

# CREATIVE INDUSTRIES PROGRAMME

CARIBBEAN REGIONAL ENTREPRENEURIAL ASSET COMMERCIALIZATION HUB  
RG-T2536

TERMS OF REFERENCE

## GENERAL BACKGROUND

The Caribbean's traditional export sectors (i.e. agriculture and tourism) have stagnated due to lack of economies of scale and/or high production costs. Innovation can help these economies increase value-added and capture a greater share of the benefits by, among other factors, monetizing intellectual property (IP) linked to those sectors. Barbados leads the LAC region in its innovation capabilities ranking 41 in the Global Innovation Index 2014<sup>1</sup>. Guyana follows at 80, Jamaica at 82 and Trinidad and Tobago at 90 revealing relatively weak performance amongst the larger economies of the Caribbean. IPRs are instrumental for SMEs to protect and build on their innovations, gain access to higher market value, signal current and prospective investors and partners, and open up new commercial pathways<sup>2</sup>. Improved management of IEAs in the areas of technological innovation, brand value, and the creative industries would increase firms' market value and clearly strategize product marketing, identifying partners and suppliers, entering export markets, acquiring technology and facilitating business transactions.

Effective strategies to monetize knowledge assets in firms (Intangible Entrepreneurial Assets, or IEA<sup>3</sup>s) through improved commercialization of Intellectual Property Rights (IPRs) would narrow the productivity gap of Caribbean entrepreneurs relative to global competitors and capture more income opportunities for these firms. In the long run, improved commercialization efforts will result in increased innovation and productivity growth that will boost competitiveness and economic growth in the region<sup>4</sup>.

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<sup>1</sup> The Global Innovation Index ranks the innovation capabilities of 143 world economies. The report is co-published by Cornell University, INSEAD, and the World Intellectual Property Organization (WIPO, an agency of the United Nations, UN).

<sup>2</sup> OECD (2011), Intellectual Assets and Innovation: The SME Dimension, OECD Studies on SMEs and Entrepreneurship, OECD Publishing. <http://dx.doi.org/10.1787/9789264118263-en>

<sup>3</sup> IEAs have become important to the firm's business strategy model. Indeed, the intangible value of companies has, over the years, greatly shifted to supersede its book value. According to the International Integrating Reporting Committee, in 1975, more than 80 percent of a company's value was linked to its physical and financial assets. By 2010, this figure had fallen to less than 20 percent, with "intangible" assets playing an increasingly central role in driving market value.

<sup>4</sup> Ruprah, Inder. 2014. Caribbean Sclerosis.

It follows that the objective of the project is to foster innovation and competitiveness in Caribbean SMEs <sup>5</sup> through the creation of a Regional Entrepreneurial Assets Commercialization Hub (REACH) that will assist companies in commercializing their intellectual assets.

The project will establish facilities that will provide support services for improved management through three main categories of available IPR tools (i) patents, industrial designs <sup>3</sup> and utility models (technology transfer) (ii) copyrights in the Creative Industries, and (iii) trademarks and product branding of exporting companies. Lessons from the REACH will feed into the design of an action plan establishing a framework for the REACH that will incorporate practical solutions to sustain implementation of the Caribbean REACH.

The project consists of four components:

1. Landscape analysis and survey: The landscape analysis will map the Caribbean's local and donor initiatives on IP commercialization. The survey will gather qualitative and quantitative data on innovative firms aiming to assess current IP use and demand, knowledge of IP tools, and firms' attitudes and perceptions towards the IP system.
2. Stakeholder sensitization: Selected project launches and development of the REACH platform will promote REACH and raise awareness of incorporating IP tools into business models.
3. Building commercialization capabilities for public and private stakeholders: SMEs will be trained and competitively selected SMEs will undergo mentorship programmes in the three thematic areas: (i) technology commercialization (patents, industrial designs, and utility models) (ii) creative industries intellectual asset management (i.e. copyrights) (iii) and product branding value capturing (trademarks and geographical indicators).
4. Sustaining implementation of REACH: A self-sustaining business plan will be developed to advise on the next steps that will ensure sustainability.

With the implementation of this project, the region will have a platform to transform intellectual ideas into profitable business models and to capture more value in export markets.

## **II. Consultancy Objective**

The objective of this TOR is to solicit proposals for a regional programme in the creative industries.

Component three of the project (Building Commercialization Capabilities for Public and Private Stakeholders) involves the implementation of a training and mentorship programme for three thematic areas, one being the creative industries. The purpose is to help build the commercialization capabilities of competitively selected creative entrepreneurs through training

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<sup>5</sup> SMEs with high innovative potential are the target. The definition of an SME varies across Caribbean countries. For the purpose of this project, the SME will be defined as less than 50 workers, with assets less than \$800,000 and sales less than \$1.6 million. See ECLAC's "SME Competitiveness in the Caribbean: Challenges and Opportunities". 2009. [http://www.cepal.org/portofspain/noticias/paginas/5/35505/sme\\_competitiveness\\_-\\_final\\_version.pdf](http://www.cepal.org/portofspain/noticias/paginas/5/35505/sme_competitiveness_-_final_version.pdf)

and mentorship programmes. Under this thematic area, the programme will assist competitively selected creators in identifying and managing their intellectual assets in order to generate new revenue streams. Training sessions for creators will help in their understanding and promoting the use of IP as collateral for financing creative projects.

