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Assembly

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INFORMATION TECHNOLOGY MODERNIZATION PROGRAM (MADRID INTERNATIONAL REGISTRATION SYSTEM): PROGRESS REPORT

prepared by the International Bureau

INTRODUCTION

1.   The purpose of this document is to outline progress on the Information Technology (IT) Modernization Program (hereafter referred to as "the Program") since the last Assembly of the Madrid Union (hereinafter referred to as "the Assembly") in October 2012. The document also serves to update members of the Assembly on any change to the overall approach to the completion of the Program, as well as to notify any change to the Program schedule.

2.   Document MM/A/45/3 contains the previous Program Progress Report.

3.   It is recalled that the Program is to be undertaken in two phases: Phase I and Phase II. Phase I consists of sub-projects aimed to produce immediate positive results or to lay down the technical foundations for Phase II. Phase II is the actual one-to-one technical migration from the current IT legacy system, supporting both the Madrid and Hague international registration procedures, to a modern technology that will ensure Madrid and Hague system stakeholders benefit in the years to come from an industry standard technical platform.

4.   It is also recalled that at its forty-fifth (26th extraordinary) session, the Assembly approved mid-2013 as the revised schedule for the completion of Phase II, and noted a total project resource envelope of 11.731 million Swiss francs (8.731 million Swiss francs approved by the Assembly of the Madrid Union, and 3 million Swiss francs approved by the Assembly of the Hague Union).

IMPLEMENTATION STATUS – PHASE I

5.   Phase I of the Program has been successfully completed and the Office Pilot is now going on under the name of International Registration Process Integration (IRPI) Project.

6.   The primary objective of the IRPI Project is to provide a framework for the electronic filing of international trademark applications. To demonstrate the effectiveness of this framework the World Intellectual Property Organization (WIPO) has developed a comprehensive electronic filing platform, which some of the participating offices will integrate into their Internet web site portals.

7.   IRPI is based on WIPO selected Service Oriented Architecture (SOA), comprising web services jointly developed by WIPO and participating National Offices (the Benelux Office for Intellectual Property (BOIP), the Office for Harmonization in the Internal Market (Trade Marks and Designs) (OHIM) and the National Institute of Industrial Property of Portugal (INPI)). Users of the IRPI Project will include applicants, for preparing and filing international applications, and offices, for certifying and transmitting international applications.

8.   Complex requirements from the participating National Offices have been integrated into the IRPI software. This includes, but is not limited to, a Single Sign-On (SSO) user authentication solution, where WIPO delegates user authentication to the National Office. Moreover, the merging of National Office handling fees with the international fees, *via* a single payment, has involved a major revision of the payment process.

9.   WIPO has also started building the production infrastructure for IRPI, hosted at the United Nations International Computing Centre (UNICC) data center in Geneva, Switzerland. IRPI will benefit from a clustered, scalable and high-available platform, catering for future growth of demand.

10.   The Request for Proposal (RFP) for IRPI's support and development, for the period 2013-2015, was issued in December 2012. The winning bidders will be known by mid-2013.

11.   During the first half of the year 2013, efforts were dedicated to freeze the IRPI's user requirements prior to a restricted go-live, planned to take place by mid-year. Both BOIP and OHIM are expected to deploy IRPI in production during the months of October and November 2013.

12.   In other Phase I activities, WIPO started to use a new translation tool in July 2012, resulting in efficiency gains and a streamlined translation process. The WorldServer translation tool is now fully deployed for all Madrid and Hague procedures.

13.   Also, in May 2012, some new web-based client services, along with video tutorials, were made available to users of the Madrid system: the Madrid Portfolio Manager (MPM), the Madrid Electronic Alert (MEA) and the Madrid Real-time Status (MRS). Such tools were further enhanced during the first half of 2013. MEA is a free "Watch Service" designed to provide information to users interested in monitoring the status of certain international trademark registrations. MRS is a stand-alone tool that presents the real-time status of requests being

processed by the International Bureau of WIPO. MPM is a web application designed for holders and representatives of international registrations wishing to access their international trademark portfolios with a view to submitting new requests for recording in the International Register.

14.   A new publication system producing the notifications and certificates will be deployed in June 2013. The new system has been developed using XML/Java technology instead of desktop publishing software. The new system will be entirely automated, reducing operator involvement and therefore operating costs. WIPO took also this opportunity to update the general layout of the documents.

15.   Phase I activities shall be concluded when the new publication system is deployed in June 2013, and the IRPI system is deployed in late 2013.

BACKGROUND INFORMATION – PHASE II

16.   It is recalled that the approved approach to the execution of Phase II of the Program was to perform a one-to-one technical migration of the legacy system to a modern, service-oriented architecture *via* the selection of a qualified external information technology partner.

17.   The objective of the technical migration is to convert the legacy application, database and internal workflow, from the programming language Natural and the database management system Adabas, to the programming language Java and database management system Oracle, including the injection of a state-of-the-art Business Process Management (BPM) tool. Achieving such migration will remove the risk of the obsolescence of the current legacy infrastructure.

