



The Government of the Hong Kong Special Administrative Region

Tender for the Provision of Outsourced Services to the Intellectual Property Department – Office Operation Services

**Tenderers' Briefing cum Business Environment Familiarisation
(17th April 2024)**

Intellectual Property Department



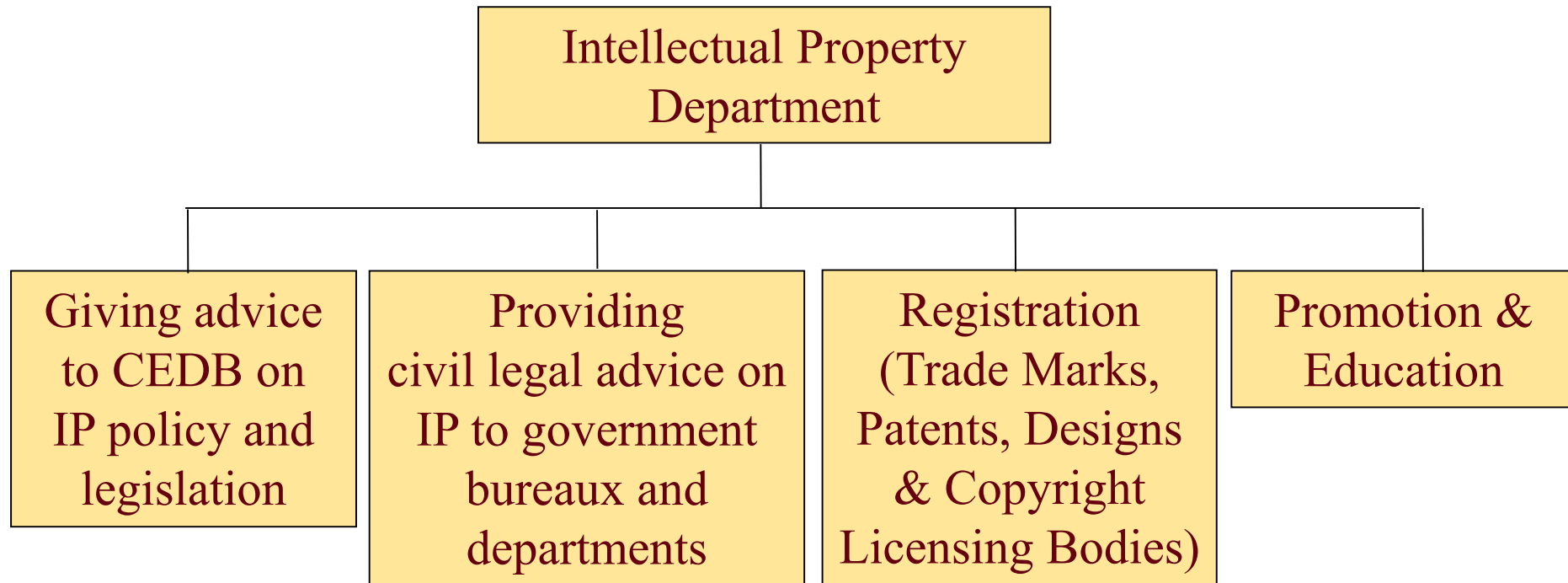
Welcome

- Please switch off your cellular phones, pagers and any sounding devices inside this room.



