at sustainability, providing a safer, healthier, more comfortable, more functional and more efficient living or working environment.

Our Ref: EOI/BSL/2024/001

- 1.5 In recent years, there has been a noticeable shift amongst the building industry, building management associations and real estate investment groups to focus on environmental resiliency, social sustainability and effective governance in the operational management and maintenance of the existing buildings. With this shift for better environmental, social and governance (ESG) analysis of buildings, BEAM Plus Existing Buildings Assessment Tool has gain credibility amongst the building industry, building management associations and real estate investment groups for its comprehensive assessment framework to analyse the sustainable operation of the built environment.
- 1.6 At the same time, there has been an increased demand for BEAM Plus Existing Buildings Assessment Tool to be applied to projects outside of Hong Kong. Stakeholders in the building industry believe that the robust assessment framework of the BEAM Plus Existing Building Assessment Tool can be applied to projects outside of Hong Kong. They see it as an opportunity to showcase their ESG commitments to international investors and attract green real estate funds from the Hong Kong financial market.
- 1.7 To allow BEAM Plus Existing Buildings Assessment Tool, BSL is seeking an independent reviewer to review the framework and credit criteria of BEAM Plus Existing Buildings Assessment Tool and to advise the improvement necessary for the tool to be applied to projects located outside of Hong Kong or for projects that cover both Hong Kong and aboard. Moreover, the credit requirement should align with the latest international trend for real asset assessment to enable international real estate investors and fund managers to easily gauge the ESG performances of existing buildings.
- 1.8 The assignment is expected to be completed within 7 months.

## **2. Objectives of the Assignment**

- 2.1 It is the intent of the Assignment to obtain professional services from the PSP for the successful completion of the Assignment as described in the current EOI.
- 2.2 The services to be provided by the PSP for this Assignment shall meet the following objectives:
  - (i) provide an independent review of the preliminary assessment framework, assessment criteria and submittal requirements developed by in-house

Our Ref: EOI/BSO/2024/001

experts and advise on the performance gap for buildings outside of Hong Kong wishing to participate in the BEAM Plus Existing Buildings Assessment.

- (ii) advise on the strategies for the assessment framework and assessment criteria to align with international green financing and green real estate investment policy frameworks, ESG disclosure requirements and building management auditing policies;
- (iii) recommend updates to the assessment criteria to ensure that the assessment criteria are aligning to the statutory requirements, green investment guidelines and policy mandates of Hong Kong and credible international standard setters while ensuring that the assessment criteria are feasible to be applied in a non-Hong Kong context;
- (iv) suggest solutions to streamline the assessment processes, either by means of simplifying submittal requirements or standardising certain submittals to enable building outside of Hong Kong to easily participate in the assessment.
- (v) explore the possibilities of including cutting-edge technologies or innovative solutions to automate and streamline the data flow of relevant operation and maintenance data generated from building operation and maintenance for BEAM Plus assessment, ESG disclosures, and management audits; and
- (vi) propose terminology alignment between English and Chinese and where necessary, provide the translation of the manual from English to Chinese.

### **3. Scope of the Assignment**

- 3.1 The scope of the assignment is to provide an independent review of the BEAM Plus Existing Buildings v.2.0 Assessment Tool, enabling its effective application to buildings outside of Hong Kong and building portfolios comprising properties in both Hong Kong and non-Hong Kong locations. The PSP should also offer professional advice on enhancing the assessment process of the tool and ensuring that it meets the requirements for more transparent ESG disclosures by international real estate investors, fund managers and property managers.

Our Ref: EOI/BSD/2024/001

- 3.2 A drafted framework of the credit criteria and assessment framework will be provided by BSL in-house experts to facilitate the PSP in completing the independent review set out by this Assignment.