### III. ACTIVITIES

The consulting firm is responsible for a programme that will equip participants with the tools necessary to commercialize their creative content. This consultancy is expected to incorporate the following elements:

**3.1 Launch of a Competition to Competitively Select the Participants:** Participants in the programme should be competitively selected through an open, regional call for interested applicants. The applications should be short-listed and selected based on at least the following criteria (i) quality and content of their work (ii) potential for commercialization and (iii) their team members' nationality. It is then expected that the consulting firm will submit a brief Project Progress Report highlighting the following:

- a. Using the project report template (to be forwarded), document the following: a short background on the consulting firm including highlights of success stories from winners of past programmes led by the consulting firm, identification of when the call for applications will be announced and closed, number and types of responses to the call for applications in the Caribbean, criteria used to select final applicants, list of final applicants, confirmation of their acceptance to enter the programme, and timeline with next steps/milestones for the project.
- b. Spreadsheet listing all qualified applications.
- c. Spreadsheet listing the competitively selected creative entrepreneurs including their nationalities and a short abstract of their work. Participants being funded from the REACH contribution must be CARICOM nationals with a preference for a higher ratio of participants funded by REACH to be from REACH's beneficiary countries (see RG-T2536 for this listing).
- d. CVs of potential coordinators and mentors/specialists that will be implementing the programme.
- e. Proposed content of the programme to be executed.
- f. Attachments of any media or press releases corresponding to the competition including marketing/promotional advertising.

**3.2 Implementation of the Programme:** The programme can be executed online but should entail an in-person/face-to-face component for the trainings and for the opportunities to dialogue with mentors and to network with potential financiers. The training content of the programme must encapsulate the following elements (i) the basics of intellectual property with a special emphasis on copyright and the management of creative content (ii) monetization strategies for creative content and (iii) basic strategies for pitching to investors. It is expected that participants will be matched with mentors who can give guided support to developing the proposed ideas of the creative entrepreneurs in the

programme. The final report of the consultancy should capture this element by including the following items:

- a. Short descriptions of the final content of the trainings held during the programme with the expectation that content from the World Intellectual Property Organization (WIPO) will be incorporated into the curriculum
- b. Final list and CVs of the Coordinators, Mentors, and Competitively Selected Creative Entrepreneurs
- c. Simple survey documenting each participant's feedback, namely "the % of firms / persons who indicate increased knowledge of IP tools available" and "the % of firms who perceive the support provided by the REACH (in this case through the training programme executed by the consultancy firm) assisted in their adoption of IP in their business strategy".

**3.3 The Pitch to a Panel of Experts:** The programme will culminate in the selected participants making a pitch to a panel of experts, preferably experts who have the financial capital to, if they so choose, invest in the idea being pitched. The final report of the consultancy should capture this element by including the following items:

- a. A short list including bios of the panelists that will be judging the pitches
- b. The scoring sheets (if available) and final rankings and results of the pitching competition including snippets of responses from the panelists and whether any deals were secured or promised as a result of the pitch.

**3.4 Final Project Report:** The final Project Report will document the results of the programme including elements from 3.2 and 3.3. In addition, the following items should be included:

- a. Attachment with the breakdown of expenses incurred, status of activities, and any related supporting documents to satisfy the contract.
- b. Documentation of the experiences of the participants including their ability to network or promising connections that, with support, can result in support for their production.
- c. The next steps for the winner(s) of the pitching competition (in this case, the mentorship support programme).
- d. Lessons learned from the implementation of the project including any risks mitigated, assessment of the potential for actual monetization of the selected projects, assessment of the support provided by the IDB funding, etc.
- e. Attachments of any media or press releases corresponding to the competition
- f. The consulting firm may also be asked to complete, at a later date, an update on the status of the beneficiaries from the project to include in the technical cooperation's results matrix.

#### **IV. DELIVERABLES**

1. Submission of Inception Report which should include the following: Short description of the programme including previous success stories, Project Timelines for intended Activities, and the Procurement Plan for the programme.
2. Short Progress Report documenting the Call for Competition and capturing the elements outlined in 3.1, including a list of the competitively selected creative entrepreneurs.
3. Final Project Report which incorporates elements 3.2, 3.3, and 3.4.

## **V. SCHEDULE OF PAYMENTS**

- 30% upon signature of the contract and submission of Deliverable 1.
- 50% upon submission of Deliverable 2.
- 20% upon submission and approval of Final Project Report (Deliverable 3).

