

ANNEX A  
REQUEST FOR PROPOSAL (RFP) N° CCIS\_CMD/2021/776/RFP

**TERMS OF REFERENCE**

**CREATORS PLATFORM: PROGRAM MANAGEMENT TEAM AND CONTENT DELIVERY TEAM**

**I. PROJECT BACKGROUND**

1. About WIPO

The World Intellectual Property Organization (WIPO) is the global forum for intellectual property (IP) services, policy, information and cooperation. It is a self-funding agency of the United Nations, with 193 member states.

WIPO's mission is to lead the development of a balanced and effective international IP system that enables innovation and creativity for the benefit of all. Its mandate, governing bodies and procedures are set out in the WIPO Convention, which established WIPO in 1967.

Further information can be found here: <https://www.wipo.int/>.

2. About WIPO for Creators

WIPO for Creators is a consortium founded by the World Intellectual Property Organization (WIPO) and the Music Rights Awareness Foundation (MRAF) <http://musicrightsawareness.org/>.

According to its Charter, "The objective of the Consortium is to raise awareness and increase knowledge of creators' intellectual property rights and related processes required for creators to be fairly acknowledged and compensated for their work, regardless of their geographical, cultural or economic conditions."

The full WIPO for Creators Charter can be found here: [https://www.wipo.int/export/sites/www/copyright/en/management/charter\\_of\\_wipo\\_for\\_creators.pdf](https://www.wipo.int/export/sites/www/copyright/en/management/charter_of_wipo_for_creators.pdf).

According to Niclas Molinder, Chair of the MRAF, "The purpose of "WIPO for Creators" is to educate and raise awareness about fundamental IP rights so that creators the world over can be properly compensated and credited when their work is used". Source: [https://www.wipo.int/pressroom/en/articles/2020/article\\_0016.html](https://www.wipo.int/pressroom/en/articles/2020/article_0016.html).

Further information can be found here: <https://www.wipo.int/wipoforcreators/en/>.

3. About the Creators Platform

The WIPO for Creators Charter sets out that "the Consortium shall undertake activities in the following areas:

(a) Organizing conferences, seminars and programs to raise awareness of creators' rights;

**(b) Producing and managing an online platform including educational videos to inspire, raise awareness and increase knowledge of creators' rights;**

(c) Supporting the development and/or the promotion of services and IT solutions regarding creators' rights (such as systems of identifier assignment, and documentation of works, performances and recordings);

- (d) Sharing of any relevant intellectual property information and documentation, subject to confidentiality requirements as appropriate;
- (e) Cooperating on specific projects and initiatives aimed at achieving the purposes of the Consortium, including by supporting global and local initiatives to enable more individuals and collaborations around the world to make a living on their creations.”

Item (b) highlighted in bold text above is the ‘Creators Platform’, described in more detail later in this document.

#### 4. Purpose of the /RFP

As recommended in the Creators Platform Business Plan, it is foreseen that the project will rely on three types of partners:

1. A Programme Management Team
2. A Content Delivery Team
3. An IT platform and associated professional services.

The purpose of the RFP is to enable WIPO for Creators to select:

LOT 1: a Programme Management Team (PMT) to progress, manage and coordinate the build and operation of the Creators Platform on its behalf; and

LOT 2: a Content Delivery Team (CDT) to design, develop and produce the content for the Creators Platform in consultation with the PMT and the Project Board.

The IT platform and associated professional services are NOT in the scope of the present tender. Instead, the PMT is expected to assist the Project Board in scoping and specifying the platform’s technical specifications, in defining the purchase strategy, in selecting suppliers and in overseeing the platform’s build and operation phases.

Please note that suppliers may bid for either or both LOT 1 and LOT 2. There may be some practical advantages to the Project Board in managing and interfacing with a single supplier, however WIPO for Creators is primarily concerned with selecting the best supplier for each lot.

The purpose of these Terms of Reference (TOR) is to define the scope of the project, the roles of the PMT and the CDT, the basis on which candidate suppliers will be evaluated, and how the PMT and the CDT will be managed by the Project Board.

These TOR should be read in conjunction with the Mandatory Requirements (MR) and Evaluation Criteria (EC) for the PMT and the MR and EC for the CDT.

A glossary of terms is available at the end of this document.

## II. **PROJECT SCOPE**

The fundamental elements of the project are identified in these TOR as well as the Creators Platform Business Plan to be provided to applicants on a confidential basis upon signature of a Non-Disclosure Agreement. These documents constitute the baseline of the project, which may evolve overtime if needed and as directed by the Project Board.

#### 5. Description of the Creators Platform

The Creators Platform will be a free platform for creators worldwide to raise awareness and increase knowledge on creators' intellectual property rights and related processes as well as on the structure and complexities of the creative industries.

In its vision, the Creators Platform will feature innovative "By Creators, for Creators" short video content, as well as leverage and incorporate best-of-breed education services and recent innovations in the education platform technology marketplace.

From a features and functionality perspective, delivery of the Creators Platform should begin with a Minimum Viable Product (MVP) and conclude with a Final Product (FP). The content will constantly evolve and be refreshed.