Scope 1: Inception

- 3.3 Based on the drafted framework provided by the BSL in-house experts, the PSP shall perform a gap analysis of the assessment framework, assessment criteria and submittal requirements against buildings situated outside of Hong Kong. The type of buildings to be inclusive in the gap analysis shall be proposed by the PSP and be agreed by the BSL in-house experts.
- 3.4 The PSP shall review the assessment framework and assessment criteria against international green financing and green real estate investment policy frameworks, ESG disclosure requirements and building management auditing policies and advise on the alignment necessary to meet the guidelines of the different green real estate disclosure and assessment schemes.
- 3.5 The PSP shall advise on possible updates to the drafted framework by the BSL in-house experts to ensure that the assessment criteria and processes are aligned with both international and Hong Kong's regulatory frameworks on green building, policy mandates of green investments, and best practices in green building management.

Scope 2: Preliminary Framework

- 3.6 The PSP shall collaborate with the BSL Secretariat team in devising a preliminary framework of the BEAM Plus Existing Buildings v.2.0 Assessment Tool for enabling practitioners with buildings located outside of Hong Kong and building portfolio located both within and outside of Hong Kong to easily gauge on the green performances of the buildings and its operations.
- 3.7 The PSP shall pay particular attention to ensuring that the benchmarking criteria and the point scale for quantifiable environmental performance data, including building energy consumption, waste management and recycling performance, flow rate of water-efficient devices (including flushing devices), and water-saving performance, are compatible with the operational environment of buildings in Hong Kong and other international cities.

Our Ref: EOI/BSD/2024/001

- 3.8 The PSP shall provide expert opinions on the contents related to the Energy Use aspect of the proposed assessment framework. The PSP shall ensure that the credit criteria for the Energy Use Aspect meet the prevailing market trends, including the adoption of energy efficient technology and the ability to enable owners of buildings and/or building portfolios to set targets to meet Net Zero buildings and other prevailing energy efficiency standards. Additionally, the PSP shall facilitate appropriate pathways for owners of buildings and building portfolios to make evaluations of energy efficiency performance, particularly regarding the detailed energy criteria related to energy benchmarking, energy analysis, energy-efficient practices and measures, and renewable and alternative energy systems.
- 3.9 The PSP shall recommend assessment processes and submission requirements that can minimise the workload of potential participants in preparing submittals and responding to comments for the BEAM Plus Existing Buildings Assessment. At the same time, the PSP shall ensure that the assessment process and submission requirements are robust enough to meet prevailing ESG disclosure requirements and disclosure requirements set out by internationally acclaimed real estate assessment schemes.

#### Scope 3: Presentation to Relevant Committees

- 3.10 The PSP shall collaborate with the BSL in-house experts in making presentation of the preliminary framework to relevant committees, including but not limited to the Technical Review Committee and Green Label Committee of the Hong Kong Green Building Council.

#### Scope 4: Final Alignment

- 3.11 The PSP shall take note of the comments received from the relevant committees and assist the BSL in-house experts in refining the manual for publication.

#### Scope 5: Translation

- 3.12 Based on the finalised manual, the PSP shall perform the translation of the manual from English to Chinese to the satisfaction of the BSL in-house experts.
- 3.13 The PSP shall ensure the appropriate terminology alignment between English and Chinese.

Our Ref: EOI/BSA/2024/001

### Scope 6: e-Form and Digitalisation Enhancement

- 3.14 The PSP shall design the layout and the workflow of the e-Forms to facilitate users in undertaking the assessment on the Employer's iBEAM Assessment Automation System ("iBEAM"). *Where necessary and at the instruction of the Employer*, the PSP shall collaborate with the Employer in programming the e-Form onto iBEAM.
- 3.15 The PSP shall provide programming policies that enable third-party data developers to transfer building operational data into iBEAM for the BEAM Plus Existing Building v.2.0 Assessment. *Where necessary and at the instruction of the Employer*, the PSP shall provide the coding for the Open Application Programming Interface to align with the programming policies.

## **4. Presentations**

- 4.1 PSP shall prepare necessary presentations required during the research, review and development of the Assessment Tool as below: -
- (i) Prepare and attend all meetings with the BSL for the purpose(s) related to the activities of the Assignment;
  - (ii) Conduct interviews with BSL staff, and any relevant industry stakeholders in relation to the Assignment;
  - (iii) Report progress of the Assignment to the BSL and the relevant Project Steering Committee;
  - (iv) Present the deliverables for the BSL comments and/or approval; and
  - (v) Support the BSL to answer any queries from the expert panels and relevant industry stakeholders and undertake improvement work in relation to the Assignment.

