

Tender Briefing

Provision of Helpdesk Services for iAM Smart to the Office of the Government Chief Information Officer

Tender Ref.: GCIO45286703

13 June 2024



Important Notes

- ▶ Tender Documents shall prevail over presentation materials.
- ▶ The presentation materials herein are for information only.
- ▶ The materials in the Tender Documents remain to be the only formal one with binding effect.



Agenda

- ▶ Background
- ▶ Highlights of the Requirements
- ▶ Highlights of the Tender
- ▶ Questions & Answers



Background



Background

- ▶ In December 2020, **iAM Smart** was launched as a single digital identity for all Hong Kong residents. As at June 2024, there are more than **2.75M** iAM Smart registered users.
- ▶ Registration channels of iAM Smart
 - ▶ iAM Smart mobile app
 - ▶ Self-service kiosk (Hong Kong and Mainland)
 - ▶ Service counter (Hong Kong and Mainland)
 - ▶ Mobile registration team



Background

- ▶ The public might have enquiries or encounter difficulties in iAM Smart registration, management and usages, as well as the use of services provided by the iAM Smart Platform.
- ▶ Examples of enquiries / requests
 - ▶ General public: general enquiry, registration, list of in-person registration points, and list of online services adopting iAM Smart
 - ▶ iAM Smart users: report fraudulent use of iAM Smart account, enquiry on change of mobile device, account suspension, complaints and suggestions, request for case or voice record of enquiry
 - ▶ Online service providers: adoption of iAM Smart in their online services, update information



