



Our Ref: EOI/TSD/M/AUTO/1/2018/005

03 Aug 2018

Dear Tenderers,

**RESPONSE TO TECHNICAL QUERIES NO. 003**

**for Expression of Interest (EOI)**

**TENDER REFERENCE NO. TEN/TSD/2018/001**

Agreement No. TSD 1/2018 (AAS)  
Information Technology (IT) Service on Design, Development and Maintenance  
for the BEAM Plus Assessment Automation System  
for the BEAM Society Limited (the "BSL")

With reference to the captioned EOI, we hereby respond to the technical queries as received from tenderers via details at **Annex A**.

2. If you have any query concerning the above submission, please write to the Procurement Division of the BSL by email or by post for any queries concerning this EOI exercise and its associated Response to Technical Queries as detailed below:

Procurement Division  
The BEAM Society Limited  
1/F, Jockey Club Environmental Building  
77 Tat Chee Avenue  
Kowloon Tong, Hong Kong SAR  
China

Tel: (852) 3610-5700  
Fax: (852) 3996-9108  
Email: [assessment\\_automation@beamsociety.org.hk](mailto:assessment_automation@beamsociety.org.hk)

Yours faithfully,

A handwritten signature in black ink, appearing to be 'C. S. Ho' with a stylized flourish at the end.

(Ir C. S. Ho)  
General Manager of the BSL

Encl.

cc.       The BSL Secretariat  
          The Automation Task Force of the BSL

## Response to Technical Queries

<b>Agreement No.</b>	TSD 1/2018 (AAS)
<b>Subject of Procurement</b>	Information Technology Service on Design, Development and Maintenance for the BEAM Plus Assessment Automation System for the BEAM Society Limited
<b>Submission Deadline</b>	12:00 noon on Friday, 10 August 2018

Item No.	Queries from Tenderers	Response from the BEAM Society Limited
1.	<p><u>With reference to Assignment Brief on Background</u></p> <p>Para. 1.7 <i>"was initiated and confirmed by the BSL in May 2018 to expand its online services."</i></p> <p>Does this imply there is some existing online service? Please clarify</p>	<p>The BSL manually conducts all assessment-associated service and administration offline. The only online service the BSL provides is the online training portal on its website. Current active project data resides in network drive. A Document Management System "DMS" has recently been established for storage/retrieval of completed projects' data. It is our intent for the future electronic submission system to store new project data in upcoming moments. The IT Solution Provider shall create function to archive and retrieve data to/from the DMS upon completion of assessments in future.</p>
2.	<p><u>With reference to Assignment Brief on Scope of the Assignment</u></p> <p>Para. 3.2, vii <i>Assist the BSL to apply funding from, including but not limited to, the Innovation and Technology Fund for Better Living."</i></p> <p>Please elaborate.</p>	<p>The IT Solution Provider shall be responsible to assist the BSL to apply funding from eligible funding sources in the market upon requested by the BSL, including but not limited to, the Innovation and Technology Fund for Better Living ("FBL") from the Innovation and Technology Bureau of The Government of the Hong Kong Special Administrative Region.</p> <p>The website of the FBL is</p>