## **5. Deliverables**

- 5.1 Based on the requirements depicted above, PSP shall provide an independent review of the assessment framework and credit criteria for the BEAM Plus Existing



Our Ref: EOI/BSA/2024/001

Buildings Assessment Tool for non-Hong Kong based projects and provide the following reporting as part of the deliverables: -

- (i) Gap analysis encompassing the application of the drafted assessment framework, assessment criteria and submittal requirements onto buildings located outside of Hong Kong and building portfolios comprising properties in both Hong Kong and non-Hong Kong locations, including:
  - Potential improvements needed for the assessment framework, assessment criteria, and submittal requirements to effectively measure the sustainability performance of buildings situated outside of Hong Kong
  - Alignment of the tool against international green financing and green real estate investment policy frameworks, ESG disclosure requirements and building management auditing policies.
- (ii) Advisory report outlining the potential technical improvements needed for the assessment framework, assessment criteria, and submittal requirements to meet the prevailing market trends, including:
  - Updates to the energy use related credits so that these credits align with the prevailing market trend on energy efficiency and net zero compliance.
  - Updates to the benchmarking criteria and the point scale for quantifiable environmental performance data to ensure these criteria is compatible with the operational environment of buildings in Hong Kong and other international cities.
  - Enhancements of the assessment processes and submission requirements to minimise the workload of potential participants in preparing submittals and responding to comments for the BEAM Plus Existing Buildings Assessment.
- (iii) Briefing sessions to relevant committees assigned by BSL based on the timing of their scheduled meeting. The purpose of these sessions is to enable the committees to grasp the considerations and rationale behind the updates

Our Ref: EOI/BSD/2024/001

made to the assessment framework, assessment criteria, and submittal requirements. Additionally, these sessions provide a platform for the experts within the committees to express their views on the deliverables made by the PSP.

- (iv) e-Form on credits assigned by the Employer should be provided, with the e-Form layout, formula, programming code, workflow, and other technical criteria furnished for undertaking assessment on the iBEAM platform and to the satisfaction of the Employer.
  - (v) Data policy and where applicable, programming codes for enabling third-party data developers to transfer building operational data into iBEAM for the BEAM Plus Existing Building v.2.0 Assessment.
  - (vi) Refined Manual of the Assessment Tool translated in Traditional Chinese and Simplified Chinese.
- 5.2 All reports produced by the PSP shall be subjected to the acceptance by BSL. BSL will endeavor to respond and comment on the reports submitted by the PSP within reasonable time of submission as practical as possible. PSP shall rectify and supplement the submissions within 2 weeks upon receiving comments from the BSL and/or stakeholders.
- 5.3 All documents shall be submitted electronically in MS Word format, MS Excel format (for data) and in PDF file format or any other formats as applicable which are readily printable.
- 5.4 The copyright of the customised design and system, reports, documents, recommendations, data and any other information prepared or collected by the PSP, its specialist(s) and the sub-contractor(s) and their employees and agents in the course of this Assignment shall rest with the BSL.

Our Ref: EOI/BSD/2024/001

## 6. Brief Timeframe of the Assignment

- 6.1 The Assignment is planned to commence around March 2024 and shall take 7 months to complete. The indicative timeline to the Assignment is shown below:  
BEAM

Scope (as per Clause 3 of the Assignment Brief)	Anticipated End Date
Scope 1: Inception	31 March 2024
Scope 2: Preliminary Framework	30 April 2024
Scope 3: Presentation to Relevant Committees	15 May 2024
Scope 4: Final Alignment	31 July 2024
Scope 5: Translation	15 September 2024
Scope 6: e-Form and Digitalisation Enhancement	30 September 2024

- 6.2 The deliverables are expected to be submitted during the course of the Assignment as specified in Clause 3 above, under the supervision of the BSL.
- 6.3 To achieve the objectives of this Assignment, PSP shall conduct the Assignment following the proposed methodology and plan. The proposed methodology and plan shall be accepted by BSL prior to the commencement of Assignment.
- 6.4 Supplementary modification on the proposal, and information and reports other than the deliverables stated above shall be prepared and delivered at such reasonable time upon request by the BSL.

