

## **ANNEX I**

### **To Request for Proposals (RFP) N° PCD/07/022**



#### **TERMS OF REFERENCE**

#### **for the provision of IT Consultancy Services to the PCT Information Systems Division of WIPO**

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## 1 INTRODUCTION

### 1.1 WIPO

1. WIPO is an intergovernmental organization headquartered in Geneva, Switzerland, and is one of the 16 Specialized Agencies of the United Nations system of organizations. WIPO is responsible for promotion of the protection of intellectual property throughout the world, including the administration of the PCT System.

2. The Patent Cooperation Treaty simplifies and reduces the cost of obtaining international patent protection and facilitates public access to a wealth of technical information relating to inventions. By filing one international patent application under the PCT, an applicant can simultaneously seek protection for an invention in each of the PCT Contracting States throughout the world.

3. More information on the PCT can be found at <http://www.wipo.int/pct/en>

### 1.2 PCT Information Services

4. PCT Information Services provides information technology research, development and operations services in support of activities directly relating to the administration of the Patent Cooperation Treaty. As the intellectual property community has moved away from paper-based transactions, PCT Information Services has experienced significant growth in the requirements placed upon it for research and development activities, with commensurate growth in operational support of the resulting new services.

5. As a single example, in the last calendar year, research and development activities have included the prototyping and development of the Patent Cooperation Treaty Electronic Data Interchange service (PCT-EDI), which permits PCT Member State offices to submit intellectual property registration materials to the International Bureau via the Internet. This incurred a requirement for the upgrading of existing internal information systems to include support for external electronic document intake; two major activities that have resulted in an increase of electronic document submissions to over 50% of the PCT total.

6. PCT Information Services has a small group of staff members that provide both the organizational continuity and institutional memory required for effective PCT information services development and support, as well as the extensive knowledge of the Patent Cooperation Treaty and the needs of the WIPO Member State intellectual property organizations.

### 1.3 Other Information Services

7. WIPO has several other services that provide information technology research, development and operations services in support of WIPO's activities. The situation in WIPO's Information Systems environment in general is similar to that described for the PCT Information Services.

## 2 PURPOSE OF RFP

8. In light of these new activities, requirements and the overall institutional shift away from paper transactions, the Organization requires additional experienced general and special-purpose software developers and software maintainers of varying skill levels, for both long and short term activities, along with the flexibility to adjust resource levels, both up and down, on a flexible, expeditious basis.

9. Development services will be required on both a medium term (e.g. 3 to 6 months) and the occasional short term (5 days up to 3 months) basis.

10. Critical to the RFP is the cost effectiveness and quality of service demonstrated in the proposals. Cost effectiveness will be evaluated to take into account management, transportation and other relevant elements that affect the overall costs. Considerations that will effect the quality of service evaluations will include the bidder's demonstrated ability in making appropriately qualified consultants available in a timely fashion.

## 3 Scope of Work

### 3.1 Primary Role of Bidder

11. The role of the selected bidder<sup>1</sup> will be to provide time and material based software development and maintenance services in support of new and existing PCT automation systems at the International Bureau.

12. The selected bidder may also be called upon to provide the same kind of services in support of other automation systems at WIPO, such as those used in support of the Madrid, the Hague and the Information Services function.

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<sup>1</sup> It should be noted that while the term "bidder" is used in many parts of this document, it is possible that more than one bidder may be awarded a contract and the relevant text may in this case apply to more than one bidder.

13. In light of the above, bidders are requested to provide to WIPO professional software development and maintenance consultants with skills in the following areas:

- Java/Perl language software development and maintenance. This includes software module documentation to standards set by WIPO.
- Oracle/MySQL database software development and maintenance.
- Skills and experience with the development and maintenance of XML/SGML processors in the above languages.
- Skills and experience in the development and maintenance of network information and communications systems in the above languages.
- Skills and experience in the development and maintenance of web-services applications based upon the Simple Object Access Protocol (SOAP) in the above languages.
- Software quality assurance.
- Source code and software development infrastructure set up and control.
- Web -based user interface development and maintenance related to software development.
- Unix operating system skills appropriate for development and maintenance activities in the areas described above.
- Software testing, including unit testing, non-functional testing, and system testing.
- Data architecture, modeling and analysis.
- Skills and experience in Information Systems security.

In addition,

- Fluency in written and spoken English is required for all consultants. Fluency in written and spoken French would be helpful.

14. Bidders shall provide curriculum vitae and references outlining the skills and experience of proposed consultants.

15. Bidders shall provide details on the working permit arrangements and on how quickly the proposed consultants can be available for working on-site at WIPO.

16. Bidders shall also provide details on how quickly the unlisted consultants could normally be made available for working on-site at WIPO, for example when a replacement consultant is needed, or new assignments are requested.

### 3.2 Volume of intended work

17. The time and material contract will be awarded on a yearly basis for a duration of up to 5 years. WIPO is unable to anticipate the exact level of usage, but as a gauge only, the bidder should consider a minimum of zero to a maximum of 15 concurrent consultants at any given time. It is likely that the initial volume of work would be 11 consultants. Since contracts may be awarded to more than one bidder, the volumes mentioned could be distributed over more than one bidder. Billing is expected to be performed every month. No billing occurs if no days were consumed in one month. [Also covered by paragraph 27 of the invitation letter.]

18. The bidder shall demonstrate each consultant's specialized experience using documentation such as curriculum vitae. Categorization of the consultant level are negotiated between WIPO and the company for each assistance request.

### 3.3 Consultant(s) Assistance Requests and Mobilization Time

19. In addition, as indicated in the modus operandi, work packages provided by the bidder are initiated by a consultant assistance request, and bidders are requested to specify in Annex IV – Price Schedule, the maximum delay they are willing to offer in mobilizing resources for a consultant assistance request.

### 3.3 Modus operandi and “consultant assistance request”

20. WIPO and the awarded company(ies) maintain together a log of the consumed working days accumulated. WIPO will request consultant resources on an ad-hoc basis, describing the purpose of the request, the required skills and the expected duration. Within one week after the receipt of a consultant assistance request, the winning company shall respond specifying if it can support the request and if it can, which staff it can make available for the request, for which rate and the proposed starting date of the assistance. The curriculum vitae of each proposed staff shall be appended to the response to the consultant assistance request.

21. Each assistance request is of a minimal volume of 5 basic working days.

22. This request/answer mechanism may be managed in an informal manner, for example by E-mail. The WIPO program manager will check the monthly bills before they are processed by the WIPO Financial department.

23. WIPO has the right to reject each proposed candidate. In the case of a rejection, the awarded company(ies) may propose other candidates for the same assistance request.

24. The proposed staff shall work full-time or part-time on WIPO premises at Geneva, or off-site, depending on the modalities of the corresponding assistance request.

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25. The winning company shall do its best to propose the same staff again for assistance requests requiring the same skills in order to avoid the training overhead.
26. Unless specified otherwise, all project management and administrative tasks are performed by WIPO staff.
27. Consultants should be equipped with a laptop computer and the software licenses necessary to carry out the role expected of them.

## 4 GLOSSARY OF TERMS

GUI	Graphical User Interface
HTML	Hyper Text Markup Language
PCT	Patent Cooperation Treaty
SOAP	Simple Object Access Protocol
SGML	Standard Generalized Mark-up Language
WIPO	World Intellectual Property Organization
XML	Extensible Markup Language

[Annex II follows]