

WORLD INTELLECTUAL PROPERTY ORGANIZATION

WIPO STANDARDS ADMINISTRATION DATABASE
(WIPOSTAD) project

Software as a Service Solution for WIPOSTAD Surveys

Terms of Reference

Annex I to RFP No. PTD/10/039

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1. GENERAL BACKGROUND

1.1. Introduction

1.1.1. Introduction to WIPO

The World Intellectual Property Organization (WIPO) is an inter-governmental organization with headquarters in Geneva, Switzerland. It is one of the 16 specialized agencies of the United Nations system of organizations.

WIPO is responsible for the promotion of the protection of intellectual property throughout the world through co-operation among States and for the administration of various multilateral treaties dealing with the legal and administrative aspects of intellectual property.

1.1.2. Introduction to the Committee on WIPO standards

The Committee on WIPO Standards (CWS) was created by WIPO Member States at the General Assembly of WIPO held in 2009. Within the framework of the new Strategic Goal IV, which concerns “coordination and development of global IP infrastructure”, the CWS will continue to work on the revision and development of WIPO standards relating to industrial property information. Its membership comprises all WIPO Member States and observers. The CWS will, in effect, perform the same work as the former [Standards and Documentation Working Group \(SDWG\)](#).

The CWS area of WIPO’s website provides access to [WIPO standards](#) and related matters, including [examples and industrial property offices' practices](#), as well as to documentation on meetings related to WIPO standards. It also includes access to the [Annual Technical Reports \(ATRs\)](#) on patent, trademark and industrial design information activities of industrial property offices.

More information is available under <http://www.wipo.int/cws/en/>

1.1.3. Introduction to the WIPOSTAD project

The purpose of this project is to streamline the support for the multilingual revision and publication of WIPO Standards, and the compilation of practices, regarding patents, trademarks, and industrial designs for industrial property offices (IPOs) and other users through ICT automation and efficient use of WIPO and IPO resources.

The scope of the project is limited to ICT automation to facilitate

- revision of the active part of WIPO IP standards (Part 3) and,
- update by IPOs of Survey of IP Office practices (Part 7).

The purpose of this RFP is to identify a solution for WIPOSTAD Part 7 surveys and associated reports available under http://www.wipo.int/standards/en/part_07.html .

It is expected that the same solution could be used for other types of surveys handled by the CWS (e.g. Annual Technical Reports see <http://www.wipo.int/cws/en/atrs/>).

The work needed for integration and search of these reports in WIPOSTAD is not in the scope of the present RFP.

2. REQUIREMENT SPECIFICATIONS

2.1. Functional requirements of the solution:

The following table provides a list of functional criteria which will be considered for the selection of the solution. Contractor's solution is expected to fulfill all requirements below. For each of the requirement, bidders should describe in what respect their solution could fulfill the requirement.

Absence of information in any of these items will be considered as bidder's solution failing to meet the requirement.

Criteria Numb.	Description	Ref.
2.1.1.	Respondent authentication through CAS (Central Authentication Service)	"Log in" under http://www.wipo.int/wipostad/
2.1.2.	Answers collation also based on respondent identity	
2.1.3.	Accessibility	http://www.wipo.int/accessibility/en/
2.1.4.	A Questionnaire may be submitted again with answer(s) pre-filled with the last response made by the same respondent to the same question during a previous survey	
2.1.5.	Questionnaire and report to be easily prepared by users who are not computer experts	<p>(a) Correction Procedures:</p> <p>Questionnaire: http://www.wipo.int/export/sites/www/scit/en/mailbox/circular/2663a.doc</p> <p>Individual answers: http://www.wipo.int/scit/en/mailbox/index.html</p> <p>Survey report: http://www.wipo.int/export/sites/www/standards/en/pdf/07-04-01.pdf http://www.wipo.int/export/sites/www/standards/en/pdf/07-04-02.pdf</p> <p>(b) Citation Practices:</p> <p>Questionnaire: http://www.wipo.int/export/sites/www/scit/en/mailbox/circular/circ2651/2651-printable.pdf</p> <p>Individual answers:</p>

