

The Brief

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1 Introduction

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 is a subsidiary of Hong Kong Science and Technology Parks Corporation, and is responsible for building the superstructure and management, operation and maintenance of the Park.

1.2 The Park

- 1.2.1 The Park is located at the northern fringe of the New Territories of Hong Kong. It is bounded by the bank of Shenzhen River in the northwest, fish ponds of Hoo Hok Wai in the northeast, Lok Ma Chau and Tai Law Hau in the south, the Lok Ma Chau Control Point and Lok Ma Chau Spur Line Control Point in the southwest, as well as the Mai Po Nature Reserve in the further southwest. There are associated environmental specific requirements to be observed.
- 1.2.2 The development intention of the Park is to establish a key base for co-operation in scientific research, through liaising with top-tier enterprises, research and development (R&D) institutions as well as higher education institutions in the Mainland and overseas in establishing a base for co-operation in scientific research, exchanging and co-operating with excellent quality research talents from all over the world. As a global hub of R&D, the Park provides players in innovation and technology (I&T) industry with physical space and a conducive environment for R&D, and allows them to tap into the I&T talent pool, supply chain capabilities and markets in Hong Kong and the neighboring Greater Bay Area conveniently.
- 1.2.3 The Park, with a total gross floor area (GFA) of about 1,200,000m², will be developed in batches. The first development batch, Batch 1, has been further sub-divided into Batches 1A, 1B and 1C.

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2 The Project

- 2.1** To support HSITPL's upcoming funding programs and business growth, HSITPL is planning to set up a centralized platform Customer Relationship Management ("CRM") platform. In addition, once this platform has been implemented, the front-end online form and backend management will be adopted in a single system so that all the data can be managed easily, and it is no longer necessary to implement management system for each new program.

The invited tenderer needs to start providing the above-mentioned goods and/or services with appropriate licenses for a continuous period from the date of contract award until completion of the delivery and implementation of CRM.

3 Objectives of this Assignment

- 3.1** Support user, maintain the new system, ensure reliable and satisfactory operations to meet the requirements, and maintain and update the system documentation to reflect the latest production systems.
- 3.2** The new common program platform shall provide a flexible environment for HSITPL team to create relevant entities, forms and workflows by using pre-defined templates setting up in this environment so that no additional systems are required to develop.

4 Services to be Provided by the Vendor

- To propose a mature centralized solution to support marketing needs, opportunities tracking, collaboration and service supports for visitors, tenants, incubates, partners
- To leverage CRM best practices and minimize customization, ensuring cost & time effective implementation to meet the project's tight schedule
- Recommend the system design and to provide the detail implementation plan of the proposed systems
- Implement the proposed system in accordance with the prevailing HSITPL standards and guidelines to ensure the quality of the deliverables
- Set up and configure the proper system environment for HSITPL to carry out the user acceptance test of the proposed systems as a whole
- Support user, maintain the new system, and ensure reliable and satisfactory operations to meet the service level requirements
- Maintain and update the system documentation to reflect the latest production systems

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5 Independent Consultant

5.1 An independent 3rd party consultant, Deloitte Advisory (Hong Kong) Ltd (“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	26 Sep 2024
Tender submission deadline	10 Oct 2024
Presentation	Week of 14 Oct 2024
Tender Evaluation	Week of 14 Oct 2024
Tender award	Week of 14 Oct 2024
Project kick-off	Week of 14 Oct 2024
Project completion and closure for Phase 1	End of Feb 2025
Project completion and closure for Phase 2	End of Oct 2025

7 Payment Terms

- Subject to the work done to the satisfaction of HSITPL, payments due under the contract will be made as per the following payment schedule (“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.
- Payments will be processed upon successful completion and HSITPL's milestones of the corresponding deliverables. HSITPL shall review and approve the deliverables within the agreed-upon timeframes specified in the Payment Schedule.

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

Item No.	Task	Payment
Phase 1		
1	Kick-off completion	5%
2	Overall project plan completion	5%
3	Blueprint sign-off	10%

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4	User Acceptance Testing (UAT) sign-off	10%
5	Go-live completion	5%
6	By Deliverables of nursery period of Phase 1	5%
	Sub-total	40%
Phase 2		
1	Kick-off completion	5%
2	Overall project plan completion	10%
3	Blueprint sign-off	10%
4	User Acceptance Testing (UAT) sign-off	20%
5	Go-live completion	10%
6	By Deliverables of nursery period of Phase 2	5%
	Sub-total	60%
Total		100%

- **Part II** – Payment Schedule of License (after receiving the overall project plan of Phase I in Part I)

Item No.	Task	Payment
1	Activation of License	100%

- **Part III** – Payment Schedule of 12 months maintenance support (12 months after the completion of Phase I Go-Live)

Item No.	Task	Payment
1	12 months after the completion of Phase I Go-Live	100%

RFP reference: FD-03-06-02(060)

Annex 2

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Proforma - Statement for Expression of Interest

We hereby write to express our interest in undertaking the <Delivery and Implementation Service of centralized CRM System for Hong Kong-Shenzhen Innovation and Technology Park>. 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)

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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 they meet 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 a proof that the tenderer is an existing official partner of the proposed CRM system.</p> <p>Document(s): certifications / valid authorization letters</p>	
2	<p>Experience in providing CRM implementation in Hong Kong, with details of these projects, including scope, outcomes and references to be provided. Requirements are as below:</p> <ul style="list-style-type: none"> - A minimum of 20 cases of CRM projects completed successfully in the past 3 years, which must include: <ul style="list-style-type: none"> a. At least 1 case of CRM project on property, leasing or Innovative and Technology Park industry; b. At least 1 case of CRM project with sum value more than HK\$2.5 million; and c. At least 5 cases of CRM projects for Quasi-Government Corporations, Public Institutions or Non-Governmental Organizations (NGOs) or similar organizations. <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+ year relevant experience in performing consulting services and is a certified consultant of any top tier solution; and - 3 Implementation consultants: 5+ year relevant experience in performing implementation services and are certified consultants of any top tier solution. 	

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	Documents: curriculum vitae as proof of experience above	
4	Able to provide audit report dated within 2 years Document(s): audit report within 2 years	
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, 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> <p>Document(s): a detailed corporate organizational structure, including any parent companies, subsidiaries, affiliates, joint ventures, and other related entities, allowing HSITPL to assess any potential relationships with the Independent Consultant.</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. 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".

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- 6. Please refer to and comply with the submission requirements for the Expression of Interest (EOI) documents under the Invitation Letter for EOI Proposal.

Declaration

We hereby declare that the information given in this 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) : _____