18.   One of the major challenges for the technical migration project is to reproduce a modern web-based end-user interface that continues to be close enough to the current end-user experience in order to minimize end-user's training and learning curve.

19.   It should also be recalled that any necessary transformations of the end-user interface as well as possible process reengineering will probably be undertaken as part of the reintroduced Phase III of the Program (see document MM/A/43/1, paragraph 3, for the recommendation of merging Phase II and Phase III with the option to reopen Phase III "where there was a clear business requirement to do so" and document MM/A/45/3, paragraph 24). Any Phase III activity shall be undertaken within the original project envelope.

ACHIEVED RESULTS – PHASE II

20.   Following the successful completions of Stages 1 and 2 of the Project (Analysis and Design) ELCA (the selected external IT technology partner) performed by the end of the year 2012 an in-depth analysis of the software code programmed in Natural language in order to reassess the complexity of the migration project and to validate technical assumptions made during the preparation of its fixed price proposal. The outcome of the analysis revealed higher project complexity for the required one-to-one technical migration of the legacy system and database, resulting in the extension of the overall elapsed time for the project completion in order to keep the initial price proposal fixed.

21.   The technical migration started with the implementation of the end-to-end transaction related to the reception and examination of international applications and the international registration of trademarks.

22.   The first four iterations of developed code were successfully installed in the WIPO development environment for the Project Team review, validation and test, during the first quarter of 2013. Test plans were produced in order to perform initial tests and acceptance of the new end-user interface.

23.   WIPO custom workflow was mapped in the new BPM tool and validated by the Project Team.

24.   A database data migration tool was selected and first data dumps are on-going for testing purpose.

25.   The technical migration of the software code programmed in Natural language is progressing well. The transformation of the end-user interface, as well as possible process reengineering, will be undertaken as part of the reintroduced Phase III of the Program.

HIGH LEVEL PROJECT PLAN – PHASE II

26.   Phase II of the Program was initiated in the third quarter of 2010. Tasks from 1 to 10 of the High Level Project Plan presented in Figure 1, below, have already been completed. Task 11 is in progress. The Program is running according to the following schedule:

ID	Task Name	Start	Finish	% Complete	2010 Q3	2010 Q4	2011 Q1	2011 Q2	2011 Q3	2011 Q4	2012 Q1	2012 Q2	2012 Q3	2012 Q4	2013 Q1	2013 Q2	2013 Q3	2013 Q4	2014 Q1	2014 Q2	2014 Q3	2014 Q4	2015 Q1
1	Project Manager Selection Process	01.07.2010	30.09.2010	100%																			
2	Publication of Expression of Interest (EOI) - First Round	13.09.2010	08.10.2010	100%																			
3	Evaluation of EOI Responses - First Round	09.10.2010	30.11.2010	100%																			
4	Project Manager at WIPO	01.12.2010	01.12.2010	100%		★																	
5	Publication of EOI - Second Round	15.12.2010	17.01.2011	100%																			
6	Evaluation of EOI Responses - Second Round	18.01.2011	18.03.2011	100%																			
7	Publication of Request for Proposal (RFP)	21.03.2011	20.06.2011	100%																			
8	RFP Due Date	20.06.2011	20.06.2011	100%				☆															
9	Evaluation of RFP Responses	21.06.2011	30.09.2011	100%																			
10	Contract Review Committee (CRC) Approval & Contract Negotiation	01.10.2011	31.12.2011	100%																			
11	Project Execution	16.01.2012	30.06.2014	45%																			
12	Go Live	01.07.2014	01.07.2014	0%																★			

Figure 1- Phase II High Level Project Plan

27.   From the above timelines, it is clear that the focus of Phase II activity for the remainder of 2013 shall be the technical migration of the legacy system. New iterations of developed software code will be released during the year, and subject to the Project Team's validation.

28.   It should be noted that the strict functional equivalence approach implies the reintroduction of Phase III of the Program, as already recommended in document MM/A/45/3. A detailed description of work to be undertaken in Phase III shall be presented with the next Progress Report, and shall be accommodated within the existing project budget.

FINANCING STATUS

29.   The total resource envelope of 11.731 million Swiss francs approved during the forty-second (18th ordinary) session of the Assembly of the Madrid Union (8.731 million Swiss francs) and the twenty-eighth (17th ordinary) session of the Assembly of the Hague Union (3 million Swiss francs) has been partially utilized to cater for the completion of Phase I of the Program and the resources remaining available to complete Phase II of the Program are sufficient.

30.   The next IT Modernization Progress Report shall make proposals to the Assembly concerning any resource implications of the reintroduced Phase III.

31.   The Assembly is invited to:

(i)   take note of the completion of Phase I of the Program;

(ii)   take note of the progress of Phase II of the Program;

(iii)   take note that a detailed description of Phase III activities will be presented with the next Progress Report.

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