Highlights of the Requirements

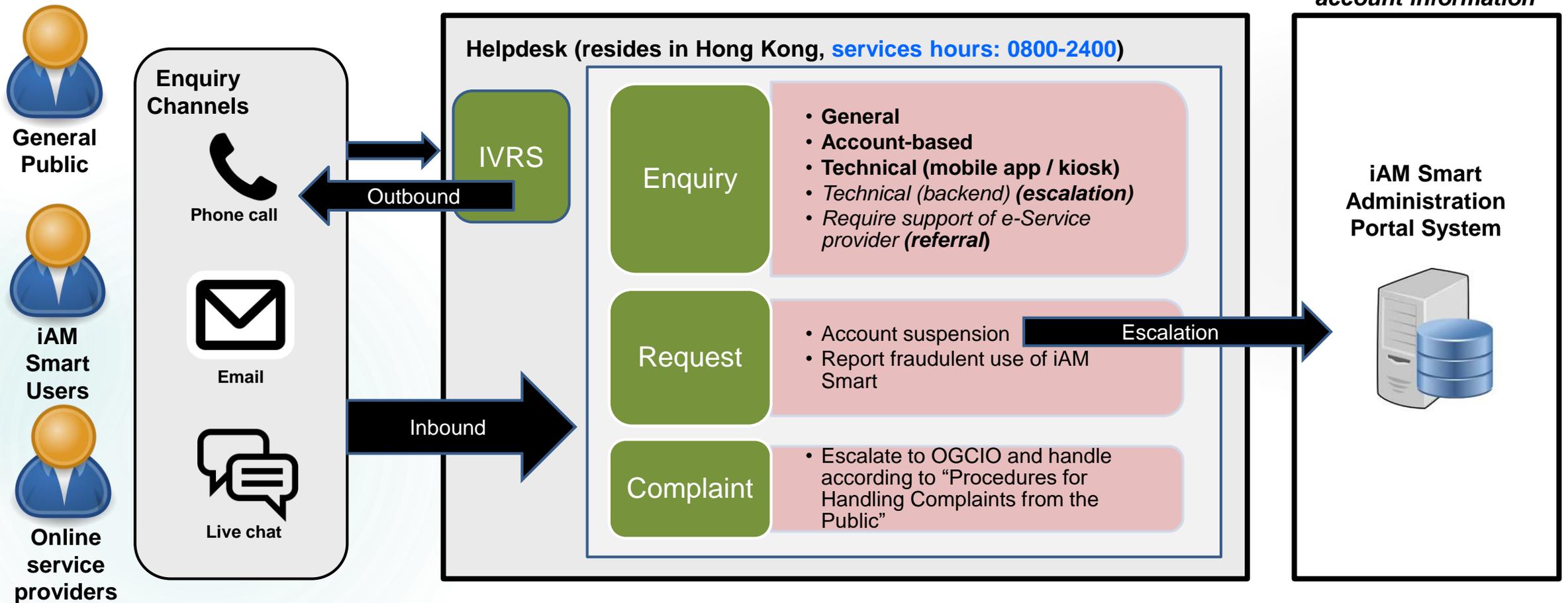


Scope of Services

- ▶ Operating hour: **0800 to 2400** (Interactive Voice Response System (“IVRS”) and Live Chat system shall be able to inform enquirers when it is outside operating hour)
- ▶ Helpdesk Services period: **30 months**
- ▶ Communication channels: **Phone** (with IVRS and voicemail), **Email** (with email servers) and **Live chat**
- ▶ Inbound and outbound (for replying voicemail)
- ▶ Live chat related requirements:
 - ▶ Support enquiries made via web pages and mobile app of iAM Smart
 - ▶ Provide APIs or SDKs for integration, and default user interface which can be customised
 - ▶ Support uploading of photos, videos and documents
- ▶ Language: English and Chinese (Cantonese and Putonghua, Traditional Chinese and Simplified Chinese)
- ▶ Location of helpdesk centre: **Hong Kong**
- ▶ Location of physical storage of Case Data and Government Data: **Hong Kong**



Scope of Work



Manpower

- ▶ Enquiries not relevant to the scope of Helpdesk Services shall be handled under the case referral arrangement to be agreed with the Government
- ▶ Manpower and Helpdesk Services Team
 - ▶ Helpdesk Manager: at least 1 full-time
 - ▶ Operation supervisor: at least 1 full-time
 - ▶ Operators: no less than 2 at anytime during operating hours (0800 – 2400), at least 8 are required



Estimated Caseload

- ▶ Estimated total number of enquiries (“caseload”)

Estimated Caseload (per month)	Communication Channel	Estimated Caseload per Channel (per month)
6000	Phone	1,400
	Email	400
	Live chat	4,200

- ▶ Review on monthly basis
- ▶ Can be scaled up or down to a maximum of 50%
- ▶ Lead time for manpower resources adjustment: 2 weeks



Service Level Requirements

Category	Key Performance Indicator (KPI)	Target
Phone	Calls abandoned rate	< 10%
	Calls answered within 15 seconds	>= 90%
	First contact resolution rate (no follow-up call required)	>= 90%
Voicemail	First response within 4 hours	100%
Email	First reply within one working day (exclude auto-reply)	100%
Live Chat	First reply within 3 minutes	>= 80%
	First reply resolution rate	>= 90%
Escalation	Pre-defined cases escalated within 4 hours	>= 98%
Overall	All enquiries resolved within 10 working days	100%



Facilities

- ▶ Helpdesk Services shall be operated in **dedicated operation area** with **dedicated access network**, and appropriate and sufficient privacy and security measures for **handling personal information** should be in place
- ▶ Provide hotline number for receiving incoming calls
- ▶ CCTV, and security control (e.g. event log and access right control) on entering/exiting the dedicated operation area



Other Service Requirements

- ▶ Training (Section 6 of Service Specifications)
 - ▶ The Contractor shall provide **adequate training** to staff members who carry out duties for the Helpdesk Services.
 - ▶ The Contractor shall develop, maintain and update a **knowledge base** for answering enquiry and support requests from enquirers
 - ▶ The Government will arrange a training session to **train the trainers** of the Contractor on the technical aspects of the Services. Trainers of the Contractor should deliver training to all other staff in the Helpdesk Services team.
- ▶ Reporting and escalation
- ▶ Complaint handling
- ▶ Customer satisfaction survey
- ▶ Routine and ad hoc reporting
- ▶ Quality check
- ▶ Exit services, etc.