The expected MVP, FP and intermediate target releases and timescales are defined in more detail below. The targets and release dates are conditional on the availability of funding and may be subject to change.

## 6. Scope of the Creators Platform

Starting with music, the Creators Platform will progressively be extended to include various other creative repertoires, including literature, visual arts, drama and audio-visual.

Produced in English, the Creators Platform will be translated into other UN languages in cooperation with WIPO's translation services.

Geographically, the scope is global and therefore targets a comprehensive and diverse spectrum of creators.

At the MVP stage, the Creators Platform will focus on globally relevant content, progressively adding content with local context in subsequent release phases.

## 7. Expected Key Features and Functionality of the Creators Platform

Although not exhaustive, the Creators Platform Final Product (FP) is expected to have the following key features and functionalities, which are aligned or refined from the Creators Platform Business Plan:

- Low barriers to use – free to creators with simple and quick profile set-up, where required, with the aspiration to be available on any connected device anywhere;
- Credible creators - locally or internationally famous creators featuring in content and/or as host/mentor characters who guide creators through the Creators Platform, perhaps user-selectable from a choice;
- Creator-centric content — for example organised by repertoire, role, and goal, to meet specific learning objectives. This enables creators to get quick and targeted information or to opt for predefined learning paths without having to spend time discovering and organising relevant content;
- Self-paced, online learning — creators can learn what they need anytime and anywhere, and progress at their own pace;
- Modularity — content is arranged in a hierarchy, with levels, including simple, self-contained, and directly useful modules consisting of small units;
- Micro-learning – educational approach that offers bite-sized, small learning units with just the necessary amount of information to help learners achieve a goal;
- Interactive challenges — enabling creators to verify what they have just learned, by answering multiple-choice or interactive questions, and to get instant feedback on their learning;
- Gamification and social rewards — for instance points or other merits on successful completion of units and modules, respectively. These are displayed on the creator's profile and may be shared at the creator's discretion on social networks. This provides recognition and positive reinforcement to encourage further learning;

- Accessibility – supporting multi-language (at least the six official languages of the UN, being Arabic, Chinese, English, French, Russian and Spanish) and digital formats accessible to users with print impairments or special access needs;
- Reference mode – to quickly provide answers to questions as they arise in real-time, including during creative processes. Consideration should be made to enabling this mode through popular smart speakers and other voice-activated devices;
- Scalable and secure – a platform that leverages the power of the cloud Preventive measures to respond to denial-of-service attacks and other essential security requirements. Scalable front-end and back-end architecture by design from the point of inception – the FP should be developed on the basis of the MVP without having to be re-designed or produced from scratch (including responsive Web design);
- Widely available content – furthering the aims of WIPO for Creators by making content available or searchable directly within other creator resources on an open or licensed basis e.g. Digital Audio Workstations, music society member portals. Thought should be applied to achieving this through a Content as a Service (CaaS) approach, which may underpin an overall technology solution design, deep search directly into the Creators Platform, and single sign-on with other platforms;
- Rich design and user experience – meeting and exceeding creators’ expectations;
- A comprehensive credential mechanism, possibly incorporating existing industry solutions and WIPO accounts, to be approved by the Project Board based on user acceptability, privacy and other considerations;
- Tracking measures and reporting – evaluating the desired benefits, monitoring and assessing the tangible impacts and creator learning outcomes to continuously refine the platform and improve the user experience - based on smart analytics, business intelligence and visualization, to provide data science capabilities in order to assess and analyze the usage and impact by various demographics, while complying with data privacy requirements;
- Community features and feedback services, such as a newsletter, discussion forum, user support and frequently asked questions services;
- Recognised qualifications – for instance a ‘certificate’ which demonstrates learning achievement to a specified level in a certain subject. For example, a WIPO for Creators Certificate in Music Rights could become a recognised and desirable qualification in the music industry;
- Back-end content upload and preview/testing facilities – so that a content expert, once suitably trained, can quickly and easily upload and assure that new or amended content is of the expected quality without reverting to technical specialists.

#### 8. Expected Creators Platform Minimum Viable Product (MVP)

The scope of the Creators Platform MVP should include:

- A single language – English, but multilingual capable;
- A single repertoire – music;
- Globally applicable content – for example generic information on the structure of the music industry and its constituent parts, the building blocks of a song and their associated rights and industry identifiers. Locally focused content is not required for the MVP;
- Multimedia, micro-learning units – including audiovisual content. The same modular, bite-size content approach to be taken through the platform iterations;
- Scalable front-end and back-end architecture by design from the point of inception – the FP should be developed on the basis of the MVP without having to be re-designed or produced from scratch (including responsive Web design);
- A feedback mechanism – essential to enable design and build assumptions to be validated, to help shape and refine future platform plans.

#### 9. Intellectual Property

All intellectual property developed under this contract shall remain the exclusive property of WIPO for Creators, as determined in accordance with its rules.

