



**Request For Quotation**

**for the Drafting and Production of**

**An Intellectual Capital Management Booklet**

30 September 2009

Manufacturing Enterprise Integration and Innovation Association (MEIIA)

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**RFQ OF INTELLECTUAL CAPITAL MANAGEMENT BOOKLET FOR THE  
MANUFACTURING ENTERPRISE INTEGRATION AND INNOVATION ASSOCIATION  
(MEIIA)**

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**1. SCOPE OF THE SERVICES**

1.1 You are invited to submit a proposal for the service of producing an Intellectual Capital Management (ICM) booklet (the “Services”) in relation to the ICM Seminar and Workshops Programme to be held by the Manufacturing Enterprise Integration and Innovation Association (“MEIIA”). The Services shall cover the following scope:

1.1.1 Design and production of an ICM booklet which is printed in A5 size with approximately 80 pages, covering topics as illustrated in Section 4.2.3; and

1.1.2 Delivery of the booklets to the secretariat of MEIIA

1.2 The scope of the Services shall cover, but not be limited to, those areas related to any forms of support on the construction of the ICM booklet.

1.3 The tentative commencement date of the Services is 12 October 2009 and the scheduled completion date is 7 December 2009.

**2. BACKGROUND**

With the funding support from Professional Services Development Assistance Scheme (PSDAS), which is aim at increasing the competitiveness of the professional sector(s) concerned in the Mainland or overseas markets or enhancing the standard of professional services in Hong Kong, MEIIA is going to publish an ICM booklet. 1000 copies of booklet will be made in the first instance and electronic copies of the booklet will also be requested under this Service.

**3. OBJECTIVES OF THE SERVICES**

3.1 By reading the ICM booklet, Hong Kong IT consultants and business consultants will have an appreciation of what ICM is.

3.2 Make the ICM knowledge and techniques more visible to the society.

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**4. SERVICE REQUIREMENTS**

Meeting the service requirements and features specified in this Section is of primary concern in the selection of the contractor. Your proposal should state clearly whether ALL the requirements and features set out below would be met.

4.1 The appointed contractor will be responsible for:

4.1.1 Delivering the services as described in Section 1 above and detailed in Section 4 and 5 below;

4.1.2 Resolving problems during the entire services life cycle;

4.1.3 Overseeing and monitoring the progress of during the services life cycle to ensure that the activities are completed according to the implementation schedule and meeting the requirements as specified;

4.1.4 Reporting progress, follow up all outstanding issues with all related parties, suggest solutions and resolve difficulties throughout the services; and

4.1.5 Carrying out any other activities which are necessary for the satisfactory completion of the services as set out in this document.

4.2 Requirements in relation to the ICM booklet content (Section 1.1.1 refers) shall include:

4.2.1 The appointed contractor shall deliver 1000 copies of ICM booklet, printed in A5 size with approximately 80 pages. The content of the booklet should be in English.

4.2.2 The appointed contractor shall invite local and/or overseas authors to contribute to the booklet. Both administration and coordination support shall be given to authors by the appointed contractor.

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4.2.3 The booklet shall cover relevant topics of ICM, including but not restricted to the following:

- Introduction
  - Basic concept
  - The evaluation of ICM
- Knowledge Economy and ICM
  - The business value of ICM
  - Converting IC to value: value creation and value extraction
- ICM Applications
- Benefits of ICM and case studies
- Concluding Remarks

4.2.4 The appointed contractor shall produce 1000 hard copies and an electronic copy.

4.2.5 The appointed contractor shall develop and produce both hard and electronic copies of booklet suitable to the Hong Kong business environment. A full set of materials for the Services shall be submitted to MEIIA for record purpose.

4.3 For the purpose of delivering the Services, the appointed contractor shall meet the following staff requirement:

4.3.1 Assign a coordinator to provide administrative support to the authors.

4.3.2 The authors should have at least four years of experience in ICM or directly related disciplines.

4.3.3 The appointed contractor shall have an coordinator ready to be reached, either by telephone or electronic mail, during office hours of MEIIA.

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**5. PROJECT DELIVERABLES, MILESTONES & IMPLEMENTAION  
SCHEDULE**

The tentative commencement date of the Services is 12 October 2009 and the scheduled completion date is 7 December 2009. You are required to propose a detailed implementation schedule with a planned completion date for each task. Milestones and their required deliverables and the corresponding scheduled completion dates are listed for reference.