Project Timeline and Key Milestones

► Key milestones and tentative schedule

Stage	Key Milestones	Tentative Schedule
1	Contract Award	Month 0
2	Setup Period (Software, Hardware, Facilities, etc.)	Month 0 – 2
3	Commencement of Helpdesk Services	Month 3



Points to Note for Tenderers



Tender Closing Time & Validity Period

Tender Closing Time

- ▶ **12:00 noon on 12 July 2024** (Hong Kong time)

Part 1A – Terms of Tender (Supplement) Clause 3.2.3 - Non-compliance with submission deadline and requirements

- ▶ A Tender submitted after the Tender Closing Time or a Tender not submitted in accordance with the submission requirements stipulated in the Tender Form and in Paragraph 3.2.2, including a Tender submitted by facsimile or e-mail, **WILL NOT BE CONSIDERED FURTHER.**

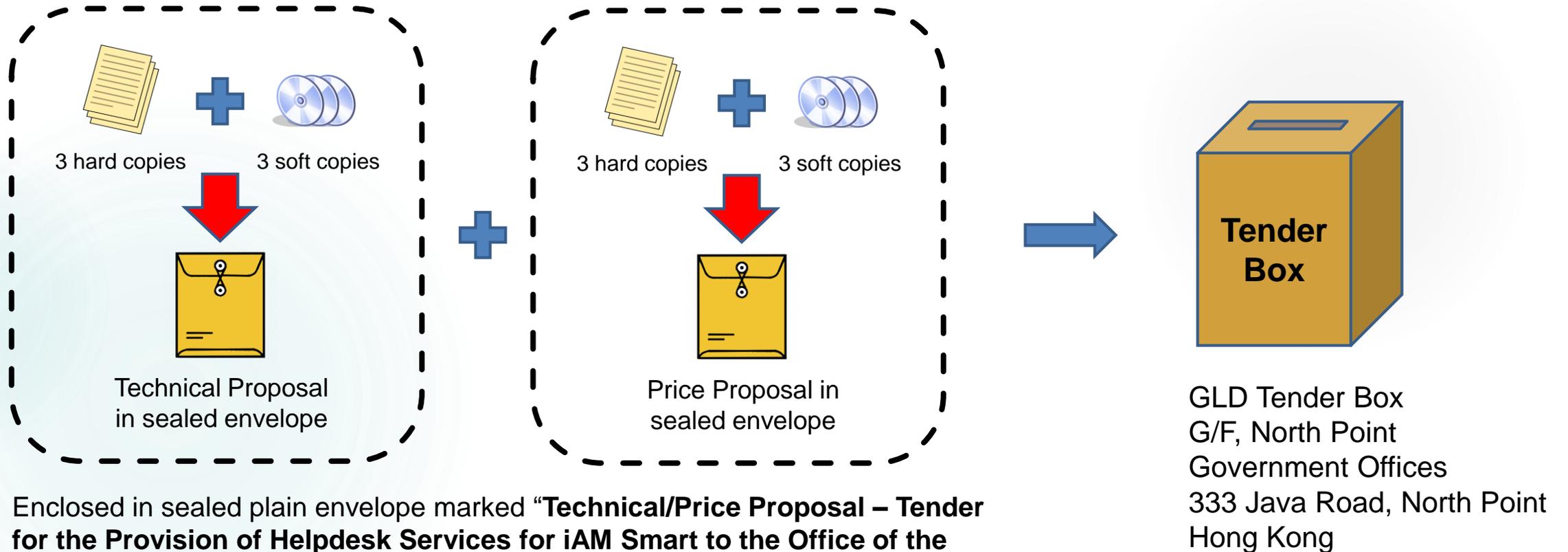
Part 1A – Terms of Tender (Supplement) Clause 4 – Tender Validity Period

- ▶ The Tender Validity Period shall be **150** days after the Tender Closing Time.



Tender Submission

Part 1A Clause 3.2.2.1 - Manner of Submission (Paper-based Tendering)



Enclosed in sealed plain envelope marked “**Technical/Price Proposal – Tender for the Provision of Helpdesk Services for iAM Smart to the Office of the Government Chief Information Officer, Tender Ref. GCIO45286703**”



Tender Submission

Part 1A Clause 3.2.2.2 - Manner of Submission (Electronic Tendering)



Please refer to the e-Tender Box (ETB) System and File Attachment Requirement at:
<https://pcms2.gld.gov.hk/iprod/#/sta008071?popup=Y>



Definitions on Contract Period

Part 3 (Special Conditions of Contract) Clause 1.1

- ▶ Subject to any provision for earlier termination, the **Contract Period** shall commence from the **Date of Tender Acceptance** and end on the **date of expiry of the Helpdesk Service Period**, both dates inclusive.

