

**ANNEX I**

**TO**

**REQUEST FOR PROPOSAL**

**No. PTD/14/019**

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**FINAL**

**TERMS OF REFERENCE**

**EPCT CUSTOMER SUPPORT SOLUTIONS**

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## 1. BACKGROUND

### 1.1 WIPO AND PCT BACKGROUND

The World Intellectual Property Organization (WIPO) is an intergovernmental organization with its 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, including the administration of the Patent Cooperation Treaty (PCT) System.

The PCT system, WIPO's most successful IP service, allows users to seek patent protection simultaneously in a large number of countries by filing a single patent application.

The system is widely used; in 2012 some 200,000 PCT applications were filed in the 144 member States of the PCT.

ePCT is a new service provided by WIPO that allows applicants to access online their confidential international application files at WIPO. ePCT was first made available to a limited number of pilot participants in early 2011 and is being gradually extended. In its current phase, users are offered online secure file inspection and the possibility to upload documents to their applications. Additional secure online services are also foreseen that permit applicants to manage and interact with their international applications electronically by performing a wide range of actions directly online. ePCT is a much sought-after service that has tens of thousands of potential users (not necessarily PCT experts or IT specialists).

### 1.2 EPCT CUSTOMER SUPPORT

WIPO PCT eServices (the ePCT customer support unit within PCT) has been using a customized OTRS-based solution to record and follow up external customer service requests related to ePCT web application.

This solution did not meet some ePCT service specific customer support requirements.

In order to replace this existing solution, WIPO commissioned an external expert consultant to explore the available customer support software products on the market and provide guidance on the most suitable solution for ePCT.

The conclusions of the study recommended **Kana Express** and **Cherwell** as the most appropriate solutions with regards to ePCT's requirements.

## **2. OBJECTIVES OF THE RFP**

The objective of this Request for Proposal is to seek the most qualified company to deliver a customer support solution based either on **Kana Express** or **Cherwell**, including maintenance and initial support services for its implementation.

## **3. SCOPE OF THE RFP**

The scope of this RFP includes the software product, the delivery of the product, the installation, the training, the initial assistance to the configuration as well as the maintenance of the customer support solution based either on Kana express or Cherwell.

The expected solution will be deployed in the premises of WIPO (SaaS is not being considered at this stage). The basic Hardware (Servers, storage systems, Network and workstations) and Software (OS, DBMS, and web servers) will be provided by WIPO. To this end the bidders will be required to provide detailed hardware and software requirements for test and production environments.

## **4. CUSTOMER SERVICE SOLUTION REQUIREMENTS**

### **4.1 USER REQUIREMENTS**

The requested services shall take into account the following requirements:

- Authentication management for support staff, and possibly use of WIPO certificates and any other relevant means of authentication <sup>(1)</sup> for external customers.
- Automatic submission of tickets online
- Knowledge base options for internal and public use
- Customization of login pages.
- Anonymous access to FAQ / Knowledge base
- Automatic ticket creation from email
- Ability to plugin to external IDM for authenticating external users
- Ability to cut and paste images into ticket responses
- Ability to offer online Multilanguage chat
- Ability to handle multiple languages (including Asian languages such as: Japanese, Korean and Chinese)
- Management reporting tools (statistics).

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<sup>1</sup> An RFP is being run to review the authentication and access management tools where other means of authentication may be considered. Therefore multiple alternative authentication means may be considered an asset.

## **4.2 DEPLOYMENT REQUIREMENTS**

- The deployment of the kana-based customer support solution will be carried out according to the following provisional plan :

Phase 1: 2014

Delivery of a solution starting with 15 user agents and an unlimited number of users

Phase 2: 2015 onwards

It is expected to gradually deploy user agents up to a foreseeable number of 150/200.

- The bidder is requested to provide hardware and software requirements so that the hosting of the proposed solution can be anticipated and integrated in the overall infrastructure.
- WIPO will be ready to provide support during the installation and deployment phases of the proposed solution, providing that the bidder specifies when and where such support is required. To this end an estimate of the required effort for obvious resource planning purpose is required.
- The bidder is requested to provide clear and detailed indications so as to demonstrate how his offer can fit in WIPO existing infrastructure and in particular with the high availability and security requirements (duplicate data centers, virtualized servers, existing oracle based solutions, disaster recovery planning)

## **5. EXPECTED OFFERS**

The bidders are expected to provide an offer that meets the above technical and deployment requirements. In addition the bidder's attention is drawn on the fact that any incomplete offer may be rejected. The bidder must in particular provide adequate responses to the questions and requests formulated in the following documents:

1. General and Technical Response Requirements (Annex III-A)
2. Financial Response Requirements (Annex III-B)

## **6. EVALUATION OF THE OFFERS**

The offers received from the bidders will be evaluated based on the following criteria:

- Bidder's qualifications and proven references
- Bidder's financial stability
- Bidders technical ability to deliver customer solution based either on Kana or Cherwell
- Bidders financial offer

Preference will be given to solutions that scale up reasonably in terms of cost as we expect the need to grow from 10 agents up to 150/200 agents in 3 years.

The evaluation will be carried out based on the offers made and in particular on the responses provided in the price schedule document and in the technical responses requirements document.

It is expected that these responses include (but are not limited to) the following information:

- Software cost (indicating in particular the licensing model)
- Maintenance cost (separating the actual maintenance cost from license fees if any)
- Available maintenance options (levels of service), and which option is recommended
- Software components versions

The above informations will be further detailed in the technical response requirements.