10. Travel Requirements

Most meetings should be held remotely via video conference. By exception, and with prior agreement, travel may be required for face-to-face meetings.

11. Sustainability

Please refer to the UN Global Compact (<https://www.unglobalcompact.org/>), in particular the Ten Principles which provide a framework for doing business responsibly and can be found here: <https://www.unglobalcompact.org/what-is-gc/mission/principles>.

III. **DETAILS OF MILESTONES AND SPECIFIC DELIVERABLES PER LOT 1 AND 2**



Figure 1: Creators Platform Roadmap

Figure 1 above is an overall roadmap highlighting the Creators' Platform stages, and includes deliverables that are outside the scope of Lot 1 and Lot 2. The respective roles of the PMT and the CDT and their expected deliverables at various stages of the project are detailed below.

**LOT 1:**

Lot 1 of this tender seeks to select a PMT as a long-term partner, reportable to the Project Board and which will be accountable for delivering Stage 04 and then, upon satisfactory performance and availability of funds, delivering Stages 05, 07, 09, 10 followed by 11 & 12 (divided into platform release modules) as described below.

From Stage 05 onwards, each stage (or modules for Stages 11 & 12) and associated execution work will need to be discussed in content, costed on the basis of the unit costs agreed in the contract, and validated upfront before any work commences, subject to fund availability, proposed content and timing of implementation, and work will only commence after a formal acceptance by the Project Board and on the basis of a Purchase Order.

For the avoidance of doubt, the PMT has overall responsibility to the Project Board for all Creators Platform release milestones being achieved to time, budget, scope, risk and quality; and ensuring coordination and alignment of the activities and readiness of the CDT, the technology platform producer and any other supplier(s).

The supplier selected for the PMT role is expected to produce in-house the majority of the PMT's deliverables confirmed by Project Board according to the Purchase Order. However, the selected supplier may be supported by external individuals or partner companies for specialised tasks which require specific expertise. The selected supplier will remain fully accountable and responsible for all deliverables and their quality, whether produced directly/in-house or indirectly/outsourced. It is requested that the potential suppliers detail in their proposal potential foreseen partnerships and stand ready to provide additional information about said external parties. The Project Board will reserve the right to validate proposed arrangements with external contractors if deemed necessary, prior to confirmation of each deliverable.

## 12. Key Deliverables

### **Stage 04: Service Planning**

Provide a Service Planning document that will include:

- Learning and education platform market research, including identifying options and recommendations on integrating existing solutions vs. developing tailor made solutions, in light of the goals highlighted in the Business Plan;
- A recommendation on the optimal procurement strategy for the technology platform to execute rapidly the delivery of the MVP taking into account market offerings; contracts already in place with WIPO or other international organizations, as well as technology already available to WIPO;
- A recommendation on the depth and breadth of the proposed MVP in terms of content (to be delivered in the PMT's responsibility but developed in consultation with the CDT, see Section 17 below) and a recommendation on the MVP's functionality, in order to start the project with a scalable and valuable product, and raise interest from sponsors. The recommendations should include an overall platform design draft and preliminary elements of budgeting to allow for planning and kick-off of the tender and build phase;
- A recommendation on the scale, timing and methodology for the impact assessment to be performed after the launch of the MVP;
- A structured project management roadmap based on a recognized methodology such as Prince 2, product based development or an agile approach, with milestones and gates reflecting the different activities undertaken by each stakeholder, including the PMT and CDT, to ensure a successful, timely and qualitative delivery of the MVP, as well as the potential second release and assessment of the product, at latest 6 months after its release.

### **Stage 05: Implementation of the agreed procurement strategy for additional product/service**

In light of the agreed procurement strategy defined in Stage 04, and with regards to the technology platform and associated services, the PMT is expected to deliver, under his responsibility but in consultation with the CDT:

- The technical specifications which will underpin the build activity and the recruitment of additional supplier(s);
- Supplier(s) terms of reference;
- Supplier(s) mandatory requirements;
- Supplier(s) evaluation criteria;
- Supplier(s) scoring mechanism;
- Supplier(s) Key Performance Indicators.

### **Stage 07: Selection of Partner(s)**

- Participation in supplier(s) selection according to WIPO procurement rules;
- Advice in the evaluation of the offers;
- Involvement in the contracting phase with a view to ensure the successful release of the MVP, including suppliers reference checking.

Note: Should Lot 2 not be awarded during this tender, or should the need arise for additional services, the PMT may be requested to support a new procurement process to select other provider(s) for the provision of the services/deliverables identified for LOT 2. Therefore, Stages 05 and 07 may need to be re-estimated financially and implemented upon approval of the Project Board.

#### **Stage 09: Build & Launch MVP**

- Deliver the agreed MVP proposal from Stage 04 within agreed time, budget, risk and quality corresponding to the MVP's scope as defined under Section 8;
- Coordinate, manage and align the readiness and activities of the CDT, technology platform provider and other suppliers;
- Track progress and costs and provide regular updates to the Project Board.