## **VI. CHARACTERISTICS OF THE CONSULTANCY**

**Consultancy Category & Modality:** Products and External Services Consultant (PEC) Lump Sum

**Contract Duration:** Six months. **This consultancy must be completed by August 31<sup>st</sup>, 2017.**

### **Team Qualifications:**

- a) At least five years' demonstrated experience in producing and monetizing creative content. Experience with mentoring and training creative entrepreneurs is necessary.
- b) Strong analytical skills and demonstrated leadership ability; excellent report-writing skills.
- c) Knowledge of intellectual property tools and the IPR system as it relates to the creative industries.
- d) Profound knowledge and experience with the creative industry in the Caribbean region.
- e) Proven experience in successfully working with entrepreneurs in turning their ideas into a profitable business.
- f) Collaboration or support from other donors in the community.
- g) Strong track record in supporting entrepreneurs in the creative industries.
- h) Knowledge of current trends in the creative industries (e.g. audiovisual works, music, fashion, graphic design, Carnival, drama, literary works, arts and craft etc.).
- i) Language: Excellent written and oral communication skills in English are required.

## **VII: SUBMISSION OF PROPOSALS**

The consulting firm's proposal should include the cost of the consultancy, CVs of all key experts who will be delivering the programme and the methodology by which the consulting firm will conduct the Activities listed at sections 3.1, 3.2 and 3.3 above.

Proposals should be submitted electronically to the REACH Project Manager at email address [AdminAssistantREACH@sta.uwi.edu](mailto:AdminAssistantREACH@sta.uwi.edu).

The deadline date for receipt of proposals has been extended to **December 16<sup>th</sup>, 2016**. Late submissions will not be accepted.

## **VIII: GENERAL**

### **Coordination**

The technical responsibilities of this consultancy will be coordinated by Ignacio L. De Leon Delgado, Private Sector Development Lead Specialist (IFD/CTI). The day-to-day technical coordination of the consultancy will be the responsibility of the Executing Agency.

**Payment and Conditions of Employment:** Remuneration will be determined in accordance with Bank regulations and criteria. The Bank may additionally contribute toward travel and moving expenses, if applicable. If a candidate is not a citizen or resident of the country where he/she will be working, the Bank will assist him/her to obtain the corresponding visa or work permit. If a candidate cannot obtain a visa to work at the IDB the contractual offer will be canceled.

**Consanguinity:** Individuals with relatives working for the IDB within, and including the fourth degree of consanguinity and the second degree of affinity are not eligible for employment as staff or consultants. Candidates must be citizens of a member country of the Inter-American Development Bank.

**Diversity:** The IDB is committed to diversity and inclusion and to providing equal opportunities in employment. We embrace diversity on the basis of gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, religion, and HIV/AIDS status. We encourage women, Afro-descendants and persons of indigenous origins to apply.

## **Annex: Eligibility of Consultants and Sub-contractors**

The Consultants and its Subcontractors shall have the nationality of a Bank's member country.

### **List of Member Countries:**

Argentina, Austria, Bahamas, Barbados, Belgium, Belize, Bolivia, Brazil, Canada, Colombia, Costa Rica, Chile, Croatia, Denmark, Dominican Republic, Ecuador, El Salvador, Finland, France, Germany, Guatemala, Guyana, Haiti, Honduras, Israel, Italy, Jamaica, Japan, Mexico, Netherlands, Nicaragua, Norway, Panama, Paraguay, People's Republic of China, Peru, Portugal, Republic of Korea, Slovenia, Spain, Suriname, Sweden, Switzerland, Trinidad & Tobago, United Kingdom, United States, Uruguay and Venezuela.

A Consultant or Subcontractor meets the eligibility criteria in the following cases:

- (a) **An individual** is considered to be a national of a member country of the Bank if he or she meets either of the following requirements:
  - (i) is a citizen of a member country; or
  - (ii) Has established his/her domicile in a member country as a "bona fide" resident and is legally entitled to work in the country of domicile.
- (b) **A firm** is considered to have the nationality of a member country if it meets the two following requirements:
  - (i) is legally constituted or incorporated under the laws of a member country of the Bank; and
  - (ii) More than fifty percent (50%) of the firm's capital is owned by individuals or firms from member countries of the Bank.

All members of a JV and all subcontractors must meet the nationality criteria set forth above.

In the case that the Consulting Services Contract includes the supplying of goods and related services, all such goods and related services shall have as their origin any member country of the Bank. Goods have their origin in a member country of the Bank if they have been mined, grown, harvested, or produced in a member country of the Bank. A good has been produced when through manufacture, processing or assembly another commercially recognized article results that differ substantially in its basic characteristics, function or purposed of utility from its parts or components. For a good consisting of several individual components that need to be interconnected (either by the supplier, the purchaser or by a third party) to make the good operative and regardless of the complexity of the interconnection, the Bank considers that such good is eligible for financing if the assembly of the components took place in a member country, regardless of the origin of the components. When the good is a set of several individual goods that are normally packaged and sold commercially as a single unit, the good is considered to originate in the country where the set was packaged and shipped to the purchaser. For purpose of origin, goods labeled "made in the European Union" shall be eligible without the need to identify the corresponding specific country of the European Union. The origin of materials, parts or components of the goods or the nationality of the firm that produces, assembles, distributes or sells the goods, does not determine the origin of the goods.