Criteria Numb.	Description	Ref.
		http://www.wipo.int/scit/en/mailbox/circ08.htm Survey report: http://www.wipo.int/export/sites/www/standards/en/pdf/07-09-01.pdf
2.1.6.	A survey/questionnaire to be submitted permanently or for a limited period	
2.1.7.	Answers to a questionnaire are persistent during a survey period (a respondent may use different computers to answer the same questionnaire)	
2.1.8.	Answers to a question may influence the wording(s) of subsequent question(s).	
2.1.9.	Questionnaire to be proposed in several languages (en, fr, es, de, ru, zh, kr,cn...)	Questionnaire for the survey on Correction Procedures in French and Spanish: http://www.wipo.int/export/sites/www/scit/fr/mailbox/circular/2663a.doc http://www.wipo.int/export/sites/www/scit/es/mailbox/circular/2663a.doc
2.1.10.	Answers to be extracted in an editable format (MS-Excel or MS-Word) to be translated and then restored to the database as if the questionnaire was also answered in other languages	
2.1.11.	New questionnaire to be created on the basis of an existing one along with its language versions	
2.1.12.	Automatic generation of collation reports in several languages	
2.1.13.	Questionnaire, answer by each respondent and survey reports to be exported in editable formats (MS-Word and MS-Excel) and in static format (HTML and PDF) (one per language)	e.g. http://www.wipo.int/export/sites/www/standards/en/pdf/07-04-01.pdf
2.1.14.	Keeping versions of questionnaire, answers by each respondent and survey reports	
2.1.15.	Image, video and audio files may be attached to a response (taking information security concern into account)	
2.1.16.	Online help for both surveyor (analysis and report tool) and respondent (questionnaire)	
2.1.17.	Spell checking for both questionnaire answer fields and report editing tool.	

Criteria Numb.	Description	Ref.
2.1.18.	Distribution of questionnaire to some 200 potential respondents and answers from between 50 to 100 respondents	
2.1.19.	Some questions include sub-questions in 3 or 4 level depth	
2.1.20.	One choice out of multiple options	
2.1.21.	Multiple choices out of multiple options	
2.1.22.	Questions require to make one or more choices out of multiple options and then to provide textual answer	
2.1.23.	Some questions ask to answer only in text, not to make a choice.	
2.1.24.	Questions contain textual “comments” field	
2.1.25.	Some questions need a ratio indicator as answer, e.g., 10%	
2.1.26.	Answer to a question may lead following question (goto) other than the next question	
2.1.27.	Direction of answering questions is not always forward. Some questions ask to go back to previous question(s) to answer, e.g., “Q18. If your answer to Questions 4, 8 or 13 was “Yes”, please indicate whether your Office...” (Survey on the implementation and promotion of WIPO Standard ST.22)	
2.1.28.	Some questions request textual answer in table format	
2.1.29.	Answer to be marked or filled in table and cell-unit information to be processed in collated report	
2.1.30.	Respondents need to provide not just one but two or more copies with different sets of answers to the same questionnaire	
2.1.31.	For the survey report, support of single-column sort, by default, with ascending/descending toggle by respondent and subject (question number)	
2.1.32.	Possibility to sort collated data using multiple column selection (multi-column sort)	
2.1.33.	Table and various types of chart, e.g., bar, pie, area, line can be used for the survey report	
2.1.34.	Multiple survey results can be	

Criteria Numb.	Description	Ref.
	incorporated in one single collated report	
2.1.35.	Flexible for user to prepare different type of questions or questionnaire from existing ones	
2.1.36.	Customizable for developer to upgrade a tool to deal with a new type of questionnaire (new type of question), if user is not able to prepare a question using types of question currently available	
2.1.37.	User can create templates of different question types and reuse them	
2.1.38.	Respondent should be able to read and print the entire questionnaire before conducting survey	
2.1.39.	Respondent should be able to save a draft answered questionnaire and to preview their completed questionnaire and keep it in local machine before submitting.	
2.1.40.	Respondent should be able to correct the submitted questionnaire before publication (the status of document to be changed by WIPO)	
2.1.41.	Collated report produced by the system should be editable	
2.1.42.	The system should provide a tool to analyze respondents' answers	
2.1.43.	Training course of the tool	See "Section 2.3.2 Training" of this document

2.2. Service level agreement:

2.2.1. Availability of the expected solution to respondents

As WIPO covers Member states from all over the world (i.e. outside Geneva time zone), the system is expected to be available all time. However the guaranteed level of availability of 8/24 hours, 5/7days is acceptable for the expected solution.