## 7. Requirements of the PSP

- 7.1 PSP shall be directed and supervised by the BSL.
- 7.2 PSP shall obtain the approval of the BSL before commencement of each stage of the Assignment.
- 7.3 PSP shall attend all meetings held by the BSL for this Assignment and the internal meetings of the BSL as required and necessary.

Our Ref: EOI/BSA/2024/001

## **8. PSP Office and Staffing**

- 8.1 An experienced and competent PSP will be engaged to conduct the tasks stipulated in Clause 3 above. It is anticipated that the PSP shall consist of one (1) BEAM Pro specialising in undertaking BEAM Plus Existing Buildings Assessment, one (1) Green Building Professional specialising in undertaking green building assessments for existing buildings outside of Hong Kong, one (1) Energy Specialist specialising in performing energy audits and/or drafting energy policy for buildings within and/or outside of Hong Kong, one (1) ESG Specialist/Real Estate Assessment Specialist specialising in preparing ESG survey for real estate portfolios or real estate investors and any other professional staff sufficient to complete the Assignment.
- 8.2 PSP shall maintain for the duration of this Assignment an office in Hong Kong under the control of a Project Manager with at least 7 years of management experience in the field relevant to the subject matter of the Assignment.
- 8.3 The composition of the PSP shall also include at least the following team members:
- (a) BEAM Pro – Minimum of 7 years of working experience in managing project teams on green building projects. He/she shall be the executive sponsor for the project and to ensure that all the designated Objectives are satisfactorily completed. He/she shall have experience in leading BEAM Plus Existing Building Assessment for a building and/or building portfolio for at least one (1) client of significant size.
  - (b) Green Building Professional – Minimum of 5 years of working experience in green building project. He/she shall have performed a green building assessment of internationally acclaimed assessment scheme for one (1) sizable project outside of Hong Kong.
  - (c) Energy Specialist – Minimum of 5 years working experience in performing energy audit and/or drafting energy policy for buildings or building portfolios within and/or outside of Hong Kong.

Our Ref: EOI/BSD/2024/001

- (d) ESG Specialist/Real Estate Assessment Specialist – Minimum of 2 years of working experience in providing ESG reporting advisory for a real estate portfolio and/or real estate investors. He/she shall have led the development of the ESG report and/or ESG survey and/or real estate assessment for one (1) sizable client within or outside of Hong Kong.
- 8.4 PSP shall provide the BSL with full details of staff to be employed on the Assignment together with their curriculum vitae and proof of qualifications for prior approval from the BSL. Separate approval from the BSL shall be obtained for any subsequent changes of staff.
- 8.5 PSP shall provide all specialist and sub-contractor services (not limited to those specified in this Assignment above) required for the satisfactory completion of the Assignment. No additional fees or expenses for the provision of such services rendered locally or overseas shall be payable by the BSL.
- 8.6 PSP shall provide staff and manpower input in accordance with the technical proposal made at the tender stage, and that the BSL shall have the right to call for and audit the time-log record of the PSP's staff deployed for the Assignment.
- 8.7 In the event of any deviation or change of team members with respect to the submitted tender, prior approval from the BSL must be sought.
- 8.8 In the event, for reasons beyond his control, PSP is unlikely to provide or maintain any key staff as specified in the proposal, he shall report to the BSL as soon as practicable and propose for the BSL's approval of a substitute staff having qualification and experience comparable with the staff who is departing the PSP.
- 8.9 PSP shall be responsible for preparing the meeting minutes and submitting them to the BSL within 2 weeks after the meeting. Meeting papers and documents shall be prepared and submitted by PSP within 1 week before the meeting.

Our Ref: EOI/BSD/2024/001

## 9. Tentative Procurement Plan

9.1 It is anticipated that the procurement plan may be as follows:

Description	Anticipated End Date
EOI Issuance	24 January 2024
EOI Evaluation	31 January 2024
Formal Tendering	2 February 2024
Tender Evaluation	9 February 2024
Tender Award	22 February 2024
Commencement of Assignment	1 March 2024