Part 3 (Special Conditions of Contract) Clause 1.2

- ▶ Subject to any provision for extension of Helpdesk Service Period, the **Helpdesk Service Period** shall commence from the date of Acceptance Notice for a period of **thirty (30) months**.



Prices (1)

Part 1A (Terms of Tender (Supplement)) Clause 2A - Partial Tender

- ▶ Tenders will be considered on an “**Overall basis**” based on **the Estimated Contract Price** quoted in the Price Schedule. A Tenderer’s Tenders with **incomplete or partial offer will not be considered further.**

Part 3B Annex C (Tender Evaluation Procedure and Assessment Criteria) – Price Assessment

- ▶ The Estimated Contract Price is the total price as specified in Table 3 in the Price Schedule which comprises **Lump Sum Charge (after discount)** and **Estimated Monthly Charges for thirty (30) months.**



Prices (2)

Part 1A (Terms of Tender (Supplement)) – Clauses 5.1 and 5.2

- ▶ The **Lump Sum Charge (after discount)** in Table 1 of the Price Schedule is the price after deduction of all discounts (except for prompt payment discount) for the Implementation Services and maintenance and support services proposed in this Tender.
- ▶ The **Estimated Monthly Charge** calculated in Table 2 of the Price Schedule is the estimated price for the engagement of all the proposed staff in the Helpdesk Services for each month during the Helpdesk Service Period to fulfill the requirements in the Service Specifications.



Prices (3)

Part 1A (Terms of Tender (Supplement)) Clause 5.3 – Estimated Requirements

- ▶ There is no guarantee that the Government shall adhere to the numbers in regard to the caseload (as defined in Paragraph 3.27 of the Service Specifications), the number of operators required in the Helpdesk Services during the Helpdesk Service Period and their costs. **The Government's actual requirements may vary depending on the actual needs of the Helpdesk Services. The successful Tenderer must accept any increase or decrease of the estimated requirements.**

Part 3 (Special Conditions of Contract) Clause 4.1 - Changes on Manpower Resources

- ▶ In the event that the Government considers necessary, the Government may by **giving no less than two (2) weeks' written notice** to the Contractor at any time during the Contract Period require change(s) **(addition or reduction) in the number of operators** to be provided by the Contractor. With the change of manpower resources, the caseload requirements to be supported for the operation of the Helpdesk Services will also be adjusted up or down accordingly based on the information provided in the Price Schedule.



Tender Evaluation (1)

Part 1A (Terms of Tender (Supplement)) - Clause 3.1

- ▶ Tenderers shall note that **its Tender will not be considered further** if by the Tender Closing Time the Tenderer fails to submit any of the following:
 - ▶ **Schedules 3, 5 and 6 of Part 3B**; or
 - ▶ a duly signed Part 4 - **Offer to be Bound** of the Tender Form in English or Chinese containing an **original signature** by or on behalf of the Tenderer or (for Electronic Tendering) the box signifying the Tenderer's agreement with Part 4 "Offer to be Bound" of the Tender Form must have been checked.

Part 1A (Terms of Tender (Supplement)) – Clause 3.2.1.3

- ▶ The Government will conduct the **tender assessment according to Annex C – Tender Evaluation Procedures and Assessment Criteria** to Part 3B and complete the technical assessment by evaluating the Technical Proposals of the Tenderers. Those Tenders who can pass the technical assessment will be evaluated further based on their Price Proposals.



Tender Evaluation (2)

Part 3B Annex C (Tender Evaluation Procedure and Assessment Criteria)

- ▶ The relative weightings for technical and price assessment are **70%** and **30%**.
- ▶ Stage 3 Technical Assessment - The technical features of tenders which have passed Stages 1 (Completeness Check) and 2 (Assessment of Compliance with Essential Requirements) will be further assessed in accordance with the criteria stated in the **marking schemes specified in Annex D - Detailed Evaluation Criteria and Marking Scheme to Part 3B.**
- ▶ Stage 4 Price Assessment - The price assessment of those tenders which have passed Stage 3 (Technical Assessment) will be evaluated based on the **Estimated Contract Price.**
- ▶ Stage 5 Calculation of Combined Score - The combined score of each of the tenders that have completed Stage 4 evaluation will be calculated.



Questions and Answers



Thank you



Office of the Government Chief Information Officer
The Government of the Hong Kong Special Administrative Region



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iAM Smart