

The Brief (Draft)

Table of Contents

1 Introduction.....2

2 The Project.....3

3 Objectives of this Assignment3

4 Services to be Provided by the Vendor4

5 Independent Consultant4

6 Project Timeline5

7 Payment Terms.....5

1 Introduction

This Brief is to be read in conjunction with the Tender Invitation Letter and the General Terms and Conditions for Purchase Orders.

1.1 Hong Kong-Shenzhen Innovation and Technology Park Limited (“HSITPL”)

- 1.1.1 On 3 January 2017, Hong Kong Special Administrative Region Government and the Shenzhen Municipal People’s Government signed a Memorandum of Understanding on the development of a Hong Kong-Shenzhen Innovation and Technology Park (the “**Park**”) at the Lok Ma Chau Loop in Hong Kong.
- 1.1.2 HSITPL, a wholly-owned subsidiary of Hong Kong Science and Technology Parks Corporation, is vested with the responsibility to develop, operate, maintain, and manage the Park.

1.2 The Park

- 1.2.1 The Park envisions to serve as the world’s knowledge hub and innovation & technology (I&T) centre, converging enterprises, research & development (R&D) institutions and higher education institutions from local, the Mainland and overseas, which can connect upstream and midstream research to downstream market, further enhancing collaboration among industry, academic and research sectors.
- 1.2.2 The Park focuses on six I&T pillar industries including life and health technology, artificial intelligence and data science, new materials, new energy, robotics and microelectronics.
- 1.2.3 The Park covers an area of 87 hectares and the development is divided into two phases. The estimated total floor area of the first phase will be approximately 1 million square metres, which will provide R&D (Wet Lab / Advanced Manufacturing) buildings, Dry Lab / Office buildings, Research, Academic and Industry buildings, Talent Accommodation, Visitor Lodges, Commercial and Ancillary facilities, etc. Apart from Batch 1, the remaining land in the first phase of the Park will be developed through enterprises investment, aiming to enhance the speed and quantity of project development by leveraging market forces to build high-quality research and industrial infrastructure.
- 1.2.4 The first phase of the Park will be developed by three batches, i.e., Batch 1, Batch 2 and Batch 3. The first development batch, Batch 1, has been further sub-divided into Batch 1A, Building 1, Batch 1B and Batch 1C. Batch 1 is being developed by HSITPL which consists of eight buildings with a total gross floor area of approximately 116,000 square metres. Batch 1A consists of three buildings: Buildings 8 & 9 (wet laboratory enabled) and Building 11 (Talent Accommodation).

2 The Project

- 2.1 To support HSITPL's property and facility management needs, HSITPL is planning to purchase a combined solution of Property Management System ("**PMS**") and Facility Management System ("**FMS**"). This integrated solution will streamline operations, allowing HSITPL to manage property-related and facility-related data efficiently within a single platform. By consolidating PMS and FMS functions, HSITPL aims to eliminate the challenges associated with multiple siloed systems, enhancing data management efficiency and operational effectiveness.
- 2.2 The selected Tenderer will be expected to provide a combined PMS and FMS solution with appropriate licenses for a continuous period from the date of contract award until the completion of delivery and implementation of such combined solution. This period will include (i) a 2-month nursing period commencing after the Phase 1 Go-live Date (as defined below) (the "**Phase 1 Nursing Period**"), (ii) a period of 12 months commencing upon the expiry of the Phase 1 Nursing Period during which the selected Tender shall provide HSITPL with support and maintenance services in respect of the PMS and FMS solutions (the "**Term**") and (iii) a 2-month nursing period commencing after the Phase 2 Go-live Date (as defined below) (the "**Phase 2 Nursing Period**"), which forms part of the Term. HSITPL reserves the right to extend the Term for a further 2 years in its sole and absolute discretion for the selected Tenderer to provide such support and maintenance services.
- 2.3 Additionally, the combined solution of PMS and FMS should allow for future enhancements and integration with other systems currently used or to be used by HSITPL. Strengthening data security governance is a critical objective, ensuring the protection of sensitive property and facility management data.
- 2.4 The implementation process will be divided into two phases based on HSITPL's requirements. Phase 1 with the implementation of the core PMS function ("**Phase 1**") shall be completed by 30 June 2025 (unless otherwise agreed by HSITPL) (the "**Phase 1 Go-live Date**") to support upcoming operational demands. Phase 2 with the implementation of the core FMS function and a combined solution of PMS and FMS ("**Phase 2**") shall be completed by 30 November 2025 (unless otherwise agreed by HSITPL) (the "**Phase 2 Go-live Date**").

