



NET ZERO



SUSTAINABLE PLACES



INCLUSIVE GROWTH

Public asset condition and performance is improved



## Supporting improved data transfer on PFI project handbacks



**A** CROSS Scotland there are some 120 operational PFI/PPP contracts, with an ever-increasing number approaching handback status.

During the 1990s and early 2000s, many essential public sector buildings such as hospitals and schools were built using the Public Private

Partnership (PPP) and Private Finance Initiative (PFI) revenue-funded delivery models.

As part of the PFI/PPP contract, it is the responsibility of the private sector to maintain these buildings on behalf of the public sector, usually for a period of 25 years, and then hand them over to the public sector in good order.

The scale and complexity of successfully handing back, for example, a PFI/PPP hospital, is huge. So it is vital public bodies not only have a sound understanding of the condition of the building they will soon be 100% responsible for, but crucially, know what will be required to be transferred over in terms of asset data, information and documentation

# Supporting improved data transfer on PFI project handbacks



## Information and Asset Data Transfer at Project Handback

that should have been maintained over the whole life term of the contract.

It is then important to extract and validate the required handback data information in a smooth and effective manner. Sufficient time must be allowed to ensure data and information play their part in the successful handback process and, wherever possible, the data is provided in a consistent format across the PFI/PPP sector.

In order to support the process, our Operational Contract Management (OCM) team published guidance in August 2023, entitled, Information and Asset Data Transfer at Project Handback.

The guidance sets out the importance of establishing the quality and completeness of asset data and information and is supported by a template workbook that provides a baseline checklist of actions and information to be delivered by project companies prior to and up to project handback.

The workbook has also been designed in such a way so it is compatible across the construction and facilities management industries in ways that allow public bodies classify information, data and records to structure and help manage handback information as projects complete their handback journey.

The guidance has been well received by public sector colleagues across the OCM team's handback network and has been adopted on a number of projects.

It is also worth noting that the template workbook is being used by public bodies in different ways to suit their individual requirements, whilst still providing a consistent baseline checklist of actions to create a single dataset jointly with the project company and its supply chain.

Having project data that is easily accessed by anyone engaged on handback who needs it will increase transparency and build credibility and trust within teams, all of which is vital to underpin a successful handback transition.

Richard Teed, Senior Forward Planning Officer at Falkirk Council said: *"When PPP contracts are approaching expiry, the transfer of high quality asset data and documentation is fundamental to planning and delivering an orderly continuation of service and transition to new Facilities Management arrangements.*

*"The guidance and template produced by the Scottish Futures Trust provides a toolkit that allows the contracting authority and ProjectCo to reach swift agreement on what is required and how it will be provided. What could have been a protracted and complex exercise was made quick and easy with the availability of this invaluable resource."*