IDB Inter-American Development Bank

REQUEST FOR EXPRESSIONS OF INTEREST CONSULTING SERVICES

Selection # as assigned by e-Tool: PE-T1434-P001
Selection Method: Simplified Competitive Selection
Country: Peru
Sector: Competitiveness, Technology and Innovation
Funding – TC #: ATN/KK-18542-PE
Project #: PE-T1434
TC name: Applying artificial intelligence (AI) and machine learning to upgrade the IP administration system in Peru
Description of Services: Consultancy for Design proof of concept using Artificial Intelligence to upgrade the IP system of INDECOPI
Link to TC document: https://www.iadb.org/es/project/PE-T1434

The Inter-American Development Bank (IDB) is executing the above mentioned operation. For this operation, the IDB intends to contract consulting services described in this Request for Expressions of Interest.
Expressions of interest must be delivered using the IDB Portal for Bank Executed Operations (http://beo-procurement.iadb.org/home) by**: March 26, 2021 at 5:00 P.M. (Washington D.C. Time)**.

The consulting services ("the Services") include the Design proof of concept using Artificial Intelligence to upgrade the Intellectual Property (IP) system of the National Institute for the Defense of Competition and Protection of Intellectual Property – INDECOPI. The consulting service is expected to be completed in 24 months, and the estimated amount is USD 245,000.00.

Eligible consulting firms will be selected in accordance with the procedures set out in the Inter-American Development Bank: *Policy for the Selection and Contracting of Consulting firms for Bank-executed Operational Work* - GN-2765-1. All eligible consulting firms, as defined in the Policy may express an interest. If the Consulting Firm is presented in a Consortium, it will designate one of them as a representative, and the latter will be responsible for the communications, the registration in the portal and for submitting the corresponding documents.

The IDB now invites eligible consulting firms to indicate their interest in providing the services described above in the draft summary of the intended Terms of Reference for the assignment. Interested consulting firms must provide information establishing that they are qualified to perform the Services (brochures, description of similar assignments, experience in similar conditions, availability of appropriate skills among staff, etc.). Eligible consulting firms may associate in a form of a Joint Venture or a sub-consultancy agreement to enhance their qualifications. Such association or Joint Venture shall appoint one of the firms as the representative.

Interested eligible consulting firms may obtain further information during office hours, 09:00 AM to 05:00 PM, (Washington D.C. Time) by sending an email to: gcrespi@iadb.org, rafaelcas@iadb.org and lorenamir@iadb.org

Inter-American Development Bank
Division: Competitiveness, Technology and Innovation
Attn: Gustavo Crespi, Team Leader

Calle Dean Valdivia Nro. 148 Piso 21 San Isidro, Lima – Peru
Email: gcrespi@iadb.org, rafaelcas@iadb.org, lorenamir@iadb.org
Web site: www.iadb.org

Draft Summary of Terms of Reference

The National Institute for the Defense of Competition and Protection of Intellectual Property – INDECOPI, is a Specialized Public Organization attached to the Presidency of the Council of Ministers (PCM), with legal status of internal public law. INDECOPI provides services to end users (citizens, government entities and companies) within the framework of its subjects of competence (Intellectual Property, Consumer Protection, Bureaucratic Barriers, Free Competition, Bankruptcy Procedures, Unfair Competition, and Dumping and Subsidies), for which purpose it has systems and applications that support said rendering of services, however, currently, these tools are old and show deficiencies for an adequate rendering of services to users, thus presenting relevant gaps in Information Technology and Communication (ICT) and Digital Government.

One of the most requested services at INDECOPI is the registration of trademarks, which includes the processing and evaluation of the corresponding forms and required documents, as well as a prior advisory service through which users consult the viability of their trademark proposals and receive technical support from INDECOPI, leading them to the filing of their trademark applications.

Currently, the figurative or image search service, which allows INDECOPI to identify whether there are registered trademarks or trademark applications processed at INDECOPI that include figurative similar or identical elements to the trademark under evaluation, takes several days to be assisted. Moreover, there is no registry or database that stores the evaluations carried out previously, with the risk of concluding in a new analysis with results that are inconsistent with the results of the previous exam, which altogether leads to a long service time for the preparation of the report that is sent to the users.

it is necessary to have modern instruments that allow speeding up the procedure, as well as answering queries in real time and with updated information. There is a need to explore the use and incorporation of artificial intelligence into the INDECOPI's system to serve the citizens in a timely and massive manner. In this context, the IDB has approved this Technical Cooperation with the main goal to support strengthening the institutional capacity of INDECOPI, specifically by optimizing and simplifying its activities and procedures to improve the attention of the requests and provide services with enhanced predictability.

The objective of this consultancy is to design solutions that take advantage of the potential of artificial intelligence for the development of tools that will allow the better management and administration of trademark registration and citizen attention services of INDECOPI. The service includes the collection of information, design prototype services, analyze the requirements of the Integrations to the trademark registration file tracking system, and the capacity building of the INDECOPI personnel.

Additional information:

Data organization at INDECOPI:

- Trademarks are registered in two phases, using two systems:
  a) Trademark virtual application registration: It receives the registration attempts of a brand, before going to the core system.
  b) File Tracking System (SSE - Sistema de Seguimiento de Expedientes in Spanish): Core system that stores bibliographic data, headlines, actions or monitoring of a trademark.

- The data used by trademark systems are found in Databases.
- The images of the trademarks are stored in a file server named with the file number to which they

refer, this is the only relationship with the database.

- The documentation of the physical files that are being processed digitally in a file system due to the pandemic are not related to a database record. (Only one taxonomy has been defined where the information is stored in a folder with the file number).

Data storage:

- Currently the data is in the Oracle11g R2 11.2.0.4 Enterprise Edition Database, in cluster mode, made up of 4 nodes, which allow high availability, likewise the information is stored in an exclusive storage configured in ASM mode, INDECOPI manage mechanisms of backup with a rman and expdp strategy, and the backups are stored in an external repository under a service with Iron Mountain.
- The information is stored in 2 main schemes:
  a) SSE scheme, where the core information of the system used by the office of the Directorate of Distinctive Signs (DSD - Dirección de Signos Distintivos in Spanish) is located,
  b) Scheme USR_DSD_VIRTUAL, for the data that comes from the records made by the virtual mechanisms that provide citizens with the registration of their trademark application.

Data size:

- SSE Scheme (indecopi7): 50 GB
- Scheme USR_DSD_VIRTUAL (indecopi7): 1.5 GB
- Image space on file servers: There is approximately 36 GB which corresponds to a total of 430,000 images.

Preferred programming language:

- For the integration points that need to be installed in the INDECOPI infrastructure, the following must be considered:
  a) For the Front-End: It will be deployed on an Apache server and the technology to use is Angular in the current version.
  b) For the Back-End: A REST service will be generated in Java, the same that will be deployed in a Weblogic 12c in WAR format.
  c) The REST service must have communication with our authorization API.
  d) For data storage, Oracle 11g will be used.

- As shown in the following image: