



Invitation for Expression of Interest -
Professional Services Provider for The ISO 27001 Impact Assessment and
Operational Enhancement of iBEAM

Our Ref: EOI/SDD/2023/001

Invitation to Expression of Interest (EOI)

Agreement No. SDD 1/2023

Professional Services Provider for The

ISO 27001 Impact Assessment and

Operational Enhancement of iBEAM

for

BEAM Society Limited

ASSIGNMENT BRIEF

February 2023



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for BEAM Society Limited**

Table of Contents

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

Our Ref: EOI/SDD/2023/001

This document describes the requirements for the ISO 27001 Impact Assessment and Operational of iBEAM Assessment Automation System (“iBEAM”). 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 of iBEAM.

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.
- 1.5 In recent years, the green building industry has made significant investments in its digitalization efforts and advanced technology to enhance and expand the existing

Our Ref: EOI/SDD/2023/001

green construction management measures and services. BSL launched the iBEAM with an aim of automating the current green building assessment and other business-related processes to drive efficiency, reducing dependence on human operation, enhancing consistency of data transferred across platforms and mitigating risk of bribery and other irregular practices.

- 1.6 Moreover, our close working partner, the Construction Industry Council (“CIC”) is launching several digital platforms to enhance the business workflow and data collection process of data generated from the construction site. Recently, CIC has launched the Smart Waste Plugin Platform with an aim of standardizing the data collection process of waste generated from the construction site. It is BSL’s intention to link iBEAM with CIC digital platforms to enhance the data transfer and communication process in the green building industry.
- 1.7 BSL is committed to building an ecosystem to enhance the processing power of environmental and sustainability data for the building industry while providing a secured data repository for the building industry. To cope with this vision, BSL is pleased to initiate the tendering of Professional Services Provider for The ISO 27001 Impact Assessment and Operational Enhancement of iBEAM ("Assignment") to (a) expand on the processing capability of data between iBEAM and CIC Smart Waste Plugin Platform and (b) analyze the information security measures on iBEAM against ISO 27001 standard and provide appropriate management measures to upkeep information security control of iBEAM.
- 1.8 The overview of the iBEAM system can be found in **Annex A-1**.

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 concept rests on the idea of viewing the BSL, iBEAM PSP, CIC and the CIC Smart Waste Plugin Platform PSP and/or ISO 27001 Lead Auditors as members of one team that understand and support each other in pursuing the cooperative goal of improving the integrity, speed, accuracy, consistency, and completeness of data processed within iBEAM and between iBEAM and other third-party platforms. The services to be provided by the PSP for this Assignment shall meet the following objectives:

Our Ref: EOI/SDD/2023/001

- (i) Ensure that the iBEAM complies with the certification requirements under ISO 27001 standard on information security;
- (ii) Recommend an appropriate data management process to ensure that iBEAM information security controls continue to meet BSL's information security needs;
- (iii) Facilitate waste data collaboration, information sharing and data exchange among the BSL and CIC Smart Waste Plugin Platform throughout the life-cycle of the projects;

3. Scope of the Assignment

3.1 The scope of the Assignment is to provide an ISO 27001 impact assessment on the iBEAM assessment system and to develop the necessary program interfacing between iBEAM and CIC Smart Waste Plugin Platform.

Task 1: ISO 27001 Impact Assessment

- 3.2 The PSP shall provide an impact assessment on the iBEAM against the ISO 27001 standard, which encompasses the following high-level purview:
- (i) Conduct a gap analysis of the iBEAM's current system design, data security measures, system threats and vulnerabilities and data management methods against the ISO 27001 certification framework;
 - (ii) Collaborate with iBEAM PSP on collating the necessary deliverables for the ISO certification;
 - (iii) Respond to comments on the ISO certifications from the ISO 27001 Lead Auditors;
 - (iv) Recommend on the data management and security improvement measures for iBEAM to comply with ISO 27001 certification; and
 - (v) Attend all meetings with the BSL and, as instructed by the BSL, give presentations, for the purpose(s) related to the activities of ISO 27001 certification.