3 Objectives of this Assignment

- 3.1 Propose a robust combined solution for PMS & FMS to support HSITPL's property and facility management operations.
- 3.2 Recommend the system design and develop a detailed implementation plan for the proposed combined solution for PMS & FMS.
- 3.3 Incorporate comprehensive features in the combined solution for PMS & FMS to meet HSITPL's current business needs and future requirements.
- 3.4 Support users, maintain the PMS and FMS, ensure reliable and satisfactory operations to meet the requirements of HSITPL, and maintain and update the system documentation to reflect the latest production systems.

RFP Subject: PMS & FMS Solutions and Implementation Services

- 3.5 Adhere to the recommendations provided by the Independent Consultant (as defined in paragraph 5 below) throughout the PMS and FMS implementation process.

4 Services to be Provided by the Vendor

- 4.1 Propose a combined solution to support both property and facility management needs, ensuring effective tracking, collaboration, and service support.
- 4.2 Provide implementation services for ensuring successful deployment of proposed PMS and FMS and corresponding deliverables.
- 4.3 Recommend the system design and develop a detailed implementation plan for the proposed combined solution for PMS and FMS.
- 4.4 Set up and configure the proper system environment for HSITPL to carry out user acceptance testing of the proposed PMS and FMS.
- 4.5 Recommend the appropriate infrastructure for the proposed combined PMS and FMS solution to ensure optimal performance and scalability.
- 4.6 Leverage best practices in PMS and FMS implementation, minimizing customization to ensure cost- and time-effective deployment.
- 4.7 Ensure that all necessary licenses for the proposed combined PMS and FMS solution provided are valid at all times.
- 4.8 Provide maintenance and support services in respect of the PMS and FMS solutions for post-implementation and ongoing support.
- 4.9 Provide integration solutions for PMS and FMS to integrate with other systems such as customer relationship management systems and mobile applications according to HSITPL's business needs.
- 4.10 Hosting services of the proposed combined PMS and FMS solution shall be included (if required by HSITPL).
- 4.11 Adopt industry best practices for security hardening during PMS and FMS implementation phase to protect sensitive data and maintain system integrity.

5 Independent Consultant

- 5.1 An independent third party consultant, Deloitte Advisory (Hong Kong) Ltd (the "**Independent Consultant**"), has been nominated by HSITPL. Regular review meetings shall be scheduled with the Independent Consultant to assess the project status, design verification, alignment with project goals and benefits, etc., as well as the realization of the business case.

6 Project Timeline (Tentative)

Tender invite	7 April 2025
Tender submission deadline	18 April 2025
Tender presentation	Week of 21 April 2025
Tender evaluation	Week of 21 April 2025
Tender award	Week of 21 April 2025
Project kick-off	Week of 21 April 2025
Phase 1 Go-live	End of June 2025
Phase 2 Go-live	End of November 2025
Project completion and closure (includes 1-year maintenance period)	31 August 2026

7 Payment Terms

- 7.1 Subject to the work done to the satisfaction of HSITPL, payments will be made as per the following payment schedule (the “**Payment Schedule**”). Please note the Payment Schedule is for reference only and does not amount to any representation and warranties. Tenderers shall not rely on any information set out in the Payment Schedule.
- 7.2 Any deliverables by the successful Tenderer shall be reviewed and approved by HSITPL to ensure they meet HSITPL’s satisfaction level, which is at the sole and final discretion of HSITPL.

Part I – Payment Schedule of implementation services, including Phase 1 & Phase 2 implementation, set up and configuration with project documents

Item No.	Task (the timetable for such tasks shall be provided by Tenderers in their implementation proposal as stated in [Part 3 of Schedule 6] of the Tender Documents)	% of payment of Item 1
Phase 1		
1	Kick-off and project plan completion	10%
2	Blueprint sign-off	10%
3	User Acceptance Testing (UAT) sign-off	10%
4	Go-live completion	5%
5	Completion of the Phase 1 Nursing Period	5%

	Sub-total	40%
Phase 2		
1	Kick-off and project plan completion	10%
2	Blueprint sign-off	20%
3	User Acceptance Testing (UAT) sign-off	20%
4	Go-live completion	5%
5	Completion of the Phase 2 Nursing Period	5%
	Sub-total	60%
Total		100%

Part II – Payment Schedule for licenses for software and hardware for the Term

Item No.	Task	% of payment of Item 2
1	Upon activation of all necessary licenses for software and hardware for the Term	100%

Part III – Payment Schedule for maintenance and support services for the Term (which shall be provided upon the expiry of the Phase 1 Nursing Period)

Item No.	Task	% of payment of Item 3
1	After the completion of the maintenance and support services for the Term	100%

Proforma

Statement for Expression of Interest

We hereby write to express our interest in undertaking the < **PMS & FMS Solutions and Implementation Services** >. By submission of the following completed Proforma for Expression of Interest, we confirm our understanding and agreement to the conditions as stipulated in the “Invitation Letter for Expression of Interest Proposal” and the associated Annexes.