		<a href="https://fbl.itb.gov.hk/?lang=EN">https://fbl.itb.gov.hk/?lang=EN</a> Application Guide of the FBL can be found at: <a href="https://fbl.itb.gov.hk/Content/Files/FBL_Application_Guide_en.pdf">https://fbl.itb.gov.hk/Content/Files/FBL_Application_Guide_en.pdf</a> Frequently Asked Questions of the FBL can also be found at: <a href="https://fbl.itb.gov.hk/Home/FAQs?lang=EN">https://fbl.itb.gov.hk/Home/FAQs?lang=EN</a>
3.	<p><u>With reference to Assignment Brief on Other system, storage and hardware requirement</u>  Para. 43 iii <i>"Past paper-form application shall be converted into electronically readable format for future reference, with permission-based Keyword Search function enabled"</i></p> <p>Does this mean an automated process is expected to convert paper forms to electronic format?</p>	<p>The BSL has a database of around 1,200 projects.</p> <p>The ongoing projects are stored in the network drive, and the remaining completed projects will be stored in the DMS.</p> <p>The BSL does not specify whether the conversion must be automated or manual. But the conversion must be carried out with the following elements in mind:</p> <ol style="list-style-type: none"> <li>1. Confidentiality</li> <li>2. Accuracy</li> <li>3. Timeliness</li> <li>4. Permission-based Keyword Search function.</li> </ol>
4.	<p><u>With reference to Assignment Brief on Other system, storage and hardware requirement</u>  Para. 43 i <i>"Existing data shall be migrated"</i> –</p> <p>Where is the current data located, and in what format?</p>	<p>Data is currently stored in the network drive and DMS, and it comes in various formats, including but not limited to, MS Word, Excel, PPT, PDF, and JPEG, etc.</p>
5.	<p><u>With reference to Assignment Brief on Other system, storage and hardware requirement</u></p> <p>Para. 43 i What is the approximate data volume to be migrated, including electronic and paper forms (ex: number of building assessments)</p>	<p>The number of registered projects is around 1200 with approximately 1GB data per project.</p>
6.	<p><u>With reference to Assignment Brief on Other system, storage and hardware requirement</u></p> <p>Para. 43 ii <i>"Data conversion shall be required"</i>.</p> <p>Please elaborate on the kind of conversion required.</p>	<p>Data conversion requires the capture of pre-defined data fields within standardized project application forms.</p>

7.	<p><u>With reference to Assignment Brief on General Requirements for the BEAM Plus Assessment Automation System</u></p> <p>Para. 8 ii We assume that HKGBC provides a mechanism (ex: APIs) for <i>"retrieval of project registration information from Hong Kong Green Building Council (HKGBC), and transferal of project assessment results to the HKGBC;"</i></p> <p>Please confirm.</p>	<p>The System shall operate on a standalone basis capable of interfacing with a registration platform.</p>
8.	<p><u>With reference to Assignment Brief on General Requirements for the BEAM Plus Assessment Automation System</u></p> <p>Para. 8, viii Is the payment to be done as part of this application, or offline (ex: cheque or bank transfer)?</p>	<p>Currently the BSL accepts only offline payment and intends to explore the possibility of accepting also online payment.</p> <p>The IT Solution Provider shall propose to the BSL viable online payment platform(s) to be incorporated into the Solution considering the BSL's business model. The BSL currently handles around 20 transactions monthly.</p> <p>The Solution shall also cater for the need of those users who prefer making offline payment by allowing them to upload proof of payment onto the Solution.</p>
9.	<p><u>With reference to Assignment Brief on General Requirements for the BEAM Plus Assessment Automation System</u></p> <p>Para. 15 iii <i>" If Applicant selects to download e-forms and complete them offline, the System shall allow them to upload e-form and data shall be incorporated into Applicants' project file"</i></p> <p>We assume the e-forms would be in some standard document format like Word, Excel, PDF etc., or does it refer to forms that are printed, filled manually and uploaded. Please</p>	<p>The assumption is correct. The e-forms shall be fillable forms in standard formats, including but not limited to, Word, Excel, PDF etc.</p>

