

July 15, 2009

Subject: Request for Proposal (RFP) N° PTD/10/039 Software as a Service Solution for WIPOSTAD Surveys

Dear Sir or Madam,

1. We are pleased to invite you to submit a proposal for the provision of survey solutions for the World Intellectual Property Organization (WIPO) as described in the attached Terms of Reference (Annex I).
2. Your proposal could form the basis for a contract between your firm and WIPO. Should your proposal be selected, your firm will be required to sign a contract, which shall incorporate WIPO's mandatory conditions for the purchase of goods and services as per the attached Annexes II.

If you have any questions concerning WIPO's mandatory conditions, these questions should be submitted as queries in accordance with paragraphs 13, 14 and 15 below.

3. To enable you to submit a proposal, please find attached:
 - (a) Annex I: Terms of Reference (TOR);
 - (b) Annex II: WIPO's General Conditions;
 - (c) Annex III: Non-disclosure Agreement for Non-Treaty Data Access by Member States and External Users;
 - (d) Annex IV: Acknowledgement Form;
 - (e) Annex V: Officials-Not-to-Benefit and Third-Party Declaration.
 - (f) Annex VI: Information Security Agreement
 - (g) Annex VII: Price Schedule

This RFP is not to be construed in any way as an offer to contract with your firm/institution.

I. RFP SUBMISSION: INSTRUCTIONS FOR COMPLETION

4. Your proposal shall be prepared in **English**.

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Proposal Submission Format and Date

5. Your proposal shall be prepared in **Duplicate** with one marked "Original" and the other marked "Copy". In the event of any discrepancy between them, the original proposal shall govern.
6. The original and the copy, may be put together in one envelope. The proposal shall be sealed in one outer envelope, as detailed below. The outer envelope must be addressed as follows:

RFP N° PTD/10/039: Software as a Service Solution for WIPOSTAD Surveys

CONFIDENTIAL - NOT TO BE OPENED

Mr. Giorgio Fraternali
Deputy Director
Procurement and Travel Division
World Intellectual Property Organization (WIPO)
34, chemin des Colombettes
1211 Geneva 20
Switzerland

7. **Please note that for security reasons all envelopes that are not addressed in accordance with the above-mentioned instructions are likely to be opened by WIPO Security and, consequently, in such event, WIPO disclaims any responsibility for maintaining the confidentiality of the bid.**
8. **Proposals must be received by WIPO at the above address on or before Thursday, August 5, 2010. Any proposal received after the deadline will not be considered.** WIPO may, at its discretion, extend the deadline for the submission of proposals in accordance with paragraph 9 below.

RFP amendments

9. WIPO reserves the right to modify and/or amend this RFP in any way it may deem necessary. RFP amendments, if any, will be published on WIPO's Procurement Web site (<http://www.wipo.int/procurement/en/pcs.html>). Please check this Web site regularly.

Officials-Not-to-Benefit and Third-Party Declaration

10. WIPO's Financial Rules and Regulations and WIPO's Procurement Procedures require that bidders shall provide a declaration of undertaking stating the following:

- (a) no official of WIPO has received or will be offered by the Contractor any direct or indirect benefit arising from the contract or the award thereof;
- (b) no third party has received or will be offered any improper benefit arising from the contract or the award thereof;
- (c) the Contractor has not engaged the services of a third party to obtain improper influence within the tender process;
- (d) the Contractor is aware of and agrees that the non respect of these clauses will be considered a fundamental violation of the contract giving WIPO the right to declare the contract void and take any other appropriate legal action.

Required Validity of Proposal

- 11. You are requested to hold your proposal valid at least for 90 days from the deadline for submission. WIPO will make its best effort to select a firm within this period.
- 12. Please note that the cost of preparing a proposal and of negotiating a contract, including any related travel, is not reimbursable, nor can it be included as a direct cost of the assignment.

Vendor Queries

- 13. Queries concerning the technical, legal or commercial aspects of this RFP should be sent by E-mail, indicating as the subject "**RFP N° PTD/10/039**" to the following address:

procurementNW@wipo.int

- 14. Queries must be received by WIPO at the above addresses **on or before July 22, 2010**. A consolidated and anonymous list of all queries received, together with WIPO's answers, will be published on WIPO's Procurement website (<http://www.wipo.int/procurement/en/pcs.html>). Please check this website regularly.
- 15. Due to the tight time schedule WIPO will not be in a position to respond to a second round of queries.