Milestone	Deliverable <sup>1</sup>	Scheduled Completion Date <sup>2</sup>
<b>Stage 0: Appointment of Contractor</b>		
Appointment of Contractor		9 October 2009
<b>Stage 1: Project Initiation</b>		
Initiation meeting	Implementation plan	12 October 2009
<b>Stage 2: Construction Period</b>		
Confirmation of the authors	Confirmation documents	16 October 2009
Finalize the content of the booklet	Content of booklet <sup>3</sup>	13 November 2009
Graphic design	Design of the booklet	20 November 2009
Send a copy of the booklet for checking before mass production	Booklet <sup>3</sup>	27 November 2009
Mass production and delivery of the booklet	Booklet <sup>3</sup>	7 December 2009

Notes

1. For all written deliverables, the appointed contractor shall provide both printed and electronic copies to MEIIA.
2. 'Scheduled Completion Date' refers to the formal acceptance of the final deliverables. It is the appointed contractor's responsibility to submit the deliverables on time and expedite users' understanding of the deliverables.
3. The authors are responsible for the content of the booklet, whilst the appointed contractor shall provide advice and assistance where necessary, and seek to ensure that the authors complete their tasks by the scheduled completion date.

## **6. OTHER REQUIREMENTS**

### **6.1 Delay and Termination**

- 6.1.1 The appointed contractor shall adhere to the implementation schedule set out in Section 5 above, of which time shall be of the essence. MEIIA shall be entitled to terminate the Construction and Retainer Support contract forthwith if the appointed contractor delays or otherwise fails to comply with the implementation schedule without the prior written consent from MEIIA.
- 6.1.2 Without prejudice to the operation to Section 6.1.1, MEIIA shall be entitled to terminate the Construction and Retainer Support contract at any time by giving the appointed contractor 14 days' written consent from MEIIA.

### **6.2 Confidentiality of Information and Conflict of Interest**

The appointed contractor must confirm its compliance with the following requirements on Confidentiality of Information and Conflict of Interest.

- 6.2.1 The appointed contractor shall treat as confidential all information, drawings, specifications, documents, contracts, design materials and all other data (including without limitation any personal records and Personal Data (as defined in the Personal Data (Privacy) Ordinance (Cap 486)) and materials of any nature (in or on whatever media)) accessible by the appointed contractor under the Services or which the MEIIA has for the purposes of or in the course of performing the Services disclosed, supplied, made available or communicated to the appointed contractor.
- 6.2.2 The appointed contractor shall procure each author and its employees, agents and sub-contractors to execute a legally binding written undertaking in favour of the appointed contractor and MEIIA jointly and severally in a form prescribed by MEIIA agreeing not to disclose any such confidential information.

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6.2.3 The appointed contractor shall ensure that it (including each authors and its employees, agent and sub-contractors) shall not do anything whatsoever for or on behalf of any third party (other than in the proper performance of the Services) which conflicts, or which may be seen to conflict, with the appointed contractor's duties to MEIIA in the Services. The appointed contractor shall notify MEIIA in writing of all or any facts which may reasonably be considered to give rise to a situation where the financial, professional, commercial, personal or other interests of the appointed contractor or any of the above-mentioned persons conflict or compete, or may conflict or compete, with the appointed contractor's duties to MEIIA in the Services.

6.2.4 The appointed contractor shall procure each author and its employees, agents and sub-contractors to execute a legally binding written undertaking in favour of the appointed contractor and MEIIA jointly and severally in a form prescribed by MEIIA agreeing to observe the above requirement relating to conflict of interest.

6.3 Intellectual Property Right in Materials

6.3.1 The appointed contractor may, subject to having obtained the requirement authorization, use materials developed by itself and other third parties which are or were produced or created in relation to services other than the Services, and may retain intellectual property rights in such works.

6.3.2 All intellectual property rights in new works developed in relation to the Services or in the course of the Services, and all rights in relation to works developed by the authors will belong to MEIIA.

6.3.3 All appointed contractor undertakes to acquire all requisite consents and licences for the benefit of MEIIA for the use and reproduction of the third party works incorporated in the deliverables for an purposes which MEIIA may in its absolute discretion use the deliverables for.

