



February 15, 2011

Subject: Request for Proposal (RFP) N° PTD/11/013 for the provision of IT consultancy services for the IPC Reclassification (IPCRECLASS) Project of WIPO

Dear Sir or Madam,

1. We are pleased to invite you to submit a proposal for the provision of IT consultancy services for the IPC Reclassification (IPCRECLASS) project of 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 General Conditions as per the attached Annex II.

If you have any questions concerning WIPO's mandatory conditions (Articles 1 to 7 of Annex II - WIPO General Conditions), these questions should be submitted as queries in accordance with paragraphs 14, 15 and 16 below.

3. To enable you to submit a proposal, please find attached:
 - (a) Annex I: Terms of Reference (TOR) and its 16 Annexes¹;
 - (b) Annex II: WIPO General Conditions;
 - (c) Annex III: Price Schedule;
 - (d) Annex IV: Officials-Not-to-Benefit and Third-Party Declaration;
 - (e) Annex V: Non-disclosure Agreement for Non-Treaty Data Access by Member States and External Users;
 - (f) Annex VI: Information Security Agreement;
 - (g) Annex VII: Acknowledgement Form

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

/...

¹ Kindly note that "Annex ..." (with Roman numerals I, II, III, IV, V, VI, VII) refers to the main documents and "Annex ..." (with numerals 1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16) pertains to the documents that compose the Terms of Reference.

I. RFP SUBMISSION: INSTRUCTIONS FOR COMPLETION

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

Proposal Submission Format and Deadline*Submission of proposals via the WIPO e-Tendering System:*

5. It would be preferable to submit your offer using the WIPO e-Tendering System at <https://in-tendhost.co.uk/wipo/>.

6. However, depending on the quality of your Internet connection, it should be noted that large-sized files (over and above 15 MB) may be difficult to upload. In this case WIPO recommends submitting the offer in accordance with paragraph 7 below (submission by mail).

Submission of proposals by mail:

7. Should you prefer to submit your proposal in hard copy format by postal service, please follow the instructions provided under paragraphs 7.1 to 7.3 below.

- 7.1 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.

- 7.2 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/11/013 – IT Consultancy Services for the IPC Reclassification Project of WIPO

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

- 7.3 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 an event, WIPO disclaims any responsibility for maintaining the confidentiality of the bid.

Deadline:

8. Proposals must be received by WIPO at the above address on or before **12 midnight, March 14, 2011 (CET)**. 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 10 below.

Facsimile proposals, e-mail proposals or proposals that are not duly signed are not acceptable and will not be considered.

Acknowledgment Form and Intent to Bid

9. We would appreciate it if you could inform us of the following:
- (a) whether or not you intend to submit a proposal and
 - (b) whether your proposal will be submitted electronically via the WIPO e-Tendering System or sent by mail

by completing the attached Annex VII - Acknowledgement Form and returning it to us as soon as possible via the WIPO e-Tendering System or by fax at +41 (0)22 338 8210.

RFP Amendments

10. WIPO reserves the right to modify and/or amend this RFP in any way it may deem necessary. Amendments to this RFP, if any, will be posted at WIPO's e-Tendering System (<https://in-tendhost.co.uk/wipo/>). In such a case, the System will automatically notify all vendors who have expressed interest in the tender. Vendors are therefore advised to log into the System immediately upon receipt of said notification in order to obtain information about the amendments.

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

11. 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

12. 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.
13. 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

14. Queries concerning the technical, legal or commercial aspects of this RFP should be sent via the correspondence tool of the WIPO e-Tendering System by **12 midnight, March 1, 2011 (CET)**.
15. A consolidated and anonymous list of all queries received, together with WIPO's answers, will be published at the designated area within WIPO's e-Tendering System.
16. Due to the tight time schedule, WIPO will not be in a position to respond to a second round of queries.

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

- (a) Your company information and qualifications;

A brief description of your firm's qualifications providing:

- (i) company size, location(s), history and executive information;
- (ii) description of at least two similar projects which your firm has recently carried out successfully, including objectives, scope, the approach followed, the team size, the results and the implementation experience as well as client contact references and an indication that WIPO can undertake an independent verification of the references;
- (iii) description of other similar assignments in addition to paragraph 17.a.ii above;
- (iv) references to current and/or previous UN engagements;
- (v) internationally recognized certifications, such as local government security certifications and the like that will facilitate our evaluation of your firm's substantive reliability and financial and managerial capacity;
- (vi) summary of your firm's financial position over the last three years. (WIPO reserves the right to gather the same information from any other source that may be deemed relevant.)

- (b) Your Firm's understanding of the requirements for services;

Include any assumptions, as well as comments on the definition of tasks, support documentation and proposed time schedules as indicated in the Terms of Reference and other annexes, or as you may otherwise believe to be necessary.

- (c) Proposed approach and methodology for carrying out the tasks related to WIPO requirements;
- (d) Proposed system design that includes, but not limited to, architecture, components, modules and data definition;
- (e) Annex IV: Officials-Not-to-Benefit and Third-Party Declaration, signed;
- (f) Annex VI: Information Security Agreement, duly completed and signed;
- (g) Annex V: Non-disclosure Agreement for Non-Treaty Data Access by Member States and External Users, duly completed and signed;
- (h) A copy of your proposed Maintenance Service Level Agreement.

Financial Component

18. Your financial offer must be all-inclusive, fixed-price quoted in Swiss francs (excluding VAT) and in accordance to Annex III (Price Schedule). It 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 Annex I (Terms of Reference).

19. 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.

20. Please note that WIPO does not accept contracts or other form of undertaking which require a payment or payments on account, in advance of the delivery of products or the performance of services, except where normal commercial practice or the interests of WIPO so require. Should your offer include any form of advanced payment, a specific justification would be required.

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, experience and financial stability;
- (b) Your firm's understanding of the requirements for services;
- (c) Proposed approach and methodology for carrying out the tasks in developing the system;
- (d) Proposed system design including, but not limited to, architecture, components, modules and data definition;
- (e) Overall risk analysis and
- (f) Price and other financial terms and conditions.

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

III. SCOPE OF THE CONTRACT

22. The successful bidder will be awarded a contract for the duration of the assignment as described in Appendix 12 (Implementation Planning) of Annex I.

IV. ADDITIONAL INFORMATION

23. 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 deemed to be the most responsive to requirements set forth in the solicitation documents.

24. 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 WIPO reference 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

25. 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

26. Your proposal shall be disqualified if:

- (a) Your proposal is late;
- (b) Your proposal is sent by fax or E-mail;
- (c) Your proposal is not signed*;
- (d) Your proposal did not include the Officials-Not-to-Benefit and Third-Party declaration, or the declaration was unsigned *;
- (e) 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

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

VIII. CANCELLATION

28. 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,

[signature on file]

Giorgio Fraternali
Deputy Director and Head
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.