Our Ref: EOI/SDD/2023/001

Task 2: Development of API to CIC Smart Waste Plugin

- 3.3 The PSP shall design, develop, set-up, test, host and maintain the environmental and sustainability data unification platform, which encompasses the following high-level purview: -
- (i) Derive an API to enable sharing, exchange and collaboration of construction waste related data between iBEAM and CIC Smart Waste Plugin Platform;
 - (ii) Collaborate with different PSP on implementing the API between iBEAM and CIC Smart Waste Plugin Platform;
 - (iii) Design the test case to test out the API;
 - (iv) Provide the necessary maintenance to upkeep the operation of the API; and
 - (v) Attend all meetings with the BSL and, as instructed by the BSL, give presentations, for the purpose(s) related to the activities of the Assignment.
- 3.4 The tentative workflow requirement for the CIC Smart Waste Plugin is set out **Annex A-2**.

4. Presentations

- 4.1 PSP shall prepare necessary presentations required during the preparation, design, development, acceptance, and training of the environmental and sustainability data unification platform 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, relevant PSP, ISO 27001 Lead Auditors and any BSL partners in relation to the Assignment;
 - (iii) Report progress of the Assignment to the BSL and the relevant Committee;
 - (iv) Present the deliverables for the BSL comments and/or approval; and

Our Ref: EOI/SDD/2023/001

- (v) Support the BSL to answer any queries from the relevant PSP, ISO 27001 Lead Auditors and BSL partners and undertake improvement work in relation to the Assignment.

5. Deliverables

5.1 Based on the requirements depicted above, PSP shall be responsible for the analysis, design, development, testing and maintenance of the new Platform, and provide the following report as part of the deliverables: -

- (i) A gap analysis or impact assessment report encompassing the current/future state of the BSL's business environment and processes, including:
 - An “As is” report encapsulating the assessment of the current view of the environmental and sustainability data unification process, with recommendation on potential improvement opportunities of the current process; and
 - A “future blueprint” report envisioning the future schematics of the environmental and sustainability data exchange, supported by potential organizational changes and training needs.
- (ii) A detailed design report which shall highlight the outcome based on potential improvement and address the needs for integrity, consistency, effectiveness and efficiency of BSL and the stakeholders in the green building industry.
- (iii) Briefing sessions to the BSL based on the timing of their scheduled meetings. The sessions aim to explain the progress of the Assignment, findings, and recommendations of the individual stages of the Assignment.
- (iv) Test scheme including all test cases and scenarios, detailing its methodology, plan and process, with resources required, for acceptance of the new Platform adhere to the end goals specified in the inception report.
- (v) Acceptance report detailing the test results, with issues identified, and signoff by all stakeholders. The report shall emphasis on how the user requirements, and design of the future Platform are being addressed.

Our Ref: EOI/SDD/2023/001

(vi) Final report to the BSL for the formal acceptance of the completed Platform. The final report shall also provide highlights on the future improvement potential and a support plan addressing the BSL’s ongoing operation needs.

(vii) User manual containing the necessary instructions, steps and workflows to assist users to navigate and maintain the essential functions on the Platform.

5.2 All reports produced by the PSP shall be subject to 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 customized 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.

6. Brief Timeframe of the Assignment

6.1 The Assignment is planned to commence around March 2023 and shall take 9 months to complete. The indicative timeline to the Assignment can be found below.

Task 1: ISO 27001 Impact Assessment	
Description	Anticipated End Date
(a) Kick-off Meeting	1 March 2023
(b) Inception Report and Scope Identification	15 March 2023
(c) System Impact Assessment	15 April 2023
(d) Responding to Comments from ISO 27001 Lead Auditors	31 October 2023
(e) Final Reporting and Recommendations	30 November 2023

Our Ref: EOI/SDD/2023/001

Task 2: Development of API to CIC Smart Waste Plugin	
Description	Anticipated End Date
(a) Kick-off Meeting	1 March 2023
(b) Development of Data Standard	15 March 2023
(c) Coding of Data Standard on iBEAM	31 March 2023
(d) Testing of API	15 April 2023
(e) Refinement of API	31 May 2023
(f) Maintenance of API	31 December 2023

- 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 the building of functions.
- 6.4 Supplementary modification to the proposed System, and information and reports other than the deliverables stated above shall be prepared and delivered at such a 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.