#### **Stage 10: Impact Assessment**

- Carry-out the agreed impact assessment proposal from Stage 04;
- Present findings and recommendations for discussion and agreement with the Project Board within 90 days of the MVP release.

#### **Stages 11 & 12: Continuous Improvement & More Creator Types**

- Define, plan, schedule and cost the subsequent Creators Platform releases based on these TOR, the Business Plan and the Impact Assessment;
- Present the plans and costs as required in line with the schedule (see section below on Financial Gateways) for review and agreement by the Project Board;
- Deliver the agreed platform releases to time, budget and quality;
- Coordinate, manage and align the readiness and activities of the CDT, technology platform provider and other suppliers;
- See Table 1 for expected target releases, which remain subject to review and funding.

### 13. PMT Governance

The PMT reports into the Project Board, and will be governed via:

- Weekly written project updates to the Project Board, including the latest milestone updates, summary project, financial plans and the risks and issues log;
- Weekly project updates must include updates from and regarding the CDT, collated into a single document set for easy assimilation by the Project Board;
- Monthly project update meetings with the Project Board and a representative from the CDT, to be held via video conference unless a face-to-face meeting is requested at least 10 working days in advance by the Project Board;
- Monthly project update meetings must include updates from and regarding the CDT, collated into a single document set for easy assimilation by the Project Board;
- The PMT is responsible for agreeing the agenda for the next monthly meeting with the Chair of the Project Board, at least 5 working days in advance of each meeting;
- The PMT must include for consideration any agenda items requested by the CDT;
- The agenda must include an Any Other Business (AOB) section at the end of each meeting for urgent items that did not make the agenda cut-off.
- The PMT is responsible for issuing all documents to the Project Board and the CDT representative at least 3 working days in advance of each meeting;
- The PMT is responsible for documenting and circulating actions and other notes to the Project Board and CDT representative within 2 working days following each meeting;
- It is expected that the PMT Contract Manager attends all these meetings to ensure a single and continuous point of contact for the Project Board.

### 14. PMT Qualifications and Experience

The identified members of the PMT selected to work on Stages 4 to 9 of the project should be fully operational from the date of appointment. Moreover, the PMT's full team members to deliver all project stages and subsequent platform releases should collectively exhibit the following expertise, clearly stated and evidenced in submitted proposals, individual CVs and client references:

- Experience of project delivery within the creative industries, preferably including the music industry;
- Demonstrated experience of Agile project management using a recognized management methodology (WIPO's preference is Prince 2). Demonstrated track record of delivery of technical projects such as new technology platforms, preferably across multiple stakeholder groups, with a key role of coordination and accountability.
- Able to sign a declaration of non-conflict of interest where it is involved in the selection of providers ;
- Experience in setting up or with learning platform(s), ideally modern, micro-learning based solutions (preferred but not mandatory) ;
- Demonstrated understanding of the mission of WIPO for Creators and the Creators Platform, and of the importance of intellectual property to stimulate economic, social and cultural innovation ;
- Fluency in English, both verbal and written, at least for team members interacting with the Project Board..
- Contract Manager ability to work on European working time zones at least 4 hours per day.

Please also refer to the Mandatory Requirements (MR) and Evaluation Criteria (EC).

Please note that the supplier appointed as PMT will not be eligible to respond to any subsequent public tender(s) prepared with the PMT's assistance.

#### 15. PMT Expected Competencies

The PMT is expected to collectively cover the below core competencies. It does not follow that team members must each provide only a single competency and potential suppliers should indicate in their proposal how the proposed team members cover these core competencies.

- Project management;
- Budget management;
- Business analysis and intelligence;
- Technical design/architecture authority;
- User interface design authority;
- Customer journey design;
- Data science and customer experience management.

While the above competencies should be covered, the Project Board expects to dialogue with a Contract Manager supported by a condensed team to ensure that communication within the team and with the Project Board is streamlined and there is no loss of knowledge or lack of continuity.

#### 16. PMT Key Performance Indicators (KPIs)

The selected PMT will be measured against the following initial KPIs, which may evolve as the project progresses, with time and quality baselines and measures to be agreed:

- Weekly project updates provided to Project Board (see PMT Governance);
- Monthly project review meetings held with the Project Board (see PMT Governance);
- Creators Platform Roadmap Stages 04 and 05 and Platform Release A delivered according to budget, expected quality requirements and defined timescales;

- Subsequent platform release milestones achieved according to budget, expected quality requirements and defined timescales;
- Risks and issues identified and highlighted to the Project Board;
- Sound financial planning and budget management according to agreed financial plan, including the PMT's own and any additional supplier's costs;
- Adhering to the defined project management methodology.
- Quality of the advice and response time to queries and questions from the Project Board;
- Project Stakeholder Satisfaction Index – Project stakeholders should be surveyed to determine if they felt their needs were met and their overall satisfaction with the project;
- Adherence to the Creators Platform Business Plan;
- Quality of feedback from creators and stakeholders in the creative industries;
- Quality of deliverables: all deliverables fit for purpose and accepted by WIPO stakeholders within 3 rounds of review maximum, and all comments addressed within 5 business days maximum;
- Turnover of key personnel: named individuals working on the project to be maintained with minimum variation.