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**6.4 Payment Schedule**

Payment for the Services will be made in the following manner - 10% of the total contract amount will be payable upon appointment of contractor and the remaining 90% will be payable to the appointed contractor upon passing the agreed payment acceptance criteria as set out in Section 7 below. The appointed contractor shall produce an invoice for the sum becoming payable and inform the MEIIA in writing.

**7. ACCEPTANCE CRITERIA**

7.1 MEIIA will only accept the delivered services if:

7.1.1 All the services and deliverables as specified in Section 4 & 5 above are completed in accordance with the agreed schedule, adhere to the requirements stipulated in Section 4 and are of acceptable quality: and

7.1.2 All the objectives as well as requirements as specified in Section 3 and Section 4 above are met satisfactorily.

7.2 MEIIA will require in general up to 2 working days to consider each required deliverable and, if it deems appropriate, to confirm the acceptance of the deliverable. Allowance should be made in the proposed project plan for such activities.

7.3 For the approval of acceptance of the last assignment deliverable, the appointed contractor shall ensure that all assignment deliverables have been delivered satisfactorily and are acceptable to MEIIA.

**8. SELECTION CRITERIA**

The selection of a contractor to undertake the Services will be based on:

- Completeness and conformity to the Service Requirements, and
- Quality assessment which would include:
  - Price ranking
  - Meeting the requirements as stipulated in Section 1, 4.2

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- Meeting the staff requirements as stipulated in Section 4.3
- Past experience and track-record on similar nature of projects or business
- Reasonableness of the proposed implementation schedule as required in Section 5.

**9. INVITED PARTY'S PROPSALS**

9.1 If interested in the provision of the Services, you are invited to submit a Price Proposal and a Services Proposal in the following manner:

9.2 Price Proposal

The Price Proposal should contain information that includes all the costs for the delivery of the Services. You are required to provide cost breakdown in terms of the estimated man-effort required and their corresponding charging rate. Price of mandatory items and optional items, if any, should be clearly stated.

9.3 Service Proposal

The Service Proposal shall demonstrate your ability in delivering the Services and shall contain at least the following information:

9.3.1 The background of your organization;

9.3.2 The proposed work approach which shall include, but is not limited to, a detailed description of how you are going to provide the Services and how the requirements deliberated in this Brief will be met;

9.3.3 Any addition items on top of the Service Requirements specified in Section 4 that you will provide in connection with the delivery of the Services;

9.3.4 The proposed roles and responsibilities of the contractor, any sub-contractor(s), and users that are specifically required to deliver the Services for the work assignment;

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- 9.3.5 The required effort expected from MEIIA;
- 9.3.6 A project plan showing the project stages and milestones, tasks, their dependencies and relationships, the deliverables, and the schedule start date and completion date of each stage and task;
- 9.3.7 Information of the proposed personnel responsible for the delivery of the Services, including the composition of the project team and the roles of individual members with respect to the Services;
- 9.3.8 Curriculum vitae of all the personnel involved, covering their academic and professional qualifications, job history and experience and skills;
- 9.3.9 Declaration of Actual or Perceived Conflict of Interest
- 9.3.9.1 You shall declare any actual or perceived conflict of interest arising from the delivery of the Services. You shall immediately inform MEIIA in writing of any or all facts or matters incidental to or related to its obligations with respect to any actual or perceived conflict of interest, including any such facts and matters affecting all the proposed personnel and sub-contractors/agencies to be involved in the work assignment; or
- 9.3.9.2 If there is no actual or perceived conflict of interest, you are required to state so explicitly.
- 9.3.10 Any dependencies, limitations and assumptions;
- 9.3.11 Any potential risks;
- 9.3.12 Any other suggestions related to the Services.

9.4 If submitted by mail, the two Proposals should be submitted in separately sealed envelopes, marked respectively

- “ICM Booklet – Price Proposal”; and
- “ICM Booklet – Service Proposal”.

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9.5 The Price and Service Proposals should be submitted by fax to 8102 2051 or by mail to Flat B, 15/F, Winsan Tower, 98 Thomson Road, Wanchai, Hong Kong (Attn.: Cammy Ko) **no later than 12:00 pm on 9 October 2009.**

**10. ENQUIRIES**

For any enquiry concerning this work assignment, please contact:

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