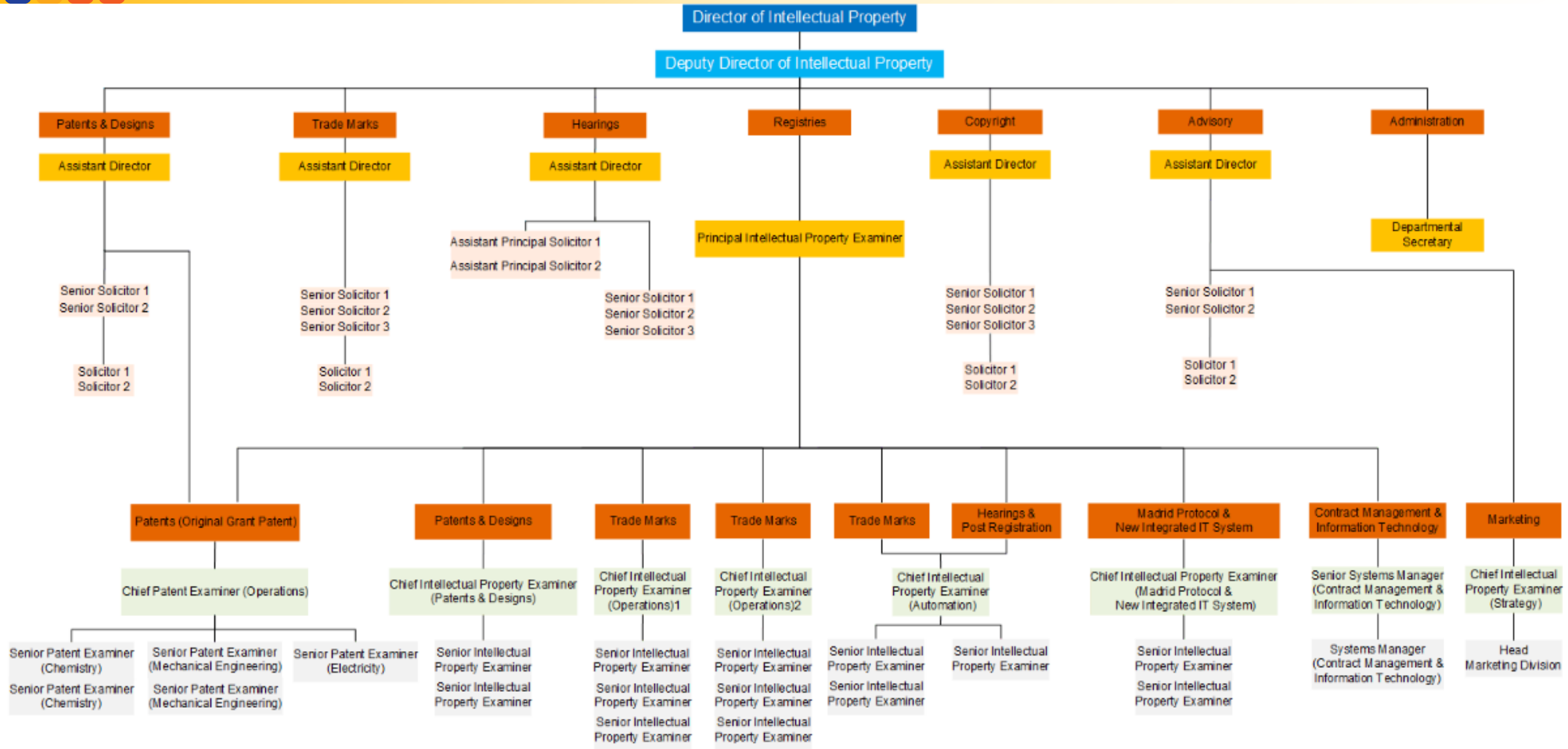
- Information provided in the ensuing PowerPoint presentation can be found in the Tender Documents (Tender Reference: IPD T1/ 2024). This PowerPoint file will be available in IPD website (<https://www.ipd.gov.hk/en/tender-notices/>) after this briefing.

Role of IPD



Organisation chart of IPD

- As at 31.3.2024:
 Total no. of IPD's staff (strength): 281
 including 177 civil servants, 44 contract staff and
 60 Outsourcing Contractor's staff





Background of Outsourcing of IPD

- IPD has outsourced its non-core activities of Office Operation Services (OOS), Ongoing Support and Maintenance Services (OSM) Services and new application development services since December 2001.
- This Tender is in relation to Office Operation Services for the Back Office of IPD.



Tender Notice -- OOS

- Government Notice 1916 gazetted on 5 April 2024 (<https://www.gld.gov.hk/egazette/pdf/20242814/egn202428141916.pdf>) and the Tender Notice posted on the website of the Intellectual Property Department (<https://www.ipd.gov.hk/en/tender-notices/tender-notices/index.html>).
- The duration of the contract shall be three (3) years commencing on 1 December 2024 or on a date as the Government of the Hong Kong Special Administrative Region shall specify, which may be extended by the Government for a further term of six months.
- Tender Closing Date: **before 12 noon** (HK Time) on **3 May 2024** (Friday)
Late tenders will not be considered.