## **LOT 2:**

Lot 2 of this tender seeks a CDT partner, reportable to the PMT but required to work closely with the Project Board on content matters. During Stages 04 and 05, the CDT will be accountable for providing:

- Input requirements to the design of the MVP;
- Input on key features to select the technology platform;
- Input to the PMT on estimates and timelines for the MVP;
- Input to the impact assessment to be performed after the launch of the MVP.

During Stages 09, 11 and 12, the CDT will be responsible for:

- Design, development and production of content for each module in consultation with the Project Board and the PMT;
- Upload and verification of new or amended content to the technology platform to ensure it looks and works as expected, adhering to agreed sign-off processes, prior to the scheduled or immediate release to creators;
- Ensuring that all compliance matters (e.g. appropriate approvals and permissions for video shoots) are requested and received in advance, and that any Intellectual Property Rights are respected, cleared and documented;
- Subject to agreement and in cooperation with the Project Board and the PMT, onboarding globally/locally well-known creators and production of video and other relevant content featuring said creators;
- As with LOT 1, each stage (or modules for Stages 11 & 12) and associated execution work, including contracting, will need to be discussed in content, costed on the basis of the unit costs agreed in the contract, and validated upfront before any work commences, subject to fund availability, proposed content and timing of implementation, and work will only commence after a formal acceptance by the Project Board and on the basis of a Purchase Order. This will be coordinated via the PMT.

The selected supplier is expected to demonstrate a breadth of core competencies to cover the full project. However, the supplier may be supported by external individuals or partner companies for tasks which require specific skills, knowledge or geographic location. The selected supplier will remain fully accountable and responsible for all deliverables and their quality, whether produced directly or indirectly. It is expected that potential suppliers will detail in their proposal their main and foreseen partnerships and stand ready to provide additional information about said external contractors. The Project Board will reserve the

right to validate proposed arrangements with external contractors if deemed necessary, prior to confirmation of each deliverable.

With regard to remote video capture of locally well-known creators, as an example, WIPO for Creators appreciates that the identity of tactical external parties may not be foreseeable at the point of proposal. In this situation, the supplier must be prepared in advance of each deliverable to justify the use and stand ready to provide details of external parties. Again, the Project Board will reserve the right to validate proposed arrangements with external contractors if deemed necessary, prior to confirmation of each deliverable.

## 17. Key Deliverables

### **Stage 04: Service Planning**

Provide input into the Service Planning documentation (see LOT 1) in support of the PMT. For the avoidance of doubt, the Service Planning documentation remains the sole responsibility of the PMT to deliver. The CDT's input required to be provided to the PMT within 30 days of the CDT's appointment shall include:

- A document detailing the technology platform's required content-related features, in light of the need to both convincingly respond to creators' expectations within the scope of the MVP as defined under Section 8 and to execute rapidly the delivery of the MVP;
- A document to be refined and agreed with the PMT and Project Board regarding the content of the proposed MVP, in order to start the project with a scalable and valuable product;
- A document detailing suggestions on the scale, timing and methodology for the impact assessment to be performed after the launch of the MVP, from a content perspective;
- A document detailing the activities, and order of activities, to be undertaken by the CDT to ensure a successful, timely and qualitative delivery of the MVP.

### **Stage 05: : Implementation of the agreed procurement strategy for additional product/service**

Provide input into the technology platform procurement documentation (see LOT 1) in support of the PMT. For the avoidance of doubt, these documents remain the sole responsibility of the PMT to deliver. This input will require from the CDT:

- To review and provide comments and suggestions on draft documentation (see list in LOT 1) across three rounds of amendments;
- Each review and comments to be completed within agreed timelines after receipt;
- Attending video calls in conjunction with these reviews as requested by the PMT.

### **Stage 09: Build & Launch MVP**

- Deliver the content of the MVP based on the proposals from Stage 04 as agreed with the PMT and the Project Board;
- Specifically, design, develop and produce the content for each module corresponding to the MVP's scope as defined under Section 8 in consultation with the Project Board and the PMT;
- Upload and verify new or amended content to the technology platform to ensure it looks and works as expected, adhering to agreed sign-off processes, prior to the scheduled or immediate release to creators.

### **Stages 11 & 12: Continuous Improvement & More Creator Types**

- Deliver the content for subsequent platform releases based on these TOR, the Business Plan and the Impact Assessment;
- Specifically, design, develop and produce the content for each module in consultation with the Project Board and the PMT (please refer to Table 1 below for expected target releases, which remain subject to review and funding); Upload and verify new or amended content to the technology platform to ensure it looks and works as expected,

adhering to agreed sign-off processes, prior to the scheduled or immediate release to creators;

- Maintain an archive for the storage and cataloguing of digital assets.

