**The Internet Society**

**on behalf of**

**The IETF Administrative Oversight Committee**

<u>REQUEST FOR PROPOSALS</u>

for

**Requirements Development for Remote Participation Services**

**Date of Issuance:  October 19, 2011**
**Proposal Submission Deadline: November 1, 2011 no later than 5:00 P.M. EDT**

**IETF Request for Proposals**

**Requirements Development for Remote Participation Services**

The Internet Society ("ISOC") on behalf of the IETF Administrative Oversight Committee (IAOC) is soliciting this Request for Proposals ("RFP") to develop the specifications for Remote Participation Services. Those submitting a Proposal ("Vendor") shall do so in accordance with this RFP.

## I. Introduction

The purpose of this project is to develop consensus on a set of specifications for IETF Remote Participation Services (RPS) to enhance remote participation at IETF meetings, interim and virtual working group meetings.

## II. Instructions and Procedures

### A. Submissions

Proposals must be received via email at rpelletier@isoc.org no later than November 1, 2011 no later than 5:00 P.M. EDT.

Vendor assumes all risk and responsibility for submission of its Proposal by the above deadline. ISOC shall have no responsibility for non-receipt of Proposals due to network or system failures, outages, delays or other events beyond its reasonable control.

All Proposals shall become the property of the Internet Society.

### B. Questions and Inquiries

Any inquiries regarding this RFP must be submitted in writing to the email address listed in II.A above. Other than such inquiries, Vendors are prohibited from contacting any person or institution involved in the selection process concerning this RFP.

All questions/inquiries must be submitted in writing and must be received no later than midnight EDT on October 24, 2011.

Responses to questions and inquiries shall be posted on the IAOC website, <http://iaoc.ietf.org/rfpsrfis.html>, by midnight, EDT, October 27, 2011.

### C. Addenda and Updates

Any addenda and updates to this RFP shall be posted on the IAOC website, <http://iaoc.ietf.org/rfpsrfis.html>. Each Vendor is responsible for checking the IAOC website prior to submission of any Proposal to ensure that it has complied with all addenda and updates to this RFP.

D.    Selection Criteria

Each Proposal must specifically address each of the selection criteria listed in Section III below in a format corresponding to this RFP.  Each Proposal should also be accompanied by any technical or product literature that the Vendor wishes the IAOC and the Internet Society to consider.

The IAOC, on behalf of Internet Society, shall select from among those submitting proposals those Vendors which in its discretion are the most qualified to perform the work.

E.    Cancellation; Rejection

The Internet Society reserves the right to cancel this RFP, in whole or in part, at any time.  The IAOC may reject any or all Proposals received in response to this RFP in its sole discretion. The Internet Society makes no guarantee or commitment to purchase, license or procure any goods or services resulting from this RFP.

F.    Costs and Expenses

Each Vendor is responsible for its own costs and expenses involved in preparing and submitting its Proposal and any supplemental information requested by the IAOC. The Internet Society shall not reimburse any such costs or expenses.

G.    Public Information

The IETF is a community committed to transparency in the manner in which it conducts its operations.  Accordingly, the following principles will apply to the Proposal and negotiations:

The names of all Vendors submitting Proposals may be announced publicly, but the Proposals and individual negotiations with Vendors will not be publicly announced.

Any Agreement negotiated with a Vendor, excluding cost, will be made public after execution.

H.    Intellectual Property Rights

All work performed, all software and other materials developed by the Vendor under the Agreement, shall be "works-for-hire" and shall be owned exclusively by the IETF Trust, and the Vendor shall not obtain or retain any rights or licenses from any work.

I.    Relationships

Describe any relationship between your company, or any parent, subsidiary or related company, or any director or officer of any of them, with the Internet Society,

IAOC, IETF or the IETF Trust, or any employee, director, officer or consultant of any of them.

**III.   Selection**

A      Selection Procedure

  1. The IAOC will, or will cause, the review and evaluation of each proposal to determine if the Vendor is qualified.
  2. The IAOC will contact references.
  3. The IAOC will conduct interviews and may require oral presentations.
  4. Requests for clarity may be made of the Vendor.
  5. Qualified Vendor will be notified of their selection for advancement to the negotiation phase by November 3, 2011.

B.      Selection Criteria as Judged by the IAOC

The IAOC must have confidence in the Vendor - its qualifications, experience, capabilities, personnel, timely performance, and professionalism.  To that end the IAOC will evaluate the following to inform its decision:

  1. Vendor Qualifications and Experience performing similar services
  2. Key Personnel qualifications
  3. Vendor Ability to Meet Requirements
  4. Proposal as a reflection of the Vendor's understanding of the Supported Organizations, their processes, culture, and the scope of work and methodologies
  5. Oral presentation, if conducted
  6. Cost to furnish the services in USD. (Note: The lowest cost offer will not necessarily be awarded a contract.)

**IV.   Proposal Format**
A.      Proposal Submissions

Proposals shall be submitted using the following format:

  1. Transmittal letter with signature of authorized representative
  2. Executive Summary
  3. Table of Contents
  4. Experience, Qualifications and Accomplishments
  5. Key Personnel
  6. Cost
  7. References (Two references attesting to performance)
  8. Resumes of Key Personnel
  9. Subcontractor Information (if any)
  10. Assumptions
  11. IPR (if any)
  12. Relationships

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## Statement of work

### Background

The IETF holds three week-long, face-to-face meetings each year, at venues around the world, with an average of 1100 on-site attendees and an unknown number of remote participants.