Tender Notice – OOS (Cont'd)

- Paper-based Tendering: Tenders in **five (5) copies**, one (1) original and four (4) copies, must be submitted in two sealed envelopes, i.e. **Envelope A (Price Proposal)** and **Envelope B (Technical Proposal)** clearly marked on the outside (not bearing any indication which may relate the tender to the tenderer) with:

“Tender for the Provision of Outsourced Services to the Intellectual Property Department – Office Operation Services” (Tender Reference: IPD T1/2024)

and addressed to the **Chairman, Government Logistics Department Tender Opening Committee**

- Location of Tender Box: Government Logistics Department Tender Box, Ground Floor, North Point Government Offices, 333 Java Road, North Point, Hong Kong



Tender Notice – OOS (Cont'd)

- Electronic Tendering: Technical and Price Proposals shall be submitted -
 - a) in accordance with the terms and conditions of use of the Procurement and Contract Management System (<https://pcms2.gld.gov.hk>) and the e-Tender Box; and
 - b) through the e-Tender Box through the use of any one type of digital certificates recognised by and uploaded to the e-Tender Box or through an Identification Code.



Tender Submission

(Clauses 14.1 of Part I -- Terms of Tender)

- The Tenderer must complete and submit the following documents:
 - (a) Schedule 2 to Part I – Execution Plan;
 - (b) Schedule 3 to Part I – Tenderer’s Experience;
 - (c) Schedule 2 to Part III – Charges for OOS; and
 - (d) A duly signed Offer to be Bound in Part V.
- Failure to submit any of the documents above will render a tender non-conforming and such tender will **not** be further considered.



Assessment of Tender

(Ref: Clause 16 and Annex C of Part I -- Terms of Tender)

- Stage 1: Completeness check – re. Clause 16.1
- Stage 2: Technical assessment – re. Clause 16.2
- Stage 3: Price assessment – re. Clause 16.3
- Stage 4: Calculation of combined score – re. Clause 16.4
(technical to price weighting > 50:50)
- Refer to the Marking Scheme at Annex C for details of Stages 1 – 4



Financial Vetting

(Ref: Clause 9 of Part I -- Terms of Tender)

- Upon the written request of the Government, the Tenderer shall provide, **within five (5) working days**, the following information to demonstrate its financial capability:
 - a) Originals (or copies certified by its auditors) of the audited accounts of the Tenderer, and the audited consolidated accounts of the group if the Tenderer is a subsidiary of another company for the three (3) financial years prior to the tender submission date;
 - b) Management accounts with a period ending not more than three (3) months before the tender submission date if this has not been covered by the latest audited accounts;
 - c) Projected statement of profit or loss and other comprehensive income and statements of cash flows of the Contract for each contract year and the pre-operating period (if applicable) and, if possible, those of the Tenderer during the Term;

Financial Vetting (Cont'd)

(Ref: Clause 9 of Part I -- Terms of Tender)

- d) Original letters from bankers, where applicable, confirming lines of credit facilities available to the Tenderer and the current undrawn/unutilised balances of such credit facilities on or after a specified date (shortly before the tender submission date or a date fixed by the Government) and stipulating the expiry date of the facilities;
 - e) Copies (certified by the sole proprietor, partners, directors or company secretary of the Tenderer) of letters of undertaking, minutes of board meetings or returns of allotment of shares to support injection of capital; and
 - f) Written confirmation from a guarantor that it is willing to provide financial support or guarantee to the Tenderer.
- Refer to Clause 25 of Part I for terms related to Performance Bond, Guarantee and Insurance.



Award of Contract

(Ref: Clause 24 of Part I -- Terms of Tender)

- The Government is not bound to accept the tender with the highest combined score or any tender and reserve the right to negotiate with any Tenderer about the terms of the offer.
- Details of the award of this Contract will be made available at the Procurement and Contract Management System (<https://pcms2.gld.gov.hk>) and the Intellectual Property Department website.



Transition and Acceptance Periods

(Ref: Clauses 4 & 5 of Part II -- Conditions of Contract)

- **Contract Commencement Date: 1 December 2024**

Transition Period <i>(At least four (4) weeks before the Commencement Date)</i>	Acceptance Period <i>(Six (6) weeks after the Commencement Date)</i>
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The Contractor should:

- work in parallel with the existing contractor for familiarisation of the Services and hand-over;
- deploy at least 50% of Key Staff resources for OOS for this Contract for transition during the Transition Period and at the costs and expenses of the Contractor; and
- provide a transition plan with task description and schedule.