#### 18. CDT Governance

The CDT reports into the PMT, working closely with the Project Board on content matters, and will be governed via:

- A content approval process to be agreed between the CDT, PMT and the Project Board;
- Weekly written project updates to the Project Board, submitted and collated via the PMT;
- Monthly project update meetings with the Project Board and PMT, to be held via video conference unless a face-to-face meeting is requested at least 10 working days in advance by the Project Board;
- The CDT may raise any required agenda items to the PMT, at least 7 working days in advance of each meeting;
- The CDT must respond to the Project Board and PMT with any omissions or errors in meeting output documentation and actions within 2 working days of receipt;
- It is expected that the CDT Contract Manager attends all these meetings to ensure a single and continuous point of contact for the Project Board.

#### 19. CDT Qualifications and Experience

The identified members of the CDT selected to work on Stages 4 to 9 of the project should be fully operational from the date of appointment. Moreover, the CDT's full team members to deliver all project stages and subsequent platform releases should collectively exhibit the following expertise, clearly stated and evidenced in submitted proposals, individual CVs and client references:

- Demonstrated knowledge of creative industry sectors and structures ;
- Demonstrated knowledge and experience in dealing with various creative industries stakeholders and understanding of their respective interests. Capability and experience in identifying and producing factual and balanced information in this domain.
- Experience in creator education and/or learning (preferred but not mandatory)
- Demonstrated track record of content scripting and copywriting within the creative industries, ideally across multiple stakeholder groups ;
- Experience of directing and capturing video recordings including with celebrities and VIPs, preferably from the creative industries ;
- Proven ability in video editing and production, including different styles such as talking head, vlog, interview, animation and text overlay – a submitted portfolio of work is required ;
- Experience of Content Management Systems (CMS) and scheduling tools ;
- An accessible network of globally and locally well-known creators, evidenced through details of previous collaborations, would be an advantage ;
- If relevant, experience of working with remote film offices/freelancers ;
- A clear understanding of the mission of WIPO for Creators and the Creators Platform the importance of intellectual property to stimulate economic, social and cultural innovation and of the different business models and solutions for managing intellectual property rights in the creative industries ;
- Fluency in English, both verbal and written, at least for those interacting with the Project Board and the PMT ;
- Contract Manager's ability to work on European working time zones at least 4 hours per day.

Please also refer to the Mandatory Requirements (MR) and Evaluation Criteria (EC).

Please note that the supplier appointed as CDT will not be eligible to respond to any subsequent public tender(s) prepared with the CDT's assistance.

#### 20. CDT Expected Competencies

The CDT is expected to cover the below core competencies. It does not follow that team members must each provide only a single competency and potential suppliers should indicate in their proposal how the proposed team members cover these core competencies.

- Demonstrated deep knowledge of the various creative industry sectors, Intellectual Property rights management and related processes ;
- Content design ;
- Scripting and copywriting ;
- Videography ;
- Video editing ;
- Post-production approval management ;
- Asset management, including cataloguing, archiving and cloud uploading ;
- Content quality assurance (QA) ;
- National and international logistics management.

While the above competencies should be covered by the CDT as a whole, the Project Board expects communication within the team and with the Project Board to be streamlined and that there is no loss of knowledge or continuity.

#### 21. CDT Key Performance Indicators (KPIs)

The selected CDT will be measured against the following initial KPIs, which may evolve as the project progresses, with time and quality baselines and measures to be agreed:

- Weekly project updates provided to Project Board via the PMT (see CDT Governance);
- Monthly project review meetings held with the Project Board and PMT (see CDT Governance);
- Content for platform release milestones delivered according to budget, expected quality requirements and defined timescales;
- Quality of the advice and response time to queries and questions from the Project Board and PMT;
- Content Stakeholder Satisfaction Index – content stakeholders should be surveyed to determine if they felt their needs were met and their overall satisfaction with the content delivered;
- Adherence to the Creators Platform Business Plan;
- Quality of feedback regarding content from creators and stakeholders in the creative industries;
- Quality of deliverables: all deliverables fit for purpose and accepted by WIPO stakeholders within 3 rounds of review maximum, and all comments addressed within 5 business days maximum;
- Turnover of key personnel: named individuals working on the project to be maintained with minimum variation.

### **IV. TIMINGS AND PAYMENT FOR THE PROGRAMME MANAGEMENT TEAM (PMT) AND THE CONTENT DELIVERY TEAM (CDT)**

#### 22. Timing

We are at Stage 03 in Figure 1 – reaching out to potential partners and sponsors, and now hiring the PMT and the CDT to move onto Stage 04 and the subsequent stages.

$T_0$  is defined as the date on which the PMT and the CDT are appointed.

Once appointed, and in order to maintain pace of delivery towards the MVP, the PMT and the CDT are expected to complete Stage 04 (Service Planning) and Stage 05 (Tender Preparation or alternative plan to on-board additional supplier(s)) to the satisfaction of the Project Board within 3 months of appointment ( $T_0 + 3m$ ).

### 23. Creators Platform Target Releases

$T_1$  is defined as the date on which the build technical supplier(s) are appointed. The Creators Platform target releases are geared around  $T_1$  – see Table 1 below.