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 Project Manager, one Project Analyst, and sufficient professional staff to complete the Assignment.

Our Ref: EOI/SDD/2023/001

- 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 10 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) Project Manager – Minimum of 10 years of working experience in managing project teams on similar project. 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 2 years of experience in designing / managing web-based platform for processing building plans, documents and applications.
 - (b) Project Associate / Analyst – Minimum of 5 years of working experience in similar project. He/she shall have 1 year of experience in designing / managing web-based platforms for processing building plans, documents and applications.
 - (c) Technical Staff – No special requirement, but practical experience in designing / managing web-based platform for processing building-related plans, documents and applications is preferred.
- 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 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.

Our Ref: EOI/SDD/2023/001

- 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.

9. Tentative Procurement Plan

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

Description	Anticipated End Date
EOI	7 February 2023
EOI Evaluation	14 February 2023
Formal Tendering	15 February 2023
Tender Evaluation	22 February 2023
Tender Award	24 February 2023
Commencement of Assignment	27 February 2023

Annex A-1

iBEAM Overview



Overview of iBEAM



BSL has designed the **Assessment Automation System (“iBEAM”)** to streamline the green building assessment workflow.



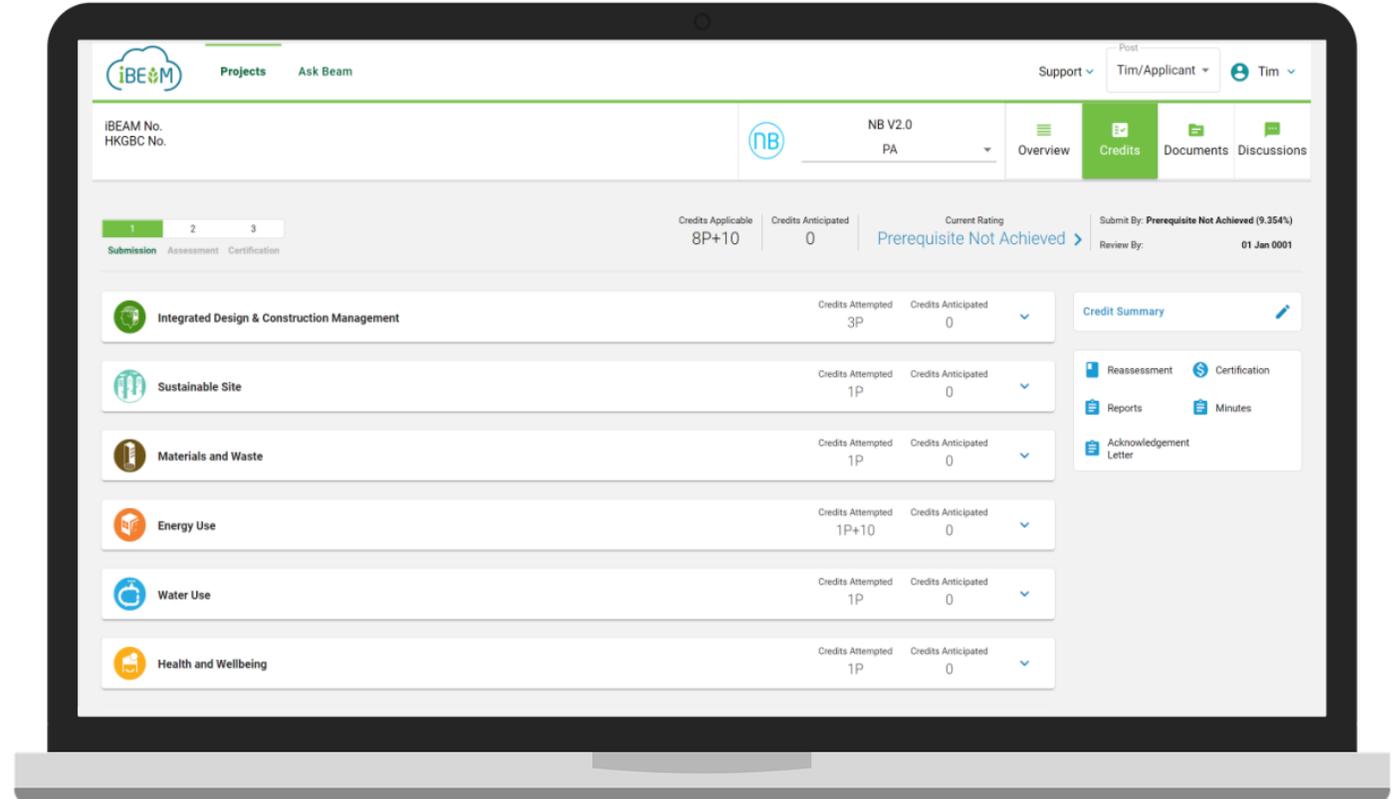
Enhance **efficiency and consistency**



Reduce **human dependence**



Safeguard the **integrity** of the assessment process



Screenshot of Credit Assessment web page on iBEAM



iBEAM Features and Benefits

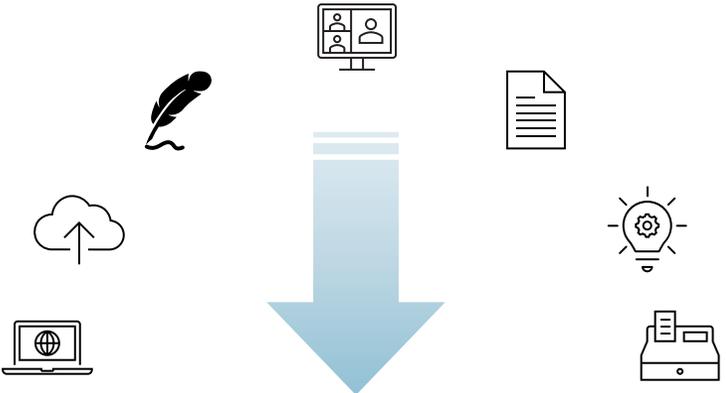


7 Development Modules of iBEAM

Module	Description
1 Document Submission Module	 A portal with functions to process and archive information in e-Forms submitted by the Applicants.
2 Workflow & Approval Module	 A centralized project management module that would define, execute and automate the processes.
3 Online Communication Module	 A communication platform for all concerned parties.
4 Reporting Module	 A flexible and fully customizable report generator that obtains real-time results on information stored within the System.
5 Knowledge Database & Keyword Search Module	 A centralized digital database of all information pertaining to BEAM Plus assessment and its related services.
6 Finance Module	 Financial reports generator, billing and invoicing system.
7 BAS Assignment Module	 An automated BAS assignment platform to safeguard transparency and integrity.