- The Contractor shall provide the Services in accordance with the Service Levels stated in Section 2 of Part IV – Service Specifications. The Government shall notify the Contractor where the Service Levels have not been met.
- On receipt of such notice the Contractor shall arrange all the additional resources that are required to fulfil Contractor’s obligations as early as practicable at no additional charge to the Government.
- The Government shall have the right either to extend the Acceptance Period or to terminate this Contract.



Scope of Outsourcing – OOS

(Ref. Section 2 of Part IV – Service Specifications)

The Back Office Service includes the day-to-day provision of clerical duties, administrative supports as well as higher level skills in formality checking and daily operation to the following:

- Trade Marks Registry
- Patents Registry
- Designs Registry
- Copyright Licensing Bodies Registry
- Business Centre
- Marketing Division



Scope of Outsourcing – OOS

(Ref. Section 2 of Part IV – Service Specifications)

Duties performed by Outsourcing Contractor include:

- ◆ Creating files; data input making use of the optical character recognition, scanning, indexing and conducting quality checking of all forms, incoming correspondence and documents
- ◆ Preparation of certificates and publication of trade marks, patents and designs details to the Hong Kong IP Journal
- ◆ Conducting preliminary checking for patent and design applications received
- ◆ Dealing with recordal of applications for renewal, amendment of address, etc.
- ◆ Arranging for receipt and despatch of letters, documents, correspondence and certificates for posting and courier services
- ◆ Compiling different trade mark, patent and design statistics
- ◆ Providing support to office operation including off-site filing



Full-time Monthly Equivalent (FTME)

(Ref: Schedule 6A of Part III – Contract Schedules)

Definition of “FTME”

- FTME means Full Time Monthly Equivalent. An FTME is equivalent to the efforts of a particular Relevant Employee of a particular role or rank in one (1) month in terms of hours (excluding lunch breaks) devoted to specific work in respect of OOS at the premises of the Department or other premises as notified by the Government (“Specific Work”).
- One (1) FTME = no. of working days in the month x 7.8 hours of Specific Work

* See Schedule 6A for the calculation and other details of FTME

OOS – FTME requirement

(Ref: Schedule 6B of Part III – Contract Schedules)

Rank	FTME Requirement
OOS Manager	1
Senior Clerk	6
Clerk I	10
Clerk II	21
Total	38

* See Schedule 6B for the minimum requirements of qualifications/experiences of the relevant role/function.

* The Contractor shall ensure sufficient and flexible deployment of human resources in the delivery of the required Services and in meeting the Service Levels.



OOS – Service Levels

(Ref: Section 2 of Part IV -- Service Specifications)

Service Levels:

- Handling time (e.g. data input and issuance of certificates)
- Accuracy in handling application forms and certificates
- Quality of services provided

* See Sections 2 and 3 of Part IV – Service Levels for Back Office Service and Data Accuracy

* See Schedule 5 – Contract Schedules for Service Levels and Service Credits



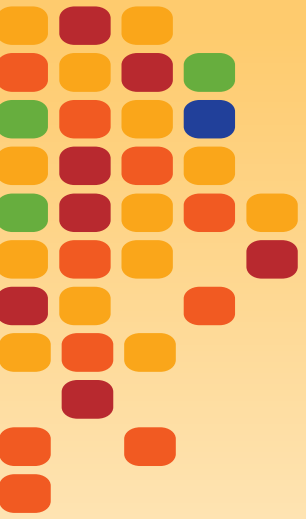
Enquiries and Supplementary Information

(Ref: Clauses 4 & 11 of Part I)

- All enquiries relating to the Tender Documents shall be in writing and shall be made to:

Director of Intellectual Property
Intellectual Property Department
25th Floor, Wu Chung House
213 Queen's Road East
Wan Chai
Hong Kong
(Attn: Departmental Secretary)
Fax no. (852) 3520 0782
Email: supplies@ipd.gov.hk

- Any supplementary information or amendment of any part of the Tender Documents will be by way of the addendum and a notice of the addendum will be posted on IPD Website and the website of the e-Tender Box.



Q & A Session



Thank you

The
Business Environment
Familiarisation
will start soon

Intellectual Property Department