Please note that the Creators Platform Business Plan uses  $T_0$ -centric timing. This has been modified in the TOR as the Business Plan did not explicitly factor the process to select the PMT and the CDT. In other respects the envisaged release timing and order has not changed but will depend on available funding and the Project Board's ongoing assessment in consultation with the PMT and the CDT. **Releases beyond the MVP are thus subject to change at the Project Board's discretion as further detailed under Financial Gateways below.**

Release Module	Release Title	Release Description	Release Timing
A	MVP	Most critical features needed in a Minimum Viable Product release (see definition)	$T_1 + 6m$
B	MVP+1	Important features that did not make the initial MVP release	$T_1 + 10m$
C	Assessment+1	Tangible in-built learning impact assessment	$T_1 + 14m$
D	Engagement+1	Social & interactive features promoting platform engagement	$T_1 + 18m$
E	Literature	Global & local content for literature creators	$T_1 + 22m$
F	AudioVisual	Global & local content for the audiovisual arts	$T_1 + 26m$
G	Visual Arts	Global & local content for the visual arts	$T_1 + 30m$
H	Dramatic Arts	Global & local content for the dramatic arts	$T_1 + 34m$
I	Reach+1	Features, content & tools supporting wider platform adoption	$T_1 + 38m$
J	Accessibility+1	Support for voice control, offline & more languages	$T_1 + 42m$
K	Engagement+2	Dynamic, personalised content forming habits & driving engagement	$T_1 + 46m$
L	Reach+2 (Final Product)	Content & features to broaden the scope of creators using platform	$T_1 + 50m$

Table 1: Creators Platform Target Releases

### 24. Financial Gateways

The full project cost is unknown and it is likely that work will commence on the Creators Platform without full build funding having been secured. Feedback on the MVP and other considerations may also lead the Project Board to adapt subsequent deliverables in consultation with the PMT and the CDT. Therefore, there is a need for a staged approval process owned by the Project Board and supported by the PMT and CDT, which is described here. The aims are to ensure that work proceeds at pace providing funding permits, and that if funding becomes an issue then all parties have sufficient notice of this fact so that they are not disadvantaged and the project is never left in an adverse state.

The process works like this:

- Before any build activity commences, the PMT, where relevant in consultation with the CDT, should identify the full costs of platform releases A and B;
- As long as funding exists through to the end of platform release B, then the Project Board can approve work to begin (Decision Point 1);
- Before the end of platform release A, the PMT, where relevant in consultation with the CDT, should identify the full costs of platform release C;
- At the end of platform release A, funding for platform release B is already in place and work can continue;
- However, the Project Board will determine if funding is available for platform release C (Decision Point 2). If so, platform release C can be approved. If not, all parties should be given notice that work may need to be paused at the end of platform release B;
- This process should continue so that at the end of each platform release there is a decision point regarding a future release stage (see Table 2 below).

Decision Point	Timing	Approving (subject to funding)
1	Before platform release A	Platform releases A and B
2	End of platform release A	Platform release C
3	End of platform release B	Platform release D
4	End of platform release C	Platform release E
5	End of platform release D	Platform release F
6	End of platform release E	Platform release G
7	End of platform release F	Platform release H
8	End of platform release G	Platform release I
9	End of platform release H	Platform release J
10	End of platform release I	Platform release K
11	End of platform release J	Platform release L

Table 2: Creators Platform Decision Points

If build work does need to be paused, quality should not be compromised and the project should be left in a good state (e.g. with everything documented, filed and organised properly) for work to begin again when funding permits, which would go through a subsequent process that would need to be fully defined at the time.

The following two categories of on-going costs should be factored by the bidders, unless the project is to be ceased altogether:

- The costs of the Contract Manager for the PMT who should remain on the project in some capacity in order to provide continuity and updates to the Project Board;
- The operational running costs of the platform.

## 25. Lot 1 - PMT Payment Model

Bidders for the PMT should provide in their proposals a fixed cost estimate for achieving each of the defined project milestones for which the PMT is responsible, using the format in Table 3 below.

The PMT should submit an invoice to the WIPO for Creators Secretariat hosted by WIPO upon agreement by the Project Board that each milestone has been satisfactorily completed. Payments will be made on standard WIPO payment terms.

Milestone	Expected Timing	Fixed Cost (CHF)
Completion of Stage 04 (Service Planning)	T <sub>0</sub> + 2m	Fixed cost but broken down by person/role, time and daily rate
Completion of Stage 05 (Tender Preparation or alternative plan to on-board additional suppliers)	T <sub>0</sub> + 3m	Fixed cost but broken down by person/role, time, action taken (refer key deliverables) and daily rate

Table 3: PMT Milestone Payments

For stages beyond Stage 05, pricing may be either on a time and material approach or alternatively additional fixed term estimates based upon negotiation for specific requirements by reference to unit costs .

Bidders should provide in their proposals the expected resources needed to achieve Stage 7 to 12 and each subsequent platform release, the percentage of their time to be allocated to the Creators Platform and their daily rate, using the format in Table 4 below. This enables the Evaluation Team to forecast the PMT monthly costs, as well as a comparison of approach and expected costs from each supplier.