	confirm.	
10.	<p><u>With reference to Assignment Brief on General Requirements for the BEAM Plus Assessment Automation System</u></p> <p>Para. 15 iii Is the Q&amp;A process similar to an online discussion forum where more than 2 parties can participate and have comments, threaded replies etc.?</p>	Correct.
11.	<p><u>With reference to Assignment Brief on General Requirements for the BEAM Plus Assessment Automation System</u></p> <p>Para. 15 iii Does the Q&amp;A session span more than 1 appointment, or each appointment is considered a separate session?</p>	The BSL has no preference on this issue. Any related sessions for a project, or discipline shall be collated as one discussion session for audit and knowledge-based and permission-based keyword search purposes.
12.	<p><u>With reference to Assignment Brief on BAS associated assignment and project scheduling Sub-system</u></p> <p>Para. 18 “<i>A computerized roster system shall be developed with capability to automatically assign BEAM Plus assessment work to BAS without prejudice whilst maintaining confidentiality and avoid actual or potential conflict of interest.</i>”</p> <p>Is the confidentiality bi-directional?</p>	<p>There are a number of parties involved in a typical Assessment: the BSL, the TRC, the BAS and the Applicant.</p> <p>The anonymity of BAS must always be kept from the Applicant.</p> <p>The identity and assignment of the BAS is known to authorized BSL personnel and TRC members and that the BAS shall always have access to information submitted by the Applicant.</p>
13.	<p><u>With reference to Assignment Brief on BAS associated assignment and project scheduling Sub-system</u></p> <p>Para. 25 “<i>Exchange of Q&amp;A among parties shall be monitored and controlled by the BSL authorized staff to ensure the context of the exchanges is limited to ambits of project related query only and that proper integrity of the process can be maintained.</i>”</p> <p>Is the Q&amp;A session chat-based, or forum-based</p>	Currently, the BSL has no preference on this issue. The IT Solution Provider shall design an appropriate form of Q&A session for the BSL. The feature shall only be conducted via text and document sharing function (remark: document sharing function shall be enabled to serve as referencing function only), without resort to voice or face-to-face. It is the intent of this feature to prevent exposing the identities of BAS. Any related sessions for a project, or discipline will be collated as one discussion session for audit and knowledge keyword

	or email-based? Is there any audio, video or face to face interaction? If so, do the video/audio exchanges need to be recorded too?	search purposes.
14.	<p><u>With reference to Assignment Brief on Technical Review Committee (TRC) Review and Conclusion Sub-system</u></p> <p>Para. 31 <i>“TRC shall be able to retrieve reports online to discuss/comment/approve Applicant’s project accordingly.”</i></p> <p>Are these reports for that project in question or across all projects?</p>	Across all projects, so that the TRC can make references to its previous decisions when discussing and deciding on new cases.
15.	<p><u>With reference to Assignment Brief on Technical Review Committee (TRC) Review and Conclusion Sub-system</u></p> <p>Para. 32 I " <i>Questions &amp; Observations Generator</i>”</p> <p>We understand this contains all the project files, BAS discussions, assessment results etc. Is there anything that needs to be <b>generated</b> apart from just providing a consolidated view of all the documents?</p>	<p>Reports and statistical data shall be generated, but intelligent decisions and rulings are NOT necessary at this stage although it is conceived that some forms of intelligent checking should be developed in future (but NOT in this Solution).</p> <p>The functions of "Questions &amp; Observations Generator" are as follows: -</p> <ul style="list-style-type: none"> <li>- Project Assessment;</li> <li>- Reporting; and</li> <li>- Knowledge management.</li> </ul>
16.	Typically, how many assessments are done in a year, and what's the time for each assessment to complete?	Around 100 nos. of projects are done in a year. Typically, each project takes at least 5 years to be completed. Nonetheless, the IT Solution Provider shall also take into account the flexibility that the BSL does have some on-going projects that have been running over 8 years.
17.	How many users are expected to use the system concurrently?	<p>As for frequent users, there are currently 50 internal users and 180 external users of the system. As for infrequent users, the System shall be able to cater 1200 nos. of registered projects, and each of them should possess around 1-2 sub-user(s).</p> <p>In general, there should be around 120 - 240 nos. of newly registered projects per year and</p>

		<p>each of them should possess around 1-2 sub-user(s).</p> <p>But the IT Solution Provider must take into account that these numbers could increase significantly due to demand of the market.</p>
18.	What are the languages to be supported for the e-forms and other content on the site?	English will be the one with priority to be targeted upon but the IT Solution Provider must take into account that Chinese (both Traditional and Simplified) could also be supported in due course due to the demand of the market.
19.	Does BEAM have any server infrastructure for hosting the portal, since it's mentioned that preference is for private cloud?	All the projects shall be run on private cloud. The BSL should be entitled to the ownership of cloud service.

**\*\*\*\*\*End of Response to Technical Queries \*\*\*\*\***