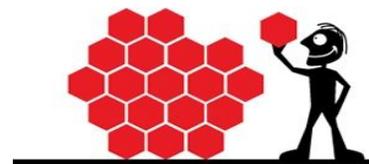
iBEAM Features and Benefits



Assessment process becomes smoother, more transparent and more efficient



THE AGILE PROCESS



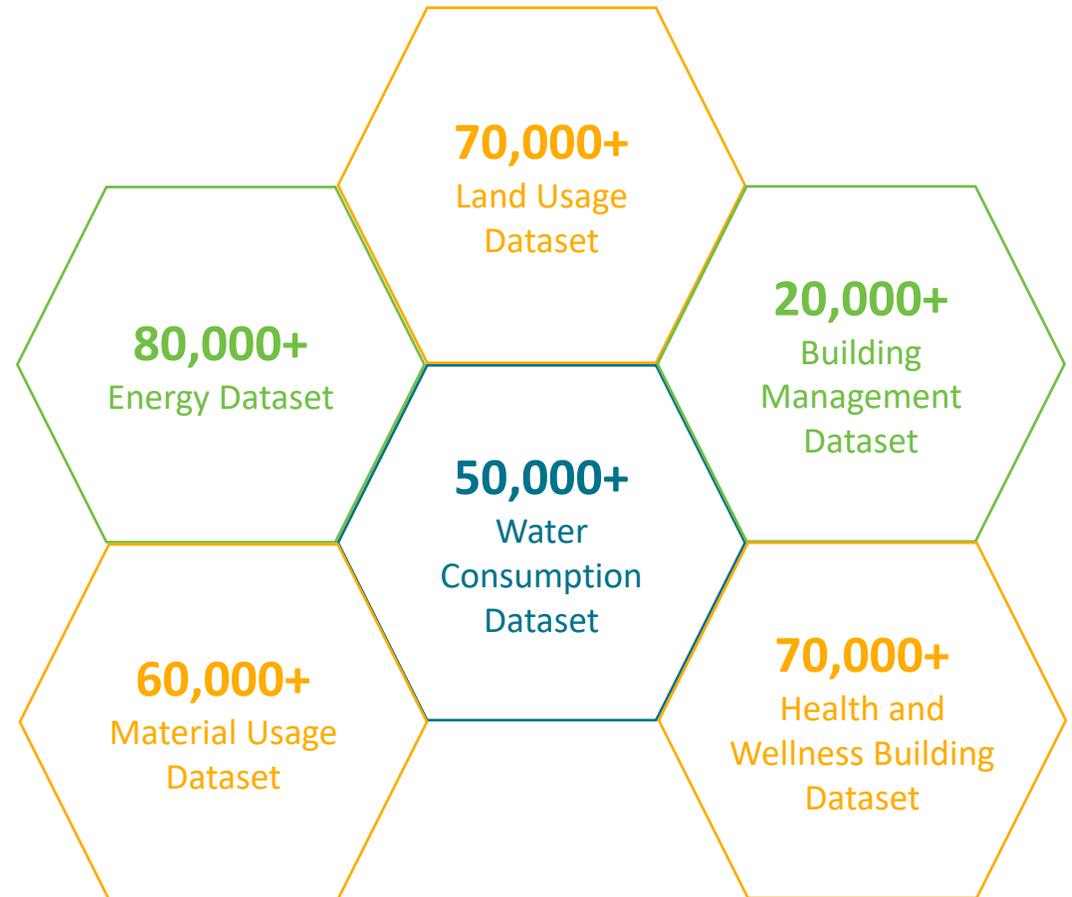
Processing High Volume of Data



BEAM Plus
綠建環評



Annual Processing



Applicable to Different Building Types



Residential · Office · Retail · Data Centre · Government & Institution