As a baseline for resourcing purposes, bidders should use the provisional platform release schedules in the Creators Platform Business Plan (repeated in Table 1 above). However, in practice these timings are provisional and may be adjusted as the project progresses due to factors such as funding, creator and other feedback etc.

The PMT should submit an invoice to the WIPO for Creators Secretariat after the end of each calendar month for the preceding month. Payments will be made on standard WIPO payment terms.

Milestone	List of Expected Resources, % of Time & Daily Rate (CHF)
<b>Stage 07</b> (Supplier Selection)	For example only: 1 x Contract Manager 100% @ 800CHF/day 1 x Technical Analyst 50% @ 600CHF/day
<b>Stage 09</b> (MVP) / Platform Release A	
<b>Stage 10</b> (Impact Assessment)	
<b>Stages 11 &amp; 12:</b>	Complete below
Platform Release B	
Platform Release C	
Platform Release D	
Platform Release E	

Platform Release F	
Platform Release G	
Platform Release H	
Platform Release I	
Platform Release J	
Platform Release K	
Platform Release L	

Table 4: PMT Time &amp; Materials Estimates

## 26. Lot 2 - CDT Payment Model

Bidders for the CDT should provide in their proposals a fixed cost estimate for each of the defined project milestones in which the CDT is only required to provide input to the PMT (i.e. the CDT has no hard deliverables), using the format in Table 5 below.

The CDT supplier is not expected to commit full-time resources during these initial stages, therefore WIPO for Creators anticipates that costs will be accordingly low.

The CDT should submit an invoice to the PMT for validation, to be checked without undue delay and forwarded to the WIPO for Creators Secretariat, upon agreement by the Project Board that each milestone has been satisfactorily completed. Payments will be made on standard WIPO payment terms.

Milestone	Expected Timing	Fixed Cost (CHF)
Completion of Stage 04 (Service Planning)	T <sub>0</sub> + 2m	Fixed cost but broken down by person/role, time and daily rate
Completion of Stage 05 (Tender Preparation)	T <sub>0</sub> + 3m	Fixed cost but broken down by person/role, time, action taken (refer key deliverables) and daily rate

Table 5: CDT Milestone Payments

Bidders for the CDT should provide in their proposals the expected resources needed to achieve Stage 9 to 12 and each subsequent platform release, the percentage of their time to be allocated to the Creators Platform and their daily rate, using the format in Table 6 below. This enables the CDT monthly costs to be forecast by the Evaluation Team, as well as a comparison of approach and expected costs from each supplier.

As a baseline for resourcing purposes, bidders should use the provisional platform release schedules in the Creators Platform Business Plan (repeated in Table 1 above). However, in practice these timings are provisional and may be adjusted as the project progresses due to factors such as funding, creator and other feedback etc.

The CDT should submit an invoice to the PMT for validation, to be checked without undue delay and forwarded to the WIPO for Creators Secretariat, upon agreement by the Project

Board that each milestone has been satisfactorily completed. Payments will be made on standard WIPO payment terms.

Milestone	List of Expected Resources, % of Time & Daily Rate (CHF)
<b>Stage 09 (MVP) / Platform Release A</b>	For example only: 1 x Editor 100% @ 800CHF/day 1 x Videographer 50% @ 600CHF/day
<b>Stages 11 &amp; 12:</b>	Complete below
Platform Release B	
Platform Release C	
Platform Release D	
Platform Release E	
Platform Release F	
Platform Release G	
Platform Release H	
Platform Release I	
Platform Release J	
Platform Release K	
Platform Release L	

Table 6: CDT Time & Materials Estimates

## V. CONSTRAINTS, ASSUMPTIONS AND RISKS

### 27. Dependency on Fundraising

The Creators Platform and other activities of the WIPO for Creators Consortium are dependent on funding being raised from creative industry and other sponsors. The Project Board will only approve key stage progress subject to funding being in place.

**VI. GLOSSARY**

WIPO	World Intellectual Property Organization
MRAF	Music Rights Awareness Foundation
MVP	Minimum Viable Product
FP	Final Product
TOR	Terms of Reference
MR	Mandatory Requirements
EC	Evaluation Criteria
PMT	Programme Management Team for the Creators Platform
CDT	Content Delivery Team for the Creators Platform
KPIs	Key Performance Indicators
CaaS	Content as a Service
T <sub>0</sub>	Appointment of the PMT and CDT
T <sub>1</sub>	Appointment of other main build and operate supplier(s)
Contract Manager	The primary point of contact between the PMT/CDT and the Project Board
Project Board	The Project Board is responsible for supervising the PMT and CDT for the build and operate phases of the Creators Platform. The Project Board is nominated by and reports to the WIPO for Creators Governance Committee
AOB	Any Other Business – the final agenda item in each monthly update meeting
CMS	Content Management System
QA	Quality Assurance
LOT 1	Relates to the selection, management and deliverables of the PMT
LOT 2	Relates to the selection, management and deliverables of the CDT