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Acknowledgment Form and Intent to Bid

16. We would appreciate it if you could inform us of the following:

- (a) whether or not you intend to submit a proposal, and
- (b) name, fax number and E-mail address of a contact person

by completing the attached Annex IV - Acknowledgement Form and returning it to us by fax at +41 (0)22 338 8210 or by email to the following address:

procurementNW@wipo.int

II. CONTENT OF THE PROPOSAL AND EVALUATION CRITERIA

17. Your proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

Technical Component

18. Please provide all the information that contains detailed instructions on the form and content of the technical component of your proposal.

Financial Component

19. Your financial offer should be quoted in **Swiss francs** (excluding VAT). Your financial offer should not contain any clause linking those prices to any future fluctuation of the exchange rate between the Swiss francs and another currency for the services indicated under the Terms of Reference (Annex I).

20. Your financial offer shall have a cover letter wherein your firm/institution's authorized representative confirms the financial offer and the period of its validity. The financial offer should clearly provide a breakdown of all costs including but not limited to all one time costs (such as initial set up, training etc) , recurrent annual costs, ad hoc cost related to surveys

Evaluation Criteria

21. The evaluation of the proposals received will be conducted on the basis of all the information requested in this RFP and of the customer reference checks based on information provided by service providers in their respective proposal. The key criteria on which the evaluation of the proposals will be based upon are:

- (a) Your Firm's Qualifications & Financial Stability
- (b) Your Firm's Understanding of the Requirements
- (c) Proposed Approach and Methodology
- (d) Proposed Solution

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- (e) Compliance with the Requirements
- (f) Price and other financial terms and conditions

The above criteria are provided for information purposes only and are not ranked by importance.

- 22. Please note that WIPO is not bound to select any of the firms submitting proposals. The procurement contract shall be awarded to the qualified bidder whose proposal, all factors considered, including value for money, is evaluated to be the most responsive to the requirements set forth in the solicitation documents.

III. SCOPE OF THE CONTRACT

- 23. The scope of an eventual contract will be for the services described in Annex I. However, WIPO is under no obligation to purchase entire estimated required services and quantities proposed.
- 24. Prices shall remain valid for a period of minimum 2 years.

IV. ADDITIONAL INFORMATION

- 25. Please also note that should your firm be awarded a contract following this RFP, it shall be responsible for requesting and obtaining all visas, authorizations or permits that may be required for the personnel your firm proposes to work within WIPO premises in connection with the execution of the contract. WIPO will assist you, on request, in providing an individual "Attestation" indicating the following information:

- (a) The number of the awarded contract and the name of the awarded firm;
- (b) The name(s) of each consultant, together with his/her passport details; and
- (c) The expected duration of the appointment.

V. TAX EXEMPTION

- 26. Please also note that WIPO is one of the specialized agencies of the United Nations system of organizations with which Switzerland has reached a headquarters agreement allowing fiscal exemption from value added tax (VAT), as well as taxes and custom duties. The relevant documents will be sent to the selected firm at the time of awarding the contract.

VI. DISQUALIFICATION OF PROPOSALS

27. Your proposal shall be disqualified if:
- (a) Your proposal is late;
 - (b) Your proposal is sent by fax or E-mail;
 - (d) Your proposal is not signed*;
 - (e) Your proposal did not include the *Officials-Not-to-Benefit and Third-Party* declaration, or the declaration was unsigned *;
 - (f) Your proposal did not include a formal requirement that was stipulated in the tender*.

*Disqualification will occur if bidder refuses to promptly reply to notice from WIPO that the proposal or its Annexes were not signed.

VII. REJECTION OF PROPOSAL

28. WIPO reserves the right to reject any or all proposals that are not in conformity with the requirements described in this document.

VIII. CANCELLATION

29. WIPO procedures for procurement allow WIPO the right to cancel the tender at any time before the award of the contract. All participants in the tender will be informed if cancellation occurs.

Yours sincerely,

[original signature on file]

Giorgio Fraternali

Deputy Director

Procurement and Travel Division

NOTICE OF CONFIDENTIALITY

This Request for Proposals contains WIPO information that is confidential, and is intended strictly for the use by the Officials of WIPO and/or the named recipient hereof. ANY UNAUTHORIZED DISCLOSURE, COPYING, DISTRIBUTION OR OTHER USE OF THE INFORMATION HEREIN IS STRICTLY PROHIBITED. If you have erroneously received this document, please notify WIPO immediately. Thank you.