(Name of Vendor)

(Signature)

(Name and Post of the Signatory)

(Date)

Assessment Criteria for Expression of Interest Proposal

The tenderer acknowledges and agrees that participation in this Tender requires compliance with the Selection Criteria for Shortlisting outlined at this part. By responding with “Y”, the tenderer hereby confirms that it meets all the Selection Criteria for Shortlisting specified in the table below. Please submit supporting documents and declarations as required. Failure to do so may result in the disqualification of the tenderer.

Item	Selection Criteria for Shortlisting	Y/N
1.	<p>Able to provide certifications or valid authorization letters as proof that the tenderer is an existing official partner of the proposed PMS & FMS, or</p> <p>Able to provide documentation verifying ownership of the self-developed platform.</p> <p>Document(s): certifications / valid authorization letters / proof of ownership of the self-developed platform</p>	
2.	<p>Experience in providing PMS & FMS solutions and implementation services in Hong Kong or the Asia-Pacific region with details of these projects, including scope, outcomes and references to be provided, which shall satisfy either of the following requirements below:</p> <ul style="list-style-type: none"> - A minimum of 10 cases of PMS or FMS projects in Hong Kong completed successfully in the past 3 years; or - A minimum of 10 cases of PMS or FMS projects related to property, leasing or innovative and technology park industry in the Asia-Pacific region in the past 3 years. <p>Document(s): relevant documents as proof of experience above</p>	
3.	<p>Experienced consultants responsible for this project must include:</p> <ul style="list-style-type: none"> - 1 project manager: at least 7+ years’ relevant experience in performing consulting services and is a certified consultant of any top-tier solution; - 1 implementation consultant: 5+ years’ relevant experience in performing implementation services and is a certified consultant of any top-tier solution; and - 1 technical manager: at least 7+ years’ relevant experience in supporting the output and review of technical solutions as a technical expert. <p>Documents: curriculum vitae as proof of experience above</p>	

4.	<p>Able to provide an audit report dated within 2 years</p> <p>Document(s): audit report within 2 years</p>	
5.	<p>Able to provide a declaration stating the following:</p> <ul style="list-style-type: none"> • The tenderer has no affiliation (e.g., parent company, subsidiary or joint venture) with the Independent Consultant; • The tenderer has no undisclosed information or connections that could give rise to a conflict of interest with the Independent Consultant; and • The tenderer has no financial, personal, or business relationships with the Independent Consultant that could be perceived by HSITPL as a conflict of interest. <p>By filling “Y” in the box to the right, the tenderer declares that the above statements are true and accurate.</p>	

Remarks:

1. If any conflict of interest arises, HSITPL reserves the right to disqualify any tenderer at any point in the evaluation process.
2. HSITPL shall have the sole and final discretion in determining what constitutes “conflict of interest” in this Invitation Letter for EOI Proposal and its Annexes.
3. In the event any conflict of interest arises after award of the tender to the successful tenderer, HSITPL reserves the right to terminate the contract with the successful tenderer and seek damages and/or compensation from the successful tenderer. HSITPL shall have the sole and final discretion in determining what constitutes “conflict of interest”.
4. The tenderer is reminded that all written information must be entered in the correct location of the proforma documents. HSITPL will not be responsible for consolidating the information in the submission. Marks will only be given to relevant information in their respective entry fields.
5. Documents stated in the Selection Criteria for Shortlisting table above shall be submitted as an attachment along with the statement marked as "Y".

RFP Subject: PMS & FMS Solutions and Implementation Services

We hereby declare that the information given in this expression of interest (“EOI”) submission is true and correct to the best of our knowledge and belief. If there are any discrepancies between the information in our EOI submission and attachments, the information in the EOI submission shall prevail.

(Name of the Vendor) : _____

(Signature) : _____

(Name and Post of the Signatory) : _____

(Date) : _____