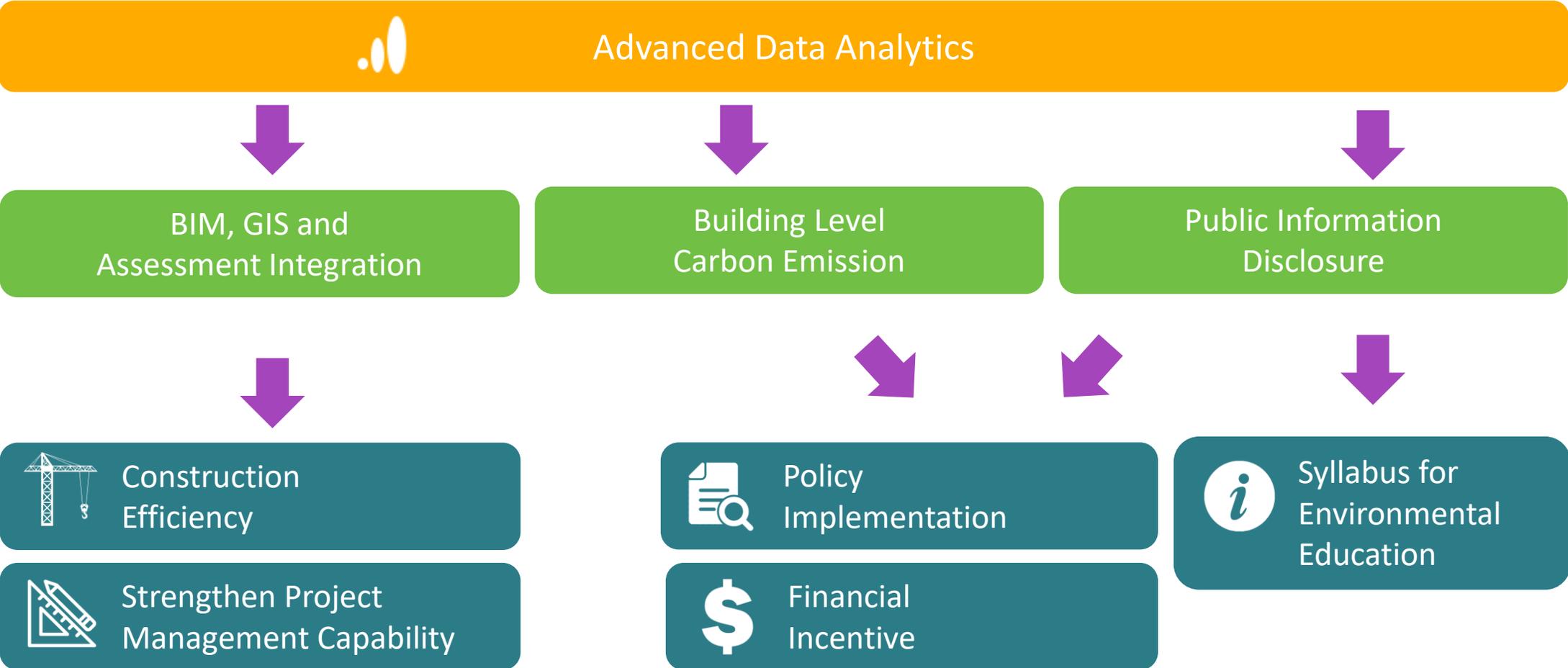
Performance Normalization



Meeting Environmental Targets



Creating New Generation of Analytics

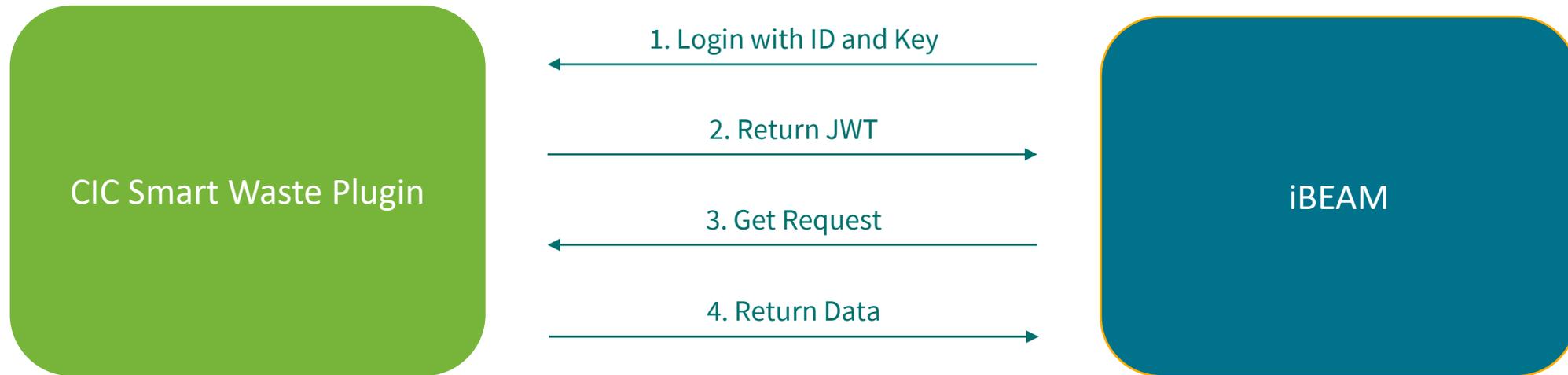


Annex A-2

Workflow Requirement for the CIC Smart Waste Plugin



Request Data Flow (Tentative)



Data to be transferred:

- (1) Waste flow table (in pdf or excel format)
- (2) Recycling rate (numerical value)
- (3) Photo records (in jpg or pdf format)