The IETF has supported remote meeting participation over the Internet for many years. For example, the audio of each session is made available in real time so that remote participants can listen to the proceedings. Instant messaging is supported by having a jabber room 'conference' for each session, so that comments from remote participants can be relayed to people in the face-to-face meeting and to permit "side" exchanges that comment on material being presented. In addition, we have experimented with bi-directional audio support for remote presenters, as well as video broadcasting of the face-to-face meeting, but these more advanced features have, to date, have proved difficult to scale.

Occasionally there is a presentation by a remote participant. These are arranged in an ad hoc manner and currently require special attention both to the logistics beforehand and to the conduct of the presentation, such as to permit the presenter to speak to the attendees and to control the flow of interaction with the speaker and the attendees.

Each session, including the plenaries, has the same basic functional arrangement: Session chairs and panelists are at a table at the front, with a number of microphones. Presentation slides are displayed on a screen through a computer projector. The audience has access to additional microphones, for interacting with speakers. Some plenary sessions also include display of real-time transcription of audio into text. A session has an agenda. A session is mixed between presentations and conversations about them and about other material, to discuss and resolve concerns and ideas. The normal interaction etiquette is to sequence through audience members who are at the microphones, in order. However some interactions become multi-person conversations, including interactions between two or more audience participants.

Remote participation can include those who are at the IETF meeting, as well as those who are not. It is common for an attendee to sit in one session but monitor another. It is also common for those attending a session to monitor and contribute to the instant messaging (jabber) room for that same session. This permits the "side" exchanges.

### Objective

The IETF wishes to support enhanced remote participation that is as seamless as possible, approaching the quality of direct physical attendance for the various roles, including chair, presenter and simple attendee. The purpose of this current work is to develop the functional specifications for IETF Remote Participation Services (RPS) that enables this enhanced remote participation in meeting sessions.

The specification will aid in efforts to improve the experience of remote (and local) participants. It will also provide guidance for reducing the meeting coordination burden on WG Chairs and

for simplifying the management and administration of remote participation tools by support personnel.

It is likely that different levels or types of service will be possible, depending on a variety of factors. The specification will consider and propose alternative functional choices and discuss their costs, feasibility and tradeoffs. The specification will cover requirements for the usual range of consumer "client" platforms and for any server-based functions that are needed.

**Session Environments**

There are four environments for that will use the RPS:
*1. IETF Meeting Group Sessions*
There are about 150 sessions, with up to 8 being simultaneous at any one time. A session varies in size from twenty to two hundred on-site participants.

*2. IETF Meeting Plenary Sessions*
There are two plenaries. On-site attendance at plenary sessions averages 700. The number of speakers at the front of the room ranges up to twenty.

3. Interim Group Meetings
In addition to sessions during one of the three regular meetings, there can be as many as thirty Working Group Meetings held throughout the world annually, serving a range of on-site participants from 15 to 50 and an unknown number of remote participants.

4. Virtual Group Meetings
There are currently 30-50 Virtual Group Meetings held throughout the year annually, serving 15-75 online participants from all parts of the globe. These have no physical, on-site instantiation and are conducted entirely through teleconferencing tools.

**Known Challenges**

The contractor is expected to highlight development and operational challenges to the functions that are defined. Experience has already demonstrated a few:
1. Erratic Internet performance, which can lose or delay data streams.
2. Physical integration with on-side audio-video services.
3. Seamless functional integration between remote and on-site participants, including coordination by the meeting chair.
There are surely others.

**Deliverables**

1. The IETF is seeking development of functional specifications for a suite of tools that enable Remote Participation Services, meeting the needs described above, ideally enabling an experience for remote attendees that rivals that of on-site attendees.
2. The specifications shall rely solely upon IETF and other open standards for all communications and interactions.
3. At a minimum it is expected that the RPS will support the following real time functionality:
    a. audio, bi-directional
    b. video, bi-directional
    c. instant messaging
    d. slide presentations, including by remote attendees
    e. whiteboard, for collaborative document development

f. conference control and moderation
g. transcription and broadcast of audio to text in real-time
h. ability to conduct and participate in straw polls.

In addition to real-time participation support, the service must support recording of an entire session, using standards-based encoding, to permit integration into the IETF meeting proceedings system.

Other capabilities, such as virtual reality room representation, may be proposed, if deemed feasible and appropriate.

The specification may be provided in segments that call for phased availability of functions, starting with those that are readily available to those that are more ambitious but deemed feasible within the next five years.

**Timeline**

The contractor will observe group and plenary sessions at IETF 82 (Fall 2011 in Taipei) and conduct interviews with vendor teams (at a minimum, Meetecho, Adobe, Citrix and Webex when possible), the Network Operations Center (NOC) volunteers, remote participants, and those individuals who run the working group and plenary sessions. After gathering all of this input, the contractor will prepare an initial specification for review by the IETF Tools Team and the vmeet mail list participants. Following these discussions, the contractor will update the specification as required.

Specifications will be circulated as IETF Internet-Drafts (I-D). It is expected that an initial I-D containing the specifications will be developed prior to IETF 83 (Spring 2012) and a completed I-D will be delivered prior to IETF 84 (Summer 2012).