The presence and expected timing of maintenance windows should be indicated as needed.

2.2.2. Availability of the expected solution to WIPO staff

The availability of the solution to WIPO staff should be indicated for creation of surveys, reports.

2.3. Initial setup of the expected solution and WIPO

2.3.1. Initial setup of the solution

Bidders are invited to show clearly separate the all inclusive one-time efforts to be provided for the initial setup of the solution. This includes in particular costs involved in ensuring that the expected solution complies with WIPO's expectations described under Section 3.

2.3.2. Training

This includes training costs on the basis of train-the-trainer approach (i.e. assigned WIPO staff will first be trained by Contractor and will subsequently train their colleagues as needed).

2.4. Transition path to other solution:

Contractor will make available all information needed to allow for transition to another type of solution (available on the market or to be developed). The expected solution should allow for "data exports" of Survey and collected response data exports in an industry standard format i.e. which does not require Contractor-specific knowledge to be re-used in another solution.(e.g. database format and associated database schema documentation, XML and associated DTD , etc...).

The data exports backup will be sent to WIPO twice a year.

3. STATEMENT OF WORK

3.1. Software As A Service (SAAS)

The expected solution is expected to be of Software As A Service (SAAS) type. Contractor will make available an operational solution to WIPO i.e. hosting, IT operation support and maintenance of the solution (operating system and other system upgrades, IT security patches, etc...) are transparent for WIPO.

Bidder will indicate their recommendations in term of product types and where applicable number of licenses fulfilling the requirements and the availability of environment as described below and will indicate separately the price of other relevant products as all inclusive yearly fee.

3.1.1. Production environment

This is the environment that Contractor is expected to make available with the highest level of security and where reference survey and response data are hosted.

3.1.2. Acceptance environment

This is the environment that Contractor is expected to make available to WIPO (and possibly to selected external users) for the purpose testing changes (e.g. functionality evolution) before they are considered in the production environment.

3.2. Evolution of the expected solution

Possibilities for extension of the functionality should be indicated with all associated price e.g. license and maintenance costs.

As and when needed, the solution may evolve in term of functionality. In such case, WIPO should be informed of the functional evolution and of its side-effects on legacy surveys. Contractor will ensure backward compatibility of legacy surveys implemented in the new solution at least through the provision of transition tools or path.

Implementation of tools allowing such transition and associated training is at Contractor expenses.

Service cost associated with running legacy data through transition paths is to be agreed-upon as ad-hoc request for services and will be born by WIPO. As an alternative WIPO should have the possibility to appoint staff to operate transition tools on legacy data.

3.3. IT security of the solution

All information relevant to this topic should be grouped and provided in the bid under a specific section.

As the expected solution would be associated to the WIPO system, it is expected to implement best practices in term of IT security, so that the associated risk management is at least at the level of WIPO applications. IT security analysis may be conducted by WIPO relevant staff as needed as prerequisite for contract establishment.

3.4. Ad-hoc request for consulting services

It is expected that Contractor offers consulting services to provide and assist WIPO with their expertise on design and implementation of surveys.

This possibility should be offered for specific survey cases but should not be mandatory in case a new survey is similar to one already implemented through the expected solution.

In case of ad-hoc service request, the following email based protocol is planned to minimize administrative overhead:

3.4.1. Request for service:

The description of the work expected from Contractor

3.4.2. Contractor's offer for the requested work:

(in number of hours, or days) and expected delay. In case the expected workload exceeds the one approved by the contract and its amendments, the offer is to be indicated by Contractor as not acceptable without contract amendment.

3.4.3. WIPO's email acceptance of the offer:
Based on this email, Contractor can start the work as offered.

3.4.4. Contractor's email notification of delivery completion

3.4.5. WIPO's confirmation of acceptance of the delivery
Based on this confirmation, the ad-hoc request service can be invoiced by Contractor.

Once approved, Contractor's failure to deliver the service is considered as serious breach of the contract.

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